



Study of the role of women in fisheries in the Mediterranean and the Black Sea

Final Report

Written by Coffey, with the support of AND-International, F&S, Cetmar, Nisea, Oikos, Katia Frangoudes and Cecile Brugère
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E-mail: EASME-EMFF-CONTRACTS@ec.europa.eu

*European Commission
B-1049 Brussels*

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LIST OF ABBREVIATIONS

BISAC	Advisory Council for the Black Sea
CFP	Common Fisheries Policy
CLLD	Community-Led Local Development
CMC	Co-management Committee
DCF	Data Collection Framework
DC MAP	Data Collection Multiannual Programme
DG MARE	Directorate-General for Maritime Affairs and Fisheries
EASME	Executive Agency for Small and Medium-sized Enterprises
EC	European Commission
EFCA	European Fisheries Control Agency
EFF	European Fisheries Fund
EMFF	European Maritime Fisheries Fund
EU	European Union
EUMOFA	European Union Market Observatory for Fisheries and Aquaculture products
FAO	Food and Agriculture Organisation
FARNET	Fisheries Areas Network
FEAP	Federation of European Aquaculture Producers
FLAG	Fisheries Local Action Group
FWC	Framework Contract
GFCM	General Fisheries Commission for the Mediterranean
ILO	International Labour Organisation
JRC	Joint Research Centre
MS	Member State
OECD	Organisation for European Economic Co-operation
OP	Operational Programme
QA	Quality Assurance
RPOA-SSF	Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea
STEFEC	Scientific, Technical and Economic Committee for Fisheries
SWOT	Strengths, Weaknesses, Opportunities and Threats
TOR	Terms of Reference
WP	Work Package
WSI	Women in the seafood industry

EXECUTIVE SUMMARY

Introduction

This report presents the findings of the study on the **presence and role of women in fisheries in the Mediterranean and the Black Sea**. The study was conducted for the Executive Agency for Small and Medium-sized Enterprises (EASME) by Coffey International Development (Coffey) in partnership with AND International, Poseidon and F&S. It covered ten Mediterranean and Black Sea coastal EU Member States, namely: Croatia, Cyprus, France, Greece, Italy, Malta, Slovenia, Spain, Bulgaria, and Romania.

The study aimed to meet the following specific objectives:

- identify the distinct roles that women play in the fisheries sector;
- quantify (to the extent possible) the presence of women in the sector;
- analyse the current legal framework in the different Member States concerning women's participation in the sector;
- identify the challenges and the opportunities for promoting women's role and presence in the sector; and
- formulate clear recommendations to improve the status of women and help their access to this sector's labour market.

With this study, the European Commission seeks to address the need to *"improve working conditions and promote the role of women in the fisheries sector and aquaculture"* that was identified in the **MedFish4Ever Ministerial Declaration** signed by the Commission and Member States in March 2017. The study should also contribute to the **Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea** (RPOA-SSF) launched in Malta via a High-Level Conference in September 2018.

This study sheds a light on women's presence in catching, aquaculture, processing, and fisheries-related activities which had not been well documented so far, particularly in the Mediterranean and Black Sea basins. The insights provided in this study add value to the existing knowledge base in relation to women's presence and role in fisheries in the EU.

Approach and methodology

The study was organised in four Work Packages (WP) and structured around a set of 15 research questions that covered the following key topics:

- Presence and profile of women who work in catching, aquaculture, processing and fisheries-related activities
- Invisibility of women in the sector¹
- Roles played by women in the different sub-sectors and fisheries-related activities
- Remuneration of women who work in the sector
- Legal status of women who work in the sector
- Participation of women in fisheries-related organisations and decision-making roles
- Factors affecting women's work in the sector
- Good practices to improve women's presence and role in the sector

¹ In this study, the "invisibility" of women is defined as the situation where women play an active role in the fishing and aquaculture enterprise without a specific legal status. This is usually the case of wives or life partners, mothers, sisters and daughters of fishers who work in assisting roles (e.g. administrative tasks) and their activities are taken as part of their household responsibilities. Their support for the business is therefore not paid and they receive no social security benefits.

Desk research conducted within WP1 (compilation of existing datasets/statistics) confirmed that the quantity and quality of statistics on women's participation in the fisheries sector (and sub-sectors) was extremely variable across Member States. Therefore, the study adopted a qualitative approach which focused on understanding, more than quantifying, the presence and role of women in each sub-sector and related activities.

During WP2 (collection of additional qualitative and quantitative evidence focusing on the different sub-sectors and fisheries-related activities), the study team conducted **113 in-depth face-to-face and telephone interviews** with institutional stakeholders and **three focus groups with women** who played an active role in the sector. The interviews included fisheries authorities, women's organisations, fishers' organisations, and FLAGs. The focus groups engaged different profiles of women, from fishers' wives and professional fisherwomen to women managing small and medium-sized fisheries companies.

In WP3 (cross-country analysis of evidence), the study team brought together the evidence and findings from the preceding WPs and conducted a **socio-economic analysis** of the evidence gathered in the ten Member States. This WP also included the development of country-SWOTs to identify the opportunities and challenges for enhancing gender equality in fisheries.

Finally, WP4 was dedicated to the development of overarching **conclusions and recommendations** which ultimately aimed to improve the existing knowledge base on the role and presence of women in fisheries, enhance women's participation in the sector and support the Commission in assessing policy orientations.

Conclusions

Women's invisibility

The **invisibility of women** in fisheries is a persistent issue in both the Mediterranean and Black Sea basins. This is directly related to the **lack of systematic collection of sex-disaggregated data** on the participation and the positions occupied by men and women in the sub-sectors, especially in catching but also in aquaculture and processing. The pronounced gaps in sex-disaggregated data relate to various socio-economic variables such as employment, age, education levels, types of jobs performed, pay scales, etc.

Women's invisibility is also a consequence of **gaps in Member States' legal framework** concerning women's role in the sector, especially regarding the recognition of the status of assisting spouses / life partners (see below). Moreover, even in Member States where such status is applied, there is no data on the number, profile and occupations of women that hold it.

Women's invisibility in the sector is further influenced by the **scale and dynamism of the sub-sectors**. Smaller-scale, family-run businesses rely more heavily on women's invisible (i.e. unaccounted) support, while larger enterprises and more commercially-oriented operations offer women formal employment contracts. Moreover, the decline in small-scale fisheries in some Member States has led to a decline in women's informal employment opportunities, and thus, a decline in their invisibility by pushing women (and men) in the formal labour market outside of the sector. The restructuring of the sector from fleets run by individuals and cooperatives into enterprises is also changing the employment landscape in catching fisheries, providing more opportunities for women's formal participation and recognition of their roles.

The evidence collected in this study showed that the invisibility of women is a phenomenon which is **more extensive in the catching and aquaculture sub-**

sectors, as well as in pesca-tourism and post-harvest activities (including processing and sale of fish) carried out as part of family or small-scale businesses.

Presence and role of women in sub-sectors and related activities

The statistical evidence collected in this study shows that the total number of women who work in catching, aquaculture and processing in the Mediterranean and Black Sea can be estimated to be over 14,000. However, this combined figure is based on data from diverse sources (and years) and therefore it is subject to a large margin of error. The estimate should be treated cautiously.

The **catching** sub-sector is heavily dominated by men. Formally employed women represent only a small share of the workforce (between 1 and 6%, depending on the Member State). This is also the sub-sector with the highest number of women who work in assisting roles without a specific legal status or remuneration. This is particularly the case in small-scale, family-run businesses where fishers' wives, daughters, mothers, assist with operations of the family business on a full-time or ad-hoc basis. They are predominantly found in land-based activities such as administering permits, licences, registrations, contracts, etc., as well as in accounting and marketing activities. In some Member States, women are often employed in other sectors on a full-time or part-time basis and still support their family's fishing business. In Greece, stakeholders estimated that there were over 90 "invisible" female workers in the catching sub-sector, and 550 to 650 in Malta.

Aquaculture is also a sub-sector dominated by men, with women representing 7% to 26% of the workforce, depending on the Member State. Nonetheless, this study showed that this sub-sector is increasingly providing more opportunities for women. Women's formal employment is more widespread than in the catching sub-sector and aquaculture activities tend to be more entrepreneurial and commercial than catching (except for shellfish farming which is more traditional). In this sub-sector, there is also an unreported number of "invisible" female workers, particularly in small-scale freshwater aquaculture and shellfish farming. In Italy, stakeholders estimated that there were 500 to 800 women who played assisting roles without a specific legal status or remuneration. In Malta, it was estimated to be 50 women. These women are usually the farmers' wives, daughters, mothers who assist in the family operations (either full-time or part-time) performing administrative, accounting and marketing tasks.

In **processing**, women either represent the majority of workers or are in the same numbers as men. Comparatively to the other sub-sectors, processing is where "invisible" female workers are found in fewest numbers, possibly because the processing industry is bound by employment laws on decent work conditions, equal opportunities and non-discrimination in pay. However, in smaller businesses, it is likely that seasonal demand of fish products is covered by involving women in the family who work without a specific legal status or remuneration. In this sub-sector, women with lower levels of education tend to perform unskilled tasks (labelling, packaging, filleting and canning), while women with higher education levels work in administration, accounting, marketing, innovation and experimentation. The study revealed that there is a glass ceiling in the progression of women to leadership positions in this sub-sector as direction posts are mostly occupied by men.

Given a generalised lack of data, it was difficult to identify trends with regards to the presence of women in **fisheries-related activities**. As a general trend, women were considered to play a vital role in the sale of fish, pesca-tourism and gastronomic activities. They are also largely present in fisheries policy-making and research.

Remuneration of women

In Member States that collect sex-disaggregated data on formal female workers in the sector, **women were predominantly found in lower-level jobs with less pay than men**. This pointed towards occupational segregation and, consequently, a gender pay gap in the sector. Moreover, more women were engaged in part-time/ad-hoc activities than men, resulting in lower wages.

Legal status of women

Many inconsistencies were found in the transposition of Directive 2010/41/EU in Member States within both sea basins and between the different fisheries sub-sectors. Findings show that **transposition of this Directive into national laws does not necessarily lead to the enforcement of the assisting spouse / life partner status** in the sub-sectors. Moreover, in Member States where the status is recognised (France, Greece, Malta, Spain), assisting spouses / life partners are not captured by official statistics, except in the case of Greece, where some estimations exist. The gaps in the legal framework adds to women's invisibility in the sector and, in Member States where the status is not recognised (i.e. the Directive was not fully enforced) at all, it prevents them from accessing social protection.

The study also found that small-scale, family-run enterprises often find it difficult to comply with tight employment regulations and costs associated with formally employing a person and/or registering an assisting spouse / life partner. This constrains the participation of women in smaller-scale operations, especially in those where certain flexibility is required to match the seasonality of fishing, tourism, and farming cycles.

Challenges and opportunities for change

Gender stereotypes (e.g. that physically demanding activities such as fishing are impossible for women to conduct, that women should work near their homes to look after their families, etc.) are found in all ten Member States, but appear stronger in the Black Sea region. These perceptions exist mostly in the catching sub-sector, and to a lesser extent in aquaculture and processing.

Although there is a strong representation of women in fisheries policy, women are rarely found in professional organisations, trade unions and workers' councils (with a few exceptions), and there is **limited mobilisation of women on gender-related issues** in this context. Only three out of the ten Member States surveyed in this study have representative organisations specifically dedicated to women in the sector. This has led to an environment in which the promotion of gender equality in fisheries is progressing at a slow pace.

Findings from this study coincide with results of a survey of FLAGs conducted by FARNET, which show that a **strong female presence in FLAGs, including in leadership positions, corresponds with a higher number of FLAG projects in support of women**. Moreover, female policy leadership in Spain over the past ten years could be linked to stronger political will to progress women's issues in the sector.

Evidence collected from Member States suggested that advances in gender equality in the sector are more likely to originate in the **aquaculture sub-sector, which is fast evolving and relatively less laden with gender stereotypes, offering new employment opportunities for women**. Aquaculture activities tend to be more entrepreneurial and commercial than catching given that in many cases they are part of the diversification of coastal economies. Despite the barriers that women still face in this sub-sector, it offers potential for the formal employment of women at all levels.

Recommendations

Addressing the invisibility and lack of recognition of women in the Mediterranean and Black Sea fisheries sector requires taking a holistic approach to address their multiple sources simultaneously. The role of EU regulations and policies in this sense is of utmost importance as it is likely that the focus on gender equality would receive even less attention without such frameworks.

In relation to **EU legal acts and regulations**, the study recommends that the European Commission:

- (1) As Guardian of the Treaties, **ensures the enforcement of Directive 2010/41/EU** in the Mediterranean and Black Sea fisheries sectors, and in particular of the assisting spouse / life partner status. It is also necessary to revise the scope of the status, which currently applies to spouses and life partners only. This leaves out other women who assist in the business (e.g. daughters, mothers, etc). An important change would be also to allow assisting spouses / life partners to submit applications for the status themselves and not through their husbands (as business owners).
- (2) Continues the efforts on the application of the DC MAP and **supports Member States in providing sex-disaggregated statistics** for the fisheries and aquaculture sectors. This implies ensuring that all Member States *continue* providing sex-disaggregated statistics on aquaculture and processing, and that from 2018 all Member States *start* providing this for the catching sub-sector.
- (3) Considers an amendment to the Data Collection Framework to ensure that the **collection of sex-disaggregated data on the fisheries sub-sectors includes socio-economic variables** such as age, education level, employment legal status (employed, self-employed), types of jobs performed, pay scales, etc. Data on number, gender, age, education, etc. of registered assisting spouses could also be provided by Member States.

In relation to **EU public policies**, the study recommends that:

- (4) **Gender equality is a cross-cutting objective of the EU fisheries financial instrument.** Key actions to be undertaken in this respect are: (i) revising the priorities of the EMFF 2021-2027² to mainstream gender equality and make them gender sensitive; (ii) promoting the organisation of women into fisheries and aquaculture-related organisations; (iii) sponsoring the participation of women and organisations promoting gender equality in fisheries and aquaculture consultative and decision-making bodies; (iv) enabling women who are not owners of a fisheries business but are actively involved in it (e.g. assisting spouses / life partners) to apply for funding under EMFF; (v) raising women's awareness of the available support and their participation in EMFF-supported projects; (vi) facilitating assisting spouses / life partners' access to vocational fisheries and aquaculture training and learning opportunities; (vii) measuring and monitoring women's access and take up of the EU fisheries fund; and (ix) ensuring that FLAGs are a means for enhancing gender equality in fisheries at local level.
- (5) Member States' **EMFF operational programmes should include a gender dimension** to increase awareness of the issue and a progressive cultural change. Adopting a gender dimension is important especially in the following processes:

² Proposal for a Regulation of the European Parliament and of the Council on the European Maritime and Fisheries Fund and repealing Regulation (EU) No 508/2014 of the European Parliament and of the Council, SEC(2018) 276 final, SWD(2018) 295 final.

- (i) selection of projects for funding; (ii) assessment of the aims of projects implemented; (iii) setting of targets for funding allocation (e.g. number of projects co-financed by the EMFF that are owned by women or support women, number of beneficiaries who are women, etc.); (iv) setting of output and result indicators that allow to monitor and evaluate progress in improving gender equality in the sector; and (v) collection of beneficiaries' profiling information (e.g. recording the gender of projects' leaders and/or individual responsible for the application for funding).
- (6) The European Commission supports the **adoption of gender-sensitive policies at all levels** that give due consideration to the specificities of the different sub-sectors of the fisheries and aquaculture sectors. This includes policies to reduce pay gaps, promote work-life balance, return of women to work after childbirth, parental leave, childcare, and dedicated financial support initiatives. Of particular relevance to small-scale fisheries are FAO's 2015 "Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication"³, and related handbook on gender-equitable small-scale fisheries governance and development⁴.
- (7) The European Commission **acknowledges and takes the lead on initiatives that are being promoted in the Mediterranean and Black Sea** regarding women and/or the future of the fisheries and aquaculture sectors to ensure that women's needs in the sector are addressed. This includes the MedFish4Ever Ministerial Declaration and Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea (RPOA-SSF), as well as other relevant initiatives such as the Regional Dialogue on Women Empowerment within the Union for the Mediterranean and the Union for the Mediterranean (UfM) Conferences.

In relation to **EU information and communication policies and campaigns** in the fisheries sector, we recommend that:

- (8) Information and communication actions **portray a modern, younger and 'female' image of the sector** to combat prejudices and stereotypes. In particular: (i) advertise and promote fishery-related jobs and opportunities for young women (and men, where underrepresented); (ii) showcase technological developments that ease physically challenging fishing tasks and occupations for both men and women; (iii) promote women role models that challenge cultural norms and social perceptions in the sector (e.g. professional fisherwomen, women who own boats, fishers' wives who are members of the crew, women who manage a processing company or are part of the board of directors of an aquaculture company, etc.). These women could also mentor / train other women in the sector.
- (9) **Support and collaborate with international organisations and networks** such as AKTEA and Women in Seafood Industry (WSI) to raise awareness in the Mediterranean and the Black Sea on the role played by women in the sector. Increased visibility of these organisations could also give raise to other national and regional women's organisations in the Mediterranean and the Black Sea.

³ <http://www.fao.org/3/a-i4356en.pdf>

⁴ FAO (2017), Towards gender-equitable small-scale fisheries governance and development - A handbook. In support of the implementation of the Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication, by Nilanjana Biswas. Rome, Italy. <http://www.fao.org/3/a-i7419e.pdf>

RÉSUMÉ

Introduction

Le présent rapport détaille les conclusions issues de l'étude sur la **présence et le rôle des femmes dans le secteur de la pêche en Méditerranée et mer Noire**. L'étude a été réalisée à la demande de l'Agence pour les petites et moyennes entreprises (EASME) par Coffey International Development (Coffey) en partenariat avec AND International, Poseidon et F&S. Dix États membres de l'UE riverains de la Méditerranée et de la mer Noire ont participé à l'étude, notamment la Croatie, Chypre, la France, la Grèce, l'Italie, Malte, la Slovénie, l'Espagne, la Bulgarie et la Roumanie.

L'étude visait à atteindre les objectifs spécifiques suivants :

- Identifier les rôles distincts que les femmes jouent dans le secteur de la pêche ;
- Quantifier (dans la mesure du possible) la présence des femmes dans le secteur ;
- Analyser les législations actuelles des différents États membres en matière de participation des femmes au secteur ;
- Identifier les défis et les possibilités de promotion du rôle et de la présence des femmes dans ce secteur ;
- Formuler des recommandations claires visant à améliorer la situation des femmes et faciliter leur accès au marché du travail dans ce secteur.

Dans le cadre de cette étude, la Commission européenne s'efforce de répondre au besoin d'« améliorer les conditions de travail et promouvoir le rôle des femmes dans le secteur de la pêche et de l'aquaculture » identifié dans la **Déclaration ministérielle MedFish4Ever**, signée par la Commission et les États membres en mars 2017. L'étude devrait également apporter une contribution à l'égard du **Plan d'action régional pour la pêche artisanale en Méditerranée et en mer Noire** (RPOA-SSF), lancé lors d'une conférence de haut niveau tenue à Malte en septembre 2018.

La présente étude permet de mettre en lumière la présence des femmes dans les activités de capture, aquaculture, transformation et toute autre activité connexe à la pêche peu documentée à ce jour, notamment en Méditerranée et en mer Noire, contribuant ainsi à développer la base de connaissances relative à la présence et au rôle des femmes dans le secteur de la pêche de l'UE.

Approche et méthodologie

La présente étude a été divisée en quatre modules de travail (appelés « Work Packages», WP) et s'articule autour d'une série de 15 questions de recherche concernant les thèmes suivants :

- Présence et profil des femmes qui exercent des activités de capture, aquaculture, transformation et d'autres activités connexes à la pêche
- Invisibilité des femmes dans le secteur⁵
- Rôles joués par les femmes dans les différents sous-secteurs et dans les activités connexes à la pêche
- Rémunération des femmes qui travaillent dans le secteur
- Statut légal des femmes qui travaillent dans le secteur

⁵ Dans le cadre de cette étude, une femme est définie « invisible » lorsqu'elle joue un rôle actif dans l'industrie de la pêche et de l'aquaculture sans bénéficier d'un statut légal spécifique. Il s'agit souvent de conjointes ou partenaires de vie, mères, sœurs et filles de pêcheurs qui jouent un rôle d'assistance (par exemple en assurant des tâches administratives) et dont les activités sont considérées comme faisant partie des responsabilités ménagères. Par conséquent, leur soutien à l'entreprise n'est pas rémunéré et elles ne perçoivent aucune prestation de sécurité sociale.

- Participation des femmes aux organisations de pêche et à la prise de décision
- Facteurs qui influencent le travail des femmes dans le secteur
- Bonnes pratiques visant à renforcer la participation et le rôle des femmes dans le secteur

Une **recherche documentaire** effectuée au sein du WP1 (compilation de séries de données/statistiques existantes) a confirmé que la quantité et la qualité des statistiques concernant la présence des femmes dans le secteur de la pêche (et dans les sous-secteurs) varient énormément en fonction de l'État membre. L'étude a par conséquent adopté une approche qualitative visant à comprendre, plutôt qu'à quantifier, la présence et le rôle des femmes dans chaque sous-secteur et dans les activités connexes.

Lors du WP2 (collecte de données qualitatives et quantitatives supplémentaires concernant les différents sous-secteurs et les activités connexes à la pêche), l'équipe d'étude a mené **113 entretiens approfondis, par téléphone ou en tête à tête**, avec des acteurs institutionnels et a organisé **trois groupes cibles avec des femmes** jouant un rôle actif dans le secteur. Les entretiens ont vu la participation des autorités du secteur de la pêche, des organisations de femmes, des organisations de pêcheurs et des groupes d'action locale de la pêche (GALP). Les groupes cibles ont fait appel à des femmes aux profils différents : des conjointes de pêcheurs aux pêcheuses professionnelles, en passant par les gestionnaires de petites et moyennes entreprises de pêche.

Lors du WP3 (analyse transnationale des éléments de preuve), l'équipe de travail a réuni les éléments de preuve et les résultats découlant de WPs précédents et a réalisé une **analyse socioéconomique** des preuves recueillies dans les dix États membres. Lors de ce WP, une analyse SWOT des pays a également été réalisée visant à déceler les défis et possibilités de promouvoir l'égalité homme-femme dans le secteur de la pêche.

Finalement, le WP4 a développé des **conclusions et recommandations** générales avec le but ultime d'approfondir les connaissances relatives au rôle et à la présence des femmes dans le secteur de la pêche, accroître la participation des femmes au secteur et assister la Commission dans l'évaluation des orientations stratégiques.

Conclusions

L'invisibilité des femmes

L'**invisibilité des femmes** dans le secteur de la pêche est un problème récurrent dans les bassins de la Méditerranée et de la mer Noire ; cela est directement liée à l'**absence de collecte systématique de données ventilées par sexe** concernant la participation et la place occupée par les hommes et les femmes dans les sous-secteurs, notamment celui de la capture, mais aussi dans l'aquaculture et l'industrie de la transformation. Les graves lacunes de ventilation de données par genre touchent plusieurs variables socioéconomiques, telles que l'emploi, l'âge, le niveau d'éducation, le type d'emploi exercé, le niveau de rémunération etc.

L'invisibilité de femmes résulte d'ailleurs des **lacunes dans les législations des États membres** relatives au rôle des femmes dans le secteur, notamment en ce qui concerne la reconnaissance du statut de conjointe/partenaire de vie collaboratrice (voir ci-dessous). En outre, même dans les États membres où ce statut s'applique, aucune donnée concernant le nombre, le profil et l'emploi des femmes ayant obtenu tel statut n'est disponible.

L'**ampleur et le dynamisme des sous-secteurs** se répercutent également sur l'invisibilité des femmes dans le secteur. Les petites entreprises à caractère familial dépendent davantage du soutien invisible (c'est-à-dire non comptabilisé) des femmes, tandis que les entreprises de plus grande taille et les activités à caractère plus

commercial fournissent aux femmes des contrats de travail officiels. En outre, la régression de la pêche artisanale dans certains États membres a entraîné une diminution de possibilités d'emploi informel pour les femmes ; les femmes (et les hommes) ont été contraints de trouver un emploi officiel dans un autre secteur, contribuant ainsi à une diminution de l'invisibilité des femmes. La restructuration du secteur, passé de flottes de pêche gérées par des individus ou coopératives à de véritables entreprises, contribue également au changement de la situation de l'emploi dans la pêche de capture, en fournissant aux femmes davantage de possibilités d'emploi officiel ainsi que la reconnaissance de leur rôle.

Les éléments de preuve recueillis au cours de l'étude ont montré que l'invisibilité des femmes est un phénomène **plus répandu dans les sous-secteurs de la capture et aquaculture, ainsi que dans le pesca tourisme et les activités après récolte** (y compris la transformation et la vente de poisson) dans des entreprises petites ou familiales.

La présence et le rôle des femmes dans les sous-secteurs et dans les activités connexes

Les preuves statistiques réunies dans le cadre de cette étude montrent que le nombre total de femmes qui travaillent dans la capture, aquaculture et transformation en Méditerranée et mer Noire est évalué à plus de 14 000. Il s'agit toutefois d'un chiffre combiné basé sur des données étant issues de sources (et années) différentes, sujet à une grande marge d'erreur et qui doit donc être pris avec précaution.

Le sous-secteur de la **capture** est nettement dominé par les hommes. Les femmes exerçant une activité professionnelle officielle ne représente qu'une petite partie de la main-d'œuvre (entre 1 et 6 % selon l'État membre). Il s'agit également du sous-secteur avec le plus grand nombre de femmes jouant des rôles d'assistance sans bénéficier d'un statut légal spécifique ni d'une rémunération. Cela est souvent le cas des petites entreprises à caractère familial où les conjointes, filles et mères de pêcheurs contribuent aux activités de l'entreprise familiale à temps plein ou de façon ponctuelle. Ces femmes exercent en grande partie des activités terrestres, telles que gérer les permis, licences, inscriptions, contrats etc. et s'occupent de la comptabilité et du marketing. Dans certains États membres, les femmes travaillent souvent à temps plein ou partiel dans un autre secteur et soutiennent quand même l'entreprise familiale de pêche. En Grèce on a estimé à plus de 90 le nombre de travailleuses « invisibles » dans le sous-secteur de la capture et ce chiffre varie entre 550 et 650 pour Malte.

Le sous-secteur de l'**aquaculture** est également dominé par les hommes, les femmes représentant entre 7 et 26 % de la main-d'œuvre en fonction de l'État membre. Néanmoins, la présente étude a démontré que ce sous-secteur offre aux femmes de plus en plus de possibilités : il fournit plus d'emplois officiels aux femmes que celui de la capture et les activités d'aquaculture sont généralement plus axées sur l'entreprise et le commerce par rapport à la capture (à l'exception de la conchyliculture de nature plus traditionnelle). Un nombre non déclaré de femmes « invisibles » travaille également dans ce sous-secteur, notamment dans l'aquaculture en eau douce à petite échelle et la conchyliculture. En Italie, entre 500 et 800 femmes joueraient un rôle d'assistance sans bénéficier de statut légal spécifique ni de rétribution ; à Malte il s'agirait de 50 femmes. Ces femmes sont souvent les conjointes, filles et mères des aquaculteurs qui contribuent aux activités de famille (à temps plein ou partiel) en accomplissant des tâches administratives, comptables ou commerciales.

L'industrie de la **transformation** est composée soit d'une majorité de femmes soit d'une répartition équilibrée d'hommes et de femmes. Comparé aux autres sous-secteurs, celui de la transformation compte le moins de travailleuses « invisibles », probablement parce que l'industrie de la transformation est tenue de respecter les législations en matière d'emploi garantissant des conditions de travail décentes, l'égalité

des chances et l'égalité de rémunération. Toutefois, il est probable que les entreprises plus petites couvrent la demande saisonnière de produits de la pêche en impliquant des femmes de la famille, qui travaillent sans bénéficier de statut légal spécifique ni de rémunération. Dans ce sous-secteur, les femmes ayant un faible niveau d'éducation assurent généralement des tâches non qualifiées (étiquetage, emballage, filetage, mise en conserve), tandis que les femmes dont le niveau d'éducation est plus élevé s'occupent de l'administration, de la comptabilité, du marketing, de l'innovation et de l'expérimentation. L'étude a révélé l'existence d'un plafond de verre qui fait obstacle à la progression des femmes vers des positions dirigeantes dans ce sous-secteur, puisque les postes de direction sont pour la plupart occupés par les hommes.

Vu le manque généralisé de données, il était difficile de cerner des tendances relatives à la présence de femmes dans les **activités connexes à la pêche**. En règle générale, le rôle des femmes dans la vente du poisson, le pesca tourisme et les activités gastronomiques était considéré essentiel ; elles figurent également en grand nombre dans l'élaboration de politiques et dans la recherche dans le domaine de la pêche.

Rémunération des femmes

Dans les États membres recueillant des données ventilées par sexe concernant les travailleuses officielles dans le secteur, **les femmes occupaient surtout des emplois de niveau inférieur avec une rémunération plus faible par rapport aux hommes**, ce qui fait état d'une ségrégation professionnelle et, par conséquent, d'une différence de rémunération entre les hommes et les femmes dans le secteur. En outre, plus de femmes exerçaient des activités à temps partiel ou de façon ponctuelle par rapport aux hommes, résultant en salaires moins élevés.

Statut légal des femmes

Plusieurs incohérences dans la transposition de la directive 2010/41/UE dans les États membres ont été relevées que ce soit entre les bassins ou entre les différents sous-secteurs de la pêche. D'après les conclusions, la **transposition de cette directive en loi nationale ne signifie pas nécessairement la mise en œuvre du statut de conjointe/partenaire de vie collaboratrice** dans les sous-secteurs. D'ailleurs, dans les États membres qui accordent ce statut (France, Grèce, Malte, Espagne), les conjointes/partenaires de vie collaboratrices ne sont pas comptabilisées dans les statistiques officielles, à l'exception de la Grèce où certaines estimations existent. Les lacunes du cadre juridique ne font qu'aggraver le problème de l'invisibilité des femmes dans le secteur et, dans les États membres qui n'accordent pas ce statut (c'est-à-dire où la directive n'est pas pleinement en vigueur), les empêchent d'accéder à la sécurité sociale.

L'étude a également conclu que les petites entreprises à caractère familial éprouvent souvent des difficultés à respecter la stricte réglementation du travail ainsi qu'à assumer les coûts associés à l'emploi formel d'une personne et/ou à l'enregistrement d'un conjoint/partenaire à vie collaborateur. Cela limite la participation des femmes aux opérations de plus petite envergure, notamment ces activités nécessitant une certaine flexibilité due au caractère saisonnier des cycles de la pêche, du tourisme et de l'élevage.

Défis et possibilités de changement

Les **stéréotypes liés au genre** (par exemple, les femmes ne peuvent pas exercer des activités physiques éprouvantes comme la pêche, les femmes devraient travailler près de leur maison pour s'occuper de la famille etc.) sont présents dans les dix États membres, mais apparaissent plus ancrés dans la région de la mer Noire. Ils existent principalement dans le sous-secteur de la capture et, en moindre mesure, dans l'aquaculture et la transformation.

Bien que les femmes soient fortement représentées dans la politique de la pêche, elles participent rarement aux organisations professionnelles, syndicats et conseils ouvriers (avec quelques exceptions) et dans ce contexte la **mobilisation des femmes pour les questions relatives au genre reste faible**. Seuls trois des dix États membres interviewés dans le cadre de cette étude disposent d'organisations représentatives spécialement consacrées aux femmes dans le secteur de la pêche, ce qui crée un contexte où la promotion de l'égalité homme-femme ne progresse que lentement.

Les conclusions de cette étude correspondent aux résultats d'un sondage auprès des GALPs réalisé par FARNET, qui montrent qu'**une forte représentation féminine dans les GALPs, y compris dans des positions dirigeantes, correspond à un nombre plus élevé de projets GALPs qui soutiennent les femmes**. En outre, la présence féminine dans le leadership politique espagnol des dix dernières années pourrait être liée à une volonté politique plus forte de développer la question du genre dans le secteur.

Les preuves recueillies par les États membres indiquent que dans le secteur de la pêche, le **sous-secteur de l'aquaculture** bénéficiera probablement d'une progression dans la promotion de l'égalité des sexes, **puisque'il connaît un développement rapide, il est relativement moins chargé de stéréotypes liés au genre et il offre de nouvelles possibilités d'emploi pour les femmes**. Les activités d'aquaculture sont généralement plus axées sur l'entreprise et le commerce par rapport à celles de la capture, étant donné qu'elles font souvent partie de la diversification des économies côtières. Malgré les obstacles auxquels les femmes sont confrontées, ce sous-secteur peut potentiellement leur fournir un emploi officiel à tout niveau.

Recommandations

Afin de résoudre le problème de l'invisibilité et le manque de reconnaissance des femmes dans le secteur de la pêche en Méditerranée et en mer Noire, il est nécessaire d'adopter une approche globale examinant ses nombreux facteurs simultanément. Les réglementations et les politiques de l'UE dans ce sens jouent un rôle essentiel puisque sans elle, la question de l'égalité entre les hommes et les femmes recevrait probablement encore moins d'attention.

En ce qui concerne les **actes juridiques et les règlements de l'UE**, l'étude recommande à la Commission européenne de :

- (1) En tant que gardienne des Traités, **garantir l'application de la directive 2010/41/UE** dans le secteur de la pêche en Méditerranée et en mer Noire, notamment en ce qui concerne le statut de conjointe/partenaire à vie collaboratrice. Il est également nécessaire de réviser le champ d'application du statut qui actuellement ne s'applique qu'aux conjointes et partenaires à vie, en négligeant d'autres femmes qui contribuent aux activités de l'entreprise (par exemples filles, mères etc.) Il serait aussi important de permettre aux conjointes/partenaires à vie collaboratrices de déposer des demandes pour l'obtention du statut elles-mêmes et non par l'intermédiaire du conjoint (en tant que propriétaire de l'entreprise).
- (2) Poursuivre les efforts en vue de l'application de la DC MAP et **aider les États membres à fournir des statistiques ventilées par sexe** pour les secteurs de la pêche et de l'aquaculture. Cela signifie que tous les États membres doivent *continuer* à fournir des statistiques ventilées par sexe en matière d'aquaculture et transformation et qu'à partir de 2018 tous les États membres doivent *commencer* à fournir ces données pour le sous-secteur de la capture.
- (3) Envisager une modification du cadre pour la collecte des données afin de garantir que la **collecte de données ventilées par sexe relatives aux sous-secteurs de la pêche inclue des variables socioéconomiques** telles que l'âge, le niveau

d'éducation, le statut d'emploi (salarié, indépendant), le type d'emploi exercé, le niveau de rémunération etc. Les États membres pourraient également fournir des données relatives au nombre, sexe, âge, éducation etc. des conjointes collaboratrices enregistrées.

En matière de **politiques publiques de l'UE**, l'étude a élaboré les suivantes recommandations :

- (4) **L'égalité homme-femme est un objectif transversal de l'instrument financier pour la pêche de l'UE.** Les actions principales à entreprendre à cet égard sont les suivantes: (i) mettre à jour les priorités du FEAMP 2021-2027⁶ en vue d'intégrer l'égalité des sexes et sensibiliser à la question du genre ; (ii) promouvoir la mise en réseau d'organisations de femmes en matière de pêche et aquaculture ; (iii) parrainer la participation de femmes ainsi que d'organisations de promotion de l'égalité homme-femme à des organismes consultatifs et directeurs du secteur de la pêche et aquaculture ; (iv) permettre aux femmes, qui ne sont pas propriétaires d'entreprises de pêche mais qui y participent activement (par exemple conjointes/partenaires à vie collaboratrices) de présenter une demande de financement au titre du FEAMP ; (v) informer les femmes quant au soutien disponible et à la possibilité de participer aux projets appuyés par le FEAMP ; (vi) faciliter l'accès de conjointes/partenaires à vie collaboratrices à des formations professionnelles et à d'autres possibilités d'apprentissage dans le domaine de la pêche et aquaculture ; (vii) mesurer et surveiller l'accès et le recours des femmes au Fonds européen pour la pêche ; (viii) veiller à ce que les GALPs soient un moyen de promotion de l'égalité homme-femme dans le secteur de la pêche à niveau local.
- (5) Les **programmes opérationnels du FEAMP des États membres devraient inclure une dimension du genre** afin de parvenir à une meilleure compréhension du problème et à un changement culturel progressif. Adopter une dimension du genre est important, notamment dans le cas des opérations suivantes : (i) choix de projets à financer ; (ii) évaluation des objectifs des projets exécutés ; (iii) fixation des objectifs pour l'attribution des fonds (par exemple nombre de projets cofinancés par le FEAMP qui appartiennent ou soutiennent les femmes, nombre de bénéficiaires femmes etc.) ; (iv) définition des indicateurs de réalisations et de résultats qui permettent de contrôler et évaluer les progrès accomplis en vue de promouvoir l'égalité entre les sexes ; (v) récolte d'informations relatives aux profils de bénéficiaires (par exemple, enregistrer le sexe de chefs de projets et/ou des individus qui ont géré la demande de financement).
- (6) La Commission européenne soutient l'**adoption de politiques intégrant la dimension du genre à chaque niveau**, qui tiennent dûment compte des spécificités des différents sous-secteurs de la pêche et de l'aquaculture. Cela inclut des politiques visant à réduire les disparités salariales, à promouvoir une conciliation entre vie professionnelle et vie familiale, la reprise du travail après un accouchement, les congés parentaux, les soins aux enfants et les aides financières spécifiques. Les « Directives volontaires visant à assurer la durabilité de la pêche artisanale dans le contexte de la sécurité alimentaire et de l'éradication de la pauvreté »⁷ de la FAO de 2015 revêtent une importance particulière pour les entreprises de pêche artisanale, ainsi que le guide connexe pour l'équité homme-

⁶ Proposition de règlement du Parlement européen et du Conseil relatif au Fonds européen pour les affaires maritimes et la pêche et abrogeant le Règlement (UE) n° 508/2014 du Parlement européen et du Conseil, SEC(2018) 276 final, SWD(2018) 295 final.

⁷ <http://www.fao.org/3/a-i4356fr.pdf>

femme dans la gouvernance et le développement de la pêche artisanale⁸.

- (7) La Commission européenne **reconnait et dirige des initiatives mises en avant en Méditerranée et mer Noire** à l'égard des femmes et/ou de l'avenir des secteurs de la pêche et de l'aquaculture afin de garantir que les nécessités de femmes dans le secteur soient prises en compte. Ces initiatives incluent la déclaration ministérielle MedFish4Ever et le Plan d'action régional pour la pêche artisanale en Méditerranée et en mer Noire, ainsi que d'autres initiatives pertinentes telles que le dialogue régional sur l'autonomisation des femmes dans le cadre de l'Union pour la Méditerranée et les conférences de l'Union pour la Méditerranée.

Dans le cadre des **politiques et campagnes d'information et de communication de l'UE** dans le secteur de la pêche, nous recommandons les mesures suivantes :

- (8) Les opérations d'information et de communication **donnent au secteur une image moderne, plus jeune et « féminine »** visant à lutter contre les préjugés et les stéréotypes. En particulier : (i) assurer la publicité et la promotion des emplois et nouvelles possibilités dans le secteur de la pêche pour les jeunes femmes (et les hommes, où ils sont sous-représentés) ; (ii) mettre en valeur les solutions technologiques qui facilitent, aux hommes et femmes, les tâches et emplois physiquement pénibles du secteur de la pêche ; (iii) promouvoir des figures féminines emblématiques qui remettent en question les normes culturelles et les perceptions sociales dans le secteur (par exemple des pêcheuses professionnelles, des femmes qui possèdent un bateau, des conjointes de pêcheurs qui font partie de l'équipage, des femmes gestionnaires des entreprises de transformation ou qui participent au conseil d'administration d'une entreprise d'aquaculture etc.). Ces femmes pourraient également faire office de mentor ou former d'autres femmes dans le secteur.
- (9) **Soutenir et collaborer avec des organisations et réseaux internationaux** tels qu'AKTEA et *Women in Seafood Industry (WSI)* afin de faire prendre conscience du rôle joué par les femmes dans le secteur en Méditerranée et en mer Noire. Une visibilité croissante de ces organisations pourrait également encourager la création d'autres organisations de femmes au niveau national et régional en Méditerranée et en mer Noire.

⁸ FAO (2017), Pour l'équité hommes-femmes dans la gouvernance et le développement de la pêche artisanale. Guide. Pour appuyer la mise en œuvre des Directives volontaires visant à assurer la durabilité de la pêche artisanale dans le contexte de la sécurité alimentaire et de l'éradication de la pauvreté, de Nilanjana Biswas. Rome, Italie. <http://www.fao.org/3/i7419fr/17419FR.pdf>

RESUMEN EJECUTIVO

Introducción

El presente informe muestra los resultados del estudio sobre la **presencia y rol de las mujeres en el sector pesquero en el Mar Mediterráneo y el Mar Negro**. El estudio fue realizado a pedido de la Agencia Ejecutiva para las Pequeñas y Medianas Empresas (EASME) por Coffey International Development (Coffey) en colaboración con AND International, Poseidon y F&S. El estudio abarcó diez Estados miembros de la UE ubicados en el Mar Mediterráneo y el Mar Negro: Chipre, Croacia, Eslovenia, España, Francia, Grecia, Italia, Malta, Bulgaria y Rumania.

El estudio tuvo los siguientes objetivos específicos:

- Identificar los distintos roles y actividades que desempeñan las mujeres en el sector pesquero;
- En la medida de lo posible, cuantificar la presencia de mujeres en el sector;
- Analizar el marco legal vigente de los diferentes Estados miembro con relación a la participación de las mujeres en el sector;
- Identificar los desafíos y oportunidades existentes para promover la presencia y rol de las mujeres en el sector;
- Formular recomendaciones para mejorar la situación de las mujeres y promover su acceso al mercado laboral pesquero.

Con este estudio, la Comisión Europea contribuye a atender una de las necesidades del sector identificadas en la **Declaración Ministerial (MedFish4Ever)** firmada por la Comisión Europea y los Estados miembros en marzo de 2017: *"mejorar las condiciones de trabajo y promover el papel de las mujeres en el sector pesquero y la acuicultura"*. El estudio también apoya el **Plan de Acción Regional para la Pesca Artesanal en el Mar Mediterráneo y el Mar Negro** (RPOA-SSF) acordado en una Conferencia en Malta en septiembre de 2018.

El estudio se enfocó especialmente en visibilizar la presencia y rol de las mujeres tanto en la pesca extractiva, como en el procesamiento de la pesca, acuicultura y otras actividades relacionadas al sector. Hasta el momento, y especialmente en las cuencas del Mar Mediterráneo y del Mar Negro, estos temas han sido poco investigados. El estudio aporta entonces nueva evidencia y conocimiento sobre el sector pesquero en la UE.

Enfoque y metodología

El estudio se organizó en cuatro módulos y se estructuró en torno a 15 preguntas que abarcaron los siguientes temas:

- Cantidad y perfil de las mujeres que trabajan en la extracción y procesamiento de la pesca, en acuicultura y en otras actividades relacionadas al sector.
- Nivel de "invisibilidad" de las mujeres que trabajan en el sector⁹.
- Roles y tareas que desempeñan las mujeres en los diferentes subsectores y otras actividades relacionadas con la pesca.
- Remuneración de las mujeres que trabajan en el sector.
- Marco legal vigente con relación a la participación de las mujeres en el sector.

⁹ En este estudio, la "invisibilidad" de las mujeres se define como la situación en la que las mujeres desempeñan un papel activo en las actividades de pesca y/o acuicultura sin un estatus legal específico. Este suele ser el caso de esposas o parejas, madres, hermanas e hijas de pescadores que trabajan en tareas de asistencia (por ejemplo, tareas administrativas) y sus actividades se toman como parte de sus responsabilidades domésticas. Por lo tanto, no están registradas en las estadísticas, no reciben una remuneración formal por su trabajo ni beneficios de la seguridad social.

- Nivel de participación de las mujeres en organizaciones de la sociedad civil relacionadas con la pesca y en el proceso de toma de decisiones sobre las políticas del sector.
- Factores que afectan el trabajo de las mujeres en el sector.
- Buenas prácticas con relación a la mejora y promoción del papel de las mujeres en el sector pesquero.

El primer módulo de trabajo consistió en la **compilación de datos y estadísticas** sobre la presencia de mujeres en el sector pesquero de los Estados miembros. La investigación confirmó que la cantidad y calidad de las estadísticas existentes es extremadamente variable entre los distintos países. Por lo tanto, se adoptó un enfoque cualitativo que se centró en comprender, más que en cuantificar, la presencia y el papel de las mujeres en cada subsector y actividades relacionadas con la pesca.

El segundo módulo se enfocó en la recopilación de evidencia adicional sobre la situación de las mujeres en los diferentes subsectores y actividades relacionadas con la pesca mediante entrevistas y grupos focales. El equipo de investigación realizó un total de **113 entrevistas personales y telefónicas** con actores institucionales y **tres grupos focales con mujeres** que trabajan en el sector. Las entrevistas incluyeron autoridades pesqueras, organizaciones de mujeres, organizaciones de pescadores y grupos de acción locales (FLAGs). Los grupos focales involucraron mujeres con diferentes perfiles, desde esposas de pescadores y pescadoras profesionales, hasta mujeres que lideran pequeñas y medianas empresas del sector.

El tercer módulo consistió en el **análisis socioeconómico** de la evidencia recolectada en los diez Estados miembros. Además, se llevó a cabo un análisis FODA (fortalezas, oportunidades, debilidades y amenazas) en cada uno de los Estados miembros para identificar las oportunidades de cambio y los principales desafíos en la mejora de la igualdad de género en el sector pesquero.

El último módulo estuvo dedicado al desarrollo de las **conclusiones y recomendaciones** generales del estudio, las cuales pretenden ampliar la base de conocimiento existente sobre la presencia de las mujeres en la pesca, y el papel que desempeñan, así como también mejorar su participación en el sector y apoyar a la Comisión en la definición de futuras políticas públicas.

Conclusiones del estudio

Invisibilidad de las mujeres

El estudio reveló que la invisibilidad de las mujeres en el sector pesquero es un problema persistente tanto en la cuenca del Mar Mediterráneo como del Mar Negro. Esto está directamente relacionado con la **falta de datos estadísticos desagregados por sexo** sobre empleo en el sector en general y, específicamente, en los distintos subsectores bajo estudio (pesca extractiva, procesamiento de la pesca y acuicultura). La escasez de estadísticas desagregadas por sexo afecta también a otras variables como, por ejemplo, edad de los trabajadores/as, nivel de educación, tipos de trabajos/tareas realizados, escalas salariales, etc.

La invisibilidad de las mujeres también es una consecuencia de las **brechas existentes en el marco legal** de los Estados miembros respecto al reconocimiento del rol que desempeñan las mujeres en el sector. Nos referimos específicamente al reconocimiento del estatus de "cónyuge / pareja colaboradora" (ver más abajo). Aun en los países donde dicho estatus está legalmente reconocido, no existen datos sobre el número de mujeres que trabajan bajo ese estatus ni sobre su perfil y ocupaciones que desempeñan.

La invisibilidad de las mujeres también se ve influenciada por la **escala y el dinamismo de la actividad pesquera** en cada país. En general, las empresas de pequeña escala

dependen más de la ayuda y colaboración informal de las mujeres de la familia que las empresas de mayor escala. Las mujeres que trabajan en empresas de mediana y gran escala generalmente lo hacen bajo contratos formales de empleo. Paradójicamente, en algunos Estados miembros, la disminución de la actividad pesquera artesanal ha resultado en una disminución de la demanda de trabajo y, en consecuencia, en una disminución de la cantidad de mujeres que colaboran informalmente en las empresas familiares. La reestructuración del sector pesquero, de flotas dirigidas por individuos y cooperativas de pescaderos a flotas dirigidas por empresas de mayor escala, está cambiando el panorama del empleo en el sector, brindando más oportunidades para el empleo formal de las mujeres y el reconocimiento de su papel en la industria.

Sin embargo, la evidencia recolectada en este estudio muestra que **la invisibilidad de las mujeres sigue siendo un fenómeno extendido**, especialmente en la pesca extractiva, procesamiento y venta de la pesca realizada por pequeñas empresas familiares, así como en acuicultura y pesca-turismo.

Presencia y rol de las mujeres en el sector pesquero y actividades auxiliares

La evidencia estadística recopilada en este estudio muestra que el número total de mujeres que trabajan en la extracción y procesamiento de la pesca y en acuicultura en el Mar Mediterráneo y el Mar Negro se puede estimar en más de 14,000. Sin embargo, esta cifra combina datos obtenidos de diversas fuentes (y de distintos años) y, por lo tanto, está sujeta a un gran margen de error. Dicha estimación debe ser tratada con cautela.

Tanto en los Estados miembros de la cuenca del Mediterráneo como del Mar Negro, la **pesca extractiva** está ampliamente masculinizada. Las mujeres empleadas formalmente en esta actividad representan solo una pequeña parte de la fuerza laboral (entre el 1 y el 6%, según el país). Este es también el subsector con el mayor número de mujeres que trabajan sin un estatus legal determinado y sin una remuneración formal. Este es particularmente el caso de las empresas familiares de pequeña escala, donde las esposas, hijas y madres de los pescadores colaboran en las operaciones de la empresa a tiempo completo o en forma parcial. Se encuentran predominantemente en actividades terrestres como la administración de permisos y licencias de pesca, registros, contratos, etc., así como en actividades contables y de marketing. En algunos Estados miembros, las mujeres a menudo trabajan formalmente en otros sectores a tiempo completo o parcial y aún apoyan el negocio pesquero de su familia. En Grecia, las autoridades pesqueras entrevistadas estimaron que existen más de 90 mujeres que trabajan bajo el estatus de "cónyuge / pareja colaboradora" en el sector de la pesca extractiva. En Malta, las estimaciones de los entrevistados apuntan a unas 550 a 650 mujeres que trabajan bajo este estatus.

La **acuicultura** también es un subsector dominado por varones donde las mujeres representan entre el 7% y el 26% de la fuerza laboral, dependiendo del país. No obstante, este estudio muestra que la acuicultura está proporcionando cada vez más oportunidades laborales para las mujeres. El empleo formal de las mujeres está más extendido que en la pesca extractiva ya que las actividades de acuicultura tienden a ser más empresariales y comerciales que las de extracción (excepto en el cultivo de mariscos cuyo desarrollo sigue siendo de carácter tradicional). Sin embargo, en este subsector, la presencia de mujeres que trabajan sin un estatus legal determinado y sin una remuneración formal sigue siendo frecuente, particularmente en acuicultura de pequeña escala, de agua dulce y de cría de mariscos. En Italia, las personas entrevistadas estimaron que existen entre 500 y 800 mujeres que desempeñan tareas de asistencia en acuicultura sin un estatus legal determinado y remuneración específica. En Malta, se estimó que existen alrededor de 50 mujeres en esta misma situación. Estas mujeres suelen ser las esposas, hijas o madres de los acuicultores, las cuales asisten en las operaciones familiares (a tiempo completo o parcial) realizando tareas administrativas, contables y de marketing.

En el **procesamiento de la pesca**, las mujeres representan la mitad o la mayoría de los trabajadores. Comparado a la pesca extractiva y la acuicultura, en las actividades de procesamiento se encuentra un menor número de mujeres que trabajan informalmente, posiblemente porque la industria procesadora está más regulada con relación a condiciones de trabajo decente, igualdad de oportunidades y no discriminación en la remuneración. Sin embargo, en las empresas procesadoras más pequeñas, es probable que la demanda estacional de productos pesqueros esté cubierta por el empleo de mujeres de la familia que trabajan sin un estatus legal específico o remuneración. En este subsector, las mujeres con niveles más bajos de educación tienden a realizar tareas no calificadas (etiquetado, empaque, fileteado y enlatado), mientras que las mujeres con niveles de educación superior trabajan en administración, contabilidad, marketing, innovación y experimentación. El estudio reveló también que hay un "techo de cristal" en la progresión de las mujeres a posiciones de liderazgo en empresas de procesamiento, ya que los puestos de dirección están generalmente ocupados por varones.

Dada la falta generalizada de datos estadísticos, fue difícil identificar tendencias con respecto a la presencia de mujeres en **actividades auxiliares a la pesca**. Como tendencia general, se evidencia que las mujeres desempeñan un papel vital en la venta de pescado, pesca-turismo y actividades gastronómicas relacionadas. También están presentes en gran medida en el sector público, en la elaboración de políticas pesqueras, y en investigación.

Remuneración de las mujeres

En aquellos Estados miembros que cuentan con estadísticas de empleo desagregadas por sexo, se puede ver que las mujeres se encuentran predominantemente en **trabajos menos calificados con una remuneración agregada menor a la de los varones**. Esto apunta a la existencia de una segregación ocupacional de las mujeres y, en consecuencia, a una brecha salarial de género en el sector. Además, más mujeres que varones desempeñan actividades laborales a tiempo parcial, lo que también da como resultado salarios más bajos en el caso del colectivo femenino.

Marco legal vigente

Este estudio reveló que existen numerosas inconsistencias en la aplicación de la Directiva 2010/41/UE tanto en los Estados miembros de la cuenca del Mar Mediterráneo como del Mar Negro, así como también entre los diferentes subsectores bajo estudio. Este estudio muestra que **el reconocimiento de esta Directiva por las leyes nacionales no conduce necesariamente a la aplicación del estatus de "cónyuge / pareja colaboradora"** en todos los subsectores relacionados a la pesca. Además, aun en los Estados miembros que sí reconocen y aplican dicho estatus en todos o algunos subsectores (Francia, Grecia, Malta, España), las estadísticas oficiales no registran la cantidad de mujeres (o varones) que se encuentran bajo dicho estatus, excepto en el caso de Grecia, donde existen algunas estimaciones al respecto. Las brechas en el marco legal de los distintos países contribuyen a mantener la invisibilidad de las mujeres en el sector, lo cual les impide acceder a los beneficios de la seguridad social.

El estudio también muestra que las empresas de pequeña escala a menudo tienen dificultades para cumplir con las estrictas regulaciones laborales y los costos asociados tanto al empleo formal de una persona como al registro de un cónyuge / pareja que lo asiste bajo el estatus de "cónyuge / pareja colaboradora". Esto limita la participación formal de las mujeres en el sector, especialmente en aquellas actividades en las que se requiere cierta flexibilidad para adaptarse a la estacionalidad de los ciclos de pesca, turismo y acuicultura.

Desafíos y oportunidades para el cambio

En los diez Estados miembros bajo estudio hemos encontrado la prevalencia de prejuicios y percepciones de género estereotipadas (por ejemplo, la creencia de que las actividades físicamente exigentes como la pesca son inapropiadas para las mujeres, que las mujeres deben trabajar cerca de sus hogares para cuidar de sus familias, etc.). Estos tienen mayor preponderancia en los Estados de la cuenca del Mar Negro. Estas percepciones existen principalmente en el subsector de la pesca extractiva y, en menor medida, en la acuicultura y el procesamiento de la pesca.

Si bien existe una fuerte representación de mujeres en la elaboración de las políticas pesqueras, las mujeres rara vez se encuentran representadas en las organizaciones profesionales y sindicatos del sector (con algunas excepciones). Existe también una **escasa movilización de mujeres en temas de género y el sector pesquero**. En sólo tres de los diez Estados miembros bajo estudio encontramos organizaciones de mujeres específicamente dedicadas a la situación de las mujeres en el sector. Estos factores contribuyen a crear un entorno poco propicio para el avance de la igualdad de género en el sector, el cual hasta el momento ha sido muy lento.

Los hallazgos de este estudio coinciden con los resultados de una encuesta de grupos de acción locales (FLAGs) realizada por FARNET. Dicha encuesta muestra que **la presencia femenina en los FLAGs, especialmente en posiciones de liderazgo, se corresponde con un mayor número de proyectos locales en apoyo a las mujeres**. De la misma manera, el liderazgo femenino en materia de política pesquera en España en los últimos diez años podría estar vinculado a una mayor voluntad política para abordar los problemas de las mujeres en el sector.

La evidencia recopilada en los Estados miembros sugiere también que los avances en la igualdad de género tienen más probabilidades de originarse en el subsector de la acuicultura que en otros subsectores. Dicho subsector **evoluciona rápidamente y está relativamente menos afectado por percepciones estereotipadas de género, lo cual puede resultar en nuevas oportunidades de empleo para las mujeres**. Las actividades de acuicultura tienden a ser más empresariales y comerciales que la pesca extractiva, dado que en muchos casos resultan de la diversificación de la economía costera. Pese a las barreras que aun enfrentan las mujeres que trabajan en este subsector, la acuicultura tiene potencial para ofrecer empleos formales a las mujeres en todos los niveles.

Recomendaciones

El reconocimiento de la presencia y el rol de las mujeres en el sector pesquero del Mar Mediterráneo y del Mar Negro requiere adoptar un enfoque holístico para abordar las múltiples causas de su invisibilización en forma simultánea. El papel que juegan las regulaciones y políticas de la UE en este sentido es de suma importancia, ya que es probable que la igualdad de género en el sector reciba aún menos atención sin la existencia de tales iniciativas.

En relación con las leyes y regulaciones de la UE, el estudio recomienda que la Comisión Europea:

- (1) En su papel de Guardián de los Tratados, **garantice la aplicación de la Directiva 2010/41/UE en el sector pesquero del Mar Mediterráneo y del Mar Negro** y, en particular, del estatus de "cónyuge / pareja colaboradora". También es necesario revisar el alcance de dicho estatus, ya que actualmente se aplica sólo a los cónyuges y parejas del trabajador autónomo. Esto deja fuera a otras mujeres que asisten en el negocio familiar (por ejemplo, hijas, madres, etc.). Otro cambio importante sería permitir que los cónyuges / parejas puedan presentar la solicitud del estatus de "cónyuge / pareja colaboradora" por sí mismos y no a través de sus

esposos/as (siendo ellos/as los dueños del negocio).

- (2) Continúe los esfuerzos en la aplicación del marco de la UE para la recopilación, gestión y uso de los datos del sector pesquero (DC MAP) y **apoye a los Estados miembros en el suministro de estadísticas desagregadas por sexo** para los sectores de la pesca y la acuicultura. Esto implica asegurar que todos los Estados miembros continúen proporcionando estadísticas desagregadas por sexo sobre la acuicultura y el procesamiento de la pesca y que, a partir de 2018, todos los Estados miembros comiencen a proporcionar estos datos también para la pesca extractiva.
- (3) Considere una enmienda a dicho marco legal (DC MAP) para **garantizar que la recopilación de datos desagregados por sexo en los subsectores de la pesca incluya otras variables socioeconómicas** como edad, nivel de educación, estatus legal del empleo (empleado, trabajador autónomo), tipos de trabajos realizados, escalas salariales, etc. Los Estados miembros también podrían proporcionar datos sobre el número, sexo, edad, educación, etc. de los cónyuges / parejas colaboradoras registradas bajo dicho estatus.

En relación con las políticas públicas de la UE, el estudio recomienda:

- (4) **Asegurar que la igualdad de género sea un objetivo transversal del financiamiento de la UE para el sector pesquero.** Las acciones clave en este sentido son: (i) revisar las prioridades del Fondo Europeo Marítimo y de Pesca (FEMP) para 2021-2027 de manera tal que incluyan la igualdad de género en el sector; (ii) promover las organizaciones de mujeres relacionadas con la pesca y la acuicultura; (iii) patrocinar la participación de mujeres en organizaciones que promueven la igualdad de género y en órganos de decisión en materia de políticas de pesca y acuicultura; (iv) permitir a las mujeres que no son propietarias de una empresa pesquera pero que participan activamente en ella (por ejemplo, ayudando a sus cónyuges / parejas) a solicitar financiamiento bajo el FEMP; (v) sensibilizar a las mujeres sobre las oportunidades para participar en proyectos financiados por el FEMP; (vi) facilitar el acceso de los cónyuges / parejas colaboradoras a las oportunidades de educación y capacitación profesional en pesca y acuicultura; (vii) medir y monitorear el acceso y la participación de mujeres en el FEMP; y (ix) asegurar que los FLAG sean un medio para mejorar la igualdad de género en la pesca a nivel local.
- (5) **Promover que los Estados miembros incluyan la perspectiva de género en los programas operativos del FEMP,** de manera tal de aumentar la conciencia sobre el tema y apoyar un cambio cultural en este sentido. La adopción de una perspectiva de género es importante especialmente en los siguientes casos: (i) durante la selección de proyectos para financiamiento; (ii) la evaluación de los objetivos de los proyectos ejecutados; (iii) el establecimiento de metas para la asignación de fondos (por ejemplo, número de proyectos cofinanciados por el FEMP que son liderados por mujeres o que benefician a las mujeres, número de beneficiarios del FEMP que son mujeres, etc.); (iv) el establecimiento de indicadores de resultado que permitan monitorear y evaluar el progreso en la mejora de la igualdad de género en el sector; y (v) la recopilación de información para determinar el perfil de los/las beneficiarios/as del FEMP (por ejemplo, registro del sexo de los líderes de proyectos y / o del individuo responsable de la solicitar el financiamiento).
- (6) La Comisión Europea debe **apoyar la adopción de políticas con perspectiva de género para todos los subsectores de la pesca,** teniendo en cuenta las especificidades de cada uno de los subsectores. Esto incluye políticas para reducir las brechas salariales entre mujeres y varones, promover el equilibrio entre la vida laboral y familiar, facilitar el retorno de las mujeres al trabajo después de ser

madres, ampliar las licencias por maternidad/paternidad, facilitar el cuidado de los hijos, etc. En el ámbito de la pesca de pequeña escala, es importante tener en cuenta las "Directrices voluntarias para lograr la sostenibilidad de la pesca en pequeña escala en el contexto de la seguridad alimentaria y la erradicación de la pobreza"¹⁰ publicadas por la FAO, y el manual adjunto a dicha guía sobre cómo desarrollar y gobernar la pesca artesanal con igualdad de género (en inglés).¹¹

- (7) La Comisión Europea debe **contribuir y/o liderar iniciativas que existen actualmente en el Mar Mediterráneo y el Mar Negro con respecto a la igualdad de género y al futuro de la pesca y la acuicultura**. Esto incluye la Declaración Ministerial de MedFish4Ever y el Plan de Acción Regional para la Pesca Artesanal en el Mar Mediterráneo y el Mar Negro (RPOA-SSF) que ya están siendo apoyadas por la Comisión Europeas, así como otras iniciativas recientes como el Diálogo Regional sobre el Empoderamiento de las Mujeres en la Unión para el Mediterráneo y las Conferencias de la Unión por el Mediterráneo (UfM).

En relación con las políticas y campañas de información y comunicación de la UE en el sector pesquero, el estudio recomienda que:

- (8) Las acciones de información y comunicación **ofrezcan una imagen moderna, joven y "femenina" del sector pesquero** para ayudar a combatir los prejuicios y percepciones estereotipadas de género. En particular: (i) publicitar y promover empleos relacionados con la pesca y oportunidades para mujeres jóvenes (y varones jóvenes, en los casos de ocupaciones donde estén insuficientemente representados); (ii) mostrar los avances tecnológicos que facilitan las tareas de pesca y las actividades físicamente demandantes tanto para varones como mujeres; (iii) promover modelos de mujeres que desafían las normas culturales y las percepciones sociales en el sector (por ejemplo, pescadoras profesionales, mujeres que son propietarias de embarcaciones, esposas de pescadores que son miembros de la tripulación, mujeres que dirigen empresas procesadoras o forman parte del directorio de empresas de acuicultura, etc.). Estas mujeres también pueden ser mentoras / capacitar a otras mujeres en el sector.
- (9) La Comisión Europea **apoye y colabore con organizaciones y redes internacionales como AKTEA y Women in Seafood Industry (WSI)** para crear conciencia sobre el papel desempeñado por las mujeres en el sector pesquero. Una mayor visibilidad de estas organizaciones también puede dar lugar a la creación de organizaciones de mujeres a nivel nacional y local en el Mar Mediterráneo y en el Mar Negro.

¹⁰ <http://www.fao.org/3/a-i4356es.pdf>

¹¹ FAO (2017), Towards gender-equitable small-scale fisheries governance and development - A handbook. In support of the implementation of the Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication, by Nilanjana Biswas. Rome, Italy. <http://www.fao.org/3/a-i7419e.pdf>

SINTESI

Introduzione

La presente relazione di sintesi illustra i risultati emersi dallo studio sulla **presenza e sul ruolo delle donne nell'industria ittica nel Mediterraneo e nel Mar Nero**. Tale studio è stato realizzato per l'Agenzia esecutiva per le piccole e medie imprese (EASME) da Coffey International Development (Coffey) in partenariato con AND International, Poseidon e F&S. Il sondaggio ha interessato dieci Stati membri costieri dell'UE che si affacciano sul Mediterraneo e sul Mar Nero, ossia Croazia, Cipro, Francia, Grecia, Italia, Malta, Slovenia, Spagna, Bulgaria e Romania.

Lo studio perseguiva i seguenti obiettivi specifici:

- Individuare i ruoli distinti svolti dalle donne nel settore della pesca;
- Quantificare (laddove possibile) la presenza di donne nel settore;
- Analizzare l'attuale normativa vigente nei vari Stati membri relativa alla partecipazione femminile nel settore;
- Individuare le sfide nonché le opportunità di potenziare il ruolo e la presenza delle donne nel settore;
- Formulare raccomandazioni chiare al fine di migliorare la condizione delle donne e facilitare il loro accesso al mercato del lavoro nel settore ittico.

Tramite questo studio la Commissione europea intende rispondere all'esigenza di *"migliorare le condizioni di lavoro e promuovere il ruolo delle donne nel settore della pesca e dell'acquacoltura"* descritta nella **Dichiarazione ministeriale MedFish4Ever**, firmata dalla Commissione e dagli Stati membri nel marzo 2017. Il presente studio intende altresì contribuire al **Piano d'azione regionale per la pesca su piccola scala nel Mediterraneo e nel Mar Nero** (*Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea*, RPOA-SSF), avviato a Malta durante una Conferenza di alto livello nel settembre 2018.

La presente relazione illustra la presenza femminile in attività di cattura, acquacoltura, trasformazione e qualsiasi altra attività connessa alla pesca finora non ben documentata, in particolare nel bacino del Mar Mediterraneo e del Mar Nero, e contribuisce ad approfondire la conoscenza relativa alla presenza e al ruolo delle donne nel settore ittico nell'UE.

Approccio e metodologia

Il presente studio è stato suddiviso in quattro pacchetti di lavoro (WP) ed è composto da una serie di 15 domande di ricerca riguardanti i seguenti temi chiave :

- Presenza e profilo delle donne che lavorano in attività di cattura, acquacoltura, trasformazione e qualsiasi altra attività connessa alla pesca
- Invisibilità delle donne nel settore¹²
- Ruoli svolti dalle donne nei vari sottosectori e in attività connesse alla pesca
- Retribuzione delle donne che lavorano nel settore
- Statuto giuridico delle donne che lavorano nel settore
- Partecipazione delle donne a organizzazioni per la pesca e organi decisionali
- Fattori che incidono sul lavoro delle donne nel settore

¹² Ai fini di questo studio per "invisibilità" delle donne s'intende la partecipazione attiva delle donne nel settore della pesca e dell'acquacoltura senza uno statuto giuridico specifico. Si tratta solitamente del caso di mogli o partner riconosciute, madri, sorelle e figlie di pescatori che svolgono ruoli coadiuvanti (ad es. compiti amministrativi) e le cui attività sono considerate parte delle responsabilità domestiche. Il loro sostegno all'impresa quindi non è remunerato e non ricevono nessun tipo di tutela previdenziale.

- Buone pratiche per potenziare la presenza e il ruolo delle donne nel settore

Un'attività di ricerca a tavolino condotta nell'ambito del WP1 (compilazione di serie di dati/statistiche già esistenti) ha confermato che la quantità e la qualità di statistiche disponibili relative alla partecipazione femminile nel settore ittico (e nei sottosettori) variavano notevolmente a seconda degli Stati membri. Lo studio ha quindi adottato un approccio qualitativo mirato alla comprensione, piuttosto che alla quantificazione, della presenza e del ruolo delle donne in ogni sottosettore e attività connessa.

Durante il WP2 (raccolta di ulteriori prove qualitative e quantitative riguardanti i vari sottosettori e le attività connesse alla pesca), il gruppo di studio ha condotto **113 colloqui approfonditi di persona e per telefono** con interlocutori istituzionali e ha organizzato **tre focus group con donne** con un ruolo attivo nel settore. I colloqui hanno coinvolto autorità del settore ittico, organizzazioni femminili, organizzazioni di pescatori e gruppi di azione locale nel settore della pesca (FLAG). I *focus group* hanno coinvolto donne dai profili diversi: dalle mogli di pescatori alle "pescatrici" professioniste, alle donne che gestiscono piccole e medie imprese ittiche.

Nell'ambito del WP3 (analisi transnazionale delle prove), il gruppo di studio ha riunito le prove ed i risultati emersi dai precedenti WP e ha condotto un'**analisi socio-economica** delle prove raccolte nei dieci Stati membri. Nel corso di questo WP è stata anche effettuata un'analisi SWOT dei paesi al fine di individuare opportunità e sfide alla promozione della parità di genere nel settore della pesca.

Infine, il WP4 ha elaborato **conclusioni e raccomandazioni** generali con lo scopo finale di approfondire le conoscenze di base esistenti relative al ruolo e alla presenza delle donne nel settore della pesca, potenziare la partecipazione femminile al settore e assistere la Commissione nella valutazione degli orientamenti politici.

Conclusioni

Invisibilità delle donne

L'**invisibilità delle donne** nel settore ittico è un problema persistente nei bacini del Mediterraneo e del Mar Nero. È direttamente correlato all'**assenza di una raccolta sistematica di dati ripartiti per genere** riguardanti la partecipazione ed i ruoli assunti dagli uomini e dalle donne nei sottosettori, in particolar modo nella cattura, ma anche nell'acquacoltura e nella trasformazione. Le gravi lacune nei dati ripartiti per genere riguardano diverse variabili socioeconomiche, come occupazione, età, livelli di istruzione, tipo di attività svolta, retribuzione ecc.

L'invisibilità delle donne è anche il risultato di **divari nelle normative degli Stati membri** riguardanti il ruolo delle donne nel settore, in particolar modo il riconoscimento dello statuto di coniugi/partner coadiuvanti (cfr. sotto). Inoltre, anche negli Stati membri in cui tale statuto si applica, non esistono dati riguardanti numero, profilo ed occupazione delle donne che godono di tale statuto.

La **portata e il dinamismo dei sottosettori** influiscono ulteriormente sull'invisibilità delle donne nel settore. Le piccole imprese e le aziende a conduzione familiare fanno maggiormente ricorso al sostegno invisibile (ossia non contabilizzato) delle donne, mentre le imprese più grandi così come le attività con un maggiore orientamento commerciale offrono alle donne contratti di lavoro ufficiali. Inoltre, il calo della pesca artigianale in alcuni Stati membri ha portato a una diminuzione delle opportunità di lavoro sommerso per le donne ; le donne (ed uomini) sono stati costretti a trovare un lavoro ufficiale al di fuori del settore della pesca, portando di conseguenza ad un calo dell'invisibilità delle donne. La trasformazione del settore, passato da flotte di pesca gestite da individui e cooperative a vere e proprie imprese, contribuisce al cambiamento

della situazione occupazionale nel settore della pesca di cattura, poiché fornisce alle donne maggiori opportunità di contratti ufficiali e di riconoscimento del loro ruolo.

Le prove raccolte nell'ambito di questo studio indicano che l'invisibilità delle donne rappresenta un fenomeno **più esteso nei sottosettori della cattura e dell'acquacoltura, così come nel pescaturismo e nelle attività successive alla raccolta** (incluse la trasformazione e la vendita del pesce) gestiti da aziende a conduzione familiare o da piccole imprese.

Presenza e ruolo delle donne nei sottosettori e nelle attività connesse

Secondo i dati statistici raccolti nell'ambito del presente studio, si stima che il numero totale di donne che lavorano nei sottosettori della cattura, acquacoltura e trasformazione nel Mediterraneo e nel Mar Nero ammonti a più di 14 000. Si tratta tuttavia di un dato aggregato basato su informazioni provenienti da varie fonti (ed anni diversi), che ha quindi un ampio margine di errore ; per questo motivo questa stima dovrebbe essere interpretata con prudenza.

Il sottosettore della **cattura** è fortemente dominato dagli uomini. Le donne ufficialmente assunte rappresentano solo una piccola percentuale della forza lavoro (tra l'1 ed il 6 % in funzione dello Stato membro). Si tratta anche del sottosettore con il maggior numero di donne con ruoli coadiuvanti che non godono di uno statuto giuridico specifico o di una determinata retribuzione ; questo avviene in special modo nelle piccole imprese e nelle aziende a conduzione familiare, dove le mogli, figlie e madri dei pescatori collaborano alle attività dell'impresa a tempo pieno o su una base ad hoc. Queste donne svolgono prevalentemente attività a terra, come gestire permessi, licenze, registrazioni, contratti ecc. e si occupano della contabilità e commercializzazione. In alcuni Stati membri le donne spesso lavorano a tempo pieno o a tempo parziale in altri settori e sostengono comunque l'attività di pesca della loro famiglia. In Grecia si stima che ci siano più di 90 lavoratrici "invisibili" nel sottosettore della cattura e il numero oscilla da 550 a 650 nel caso di Malta.

Anche l'**acquacoltura** è un sottosettore dominato dagli uomini, in cui la componente femminile rappresenta dal 7 al 26 % della forza lavoro, a seconda dello Stato membro. Ciononostante questo studio ha dimostrato che questo sottosettore sta offrendo sempre più opportunità per le donne : l'assunzione ufficiale delle donne vi è più diffusa rispetto al sottosettore della cattura. Inoltre, le attività di acquacoltura tendono ad essere più orientate all'imprenditoria e al commercio rispetto a quelle della cattura (ad eccezione della molluschicoltura di carattere più tradizionale). In questo sottosettore operano un numero imprecisato di lavoratrici "invisibili", specialmente nell'acquacoltura artigianale di acqua dolce e nella molluschicoltura. In Italia le parti interessate reputano che ci siano tra le 500 e le 800 donne che svolgono ruoli coadiuvanti senza godere di uno statuto giuridico o di una determinata retribuzione ; a Malta questa stima si attesta sulle 50 donne. Si tratta di consueto di mogli, figlie, madri di allevatori che contribuiscono alle attività dell'azienda di famiglia (a tempo pieno o a tempo parziale), svolgendo compiti amministrativi, contabili o commerciali.

Nel sottosettore della **trasformazione**, la forza lavoro è composta per la maggior parte da donne oppure vige una parità uomo donna. Rispetto ad altri sottosettori, quello della trasformazione registra il minor numero di lavoratrici "invisibili", probabilmente perché l'industria della trasformazione è obbligata per legge a rispettare normative riguardanti condizioni di lavoro dignitose, pari opportunità e pari retribuzione. Tuttavia, nel caso di imprese più piccole, è probabile che ad un aumento stagionale della domanda di prodotti della pesca corrisponda il coinvolgimento di donne facenti parte della famiglia che lavorano senza uno specifico statuto giuridico o una determinata retribuzione. In questo sottosettore, le donne con livelli di istruzione inferiore svolgono spesso attività non qualificate (etichettatura, confezionamento, filettatura e inscatolamento), mentre le donne con livelli di istruzione superiore si occupano di amministrazione, contabilità,

commercializzazione, innovazione e sperimentazione. Questo studio ha rivelato che esiste una barriera invisibile di discriminazione verticale che impedisce alle donne di assumere ruoli dirigenziali in questo sottosettore, poiché le posizioni apicali sono prevalentemente occupate dagli uomini.

Vista la carenza generalizzata di dati, si è rivelato difficile individuare tendenze riguardanti la presenza femminile in **attività connesse alla pesca**. In generale, il ruolo delle donne nella vendita di pesce, nel pescaturismo e nelle attività gastronomiche è considerato vitale e le donne partecipano in gran numero all'elaborazione di politiche e alla ricerca nell'impresa ittica.

Retribuzione delle donne

Negli Stati membri che raccolgono dati ripartiti per genere relativi a donne lavoratrici con un contratto ufficiale nel settore, è stato rilevato che **le donne svolgono prevalentemente lavori meno qualificati con una minore retribuzione rispetto** agli uomini, lasciando presagire una segregazione occupazionale e di conseguenza un divario di retribuzione tra i generi nel settore. Inoltre le donne svolgono più attività a tempo parziale o ad hoc rispetto agli uomini con conseguenti minori retribuzioni.

Statuto giuridico delle donne

Sono state riscontrate numerose incongruenze nel recepimento della direttiva 2010/41/UE negli Stati membri, sia all'interno degli stessi bacini marini che tra vari sottosectori ittici. Dall'indagine risulta che **il recepimento di questa direttiva nelle legislazioni nazionali non porta necessariamente all'applicazione dello statuto di coniuge/partner coadiuvante** nei sottosectori. Inoltre, negli Stati membri che riconoscono tale statuto (Francia, Grecia, Malta, Spagna), i coniugi/partner coadiuvanti non sono presi in considerazione dalle statistiche ufficiali, ad eccezione della Grecia dove esistono alcune stime. Le carenze nel quadro normativo esacerbano l'invisibilità delle donne nel settore e, negli Stati membri che non riconoscono per niente lo statuto (ossia la direttiva non è stata applicata a pieno), impediscono loro di accedere al sistema previdenziale.

Lo studio ha altresì rilevato che le piccole imprese e le aziende a conduzione familiare spesso faticano ad adempiere a severe norme in materia di occupazione e a sostenere i costi associati all'assunzione ufficiale di una persona e/o alla registrazione di un coniuge/partner coadiuvante. Questo vincola la partecipazione delle donne ad attività minori, specialmente laddove occorre una certa flessibilità dovuta al carattere stagionale dei cicli di pesca, turismo ed allevamento.

Sfide e opportunità di cambiamento

Gli stereotipi di genere (ad es. le donne non riescono a svolgere attività fisiche come la pesca, le donne dovrebbero lavorare in prossimità della casa per occuparsi della famiglia ecc.) sono stati riscontrati nei dieci Stati membri, ma sembrano più radicati nella regione del Mar Nero, per lo più nel sottosector della cattura e, in misura minore, anche in quelli dell'acquacoltura e della trasformazione.

Nonostante ci sia una forte componente femminile nella politica della pesca, raramente le donne partecipano a organizzazioni professionali, sindacati e comitati aziendali (con alcune eccezioni) e in questo ambito vi è una **scarsa mobilitazione femminile per le questioni di genere**. Solo tre Stati membri sui dieci intervistati nell'ambito del presente studio dispongono di organizzazioni rappresentative appositamente dedicate alle donne operanti nel settore ; di conseguenza, in questo contesto la promozione delle pari opportunità nel settore ittico procede a rilento.

I risultati emersi dal presente studio riflettono i risultati di un sondaggio sui FLAG

realizzato da FARNET, che dimostra che una **forte presenza femminile nei FLAG, anche in ruoli dirigenziali, corrisponde ad un maggior numero di progetti FLAG a sostegno delle donne**. Inoltre, la predominanza della componente femminile nella leadership politica spagnola degli ultimi dieci anni potrebbe essere correlata a una maggiore volontà politica di affrontare le questioni relative alla parità di genere nel settore.

Le prove raccolte dagli Stati membri indicano che nel settore della pesca si registreranno progressi verso la parità di genere probabilmente nel **sottosettore dell'acquacoltura, caratterizzato da uno sviluppo rapido, relativamente meno carico di stereotipi di genere e che offre nuove opportunità di lavoro alle donne**. Le attività di acquacoltura tendono ad avere una natura più imprenditoriale e commerciale rispetto alla cattura, visto che spesso rientrano nella diversificazione delle economie costiere. Nonostante gli ostacoli che le donne devono ancora affrontare in questo sottosettore, l'acquacoltura potrebbe potenzialmente offrire loro un'occupazione ufficiale a tutti i livelli.

Raccomandazioni

Il problema dell'invisibilità e il mancato riconoscimento delle donne nel settore ittico del Mediterraneo e del Mar Nero devono essere affrontati tramite un approccio globale per poterne esaminare simultaneamente i molteplici fattori. Le norme e le politiche dell'UE a questo proposito svolgono un ruolo essenziale, poiché senza tali quadri normativi la questione di genere sarebbe probabilmente ulteriormente trascurata.

In merito agli **atti giuridici e ai regolamenti dell'UE**, nell'ambito del presente studio si raccomanda alla Commissione europea di :

- (1) **Garantire**, nella sua funzione di custode dei trattati, **l'attuazione della direttiva 2010/41/UE** nel settore ittico del Mediterraneo e del Mar Nero, in particolar modo l'applicazione dello statuto di coniuge/partner coadiuvante. È altresì necessario rivedere il campo di applicazione dello statuto che attualmente prevede solo i coniugi e i partner registrati, trascurando altre donne che collaborano alle attività aziendali (ad es. figlie, madri ecc.). Una modifica importante consisterebbe anche nel permettere ai coniugi/partner coadiuvanti di presentare le richieste di concessione dello statuto da sole e non tramite il loro marito (in quanto titolare dell'azienda).
- (2) Perseguire gli sforzi per l'applicazione del DC MAP e **assistere gli Stati membri nell'elaborazione di statistiche ripartite per genere** per i settori della pesca e dell'acquacoltura. A questo fine è necessario garantire che tutti gli Stati membri *continuino* a fornire statistiche ripartite per genere relative all'acquacoltura e alla trasformazione e che, a partire dal 2018, tutti gli Stati membri *inizino* a fornirle anche per il sottosettore della cattura.
- (3) Prendere in considerazione una modifica al quadro per la raccolta di dati al fine di garantire che **la raccolta di dati ripartiti per genere relativi ai sottosettori ittici includa variabili socioeconomiche** come età, livello di istruzione, natura giuridica dell'occupazione (impiegato, autonomo), tipo di attività svolta, retribuzione ecc. Gli Stati membri potrebbero altresì fornire dati sul numero, sesso, età, istruzione ecc. dei coniugi coadiuvanti registrati.

Le raccomandazioni sviluppate in merito alle **politiche pubbliche dell'UE** sono le seguenti :

- (4) **La parità di genere è un obiettivo trasversale dello strumento finanziario dell'UE per il settore della pesca**. A tal proposito devono essere intraprese le

seguenti azioni chiave: (i) rivedere le priorità del FEAMP 2021-2027¹³ per introdurre la parità di genere e le tematiche di genere; (ii) promuovere la creazione di organizzazioni femminili nel settore della pesca e dell'acquacoltura; (iii) patrocinare la partecipazione delle donne e delle organizzazioni attive nella promozione delle pari opportunità agli organi consultivi e decisionali del settore della pesca e dell'acquacoltura; (iv) consentire alle donne, che non sono titolari di un'azienda ittica ma vi partecipano attivamente (ad es. coniugi/partner coadiuvanti), di presentare domanda di sovvenzione nell'ambito del FEAMP; (v) informare le donne dell'esistenza di servizi di assistenza e della possibilità di partecipare a progetti sostenuti dal FEAMP; (vi) agevolare l'accesso di coniugi/partner coadiuvanti a formazioni professionali e opportunità di apprendimento nel settore della pesca e dell'acquacoltura; (vii) misurare e monitorare l'accesso e il ricorso delle donne al Fondo europeo per la pesca dell'UE; (ix) garantire che i FLAG siano uno strumento di promozione della parità di genere nel settore della pesca a livello locale.

- (5) **I programmi operativi del FEAMP degli Stati membri dovrebbero includere la prospettiva di genere** al fine di aumentare la consapevolezza e promuovere un cambiamento culturale graduale. È importante adottare una prospettiva di genere, specialmente nell'ambito dei seguenti procedimenti : (i) selezione di progetti da finanziare; (ii) valutazione degli obiettivi dei progetti attuati; (iii) fissazione di obiettivi per lo stanziamento dei finanziamenti (ad es. numero di progetti cofinanziati dal FEAMP di proprietà o a sostegno delle donne, numero di beneficiari donne ecc.); (iv) definizione degli indicatori di realizzazione e di risultato che consentono di monitorare e valutare i progressi relativi alla parità di genere nel settore; (v) raccolta di informazioni di profilo dei beneficiari (ad es. registrare il sesso dei leader di progetti e/o del responsabile della domanda di finanziamento).
- (6) La Commissione europea auspica l'**adozione di politiche attente alle tematiche di genere a tutti i livelli**, che tengano debitamente conto delle specificità dei vari sottosectori della pesca e dell'acquacoltura, come politiche volte a ridurre il divario salariale, la promozione di un equilibrio tra attività professionale e vita privata, la ripresa dell'attività lavorativa dopo il parto, il congedo parentale, la cura dei figli e iniziative di sostegno finanziario specifiche. Nel caso della pesca artigianale rivestono una particolare importanza le "Direttive volontarie per garantire una pesca su piccola scala sostenibile nel contesto della sicurezza alimentare e dell'eradicazione della povertà" (*Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication*)¹⁴ della FAO del 2015 ed il relativo manuale sulla gestione e lo sviluppo di una pesca artigianale equa sul piano delle pari opportunità¹⁵.
- (7) La Commissione europea **riconosce e assume un ruolo guida nell'ambito delle iniziative promosse nel Mediterraneo e nel Mar Nero** riguardanti le donne e/o il futuro dei settori della pesca e dell'acquacoltura al fine di garantire che le esigenze delle donne in questo settore siano soddisfatte. Tra tali iniziative sono inclusi la dichiarazione ministeriale MedFish4Ever e il Piano d'azione regionale per la pesca su piccola scala nel Mediterraneo e nel Mar nero, nonché altre iniziative pertinenti come il dialogo regionale sull'emancipazione femminile nel

¹³ Proposta di regolamento del Parlamento europeo e del Consiglio relativo al Fondo europeo per gli affari marittimi e la pesca e che abroga il Regolamento (UE) n. 508/2014 del Parlamento europeo e del Consiglio, SEC(2018) 276 final, SWD(2018) 295 final.

¹⁴ <http://www.fao.org/3/a-i4356en.pdf>

¹⁵ FAO (2017), "Towards gender-equitable small-scale fisheries governance and development - A handbook. In support of the implementation of the Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication", di Nilanjana Biswas. Roma, Italia. <http://www.fao.org/3/a-i7419e.pdf>

contesto dell'Unione per il Mediterraneo (UpM) e le conferenze dell'Unione per il Mediterraneo.

Le raccomandazioni sviluppate in merito alle **politiche e campagne di informazione e comunicazione dell'UE** nel settore ittico sono le seguenti :

- (8) Le iniziative di informazione e comunicazione **trasmettono un'immagine del settore moderna, più giovanile e "femminile"** per lottare contro i pregiudizi e gli stereotipi. In particolar modo : (i) pubblicizzare e promuovere posti di lavoro e opportunità nel settore della pesca per giovani donne (e uomini, laddove sottorappresentati); (ii) presentare nuove tecnologie che facilitino, sia alle donne che agli uomini, le attività e occupazioni legate alla pesca impegnative dal punto di vista fisico; (iii) promuovere modelli femminili che sfidino le norme culturali e le percezioni sociali nel settore (ad es. "pescatrici" professioniste, donne proprietarie di barche, mogli di pescatori che fanno parte dell'equipaggio di bordo, donne che gestiscono un'azienda di trasformazione o fanno parte del consiglio di amministrazione di un'azienda di acquacoltura ecc.). Queste donne potrebbero fare da guida o formare altre donne nel settore.
- (9) **Sostenere e collaborare con organizzazioni e reti internazionali** come AKTEA e *Women in Seafood Industry (WSI)* al fine di accrescere la consapevolezza nel Mediterraneo e nel Mar Nero circa il ruolo assunto dalle donne nel settore. Aumentare la visibilità di tali organizzazioni potrebbe anche portare alla creazione di altre organizzazioni di donne a livello nazionale e regionale nel Mediterraneo e nel Mar Nero.

1. INTRODUCTION

This report comprises a study of the **presence and role of women in fisheries in the Mediterranean and the Black Sea**. The study was conducted for the Executive Agency for Small and Medium-sized Enterprises (EASME) by Coffey International Development (Coffey) in partnership with AND International, Poseidon and F&S.

The study covered ten Mediterranean and Black Sea coastal EU Member States, namely: **Croatia, Cyprus, France, Greece, Italy, Malta, Slovenia, Spain, Bulgaria, and Romania**.

With this study, the European Commission seeks to address the need to *"improve working conditions and promote the role of women in the fisheries sector and aquaculture"* that was identified in the MedFish4Ever Ministerial Declaration signed by the Commission and Member States in March 2017¹⁶. The study should also contribute to the Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea (RPOA-SSF)¹⁷ launched in Malta via a High-Level Conference in September 2018¹⁸. Overall, **the study should inform and support the formulation of policies** to improve the status of women and help their access to this sector's labour market.

The next chapter presents the study's background, its objectives and scope. This is followed by an overview of the approach and methodology applied. The fourth chapter is dedicated to presenting the research findings, structured around the key topics that were investigated. The last chapters present the study's overall conclusions and recommendations.

¹⁶ MedFish4Ever Ministerial Declaration, full text available at:

<https://ec.europa.eu/fisheries/sites/fisheries/files/2017-03-30-declaration-malta.pdf>.

¹⁷ RPOA-SSF (2018), full text available at: <http://www.fao.org/qfcm/meetings/ssf2018/rpoassf>.

¹⁸ <http://www.fao.org/qfcm/meetings/ssf2018>.

2. BACKGROUND

2.1 Women in fisheries

While fishing and aquaculture are male-dominated activities in Europe, in most fishing communities **women play a key role and make significant contributions to the industry**. In 2014, it was estimated that more than 100,000 women worked in the EU fisheries sector¹⁹, with 30% working in aquaculture and circa 60% in the processing industry (the remainder worked in the extractive sector and in jobs linked to the activities of fishing boats such as net makers, port workers or packers)²⁰. In 2018, FARNET²¹ provided similar estimations. It indicated that, based on the results of a survey on Fisheries Local Action Groups' (FLAGS)²² support to women in fisheries and aquaculture, 51% of women employed in the fisheries sector worked in processing and 26% in aquaculture, with the rest working in the extractive, auxiliary or combined sectors²³.

However, statistical data only partially reflect the role of women and their presence in the sector, as it only reports on declared and remunerated employment. This excludes a sizable portion of **"invisible" female workers**, a category that includes wives, life partners, mothers, sisters and daughters, who play an active role in family fishing and aquaculture enterprises without a specific legal status. They normally work in assisting roles (e.g. administrative tasks, sale of fish, etc.) and their activities are taken as part of their household responsibilities. Their support for the business is therefore not paid and they receive no social security benefits.

Apart from the informal nature of many women's work in the fisheries sector, the **level of disaggregation of existing statistics is also an issue**. A study commissioned by the European Parliament in 2013²⁴ raised the issue of the quality of European statistics on levels of female employment in fisheries. It noted that data produced by EUROSTAT were incomplete, either because the information provided was not broken down by sex or the Member States did not provide the necessary information. This contradicted the provisions of the EC Decision 2010/93/EU from 2009²⁵, which obliged Member States to collect employment data broken down by gender for aquaculture and processing sub-sectors.

The Data Collection Multiannual Programme (DC MAP)²⁶ is the current EU framework for the collection and management of data in support to the Common Fisheries Policy. The DC MAP foresees an obligatory collection of sex-based employment data on women who

¹⁹ <https://epthinktank.eu/2013/10/14/women-and-fisheries-in-the-european-union/>.

²⁰ European Institute for Gender Equality, <http://eige.europa.eu/gender-mainstreaming/policy-areas/maritime-affairs-and-fisheries>.

²¹ FARNET is the Fisheries Areas Network. It is a community of people implementing Community-Led Local Development (CLLD) under the European Maritime and Fisheries Fund (EMFF), <https://webgate.ec.europa.eu/fpfis/cms/farnet2/>

²² FLAGS are local partnerships that bring together the private sector, local authorities and civil society organisations. They fund local projects within the framework of a strategy, developed in response to specific needs and opportunities identified locally. FLAGS were established to deliver Axis 4 under the European Fisheries Fund (EFF) and since then have become the chosen delivery method for Community-Led Local Development (CLLD) in most EU Member States (https://ec.europa.eu/fisheries/cfp/eff/farnet_en)

²³ FARNET (2018), Survey of FLAGS support to women in fisheries and aquaculture (https://webgate.ec.europa.eu/fpfis/cms/farnet2/library/technical-report/flag-support-women-fisheries-and-aquaculture_en).

²⁴ K. Frangoudes (2013), *Women in Fisheries: A European Perspective*.

²⁵ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32017R1004>

²⁶ Regulation (EU) 2017/1004 of 17 May 2017 on the establishment of a Union framework for the collection, management and use of data in the fisheries sector and support for scientific advice regarding the common fisheries policy and repealing Council Regulation (EC) No 199/2008.

work in the aquaculture and processing sub-sectors. Only since 2018, it also requires Member States to collect sex-disaggregated statistics for the catching sub-sector.

These shortcomings suggest that there is a **need to improve the existing evidence-base** on the presence and role of women in the fisheries sector and related activities and professions. Robust data on the level and nature of female employment is key to delineate affirmative action policies to address the specific needs of these women.

2.2 Mediterranean and Black Sea fisheries

The Mediterranean and Black Sea fleet, all Coastal States included, is **dominated by small-scale vessels** of under 12 m length. According to data from 2014, they comprised 80% of all the vessels in the region, which was estimated to be 92,700 units. Small-scale fleet from the EU Mediterranean and Black Sea Member States accounts for half of these units (42,500 vessels). Moreover, small-scale fishing employed circa 60% of fishers in the area and contributed to circa 20% of total landings' value²⁷.

The highest share of the fleet – of all types of scale - operates in the eastern Mediterranean (28%), followed by the Ionian Sea basin (27%). The Black Sea's fleet represents 12% of the vessels in the region. In 2013, seven countries²⁸, including three EU Member States (Greece, Italy and Spain) were responsible for 80% of landings in the Mediterranean and Black Sea basins.

In the last 30 years, there was a **considerable decrease in fish landings** (from circa 2 million per year from 1982 to 1990, to 1.2 million in 2013). The decrease was largely attributed to the collapse of pelagic fisheries in the Black Sea. Since then, anchovies and sardines have dominated the landings, and the western Mediterranean basin has become the sub-region responsible for over half of total landings' value (€ 1.6 billion out of € 3.09 billion produced in 2013).

The availability of data in relation to female employment and "invisible" female workers in the Mediterranean and Black Sea fisheries is quite limited.

The need to plug existing data gaps and enhance understanding of the participation and contribution of women to the Mediterranean and Black Sea fisheries was therefore one of the purposes of the present study.

2.3 Legal and policy framework

In addition to data gaps and limitations of existing statistics in relation to women's presence in the sector, significant gaps remain in the legal recognition of women's role and in EU and national policies aimed at enhancing gender equality and facilitating women's access to funds.

At EU level, Directive 2010/41/EU²⁹ replaced Directive 86/613/EEC on equal treatment of men and women engaged in an activity, including agriculture, in a self-employed capacity. The legislative act of 2010 established the status of assisting spouse / life partner. This was a very important step towards women in fisheries' legal recognition as it granted fishers' spouses a legal status which gave them access to social benefits such as maternity leave, social security, a pension, professional training and

²⁷ FAO (2016), The State of Mediterranean and Black Sea Fisheries (published by FAO, 2016).

²⁸ Algeria, Greece, Italy, Spain, Tunisia, Turkey and Ukraine.

²⁹ Directive 2010/41/EU of the European Parliament and of the Council of 7 July 2010 on the application of the principle of equal treatment between men and women engaged in an activity in a self-employed capacity, OJ L 180, 15.7.2010, p. 1–6.

membership of fisheries organisations in the Member States (where this is permitted under national law)³⁰.

However, this study revealed that, at the national level, there is an **uneven enforcement of the Directive in the fisheries sector**. Except in some Member States, the role and status of spouses and partners usually does not feature in the sector's regulations and social security provisions.

At EU policy level, the European Fisheries Fund (EFF), active from 2007 to 2013, affirmed the principle of the promotion of equal opportunities between women and men in the fisheries sector and fisheries areas through several explicit references to the need to promote gender equality³¹. However, **Member States failed to include gender equality as a separate objective in their Operational Programmes (OPs)**. This limited the impact of the EFF on the promotion of equality between men and women³².

In 2014, the European Maritime and Fisheries Fund (EMFF) followed the EFF and **emphasised the importance of the gender dimension in fisheries policy**. In effect, the EMFF Regulation's Recital (8)³³ states that at every stage of its implementation, the EMFF should "*aim to eliminate inequalities and promote equality between men and women, as well as to combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation.*" In Articles 29 (fisheries) and 50 (aquaculture), the EMFF also calls on Member States to support "*networking and exchange of experiences and best practices between stakeholders, including among organisations promoting equal opportunities between men and women, promoting the role of women in fishing communities and promoting under-represented groups involved in small-scale coastal fishing or in on-foot fishing*". The EMFF goes a step further and expands the scope of its support "*to spouses of self-employed fishermen or, where and insofar as recognised by national law, the life partners of self-employed fishermen*", in line with Directive 2010/41/EU. The gender dimension of the EMFF is to be realised through the financial support of projects run by or for women. The impact of the EMFF on gender equality, as well as the extent to which the funds were accessed by women (particularly the spouses / life partners of fishers), is yet to be examined.

The **MedFish4Ever Ministerial Declaration**³⁴ signed in March 2017 by the European Commission and Member States of the Mediterranean and Black Sea coasts was another leap forward in the Mediterranean and Black Sea fisheries. This established the need to "*improve working conditions and promote the role of women in the fisheries sector and aquaculture*".

Later, in September 2018, the **Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea (RPOA-SSF)**³⁵ was launched in Malta via a High-Level Conference³⁶. The issue of women's role in fisheries was addressed in one of the conference's core panels and became part of the Ministerial Declaration on the RPOA-SSF. The Declaration recognised small-scale fisheries as a sector offering a significant role for women. It also encouraged Member States to recognise, as well as

³⁰ K. Frangoudes (2013), *Women in Fisheries: A European Perspective*, Op. Cit.

³¹ Council Regulation (EC) No 1198/2006 of 27 July 2006 on the European Fisheries Fund, OJ L223, 15.8.2006, p. 1.

³² MRAG, Coffey and others (2016), Ex-post evaluation of the European Fisheries Fund (2007-2013).

³³ Regulation (EU) No 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Maritime and Fisheries Fund, OJ L 149, 20.5.2014, pp. 1-66.

³⁴ MedFish4Ever Ministerial Declaration, Op. Cit.

³⁵ RPOA-SSF, Op. Cit.

³⁶ <http://www.fao.org/aqcm/meetings/ssf2018>.

strengthen, the small-scale fisher organisations and platforms, including associations of women.

It is within this context that the European Commission seeks to obtain an in-depth analysis of the presence and role of women in the Mediterranean and Black Sea fisheries. This should inform and support the formulation of future policies to improve the status of women and help their access to this sector's labour market. In doing so, the findings of this study will support the Commission in deciding the scope and objectives of the fisheries policy and fund after 2020.

3. METHODOLOGY

3.1 *Study objectives and scope*

The **overall purpose** of this study was to analyse the presence and role of women in the fisheries sector in the Mediterranean and Black Sea coastal EU Member States (namely: Bulgaria, Croatia, Cyprus, France, Greece, Italy, Malta, Romania, Slovenia and Spain).

With this study, the European Commission seek to address the need to "*improve working conditions and promote the role of women in the fisheries sector and aquaculture*" that was identified in the MedFish4Ever Ministerial Declaration signed by the Commission and Member States in March 2017³⁷. The study should also inform and support the design of the post 2020 fisheries fund, as well as the formulation of the Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea (RPOA-SSF)³⁸.

The technical specification of the study stated the following **specific objectives**:

- the identification of the distinct roles that women play in the fisheries sector at various levels: fisheries harvesting, fisheries communities, fishing and aquaculture enterprises, fisheries management and decision-making process, etc.;
- the quantification of the presence of women in the fisheries sector;
- the analysis of the current legal framework in the different Member States concerning women's participation in the fisheries sector (mainly recognition of non-remunerated work, employment rights, access to benefits for the fisheries sector, etc.);
- the identification of the challenges and the opportunities for promoting women's role and presence in fisheries; and
- the formulation of clear recommendations to improve the role of women in the fisheries related sectors, help their access in these sectors' labour markets and develop affirmative action policies to increase their social inclusion in the fisheries sectors.

The study should cover the whole fisheries sector (including catching, processing, aquaculture, and fisheries-related activities and professions). Under the catching sub-sector, all segments of the fleet had to be covered (not only the small-scale coastal fleet). Moreover, the study covered women formally employed in the sector, as well as those who play an active role in family fishing and aquaculture enterprises without a specific legal status ("invisible" female workers). In the case of France and Spain, the study covered only their Mediterranean coasts.

3.2 *Approach*

The initial phase of the study (structuring phase) was dedicated to refining the methodology, based on discussions with EASME regarding its objectives and scope.

From initial research conducted it was evident that there were no consistent sets of data broken down by sector and sex in most of the Member States studied. This would

³⁷ MedFish4Ever Ministerial Declaration, Op. Cit.

³⁸ RPOA-SSF, Op. Cit.

prevent a compilation of figures at macro level to provide a quantification and accurate picture of women's presence in fisheries, aquaculture and associated sub-sectors in the region. This was discussed with EASME and it was agreed that the study team would adopt a **qualitative focus** in the methodological approach. The focus would be on understanding, more than quantifying, the presence and role of women in each sub-sector and related activities.

The study then aimed to collect any existing quantitative data in the different Member States, identify gaps, collect additional qualitative data through interviews and focus groups, analyse the evidence collected from a sociological and economic perspective, and provide qualitative insights in relation to the main patterns and trends identified in relation to women's presence and roles.

A team of ten country experts was deployed to search for and collect existing data in the Member States, and to conduct interviews with institutional stakeholders and women who played an active role in the sector.

3.3 Research questions

The data collection and analysis at Member State level followed a set of **research questions (or key topics for investigation)** that the team defined and validated with EASME at the outset of the study (Figure 1. overleaf). The questions ensured a degree of comparability and consistency of the evidence collected across the different Member States studied. Nevertheless, country experts were provided with some flexibility to adapt the questions to the specificities of the fisheries sector in each Member State. The specific research instruments (data collection template, interview guides and reporting templates) were developed based on this set of questions. The research questions also provided greater focus to the study and informed the analytical stage of the study.

Figure 1 : Research questions

1. What is the estimated population of women and men that work (formally and informally) in the different fisheries sub-sectors and related activities in the ten Member States under examination?
2. What is the profile of men and women who work (formally and informally) in the different sub-sectors in terms of e.g. age, level of education, type of job (full-time, part-time, casual), status (non-remunerated, self-employed, employed), and fishing operation (artisanal, industrial)?
3. Are there any estimations of the population and profile of "invisible" female workers in the fisheries sector?
4. What are the main activities/occupations of women (formally and informally employed) in the different sub-sectors and related activities? How does this compare to those of men?
5. How has the population, profile and activities of women who work (formally and informally) in the sector evolved in the last 5 to 10 years, if at all?
6. What are the remuneration levels of women who work (formally and informally) in the sector and in relation to different fisheries occupations and sub-sectors? How this compare to those of men?
7. What legal acts recognise/govern the role and activities of women in the fisheries sector (and sub-sectors, if specific legislation exists)? What social security provisions do these legal acts confer to women?
8. To what extent has the legal framework in relation to women's participation in fisheries evolved towards more inclusive and equal participation, and towards the equal protection of women's rights and status in the profession?
9. To what extent are women (including both who work formally and informally in the sector) organised in e.g. women's organisations, trade unions, fishers/producers' organisations, workers' councils, etc.?
10. To what extent are women (including both who work formally and informally in the sector) involved in fisheries decision-making at national/regional/local level?
11. To what extent do women benefit from technological innovation in the fisheries sector?
12. What (economic, social, legal) factors 'push' women away or 'pull' them towards the fisheries labour market? Do men and women have equal access in practice?
13. What are the perceived barriers and enablers to women's presence and role in the fisheries sector e.g. in relation to occupations and activities women perform, education and training opportunities, interests and aspirations, etc.?
14. What opportunities and challenges exist to overcome barriers to women's enhanced presence in the sector?
15. What good practices exist in promoting women's presence and role in the fisheries and related sectors?

3.4 Work packages

The study entailed gathering and interpreting evidence in ten Member States in relation to the research questions presented above. First, existing statistics and datasets on the extent of women’s (formal and informal) labour within those countries’ fisheries sectors were collected through desk research and direct contact with relevant stakeholders. Additional qualitative and quantitative evidence was gathered via a series of in-depth interviews with institutional stakeholders and focus groups with women who were actively involved in the sector. This allowed an in-depth analysis of the social, economic and legal situation of women in the fisheries communities and the identification of conclusions and recommendations.

The work was structured around four **Work Packages (WP)**. A detailed description of the methodologies applied is provided in Annex 1. As way of summary, Table 1 presents an overview of the different WPs and the approach followed in each case:

Table 1 : Approach to the different Work Packages

Work package	Approach
<p>WP1: Compilation of existing datasets/statistics concerning the presence and role of women in the fisheries sectors of the ten Member States studied. The analysis also included examining existing EU and national legislation regarding women’s legal status in fisheries and their access to benefits.</p>	<p>Ten country experts conducted desk research and established direct contact with key stakeholders (e.g. public bodies, statistical agencies, FLAGS, etc.) to access available data at Member State level. Statistics were compiled in a data collection template, which also gathered legal acts at national level concerning women's legal status in the fisheries sector (e.g. recognition of the status of assisting spouses and life partners). The study team conducted an initial analysis of current facts and figures, as well as identified data gaps and additional issues for investigation through interviews and focus groups. The data sources investigated during WP1 in each country are available under request and a summary of key findings and gaps identified are presented in Annex 2. These outputs were also presented in the study’s interim report.</p>
<p>WP2: Collection of additional qualitative and quantitative evidence, focusing on the different sub-sectors (catching, aquaculture and processing) and fisheries-related activities (science, administration, marketing, etc.)</p>	<p>Additional qualitative and quantitative evidence was collected by ten country experts through the following methods:</p> <ul style="list-style-type: none"> - 87 in-depth interviews with institutional stakeholders (5 to 13 interviews per country), including public bodies, fishers’ organisations, women’s associations, etc. - 26 in-depth interviews with women with an active role in fisheries sub-sectors and related activities (2 to 7 per country)³⁹

³⁹ Of the 113 interviews conducted (87 with institutional stakeholders and 26 with women), 59 were conducted face-to-face and 51 were on the phone. Three stakeholders provided information via email.

Work package	Approach
	<p>- 3 focus groups (in Greece, Spain and Romania) with women who played an active role in fisheries. Participants were fishers' wives, fisherwomen, co-owners of shellfish farms, managers of women's associations and other representative organisations, scientists at research institutes, etc.</p> <p>The outputs of WP1 and 2 were presented in the interim report in the form of ten country reports. A summary of key findings from each country report is presented in Annex 3. These integrate the findings from WP1 and 2.</p>
<p>WP3: Cross-country analysis of evidence obtained in WP1 and 2, structured around the key topics for investigation identified at the outset of the study (see section 3.2).</p>	<p>The study team brought together the evidence and findings from the preceding WPs and conducted a socio-economic analysis of the presence and role of women in the Mediterranean and the Black Sea Member States. The identification and analysis of 'good practices' took place during this WP too, which was based on evidence gathered in each country and experts' view of what constitutes a good practice in relation to enhancing the role of women in fisheries. This WP also included the development of country-SWOTs to identify the opportunities and challenges in each country for enhancing gender equality in fisheries. The key outputs of this WP are presented in section 4 of this report. The country-SWOTs are included in Annex 4.</p>
<p>WP4: Development of the study's overarching conclusions and recommendations to enhance women's participation in fisheries in the Mediterranean and the Black Sea fisheries.</p>	<p>The study team synthesised the results of the analytical tasks carried out in WP3 into a set of structured conclusions. Drawing on these, the team formulated recommendations for improving the knowledge of the role and presence of women in the fisheries sector and to support the Commission in assessing policy orientations. Conclusions and recommendations involved a judgment, but these were nonetheless based on valid evidence collected throughout the study. Findings, conclusions and recommendations of the study are presented in sections 4, 5 and 6 of this report.</p>

3.5 Study limitations

After looking at the data collected by country experts during WP1, the study team confirmed that there were **no chronological and consistent sets of data** broken

down by sex, type of job (full-time, part-time or casual), by status (non-remunerated, self-employed or employed) and by type of fishing operation (artisanal or industrial) in most of the Member States studied. Data on remuneration levels was very limited too (Figure 2). The quantity and quality of statistics on women's participation in the fisheries sector (and sub-sectors) was therefore extremely variable across Member States. As it was explained in section 3.2, this limited the possibility of deriving an accurate picture of women's numbers in the different sub-sectors and in the region overall.

The very uneven amount and level of disaggregation of data available in each Member States also limited the comparative analysis between Member States, sub-sectors and sea basins (i.e. Mediterranean vs. Black Sea). These are important limitations of the study, although this was anticipated and, to mitigate, a qualitative focus was adopted. Indeed, during WP2, considerable emphasis was put on collecting the knowledge and views of, not only, institutional stakeholders, but also of women themselves. A total of **113 in-depth face-to-face and telephone interviews and three focus groups** were carried out in the ten Member States examined. These covered a wide range of stakeholders and different profiles of interviewees, from fishers' wives and professional fisherwomen to women managing small and medium-sized fisheries-related companies and (male and female) representatives of national and regional fisheries-public bodies, FLAGs, and fishers' organisations.

It should also be noted that the women interviewed were in many cases the 'successful stories'. Women who had worked in the fisheries sector but had to quit or move to other sectors were difficult to reach. However, in the interviews and focus groups with women, it was possible to gather valuable insights about challenges and barriers that women face in this sector and that could potentially 'push' women away from it.

Moreover, the study covered women formally employed in the sector, as well as women who played assisting roles in the fisheries business without a specific legal status (e.g. fishers' wives in charge of the direct sale of fish). While data on "invisible" female workers was sought where available, for obvious reasons, this was not routinely documented and therefore evidence on informal aspects of women's work were largely based on stakeholders' perceptions.

Taking a mixed-methods approach which combined extensive desk research with strategic stakeholder interviews and focus groups and interviews with women, and consulting **national fisheries and gender experts** in this study, made it possible to collect enough data and information at Member State level to shed a light on women's presence in catching, aquaculture, processing, and fisheries-related activities that had not been well documented so far, particularly in the Mediterranean and Black Sea basins. Thus, we are confident that the **evidence compiled is robust**, that the consequences of existing data gaps on the study findings are minor, and the insights provided by this

study add value to the existing knowledge base in relation to women's presence and roles in fisheries.

Figure 2: Summary of data gaps identified in WP1

The main data gaps in each country were identified during WP1. These are presented on a country-by-country basis in Annex 2. The study's approach and data collection tools for WP2 were fine-tuned based on this assessment. A summary of the assessment of the quantity and quality of data available is provided below:

- **The data collected in WP1 was very variable, especially in terms of disaggregation by sex, sub-sectors and other demographic data.** Whereas in half of the Mediterranean Member States (France, Greece, Italy, Malta and Spain) there were sufficient demographic data on fisheries workers (population, sex, age, nationality, level of education, status of employment) and, in many cases, also for specific sub-sectors and occupations, in Croatia there were no official data breakdowns by sex even for the whole fisheries sector. In the Black Sea Member States, the situation was not better: sex-disaggregated data was only available for the fisheries sector, and not for the different sub-sectors. Moreover, in Bulgaria, there were no data on fisheries workers' age or nationality and in Romania, demographic data available was from 2005-2012 and were likely to have become obsolete and incomplete.
- **In terms of the main data gaps identified in the different fisheries sub-sectors and related activities:**
 - Catching: no official data on women's employment in this sub-sector was available in Croatia and Italy.
 - Processing: no official data on women's employment in this sub-sector was available in Croatia and Spain, and data available in Italy presented some gaps (e.g. no data on age, level of education and nationality)
 - Aquaculture: there were relatively old-dated official data on women's employment in this sub-sector in the case of Croatia (2012) and Italy (2014). In the case of France, most data on women's employment in aquaculture was from the national level.
 - Fisheries-related activities: no official data on women's presence in these activities were available in Croatia, Italy, Malta, Romania, and Slovenia.
- **Data on remuneration levels of women who worked in the fisheries sector was generally very limited,** especially in relation to different fisheries sub-sectors and occupations. Only in Italy, Greece and, to some extent, in Spain and France, there were sex-data on wages in the fisheries sector (only for formally employed women), and only two of these Member States (France and Greece) provided data on gender pay gaps in the sector. Spain had some data on collectively negotiated wages. Member States in the Black Sea had no data on remuneration levels in the sector.
- **Except for Greece, there were no official estimations on the number of assisting spouses / life partners,** even in Member States where the status is legally recognised (France, Greece, Malta, Spain).

4. RESULTS

4.1 PART I: RESEARCH FINDINGS

Part I presents triangulated findings for each of the study's key topics for investigation. To the extent possible, we provide examples of Member States to illustrate the findings, identify trends and establish comparisons between Member States, sub-sectors, and segments of fleet. It should be noted that comparisons between sea basins (Mediterranean vs. Black Sea) were especially difficult to draw given the variance in Member States' conditions within each of the sea basins.

4.1.1 Women in the fisheries sub-sectors and related activities

This section provides an overview of the numbers, profiles and types of jobs (full-time, part-time) of women who work in fisheries sub-sectors and related activities in the ten Member States.

Presence of women by sub-sectors and related activities

Table 2 presents the number of **women who are formally employed** in the sector in each Member State. It does not cover "invisible" female workers i.e. fishers' wives, life partners, daughters, sisters, mothers, etc. who play an assisting role in family fishing and aquaculture enterprises without a specific legal status or remuneration. Even in Member States where the status of assisting spouse / life partner is legally recognised and applied in the fisheries sector (France, Greece, Malta and Spain), there are no official numbers on how many women are under this status⁴⁰.

The colour coding in Table 2 (which is explained at the bottom of the table) allows to see the discrepancies in the quality and reliability of data available in the ten Member States.

⁴⁰ Only in Greece, there is an estimated 13% of women who work in the sector under the status of assisting family members. The estimation is based on data from the 2011 National Census.

Table 2: Presence of formally employed women by Member State and sub-sector

Member State	Catching	Aquaculture	Processing	Total (n)
Croatia	n/a ⁴¹	21% n = est. 280 ⁴²	est. 70% n = est. 1,039 ⁴³	est. 1,319 (excl. catching)
Cyprus	1.5% n=18 ⁴⁴	24.9% n=104 ⁴⁵	37.5% n=7 ⁴⁶	125
France	2.5% n=20 ⁴⁷	7% n=32 ⁴⁸	56% n=264 ⁴⁹	316
Greece	4-6% n= est. 565 ⁵⁰	21-26% n = est. 1,075 ⁵¹	46-48% n = est. 480 ⁵²	est. 2,367
Italy	n/a ⁵³	15% n=770 ⁵⁴	48% n=2,858 ⁵⁵	3,628 (excl. catching)
Malta	5.5% n=32 ⁵⁶	11% n=25 ⁵⁷	30.5% n=299 ⁵⁸	356
Slovenia	1% n=1 ⁵⁹	20% n=4 ⁶⁰	55% n = 115 ⁶¹	120
Spain	2% n = 82 ⁶²	11% n = 267 ⁶³	est. 59% n=2,367 ⁶⁴	est. 2,716

⁴¹ According to the Directorate of Fisheries in Croatia, gender disaggregated data on employment in the catching and aquaculture sub-sectors is collected since 2014, but the data have not been made publicly available yet.

⁴² Data is from 2012, from the National Strategic Plan for Aquaculture Development 2014-2020.

⁴³ Estimation based on: (1) data from the Croatian Bureau of Statistics which indicates that, in 2015, there were 1,485 persons employed in processing and (2) stakeholders consulted (Croatian Directorate of Fisheries, FLAG and a processing company) who explained that the processing sector is likely to be dominated by women working in production and packaging.

⁴⁴ Data is from 2016, from the Cyprus Statistical Service.

⁴⁵ Data is from 2016, from the Cyprus Statistical Service.

⁴⁶ Data is from 2016, from the Department of Fisheries and Marine Research of the Ministry of Environment.

⁴⁷ Data is from 2014, from ENIM (social security scheme for seafarers)

⁴⁸ Data is from 2014, from ENIM, and is incomplete given that it corresponds to shellfish farming only and to farmers who operate land and sea-based shellfish activities. It does not cover farmers who operate land-based activities exclusively. It does not cover women who work in finfish farming either, which is an important activity in the Mediterranean coast and for which regional data are not available.

⁴⁹ Data is from 2009, from the National Institute of Statistics and Economic Studies (INSEE) and corresponds to two of the three administrative areas in the French Mediterranean region. Therefore, the total number of women in the processing industry that is presented in the table is likely to be underestimated.

⁵⁰ Data is from 2016 DCF and 2017 Labour Force Survey.

⁵¹ Data is from 2011 National Census and 2017 Labour Force Survey.

⁵² Data is from 2011 National Census and 2015 STEFC.

⁵³ Official social statistics on the catching sub-sector will be available from 2019 and will be collected bi-annually, as requested by the EU DCF.

⁵⁴ Data is from 2012, from the STECF 2014 report.

⁵⁵ Data is from 2013, from the STECF 2015 report.

⁵⁶ Data is from 2016-2017, from Jobsplus Malta (jobsplus.gov.mt)

⁵⁷ Ibid.

⁵⁸ Ibid.

⁵⁹ Data is from 2017, from the monitoring system of the Slovenian Managing Authority for the 2014-2020 EMFF Operational Programme.

⁶⁰ Ibid.

⁶¹ Ibid.

⁶² Data is from 2017, from the "Special Regime for the Sea Workers" provided by the Marine Social Institute ISM)

⁶³ Data is from 2016, from the National Survey to Aquaculture facilities, MAPAMA.

⁶⁴ Data "guesstimated" from companies' reports and official data (MAPAMA) for 2015

Member State	Catching	Aquaculture	Processing	Total (n)
Bulgaria	1% n=35 ⁶⁵	13% n=120 ⁶⁶	90% n=2,007 ⁶⁷	2,162
Romania	4% ⁶⁸ n= est. 49	11% ⁶⁹ n= est. 18	58% ⁷⁰ n=501	est. 990

Data Quality

- reliable data (e.g. provided by national statistical services, fisheries dept. etc.)
- data with lower level of confidence as include "guesstimates" by stakeholders consulted
- reliable, yet outdated data
- data derived from multiple sources/triangulation
- uncorroborated country expert's judgement

According to statistical evidence presented in Table 2, the **total number of women who work in catching, aquaculture and processing in the Mediterranean and Black Sea can be estimated to be over 14,000⁷¹**. However, this combined figure is based on data from diverse sources (and years) and therefore it is subject to a large margin of error. The estimate should be treated cautiously.

In the catching sub-sector, the **proportion of formally employed women is minimal (between 1% to 6% of the sector's workforce), both in large-scale and small-scale fisheries** (Bulgaria, Cyprus, France, Greece, Malta, Romania, Spain). The small proportion of women in catching was also confirmed by qualitative evidence in Member States that did not collect sex-disaggregated data for this sub-sector (Croatia, Italy).

Across all Member States studied, statistical data and qualitative research showed that **aquaculture is also a sub-sector dominated by men, with women representing 7% to 26% of the workforce**. One exception is inland fish farming and shellfish farming in France with regards to managerial roles, which are predominantly performed by women. In Italy, there was a reported increase in women in this sub-sector, due to generational change (particularly in the trout breeding sector, where producers' daughters have become more engaged in the activity), increased presence of women in clam breeding and selection/marketing of products, as well as vertical integration of aquaculture farms, where the presence of women is high given their ability to manipulate aquaculture products.

The **processing sub-sector tends to be either gender-balanced** (Greece, Italy) **or characterised by an over-representation of women** (Bulgaria, France, Romania,

⁶⁵ Data is from 2015, from the National Agency for Fisheries and Aquaculture (NAFA) and is based on fishing licenses.

⁶⁶ Ibid.

⁶⁷ Ibid.

⁶⁸ Estimations from 2016 (unpublished), from the National Agency for Fishery and Aquaculture, Maritime Directorate.

⁶⁹ Ibid.

⁷⁰ Data is from 2012, from the 2014-2020 EMFF Operational Programme.

⁷¹ This estimate excludes the catching sub-sector in Croatia and Italy and finfish aquaculture in France.

Slovenia, Spain). Qualitative evidence from Croatia also indicated the latter. Only in Cyprus and Malta the reported proportion of women in this sub-sector is below 40%.

It was **difficult to identify trends with regards to the presence of women in related activities** given a generalised lack of data⁷². While some Member States provided data and estimates that point towards a majority of women in fisheries-related activities (Bulgaria, Italy), data from Cyprus⁷³ show a more balanced picture with a representation of 44%. At the same time, estimates from Romania put the proportion of women in this sub-sector at just 17%⁷⁴. However, statistical data and qualitative evidence confirmed that women tend to be a majority in sale of fish (except in Greece, and France at national level), gastronomic activities and pesca-tourism. The latter was generally found to have provided women with increased opportunities for participation in recent years in Croatia and Slovenia. There is also a considerable number of women in fishery and aquaculture policy (except in France) and research (further details are provided in section 4.1.5)

Age and education levels of women by sub-sectors and related activities

There is a general lack of sex-disaggregated data on workers' age (and by sub-sectors) in the Mediterranean and Black Sea Member States; and, where available, they highlight **disparate trends**.

Only in Greece and Malta it was possible to collect sex-disaggregated data in relation to the age of workers of the catching sub-sector. Data point towards an older population of female workers in Greece⁷⁵ (82% aged 40-60) and a younger one in Malta⁷⁶ (35% aged 25-39).

Disparate trends could be observed in aquaculture and processing too. While in Greece and Romania⁷⁷ nearly half of women working in aquaculture are relatively young (under the age of 40), in Cyprus⁷⁸, most women are over 45 years old. In processing, data from Greece showed that nearly a third of women are aged 25-39, whereas in Spain⁷⁹ the average age is 45-49.

There were also **pronounced gaps in data related to the education level of women** by sub-sectors, although here the statistics and qualitative evidence collected supported similar findings. Namely, in the catching and processing sub-sectors, education levels of women tend to be lower (primary to secondary level) than in aquaculture, where many women have attained tertiary education (for example in Greece, France, Italy and Slovenia). These women work particularly in research and managerial roles.

Type of jobs of women by sub-sectors and related activities

Few Member States provide sex-disaggregated data on type of jobs (full-time, part-time) in the sector. However, available statistics show that, in general, **larger proportions of women work on part-time contracts than men**. For example, in

⁷² Related activities covered in this study included: port activities, supplies for the operation, research/quality/innovation, sale of fish, fishery and aquaculture policy, pesca-tourism.

⁷³ Source: communication with statistical service in Cyprus

⁷⁴ Source: 2016 survey completed by the National Agency for Fishery and Aquaculture, Maritime Directorate (unpublished)

⁷⁵ Source: communication with national programme of fisheries data collection coordinator of socioeconomic data, preliminary figures for 2016.

⁷⁶ Source: Jobplus Malta (jobplus.gov.mt)

⁷⁷ Source: Romanian annual report on national data collection programme for fisheries 2015.

⁷⁸ Source: Department of Fisheries and Marine Research (DFMR), data on employment in aquaculture between 2012 and 2016: www.moa.gov.cy

⁷⁹ Source: uncorroborated country expert's judgement

Malta⁸⁰, 28% of women work part-time in the sector, compared to 17% of men. But in the catching sub-sector, the proportion of women who work part-time is five times higher than their male counterparts.

In Greece⁸¹, data for the processing sub-sector also confirmed that more women tend to work part-time (13% compared to 8% of men). However, in the opinion of the country expert that conducted the fieldwork in Greece, these figures are likely to underestimate the significance of part-time employment in processing considering that demands for fish products increase significantly during certain seasons (e.g. Easter).

Similarly, in France⁸², data show that more women than men tend to work part-time in the sale of fish (21% compared to 13% of men) and in the processing sub-sector. In Spain and Romania, no differences were found in the mode of employment between men and women working in the catching sub-sector. However, in Spain, onshore activities associated with catches have larger proportions of men working part-time (68% compared to 47% of women), whereas a larger proportion of women hold part-time contracts in aquaculture (15% compared to 3% of men).

Qualitative evidence collected across Member States shows that **many women (fishers' wives, daughters, mothers) occupy unreported part-time roles** by assisting with operations of the family business on an ad-hoc basis. In Croatia and Slovenia, for example, interviewees noted that women are often formally employed in other sectors on a full-time or part-time basis and still support their family's fishing business during tourism season or support their spouses or fathers when needed on fish farms.

"Invisible" female workers

The "invisibility" of women in fisheries is a persistent issue in the Mediterranean and Black Sea, which is caused by at least three compounding factors:

- i. no systematic collection of sex-disaggregated data in individual Member States and/or on various socio-economic variables such as job roles, age, education level, modes of employment, pay scales, etc.;
- ii. discrepancies in the collection of sex-disaggregated data and/or too high-level aggregation (e.g. by sub-sectors); and
- iii. no data on assisting spouses / life partners and other women who play assisting roles in the sector.

There is therefore a sizeable **number of women who work in the sector and are not visible in statistics**. There are no reliable data on which to base an estimation on this number. Most of the evidence collected in this study is of a qualitative nature and is presented in Table 3 overleaf. There were a few Member States where stakeholders interviewed provided rough estimations; these go from **92 women in the catching**

⁸⁰ Source: Jobplus Malta (jobplus.gov.mt)

⁸¹ Source: census data 2011

⁸² Source: Directorate of Research Animation, Studies and Statistics, Data for 2015, dares.travail-emploi.gouv.fr

sub-sector in Greece to 590-700 in catching and aquaculture in Malta and 500-800 in aquaculture in Italy.

Adding to this evidence is FARNET's survey of FLAGS⁸³, which revealed that 52% of FLAGS in the Mediterranean and Black Sea (16 FLAGS) reported that more than 21% of family-run fisheries-related businesses in their areas rely on the informal work of women in the family (i.e. work that benefits the family business but that is not formally paid). These accounts for **611 to 690 small-scale fisheries businesses in Croatia, Greece, Italy, Romania, and Spain**. The study also explained that the number of businesses reliant on the unpaid support of women was higher in the Mediterranean than in other EU sea basins. Particularly in Greece, Spain and Italy, where nearly all FLAGS said that the number of family-run businesses relying on the unpaid support of female family members was between 36% and 40% (421 to 468 businesses in the three Member States).

Women's invisibility is a phenomenon that is **more extensive in the catching and aquaculture sub-sectors**. For example, with regards to catching, one fisherwoman interviewed in Greece said that *"for every male boat owner, there is at least one female family member who assists him"*. In fact, across all Member States studied, catching was identified as the sub-sector with the highest number of (unreported) women who work in assisting roles without a specific legal status of remuneration. This is particularly the case in small-scale, family-run businesses. This was also the case in aquaculture (Slovenia) and in many fisheries-related activities such as pesca-tourism (Croatia) and post-harvest activities carried out as part of family or small-scale businesses (Malta).

Findings of this study also suggest that **women are gradually becoming more "visible" in the sector**, owing to cultural and economic developments underpinned by legislative changes (further details are provided in section 4.1.6)

Table 3: Evidence collected on "invisible" female workers (overleaf)

⁸³ FARNET (2018), Op. Cit. Note that the figures in this paragraph are not from the FARNET's study itself but calculated from the raw data gathered as part of it (the FARNET report did not distinguish the Mediterranean and Black Sea Member States from the Member States included in the study).

Study of the role of women in fisheries in the Mediterranean and the Black Sea

Member States	Evidence collected on "invisible" female workers	Estimated numbers
<i>Mediterranean Basin</i>		
Croatia	According to fisheries authorities, the presence of "invisible" female workers is likely to be stronger in the catching sector than in other sub-sectors. But it is not possible to quantify their numbers and work input as no data has been collected to date. These women work in assisting roles supporting individual fishermen and in family-run SMEs. They are engaged especially in processing and selling of fish, when this is a diversification activity supplementing catching and/or aquaculture, and when the demand for fish increases and all family members (including wider family) and friends are called upon to assist. According to one FLAG, some of these women who lend a hand in the family business also have formal jobs outside of the sector. This gives certain economic stability to the household, but also to the family-business, as they can act as bank guarantor for loans and/or put their money in it.	n/a
Cyprus	There are no official data on "invisible" female workers according to fisheries and employment authorities and fishers' associations. Two fisherwomen and a representative of a fishers' association mentioned that in the catching sector the presence of women who lend a hand in the fishing business, but who are not formally employed, is quite frequent. Most fishermen are heavily dependent on their wives/partners/daughters (and on other family members) for land activities such as netting, mending and fish collection from nets after fish landing. The study found no evidence of the existence of "invisible" female workers in aquaculture or processing.	n/a
France	According to regional fisheries authorities and producers' organisations, official statistics do not reflect the real presence of women in the catching sector, as women who work under the status of assisting spouse are not recorded in statistics. In large-scale fishing, the number of assisting spouses is increasing mainly due to the need of additional resources to take care of increasing administrative and regulatory requirements. On the contrary, in small-scale fishing, their number appears to be decreasing due to the economic difficulties that push women (and men) out of the sector to look for other jobs. Assisting spouses in small scale fisheries still play a significant role in direct sale of fish, administrative and accounting tasks, and gastronomic activities. Moreover, the number of women with the status of assisting spouse is quite significant in shellfish farming. They are almost exclusively involved in land-based-tasks (sorting, crating, packaging and ground shipping).	n/a

Study of the role of women in fisheries in the Mediterranean and the Black Sea

Member States	Evidence collected on "invisible" female workers	Estimated numbers
Greece	<p>Greece is the only Member State that has data on assisting family members who work in the catching sub-sector. Figures from the 2011 National Census indicate that there is a 13% (92) of women employed in the catching sub-sector under this status. However, according to one fisherwoman interviewed, there are many more women who play assisting roles in the fishery business, but who are not declared or registered formally under this status. In some cases, these women hold formal jobs in other sectors. There are no data on assisting family members in aquaculture though. It is likely that they are very few since the sector is mainly composed of a few large companies that employ the major part of this sector's workforce. However, in the focus group with women it was revealed that there is a sizeable portion of women who play assisting roles in small trout and mussels farms and who are not formally registered under the status of assisting family member. In processing, the share of assisting family members is marginal and is likely to be limited to salted and smoked processing units which are usually small family business.</p>	92 (catching)
Italy	<p>There are yet no gender-disaggregated statistics for the catching sub-sector; therefore, all women who work in this sub-sector remain "invisible". Aquaculture associations explained that official statistics underestimate the number of women in aquaculture (15%; n=770 – see Table 2) as often wives, daughters and family members of the farm owners and male employees are involved in the business in assisting roles. They estimated that "invisible" female workers in aquaculture sub-sector could represent 10-15% more women than those registered in statistics. These findings are in line with the information provided by a women's association which indicated that the phenomenon of "invisible" female work is widespread throughout Italy and that there are entire areas of fish production entrusted to women who are not formally employed. They work both on boats and on land, repairing networks, marketing fish, maintaining boats, and handling relations with port authorities and control bodies. Moreover, recurring to "invisible" female workers has helped to mitigate the effects of increases in production costs for small-scale coastal fishing. In small-family fish processing enterprises, it is also frequent to find women who play assisting roles and that are not formally employed. They are usually relatives (wives, daughters, mothers) of the fishermen.</p>	500 - 800 (aquaculture)
Malta	<p>In the interviews with fisheries authorities there was consensus that official statistics only provide an accurate picture of the presence of women who are formally employed in the sector. In the case of "invisible" female workers, these were estimated to be in the range of 500-600 women, with most of them working in the catching sub-sector and in fisheries-related activities such as sale of fish. In Gozo, it was estimated that there are 40-50 more women (wives of fishers mainly). As for the aquaculture sector, it was estimated that circa 50 women are engaged in assisting roles in this sector. In the processing sub-sector, the roles are usually more formalised and require formal employment contracts.</p>	590-700 (catching and aquaculture)

Study of the role of women in fisheries in the Mediterranean and the Black Sea

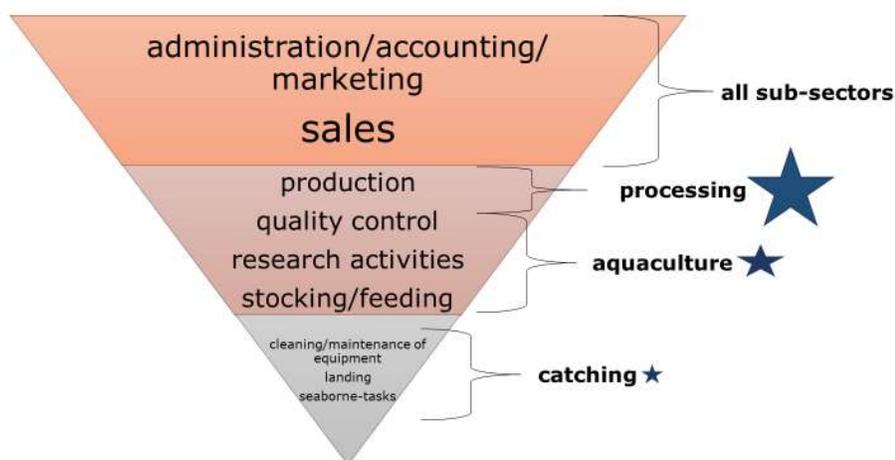
Member States	Evidence collected on “invisible” female workers	Estimated numbers
Slovenia	Official statistics say that one woman only is formally employed in the catching sub-sector (see Table 2). However, according to fisheries authorities and associations, this is a sub-sector where the presence of “invisible” female workers is strong, but it is not possible to quantify. “invisible” female workers are very frequently found in the sale of fish and pesca-tourism. It should be noted too that since fishing is at the edge of economic viability, most of fishers’ spouses are formally employed elsewhere, contributing to the financial stability of the family, as well as the fishing business. As for aquaculture, it is likely that there are “invisible” female workers in fish farms that operate as an additional activity of farms and are run as a family business. All sole proprietors registered for aquaculture farms are men. “invisible” female workers in processing are rare but can occur in small family businesses when there are seasonal increases in demand of fish.	n/a
Spain	Official statistics do not consider “invisible” female workers. Based on research conducted by the Spanish government, women carry out multiple on-shore tasks without a specific legal status (e.g. <i>poceras</i> ⁸⁴). However, there are no estimates that account for the number of women in these activities. The current legal framework may allow for the formal recognition of this assisting role in some cases (see section 4.1.4), but according to the findings of the focus group with women, assisting spouses are usually not officially registered. Other “invisible” female workers are involved in fishnets weaving and reparation, fishmongers (<i>aranderas</i>), and in some cases, development of fish gastronomy.	n/a
Black Sea Basin		
Bulgaria	There are no official data on “invisible” female workers, but fishers consulted believed that since small scale fisheries has become unsteady and unprofitable in the last 5 to 10 years (due to a significant decrease of fish resources), no women are assisting their husbands in repairing and cleaning nets anymore, as they did 10 or 20 years ago. These women have had to look for jobs in other sectors. However, in fish markets/sales, the presence of women who work under no specific legal status was reported to be still quite significant, according to institutional stakeholders interviewed. As far as aquaculture and processing, no evidence was found of women working without a specific legal status.	n/a
Romania	There are no official data on “invisible” female workers. Even estimates are difficult to obtain because the tasks performed by women are not recognised by any of the stakeholders as relevant fishing activities. During the focus group discussion, women mentioned that there are women who help their fisher-husbands without being paid, and that they work especially in the administration of the activity.	n/a

4.1.2 Roles played by women

This section presents an overview of the roles and occupations of women in the different sub-sectors and related activities. It also presents two examples of good practices in relation to increasing women's presence in the sector.

The evidence shows that the Mediterranean and Black Sea fisheries sector is characterised by the **occupational segregation of women**: job positions, responsibilities and tasks vary according to sex. Figure 3 overleaf illustrates the roles most frequently performed by women across the sector, as well as within particular sub-sectors. The proportion of women in the sub-sectors is indicated by the size of stars).

Figure 3: Roles performed by women in fisheries and sub-sectors



In the **catching sub-sector** women are predominantly found performing **administrative tasks (permits, licences, registrations, contracts, etc.), accounting and marketing activities** across all the Member States studied. In Croatia, Cyprus, Greece, Italy, Romania and Slovenia women are also involved in cleaning and maintenance of certain fishing equipment (such as netting and mending). In small-scale businesses, these tasks are typically performed by fishers' wives/partners without a specific legal status or remuneration, whereas in medium to large-scale fisheries women in these roles tend to be formally employed.

In Cyprus, Greece, Italy, Romania and Spain female boat owners were reported; however, only in Cyprus evidence found indicated that one of these women (1 of 4 women registered as boat owners) acted both as manager and fisher of the vessel. In most cases, female boat ownership does not necessarily mean that women act as business managers and/or play an active role in the fishing activities. Indeed, in Greece, Italy and Spain women may be registered as boat owners without having any direct relation with the fishing activity. Particularly in Spain, women who are ship-owners usually share the property with their husbands, and in other cases they are formally registered as individual ship-owner without developing any activity on board. In Romania, female boat ownership tends to be limited to recreational fishing operations. In addition, women who were found to work as crew members (France, Greece, Malta, Spain), are predominantly involved in cleaning and cooking activities on board rather than fishing.

Women were considered to **play a vital role in the sale of fish**, whether as assisting spouses / partners running fish shops or stands in local markets (Croatia, Cyprus,

France, Italy, Malta), or, in a more formal capacity, as sellers to wholesale retailers (Cyprus, Italy, Malta). One good practice example is the marketplace in Ajaccio (Corsica, France), which provided female family members of fishers with the opportunity to sell fish products directly. This was part of a local / regional project funded by the EMFF (Text Box 1).

Text Box 1: Good practice example: the Ajaccio marketplace (Corsica, France)

The modernisation of the marketplace in Ajaccio prompted the local fishing community to come up with a new way of selling their fish. The Corsican Regional Fisheries Committee, together with the local fishers' organisation (prud'homie), submitted a project to the local and regional authorities suggesting that the selling places were run by fishers and their families. As soon as the project was accepted at local level, it received the financial support of the EMFF. Twenty fish selling pitches were created and were allocated to fishers' families interested in practicing direct sale. Each fish selling pitch was shared by different fishers' family members (more than 20 fishers were interested in practicing direct sale at that time). Women (wives, partners, mothers or daughters of fishers) occupied this new job and operated the sale pitches. The freshness and price of the fish sold by these women were the key selling points, which ensured customers' loyalty. Direct sale of fish or shellfish has become a strategy for many small-scale fishers in the French Mediterranean coast, as well as in other coastal areas. Direct sale of fish can be organised in fish markets (like in Corsica) or near the boat (like in Saint Cyprian, Port La Nouvelle or Port Vendres).

Similarly, women working in **aquaculture** tend to perform **administrative, accounting and marketing tasks** across all the Member States studied. As mentioned before, in small-scale businesses, these roles tend to be performed by assisting spouses/partners, whereas in medium to large-scale businesses, women tend to be formally employed.

In this sub-sector, women were reported to be more educated and skilled than in other sub-sectors; therefore, they manage important tasks such as **quality control** (Croatia, Greece, France, Italy, Spain), conduct **research activities** (Croatia, Greece, Italy, Spain), and/or work in **nurseries and hatcheries** (Croatia, Italy, Spain). In Spain, it was noted that female entrepreneurship in aquaculture is particularly innovation-focussed. In Greece, France and Malta, women are also found performing packing, crating and sorting activities.

Some Member States reported differences in roles of women depending on whether they work in marine or freshwater aquaculture. In Italy, for example, women are found to be almost equally represented to men in the shell segment, and to hold decision-making roles (specifically, in the Consortium Pescatori del Polesine - Text Box 2). Conversely, in marine aquaculture there are only few women, mostly formally employed by medium-sized companies, performing activities such as stock, feeding, storage, processing and embedding of fish.

Text Box 2: Good practice example: Consortium Pescatori del Polesine (Emilia-Romagna, Italy)

The Consortium integrates women at management-level, including at the Board of Directors. Moreover, 50% of the 1,500 employees are women. Women who play a role in the Consortium's decision-making are managers in the cooperatives where they are employed. Women are extensively present in the organisation due to the fact that women are very active in the sector since the 1980s, when economic downturn drove women to the sector to find work.

In **processing**, women were reported to be involved in **production, particularly in labelling, packaging, filleting and canning – including quality control** (Bulgaria,

Croatia, Greece, France, Italy, Malta, Romania). In Croatia, Slovenia and Spain, women were reported to have low levels of education and hence generally perform unskilled tasks. At the same time, in Croatia, France, Malta and Slovenia, women have a strong presence in company management, working in administration, accounting, marketing, innovation and experimentation. Only in Malta women were reported to be engaged in sales activities.

Text Box 3: Occupational segregation in the processing sector in Spain

According to the *Annual Report of the Labour Market by Occupation (2018)*, workers in the fish processing industry had one of the best prospects. Even during the economic crisis, the fish processing industry continued generating employment. Traditionally, women accessed this profession at an early age, as teenagers (MAPAMA, 2018), and stayed there until retirement. There had always been a split of labour functions that is still in place today: women carry out activities related to the cleaning and manipulation of sea food, whereas men conduct machinery handling and maintenance services. Despite low-skilled jobs still being prevalent among women, they have gradually gained access to managerial positions. Currently, female workers hold positions as Quality and Production Directors, Heads of Human Resources, Law and Corporate Social Responsibility Departments etc. However, CEOs and Board representatives are still mostly men.

With regards to **fisheries-related activities**, large proportions of women were found to work in research and public policy. In Croatia, for example, it was reported that while leadership roles at universities (such as heads of faculty) are predominantly held by men, women represent at least half of the research staff and dominate in administration. Across all Member States studied, women were also reported to work at national and regional public bodies. In Croatia, the Head of Sector for Management of EU funds in Fisheries, Head of Service for Monitoring of EU funds and On-The Spot Control, Head of Resource and Fleet Management Service, and Head of Fleet Management were all reported to be women.

In Romania, women were reported to be increasingly involved in sports and leisure fishing activity. Finally, pesca-tourism in Croatia and Slovenia was found to offer additional opportunities for women; however, the seasonal nature of this activity was considered a barrier for continuous women's engagement in this activity.

4.1.3 Remuneration and progress of women

This section presents the findings in relation to gender pay gap in the different Member States, as well as (in)equalities identified in women's social protection. Relevant to this section too is the extent to which there is a 'glass ceiling'⁸⁵ for women who work formally in the sector.

Pay gap

There were no data available on the gender pay gap in the sector. Only in France, official statistics show a pay gap between male and female wholesalers and fishmongers (17%

⁸⁵ Glass ceiling refers to an unacknowledged barrier to progression in the workplace, especially affecting women and ethnic minorities.

and 18%, respectively)⁸⁶. In Croatia, interviewees and focus group participants mentioned pay discrimination (different pay for same tasks) of women.

However, given the pronounced occupational segregation that exists in the sector in all Member States, and considering the evidence gathered during Member State interviews and focus groups, it can be concluded that a gender pay gap exists. In Italy, for example, it was reported that in the processing sub-sector **women are generally paid less than men as they are formally employed in “minor” roles** in offices or hatcheries. Similarly, in France, pay gaps in the processing sub-sector were reported to be linked to distinct positions occupied by men and women (workers, technicians, managers, etc.), with women generally occupying lower-level positions.

But getting an accurate picture of the pay-situation of women in the sector is challenging also because **assisting spouses / life partners do not to receive any remuneration**, and other informal female workers were said to be paid in equipment, gadgets and goods rather than salaries.

Glass ceiling

Despite increasing numbers of women found in leadership positions at policy-level⁸⁷, **in the private sector, interviewees reported evidence of a glass ceiling**. In Malta, for example, interviewees mentioned that while there are several female managers in the aquaculture sub-sector, directors still tend to be male. Similarly, in Spain, in the processing sub-sector, women hold roles as quality and production managers, heads of human resources, and heads of law and corporate social responsibility departments. However, CEOs and board representatives are still exclusively men. In Spain, there were also reports of a “leaky pipeline” with regards to women’s progression in universities, with women progressing slower than men in their careers, seemingly “trapped” in early researcher roles.

There were, however, reported heads of large processing businesses who are women (in Bulgaria and Greece), who can act as role models for other women and challenge stereotypes about the place of women in the sector.

4.1.4 Legal status of women

This section examines Member States’ legal frameworks concerning women in the fisheries sector. It analyses Member States’ transposition of Directive 2010/41/EU on equal treatment of the self-employed, including the enforcement of the status of assisting spouse / life partner in the fisheries sector. It also investigates non-discrimination and equal pay regulations, collective labour agreements, employment laws and policies supporting employment.

Transposition of Directive 2010/41/EU into national laws and enforcement of the status of assisting spouse/life partner

Directive 2010/41/EU provides a framework for putting into effect in Member States the principle of equal treatment between men and women who are self-employed or contribute to the pursuits of self-employed activity. It covers self-employed workers as well as their spouses (and, if recognised by national law, their life partners), who

⁸⁶ Source: Directorate of Research Animation, Studies and Statistics, data for 2015, dares.travail-emploi.gouv.fr

⁸⁷ For example: the Director of the Department of Fisheries and Maritime Research (Cyprus), the Director of the General Secretariat for Fisheries and EMFF Managing Authority (Greece), and the Director General of the Department of Fisheries and Aquaculture (Malta)

participate in the activities of the self-employed worker, performing the same or ancillary tasks.

Apart from setting out the principle of non-discrimination on grounds of sex in relation to self-employed activities, the Directive **grants self-employed women and female spouses / life partners of the self-employed with important provisions regarding social protection (Article 7) and maternity benefits (Article 8)**⁸⁸. Namely, the Directive states that where a social protection system for self-employed workers exists, Member States shall take the necessary measures to ensure that spouses / life partners can benefit from this protection too. This also applies to maternity benefits, with Member States being directed to ensure that female self-employed workers and female spouses / life partners are granted sufficient maternity allowance for at least 14 weeks. This is to enable interruptions in occupational activity due to pregnancy or motherhood.

This study found that the Directive was transposed into national laws in all Member States studied but the **status of assisting spouse / life partner is unevenly enforced in the fisheries sector**. As Table 4 shows, in some Member States, transposition does not necessarily mean formal recognition of the status of assisting spouse / life partner in the fisheries sector (Croatia, Cyprus, Italy, Slovenia). Moreover, even where the status is recognised and enforced, social benefits that come with this status vary between Member States.

Table 4: Transposition of Directive 2010/41/EU by Member State⁸⁹

Country	Transposition of Directive	Enforcement of assisting spouse status in fisheries	Social security benefits provided by status
Croatia	yes	no	unknown
Cyprus	yes	no	no
France	yes	yes	health care, maternity benefits, retirement pension
Greece	yes	yes	health care
Italy	yes	no	no
Malta	yes	yes	no
Slovenia	yes	no	no
Spain	yes	yes, but only if identical activity to self-employed worker	health care, maternity benefits, retirement pension
Bulgaria	yes	unknown	unknown
Romania	yes	unknown	unknown

Only four Member States in the Mediterranean formally recognise and enforce the status of assisting spouse / life partner in the fisheries sector: France, Greece, Malta, and Spain. In the Black Sea Member States (Bulgaria and Romania), the Directive was transposed into national laws, recognising also the status of assisting spouse / life partner of the self-employed and their entitlement to social protection. However, it remains unclear whether the status is applied in practice in the fisheries sector given that stakeholders interviewed were unable to comment or provide

⁸⁸ <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX%3A32010L0041>

⁸⁹ The table was developed based on evidence collected by experts in the different Member State, as well as taking into account the findings of European Network of Legal Experts in the Field of Gender Equality (2015): "Self-employed: The Implementation of Directive 2010/41 on the application of the principle of equal treatment between men and women engaged in an activity in a self-employed capacity".

examples of women with that status. The evidence gathered confirmed equal access to social protection by women *formally* employed in the sector.

In France, the status of collaborating spouse was already recognised in 1997, but only since 2007 it became mandatory for spouses working in a family business to opt for one of three statuses. The statuses provide the same social benefits, but differ in terms of granting participation in representative organisations, as well as a formal remuneration:

- Spouse associate: The spouse is a business associate. This status gives access to social benefits and to participation in meetings of representative organisations and others⁹⁰.
- Employee spouse: The spouse participates actively in the business and in return receives a remuneration equivalent to the guaranteed minimum wage, as well as social security benefits.
- Collaborating spouse: The spouse participates actively in the business but receives no formal remuneration. This status gives access to social security benefits (see below) and participation in meetings of representative organisations and others. Since 2017, the status is applicable to all maritime activities.

In the French fisheries sector, collaborating spouses receive maternity benefits, a retirement pension and dedicated training to obtain the *Brevet de Collaborateur de Chef d'Entreprise Artisanale Maritime* (Small Company Assistant Manager certificate). However, in the interviews with collaborating spouses, **women identified several problems associated with the status**, including:

- very small retirement pension;
- only the business owner (who is usually male) can request the status and the status lasts only until the business owner retires;
- only one of the spouses (husband or wife) can be a member of the business governing board, which limits opportunities for collaborating spouses to participate in decision-making; and
- collaborating spouses do not have the right to engage in other employment unless it is part-time.

The status is also recognised in national law in Greece; however, maternity allowance in Greek law only refers to self-employed women and omits assisting spouses / life partners. Moreover, assisting spouses / life partners are **not eligible for pensions, unless they are registered as self-employed**. Their social protection is thus limited to health care only. The Directive is therefore not fully transposed into Greek law given that assisting spouses / life partners do not receive full social protection.

In Malta, the Directive is mentioned in the 2015 Equality Act. Qualitative evidence confirmed that the status is recognised and applied in the fisheries sector. However, to receive social security benefits, assisting spouses / life partners need to be registered as self-employed⁹¹.

Spain implemented legislation that regulates the **status of "collaborative family of a self-employed"** defined as a spouse or relatives (up to second-degree) who work with

⁹⁰ Le marin au sein de l'entreprise – Beleuenn Guilloux.

⁹¹ European Network of Legal Experts in the Field of Gender Equality (2015), Op. Cit.

the self-employed, live with them and have an economic dependence on them. However, to obtain this status it is required that the family member carries out identical activity to the one of the self-employed. This could be a *de facto* limitation as many women engage in on-shore activities that do not match the identical criteria mentioned in the regulation⁹². Spanish law also guarantees bonuses for registering assisting family members in the social security system of the self-employed. This includes unmarried partners with a continued cohabitation of a minimum of 5 years.

Croatia and Cyprus transposed the Directive into national law; however, in the fisheries sector, the status of assisting spouse / life partner is not formally recognised. Similarly, in Italy and Slovenia, the Directive is applied unevenly across economic sectors. The status of assisting spouse / life partner in both Member States is **recognised in agriculture, but not in fisheries**. In Italy, women who are assisting spouses in the fisheries sector therefore have no legal recognition and no social protection. It is the same case in Slovenia, except for aquaculture. Here, data shows that most of freshwater aquaculture are registered as a supplementary activity of an agricultural holding, giving owners and their family members (including assisting spouses / life partners) access to the same government support and funding opportunities provided to farmers. However, the status does not ensure access to social benefits.

Non-discrimination and equal pay

All Member States recognise gender equality and non-discrimination principles in their national legislation. However, in practice, **there are gaps in the enforcement of these legal provisions in the fisheries sector**: evidence gathered during interviews and focus groups shows inequalities in pay (see section 4.1.3) and unequal access to opportunities based on gender stereotypes (see section 4.1.6).

Although explicit policy-statements and legislation on gender equality and non-discrimination are essential in setting forth a Member State's vision and commitment to inclusion and advancement of women's rights, compliance with these principles and laws needs to be monitored, encouraged and supported in the fisheries sector across all Member States, as in all sectors of the economy.

Collective labour agreements and bodies governing the sector

Traditional collective agreements that govern labour in the fisheries sector **can vary in their considerations of gender equality**. In Italy, for example, national collective agreements in the catching sub-sector cover different types of contracts (for small-scale fishing, industrial fishing and professions on land), yet, according to qualitative evidence, no agreement covers tasks commonly performed by women. At the same time, the collective agreement applied in aquaculture includes the role of a "family assistant / collaborator", which involves the obligation to pay contributions and ensures social protection.

In Spain, collective bargaining agreements define wages, working hours, overtime payment and benefits and can bridge gender pay gaps, for example, by setting forth contractual provisions that must be complied with. For example, the prioritisation of contracting young women in the aquaculture sub-sector and the flexibility in the distribution of working hours in the processing sub-sector to accommodate production

⁹² For example, if a woman works on the accounting of the fisheries business and her husband is the one who goes fishing, she cannot apply to the status given that it is considered that these are two different activities.

during peaks of demand were provisions established in Spain through collective bargaining agreements.

However, in Spain, the **functioning of some of the fisheries governing bodies is still in the hands of men**. Indeed, in the *'cofradías'*⁹³, membership is granted to fishers or owners of fishing boats, who tend to be predominantly male. This represents a real barrier to the representation of women's interests and their ability to progress gender equality issues in the sector, despite their presence in governance.

Employment laws and policies supporting employment

While labour market regulation is leading to the gradual disappearance of informal and "invisible" jobs, **too rigid employment laws can also constrain women's formal participation in small-scale operations** where flexibility is required to account for the seasonality of fishing, tourism and farming cycles. The burden of tight employment regulations, as well as the costs associated with formally employing a person or registering an assisting spouse / life partner are more difficult to bear by small-scale family businesses. The latter was mentioned as a key barrier in Croatia, Italy and Slovenia. This not only results in the presence and experiences of women working in small-scale businesses being unaccounted for, but also in their inability to access social benefits.

Moreover, inadequate government policies in the fisheries sector, most notably regarding childcare and statutory provision of flexible working hours, are forcing women to prioritise caring responsibilities over professional ambitions, or, in some cases, to doubling their workload (the so-called "double burden").

4.1.5 Women's representation in organisations and decision-making

This section accounts for the existence of women's organisations in fisheries in the different Member States, as well as for the participation of women in other representative bodies such as fishers' cooperatives, professional organisations and trade unions. It also analyses the extent to which women access decision-making positions in the public and private sectors, as well as in the representative organisations mentioned above.

Women's organisations in the fisheries sector

At international level, there is **AKTEA⁹⁴, which is the network of fisherwomen's organisations in Europe**. There are 11 organisations members of AKTEA, with some being from the Mediterranean Sea basin (see below). They are independent organisations acting at national or regional levels and representing wives of fishermen carrying out tasks linked to the fisheries enterprises (selling fish, administration, etc.), as well as fisherwomen, shellfish gatherers and net menders. It was established in 2006 in Ancona, Italy. The network works for the formal recognition of women's role in the sector and to ensure access for women of fishing communities to decision-making at EU and national level. Moreover, in collaboration with Low Impact Fisheries in Europe (LIFE) it is currently acting for the establishment of a Mediterranean fisherwomen network. Indeed, contacts have already been established with fisherwomen of Cyprus, Malta, Greece, Sicilia and Spain. In 2019, AKTEA will organise a workshop where women from

⁹³ Traditional Fishermen Organisations in Spain.

⁹⁴ <http://akteaplatform.eu/>

different Member States will exchange experiences about their contribution to fisheries enterprises and participate in vocational training activities.

At national level, **of the ten Member States covered in this study, only three have women's fisheries organisations in place: France, Italy and Spain.** There is no evidence of the existence of women's organisations in Member States of the Black Sea basin.

In the French Mediterranean coast, there is the **Fishermen Wives' Association of Corsica**, which succeeded in promoting the role of fishers' wives and involve them in local discussions and debates in the sector (see Text Box 1). The Corsica association is member of the Fédération de Femmes du Milieu Maritime, which is member of AKTEA and is the only organisation representing fisherwomen interests at national level⁹⁵. According to a representative of the association, the main barrier for women's organisation is the limited resources available (for instance, the Corsica association depends on the contributions of their members, the support of regional fishing organisations and the EMFF for specific projects, but even with this support, it is still complicated for them to carry out significant actions).

In Italy, the **Penelope Association groups all women engaged in fishing.** It is a legally recognised organisation and a member of AKTEA. The main group represented in the Penelope Association are family members of fishermen; however, it also associates women in aquaculture and scientific research. Its key objectives are (i) to promote the revision of national laws and collective agreements with respect to male and female workers who work in small and medium-sized fishing enterprises and are relatives of the business owner; and (ii) to recognise the social role of unregistered women in fishing.

In Spain, the **Spanish Network of Women in the Fisheries Sector** was established in 2010 to foster visibility, empowerment and exchange of initiatives and best practices. It was the result of the government's proactive strategy to enhance women's role in fisheries. In 2016, the network created the **Spanish Association of Women in Fisheries** aimed at defending women's economic and professional interests, and to function as a platform for social dialogue. Moreover, in the Spanish Mediterranean coast, there are women's associations including the **Association Galatea (created in 2008)**, **Adomar Grau de Gandía (local, Valencia)**, and the **Andalucía Association of Fisheries Women (regional)**, both created in 2018⁹⁶. In addition, the **Catalonian Association of Fisheries Women** (Asociació de Donnes del Mar) was near to be formally constituted at the time of writing the present report⁹⁷. These are indicative of the impact and strides that can be made with political will and a pro-active women's network.

At international level there is also the **international association for women in the seafood industry (WSI)**, launched in December 2016 by an expert on French fisheries⁹⁸. It is an association *for* women; however, it also gathers men from a wide range of organisations and institutions to work together to increase the visibility of

⁹⁵ Monfort, Baelde, Vouhe (2017), La place des femmes dans les secteurs pêche et aquaculture en France, pour FranceAgrimer.

⁹⁶ At the time of writing this report, the Catalonian Association of Fisheries Women (Asociació de Donnes del Mar) was near to be formally constituted (Source: Catalonian Government).

⁹⁷ The association was approved in October 2018 and will be implemented through a cooperative project between the two FLAGS in the area and with the participation of the Federation of Cofradías of Catalonia

⁹⁸ www.wsi-asso.org

women working in fisheries and highlight dysfunctions and shortcomings which infringe gender equality in the sector.

Despite these examples, there are still too few women's organisations to create a momentum to change practices and mentalities around women's contribution to the Mediterranean and Black Sea fisheries. **Establishing and maintaining such organisations is often very difficult.** They rely on achieving a delicate balance of adequate resources, institutional effectiveness, gender awareness, individual motivation, formal recognition of women's contribution, and collective action. In Malta and Greece, for example, the lack of time and willingness to cooperate based on distrust in these types of organisations were identified as main barriers by women themselves to the mobilisation of women in fisheries. Overcoming these perceptions requires a significant re-imagination and re-organisation of the sector.

Women in trade unions, workers' councils and professional organisations

Evidence from Croatia and Slovenia shows that women are proportionally represented in workers' councils and trade unions of large companies in the fisheries sector. However, in the remaining Member States surveyed for this study, **female membership in workers' councils and trade unions was reported to be low**, particularly in leadership positions (for example, in Italy, only 10% of women make up boards of directors of trade unions and an estimated 18% of presidents of workers' councils are women⁹⁹).

In all ten Member States, **women were reported to be underrepresented in professional organisations and to rarely hold leadership roles.** In Greece, the Panhellenic Union of Middle Range Fisheries Ship Owners has no woman among the 11 members of its board of directors. In Spain, men preside over all fourteen Federations of Fishermen Organisations (*cofradías*) in the Mediterranean as well as regional aquaculture associations. One exception to the underrepresentation of women is the Spanish Fisheries Confederation, which has a balanced share of women employees (50%); however, it is presided by men. In Romania, the Executive Committee of the Black Sea Advisory Council has 3 out of 11 members who are women.

In France, though, there was a reported increase in female employees in fisheries organisations: for example, in the France Filière Pêche association, 9 out of 12 employees are women; in the Mediterranean Association of Producers Organisations, two out of six employees are women; in the Regional Committee of Maritime Fisheries and Aquaculture in Occitanie, three out of four employees are women; and in the Regional Committee of Corsica, three out of seven employees are women, including the Committee's director. However, despite playing key supporting roles in these organisations, women still tend to occupy lower-level positions than men.

There are also examples of **cooperatives in Italy and Greece that can serve as model of women's inclusion.** In the shellfish cooperatives of women in Italy, women are involved in the entire production chain and hold decision-making positions. In Greece, the Social Cooperative Enterprise of Kalymnos "Panagia Ipapandi"¹⁰⁰ gathers wives of fishermen from Kalymnos Island. Its shareholders were trained by Italian experts to use fish of low market value (caught by local fishermen) to produce gourmet products, providing an opportunity for women's entrepreneurship and alternative ways of working in the fisheries sector. The latter can also be considered a good practice

⁹⁹ Source: estimates based on direct communication with relevant bodies

¹⁰⁰ <http://www.ksf.com.gr/the-company>

regarding the provision of training and learning opportunities for women (see section 4.2.6).

Women in fisheries management and decision-making positions

In several Member States, women hold key leadership positions at national policy level. For example:

- Croatia: Heads of the OP EMFF implementation and the Resource and Fleet Management Section are women.
- Cyprus: Director of the main national fisheries body (Department of Fisheries and Marine Research) is a woman. Six women and seven men are heads of sub-departments.
- France: Almost equal representation of men and women in the national Directorate of Marine Fisheries (11 female managers out of 25 who work in fisheries and aquaculture¹⁰¹); however, only 4 out of 32 people in managerial positions at the Inter-Regional Directorate of the Mediterranean Sea are women.
- Greece: General Secretariat of Fisheries and EMFF Managing Authority have women in leadership positions and gender-balanced teams. Also, in regional fisheries departments there is a gender-balanced staff, and most heads of departments are women.
- Italy: 25% of women in high-level positions at the Ministry of Agricultural, Food and Forestry Policies and in regional fisheries departments, and a third of decision-making roles are held by women.
- Malta: Director of the Department of Fisheries and Aquaculture is a woman.
- Spain: Several Heads of the Departments at the Fisheries General Secretary have been held by women for the past decade.

The situation is relatively different at local level. In Croatia, Greece, Italy and Spain, women were found to be well-represented among FLAGs staff, but in most Member States, the inclusion of women in FLAGs boards was reported to be limited.

This coincides with the results of the survey of FLAGs conducted by FARNET which show that, **although 57% of Mediterranean and Black Sea FLAGs managers are female, only 20% of decision-making roles in these FLAGs are held by women**¹⁰². FARNET's research also indicates that where there is a strong female presence in FLAGs, including in decision-making positions, the number of FLAG projects in support of women increases. Consequently, Member States with the highest number of such projects are Spain, Italy and Greece.¹⁰³

All in all, it is possible to say that a weakness representation of women in management and decision-making structurally inhibits the promotion of gender issues at all levels. An interesting example in this sense is provided by the **co-management model implemented in Catalonia (Spain) for the sustainable management of the**

¹⁰¹ This excludes managers in areas such as accounting and human resources. Data is from the Directorate of Marine Fisheries' (DPMA) website.

¹⁰² Note that the figures in this paragraph are not from the study itself but calculated from the survey raw data provided to the evaluators by FARNET, as the FARNET report did not distinguish the Mediterranean and Black Sea Member States from the other Member States included in the study.

¹⁰³ FARNET (2018), Op. Cit.

fishery¹⁰⁴, including the ecological, biological, economic and social dimensions. It builds on a participatory approach and sharing of decision-making power among stakeholders representing five different sectors (fisheries sector, fisheries organisations, scientific community, environmental NGOs and public administration). The governance model is based on two pillars: (1) the setting up of a management plan that serves as the tool for regulation, monitoring and control of the fisheries activities and (2) the establishment of a co-management committee (CMC) for the decision-making process underlying the design and implementation of the measures included in the plan.

Whereas this could constitute an important opportunity for women's access to decision-making on fisheries matters, the model's regulatory framework considers gender parity only to a certain extent. For instance, gender parity is set for the CMC's Plenary¹⁰⁵ and Technical Commission¹⁰⁶ membership but limited to "whenever possible" (art. 15.10 and 17.1 Decree 118/2018). This conditionality reflects the difficult starting point to achieve gender parity. Moreover, most of the stakeholders that have been involved in the initiative so far come mainly from the catching sub-sector where the presence of women is rather limited.

The gender issues could potentially be addressed within the management plan's socio-economic programme. A socio-economic programme in this case is an "Action Plan integrated into the Management Plan to set and quantify the economic and social objectives, including progress indicators and the actions to be developed to achieve the objectives" (art. 3 Decree 118/2018). However, the description of the programme's content in the co-management model's regulation (art. 7) does not explicitly mention gender issues in the list of actions that should be covered.

Whereas the co-management model is oriented to empower the fisheries sector using a bottom-up approach, gender policies have so far requested a top-down approach to be introduced. However, if the introduction of gender issues is perceived by the stakeholders as imposed, it would only act as a distortion element without real value. In this sense, gender parity may prove to be difficult to achieve in the short term in the male-dominated sectors (catching sub-sector) but could be proactively balanced by representatives from other areas (scientific, public administration and civil society)¹⁰⁷. This shows that in order to enhance gender equality in the sector, **the approach needs to be comprehensive, embracing from gender balance in decision-making to**

¹⁰⁴ The initiative was recognised by the FAO's GFCM as a best practice for sustainable small-scale fisheries during the High-Level Conference on Sustainable Small-Scale Fisheries in the Mediterranean and the Black Sea held in Malta in September 2018.

¹⁰⁵ The Plenary is the decision-making body of the CMC. It is formed by a maximum of 20 representatives, four from each of the five sectors involved in the co-management model. The Plenary approves the management plan and the internal rules of the CMC, it suggests and coordinates scientific studies, assesses the management plan and the achievement of biological, economic and social objectives, approves the opening/closure of the fishery (if applicable), and disseminates the plan and the associated actions to the public.

¹⁰⁶ The Technical Committee is formed by eight representatives of the five sectors. It designs the management plan and proposes it to the Plenary for approval. It also implements the socio-economic programme of the management plan.

¹⁰⁷ Indeed, data provided by the Catalanian government revealed that whereas there are no women from the catching sub-sector in the two CMCs that exist to date (sandeel and cuttlefish committees), there is yet a relatively balanced representation of women in the other three sectors that take part in the co-management model (scientific community, environmental NGOs and public administration). But, the ratio between men and women in the two co-management committees is still 1.9 (i.e. nearly 2 men for every woman). Moreover, women are especially under-represented in the CMC's decision-making body (Plenary).

concrete actions (e.g. conciliation) and novel efforts that strengthen the role of women in fisheries.

4.1.6 Factors affecting women's work in the sector

This section provides an overview of several factors that affect women in the sector, including: barriers to their participation in fisheries (e.g. gender stereotypes, social pressure, lack of supporting policies, etc.), economic and structural factors (economic context, diversification, training and education opportunities etc.) and technological developments.

Gender stereotypes and male image of the sector

The occupational segregation of women in the sector is a result of pervasive gender stereotypes (e.g. women are better at precision) and gender-based perceptions (e.g. catching is physically demanding and therefore unsuitable for women), held by both men and women interviewed in this study. These perceptions exist in all sub-sectors and **contribute to the maintenance of a male image of the sector**. However, research studies find that "*clichéd explanations for gender differences should be rejected as excuses for restricting people to lesser work, e.g., women should work near their homes so that they can also look after their families, and that women are better at menial post-harvest processing because they have more nimble fingers.*"¹⁰⁸

Stereotypes originate in cultural norms that define women's obligations as family-oriented and confide their presence to the home. Although these norms appear stronger in Black Sea Member States where fishing is a traditional occupation and livelihood activity reserved for men, they are also found in Member States with more progressive fisheries sectors. This suggests that **gender stereotypes affect women's participation and recognition in all regions and types of activities**. In fact, evidence gathered in focus groups (for example, in Italy and Cyprus), shows that women themselves accepted these stereotypes as "correct", further highlighting how deeply ingrained these gendered perceptions are in the sector.

Pressure to "prove your capability"

Even after reaching positions of authority or being accepted as "one of the guys" on fishing vessels, **women reported that they felt like they had to prove that they were capable of their work on a daily basis**. This involved working harder than their male counterparts and meeting higher standards and expectations. Many also reflected that progressing in their careers in the processing sub-sector and in research had not been easy. All this points towards a male image of the sector, the existence of gendered "double-standards" and engrained sexist perceptions about the role of women, especially in the catching sub-sector.

Policy makers unaware of inequalities in the sector and/or gender unaware

Interviews and focus groups evidenced conflicting perceptions between women directly involved in the sector and institutional stakeholders. These referred primarily to the age of women in the sector and to the extent of formal and informal employment. These findings suggest that policy makers are not fully aware of the experiences of women in the sector, with potential implications for policy-making (for example, in Romania). In Malta, discrepancies were also found between statistics showing that women are

¹⁰⁸ Gender in Aquaculture and Fisheries: Engendering Security in Fisheries and Aquaculture Report on the 6th Global Symposium on Gender in Aquaculture and Fisheries (GAF6), Bangkok, Thailand 3-7 August 2016. *Asian Fisheries Science Special Issue* 30S (2017): <https://bit.ly/2Nxq33l>

involved in production in the aquaculture sub-sector, and policy-makers' perceptions that they were mostly involved in post-harvest activities and administration.

Lack of concern for gender equality issues and, consequently, an unwillingness to foster change through proactive policies can hamper progress that has been achieved through other means, such as the progressive breakdown of silence regarding women's participation in fisheries-related activities. Greece is one example of how hesitant policy implementation permeates the governance of the sector, negatively impacting on attempts to mobilise women and effectively use technological developments to advance gender equality and promote a new image of the sector.

By contrast, Spain is an example of how prioritising gender equality issues on the sector's policy agenda can support the development of pro-active strategies, such as the establishment of a network of women in fisheries (2010) and corresponding association (2016) to defend women's economic and professional interest.

Economic context and structural factors

Economic context and downsizing of fishing fleets

The economy of Member States was found to have a **strong influence on the extent and the way in which women participate in fisheries and aquaculture sector (including processing)**. The consequences of the economic downturn/slow economic growth that some Member States (particularly, Bulgaria, Croatia, Cyprus and Greece) have faced were considered to have affected women in three ways.

First, the economic crisis was found to **perpetuate an existing "grey economy"**, especially in small-scale family-run fisheries, thus increasing the number of "invisible" female workers in the sector. Moreover, slow economic growth was also found to **challenge gender stereotypes** since both, men and women, were pushed into jobs irrespective of which gender they were traditionally ascribed to. This was found to have resulted in more women accessing the fisheries sector than before. Finally, in Bulgaria, Romania and Slovenia, the downsizing of fishing fleets due to unprofitable and reduced fishing activities, have led to a **shrinkage in employment opportunities** for both men and women. Women, particularly from fisheries-dependent families, were reported to have been pushed towards other occupations (as part of a more or less planned diversification strategy) or into precarity, with many unknown consequences for their participation in the sector or the economy at large with regards to workload, status in society and self-esteem.

Economic diversification

Economic diversification opportunities related to fishing and fish farming are increasing, both out of necessity in Member States that are more seriously affected by the decline in fisheries and the economic downturn, and as a result of women's own initiatives. Pesca-tourism, for example, is a growing activity alongside small-scale fishing in coastal communities, and one in which women are increasingly taking part of, particularly in Croatia and Slovenia. Creativity, business flair and initiative are also enabling the seizing of market niche opportunities and/or filling of gaps in the value chain (e.g. pooling and resale of traditionally-caught fish in Italy, or gastronomy in France). In this context, funding opportunities offered by the EMFF are crucial.

For new EU Member States such as Slovenia, increasing fish exports to other Member States was found to have created new opportunities for women in the sales and marketing sub-sectors (in which they were already over-represented).

Training and education opportunities

Women's access to, and participation in, vocational fisheries and fisheries-related training is very uneven and heavily divided across disciplines. Although training opportunities are open to all, women tend to participate in those that are about ancillary and supporting activities (e.g. marketing, sales, accounting), while men tend to attend courses on production and technological developments. This was reported in Croatia and Slovenia, for example, where women's access to training opportunities was considered equal to men, yet women (particularly those involved in running family businesses) were found to make less use of vocational fisheries training and instead attended workshops related to financing, diversification and marketing. In Greece, particularly in large companies in the aquaculture and processing sub-sectors, training activities were reported to be frequent and attended by men and women in equal numbers.

Given the extent of occupational segregation in the sector, with a heavily gendered division of tasks, it does not come as a surprise that women more readily participate in training in areas that are traditionally considered "female activities". Designing, communicating and delivering training in a way that is gender sensitive on all areas in the fisheries sector is one recommendation of this report (see section 6).

Technological developments

The recent evolution of technology is rapidly changing the face of the fisheries sector. Enhanced access to digital technologies and their wider availability and affordability, including technology that facilitates physically challenging tasks, the remote performance of activities and improve access to information-sharing through social media have **opened an array of new possibilities for women's involvement in the sector**, as reported in Cyprus, France, Italy and Slovenia. However, while in principle technological developments should benefit men and women in the sector equally, their introduction is **not gender neutral** and the impact on women is often shaped by existing cultural norms and gender relations¹⁰⁹. In Spain, for example, increased use of technology in the fish processing industry has not altered the labour structure and the majority of women are still in menial jobs. In Greece, the impact of the introduction of labour saving technologies on the female workforce is unclear. Modernisation of the sector through technology therefore needs to be carefully monitored with a gender perspective in mind, to ensure that women in fisheries do indeed benefit from such developments and that the use and control of these technologies result in positive changes in the distribution of labour, responsibilities, opportunities, flexibility, and decision-making between men and women.

4.1.7 SWOT analysis

The study also included the development of country-SWOTs to identify the opportunities and challenges in each Member State for enhancing gender equality in fisheries. The

¹⁰⁹ Morgan et al. (2015): http://pubs.iclarm.net/resource_centre/AAS-2015-07.pdf; Morgan et al. (2016): <https://onlinelibrary.wiley.com/doi/pdf/10.1111/raq.12137>

country-SWOTs are presented in Annex 4. In this section, we provide a summary-SWOT which identifies the recurring themes found in the different Member States.

Table 5: SWOT analysis

<p>Strengths</p> <ul style="list-style-type: none"> - High importance of fishing for local economies - Increasing presence of women in decision-making roles at national policy level - Women tasked with greater responsibilities in the industry (e.g. quality control). 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Lack of chronological and consistent sets of employment data - Lack of data on gender pay gap - Uneven enforcement of assisting spouse status across Member States - Pronounced occupational segregation of women - Prevalence of gender stereotypes - Fewer women attending vocational training than men
<p>Opportunities</p> <ul style="list-style-type: none"> - Equal rights between men and women enshrined in national laws - Growing aquaculture sector and younger age profile of women in that sector - Technological innovations enabling women to diversify their roles and tasks performed in the sector - Shift from small-scale fleets to fleets run by larger companies 	<p>Threats</p> <ul style="list-style-type: none"> - Economic crisis faced by several Member States in the region - Very few fisheries-related women organisations in the region - Lack of attractiveness of the catching sub-sector - Prevalence of grey economy

4.2 PART II: THEMATIC ISSUES AND BEST PRACTICES

This section examines topics that are of special interest to the European Commission and that are linked to the upcoming policy developments, in particular the adoption of a regional plan of action for small-scale fisheries in the Mediterranean and the Black Sea (RPOA-SSF) and the establishment of the EMFF for the 2021-2027 period. Part II adds another layer of reflection to the analysis presented in Part I, to synthesize further the study findings.

4.2.1 Making the "invisible" visible

None of the ten Member States examined in this study provided data on the number of women who "lend a hand" in the business (e.g. wives, daughters, mothers, etc), either as assisting spouses / life partners (where the status exists) or on an informal basis. To further understand the prevalence of this phenomenon and the opportunities for women's progression in the sector, we identified indicators of women's (in)visibility, gender (in)equality, and (un)willingness to change the status quo at a political level. We then examined the situation of Member States based on these indicators, namely:

Indicators of women's (in)visibility:

- Whether sex-disaggregated data is collected – and whether the level of disaggregation is sufficient (by legal status, position, activity etc.).

- Whether the status of assisting spouse / life partner is legally recognised (related to the extent to which Directive 2010/41/EU is enforced in the fisheries sector).
- Whether women (and their interests) are represented by an organisation or association.
- The extent to which women's employment is formalised in aquaculture¹¹⁰ (e.g. there are women with formal employment contracts and associated benefits).

Indicators of gender (in)equality:

- The existence of a pay gap or over-representation of women in lower paid positions.
- The extent of a gendered division of labour.
- The extent of women's access to, and participation in, training opportunities¹¹¹.
- The prevalence of gender stereotypes.
- Whether gender discrimination is reported.

Indicators of (un)willingness to change the status quo at political level:

- Political will and gender-sensitive policies in general and for fisheries and aquaculture in particular.
- The extent to which the status of assisting spouse / life partner (as per transposition of Directive 2010/41/EU) is enforced in the fisheries sector.
- The extent to which technologies are being promoted and targeted at women and are triggering change.
- The image of the sector and economic diversification opportunities it offers to women.
- The existence of best practices and/or role models.

The extent to which these indicators are verified in the ten Member States provides an understanding of the degree of women's visibility in their respective fisheries sector. In Table 6 below we show Member States' situation in relation to the different indicators using "traffic light" colours – the meaning of each colour code is specified for each indicator. The Table visually summarises the information and analysis presented in chapter 4.1 on factors affecting the (in)visibility of women in the fisheries sector, the (in)equalities they face, and the readiness and (un)willingness of the sector and policy-makers to promote change and progress gender equality.

¹¹⁰ The focus on aquaculture responds to the fact that it was identified as a sub-sector where women's formal employment is more widespread than in the catching sub-sector (see section 4.1.1.). Starting from the assumption that women are, as a consequence, more "visible" in aquaculture than in catching, those without formal employment contracts in aquaculture will be *a fortiori* "invisible".

¹¹¹ It is important to note that although in most cases training opportunities are open to all men and women in equal terms (equal access), the uptake of these opportunities is, in many cases, gendered e.g. men predominantly attend training courses on production and women training on ancillary and supporting activities such as marketing, sales, accounting.

Table 6: Performance of Member States according to indicators

	Mediterranean Sea Basin								Black Sea Basin	
	CRO	CYP	FRA	GRE	ITA	MAL	SLO	SPA	BUL	ROM
Indicators of women's (in)visibility										
Availability of sex-disaggregated data Red: none, Orange: some, Green: fully available	Red	Green	Yellow	Yellow	Yellow	Green	Red	Yellow	Green	Yellow
Enforcement of assisting spouse status in fisheries (Dir. 2010/41/EU) Red: not enforced, Orange: incompletely enforced, Green: fully enforced	Red	Red	Green	Yellow	Red	Green	Red	Yellow	?	?
Women's organisations in fisheries and aquaculture Red: none, Green: one or more	Red	Red	Green	Red	Green	Red	Red	Green	Red	Red
Formality of women's employment in aquaculture Red: none or very few contracts, Orange: some, Green: all or most	Green	Green	Green	Green	Yellow	Yellow	Red	Green	?	Green
Indicators of gender (in)equality										
Pay gap Red: reported to exist, Orange: reported to exist in some sectors only, Green: reported not to exist	Red	Green	Yellow	Red	Yellow	Green	Yellow	Red	?	Red
Occupational segregation Red: common, Orange: some, Green: none	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red
Women's access to vocational training Red: not equal, Orange: equal, but gendered uptake, Green: equal, and equal uptake	Red	Red	Yellow	Green	Yellow	?	Yellow	Yellow	Green	Yellow
Stereotypes and cultural norms Red: common, Orange: some, Green: none	Red	Yellow	Yellow	Red	Red	Red	Green	Yellow	Red	Red
Reported gender discrimination Red: common, Orange: some, Green: none	Red	Green	Green	Red	Red	Red	Green	Red	Green	Yellow
Indicators of (un)willingness to change										

	Mediterranean Sea Basin								Black Sea Basin	
	CRO	CYP	FRA	GRE	ITA	MAL	SLO	SPA	BUL	ROM
Political will and gender-sensitive policies Red: none, Orange: some, Green: demonstrated		?	?				?			
Impact of technological developments on women Red: negative, Orange: uncertain, Green: positive									?	
Image of the sector Red: "male", Orange: evolving, Green: progressive	?									
Economic diversification opportunities for women Red: none, Orange: some, Green: fully seized										
Availability of best practices and role models Red: none, Orange: some, Green: many										

? Unknown (not possible to infer from the evidence collected at national level)

Source: Country reports developed by experts using evidence collected through desk research and interviews.

Adding all indicators and weighing them equally (Table 7) shows that Member States performing better with regards to women's visibility, gender equality and progression in the sector are, based on a simple count: Spain and France (6 green indicators each), and Malta (5 green indicators each). Member States performing less well are: Croatia (9 red indicators), Greece (8 red indicators) and Malta (7 red indicators). The sum of green and orange indicators, signifying progress of the sector with regards to the situation and participation of women, shows that France and Spain perform best (sum=11), followed by Romania and Italy (sum = 9).

Table 7 : Summary (counts) of unweighted "traffic light" indicators from Table 6

	CRO	CYP	FRA	GRE	ITA	MAL	SLO	SPA	BUL	ROM
Red (R)	9	6	2	8	5	7	6	3	5	4
Orange (O)	1	3	5	4	7	1	3	5	2	5
Green (G)	3	4	6	2	2	5	4	6	3	4
n/a	1	1	1	0	0	1	1	0	4	1
G+O	4	7	11	6	9	6	7	11	5	9
r=(G+O)/R	0.44	1.17	5.5	0.75	1.8	0.85	1.17	3.67	1.0	2.25

Table 8 ranks countries according to the ratio of unweighted green and orange indicators over red ones. A ratio (r) greater than 1 suggests that a **Member State is on the “right track” in recognising women for their contribution to the sector: France, Spain, Romania, Italy, Cyprus, Slovenia and Bulgaria**. Progress in other Member States is considerably slower.

Table 8 : Ranking of Member States

Rank	Country	r value
1	FRA	5.5
2	SPA	3.67
3	ROM	2.25
4	ITA	1.8
5	CYP	1.17
6	SLO	1.17
7	BUL	1.0
8	MALT	0.85
9	GRE	0.75
10	CRO	0.44

4.2.2 Small-scale versus large-scale fisheries

The different nature and modus operandi of small-scale and large-scale capture fisheries operations means different levels of participation, visibility and recognition for women in the fisheries sector. It is therefore to take the size of the catching sector (and corresponding fleets) into account. **Women are found more frequently on board in small-scale fisheries**. As vessel size increases (from mid-range onwards), women return to the land to perform managerial and administrative duties mainly. In general, women are far fewer on larger fishing vessels. Time spent at sea, physicality of the work and harsh working conditions are often put forward – by women and men alike – as justification for this differential. Yet, counter-examples of women breaking this are also found (see Text Box 4).

Scale also matters when it comes to women’s formal employment in fisheries. The general pattern is that **larger, well-established fisheries enterprises offer greater opportunities for women’s involvement and formal employment**, than small-scale, family-run operations. In this regard, it is interesting to note that the Member States with a ratio inferior to 1 in Table 8 (Malta, Greece, Croatia), i.e. where the visibility and recognition of women in the fisheries sector is progressing slowly, are those with a predominantly small-scale fisheries sector (to the exception of Greece). The reverse is true for Spain and France, which score higher and have some larger fleets (though their higher scores should not be solely correlated with the size of their fishing fleets – indeed, Romania scored high too, but its national fishing fleet is almost entirely represented by the small-scale fishery).

Paradoxically however, the **decline in small-scale fisheries in some Member States, which has led to a decline in women’s (mostly fisher’s wives or partners) informal employment opportunities, has also led to a decline in their ‘invisibility’** (when their status as assisting spouse was not legally recognised). The

restructuring of the sector, away from fleets run by individuals and cooperatives to companies (Croatia), is also changing the employment landscape in the catching sub-sector, which could provide more opportunities for formal employment in the future and thus, the recognition of women's roles.

Text Box 4: Women at the sea

Claudia (46 years old, France): vessel owner, fisherwoman (coastal fisheries), fishmonger, tourist guide (with specialised boat)

Claudia grew up in the fisheries sector with parents active in fishing and shellfish farming. This helped her to establish a positive reputation among fishermen and become their representative as an elected "Prod'homme". She has led a small-scale fishing business for 30 years, in which she not only works as a fisherwoman, but also as a fishmonger, selling her products in her own shop. In her role as "Prod'homme" she represents and assists fishermen in her town in enforcing regulations and fisheries management measures.

Claudia started her fishing career with a marine captain diploma, and, years later, she obtained a diploma in boat mechanics. This allowed her to start a new business as a tourist circuit. After years of physical work, she now intends to dedicate more of her time to this new business and slowly end her fishing activity. Claudia finds that resources are becoming scarce and that the sector is in a difficult situation, however, she regrets leaving the industry. She believes that pursuing touristic activities will allow her to pass her knowledge about the sea on to visitors.

Claudia participated in an interview in this study, providing her views and experiences as fisherwoman.

Voula (Greece): fisherwoman

Voula is a mother of four and runs a coastal fishing boat together with her husband. Due to her husband's health issues, she is undertaking most of the fishing activities by herself. Voula is also the only woman elected President of the local fisheries association. For the past 8 years, she has been representing small-scale fisheries in various fora and encourages female colleagues to be actively involved in the association and to seek independent insurance to OGA so as to benefit from the pension scheme. She is happy that she can support women in the sector.

Voula participated in the focus groups conducted in the framework of this study in May 2018 in Kavala (one of the major fishing areas in the North of Greece).

4.2.3 The case of aquaculture

Evidence collected in this study suggests that the catching and aquaculture sub-sectors differ with regards to opportunities offered to women and their scope for advancement of gender equality. Except for shellfish farming, which is traditionally carried out by male coastal dwellers, **aquaculture activities tend to be more entrepreneurial and commercial than catching**. This is likely because aquaculture is a relatively younger and more formalised economic sector, either existing on its own or alongside farm activities as part of the diversification of coastal economies. It requires substantial capital investments and business development strategies which contrasts with the more traditional management of small-scale catching fisheries. Aquaculture therefore appears more modern and dynamic, and, despite the barriers that women entering and working in aquaculture still face, this modern image **offers potential for countering gender stereotypes and opening opportunities for women at all levels**.

However, attributes of the aquaculture sector also determine the extent to which gender equality can be advanced in this sector, such as:

- **Size of the enterprise has an impact on formality of employment:** Owing to the nature of aquaculture enterprises, employment in the aquaculture sub-sector is generally more formalised than in the catching sub-sector. In Slovenia, for example, aquaculture enterprises abide by standard employment laws on self-employment and the employment of partners (which differ from those in catching fisheries), allowing for formal recognition of all their workers. In Member States where this sub-sector is growing (e.g. Malta, Cyprus, Greece, Italy, Spain), women have more opportunities for formal employment. Exceptions are smaller family-run aquaculture businesses which continue to rely more on “invisible”, as in unregistered, female workers than larger companies.
- **Nature of aquaculture activity determines women’s involvement:** Freshwater aquaculture operations tend to be family-based enterprises, sometimes associated with agricultural activities. In these enterprises, fewer women (wives and other relatives of farmers) are officially employed. This contrasts with sea-based operations, although it is important to distinguish between finfish and shellfish farming. Finfish farming is capital intensive and high-tech, usually run as a medium to large-scale enterprise where women’s employment is formal and they tend to be highly skilled. However, few women are found as CEOs of such enterprises. Shellfish farming, on the other hand, is traditional, relatively low-tech and family-based, where women work directly in production. In shellfish farming, women often feature as the official entrepreneur (or registered self-employed worker). However, if they work by “lending a hand” to their husband/partner in whose name the farm is registered, or if the farm is part of a diversified household business (for example, agriculture), their contribution is considered informal and thus not recognised.
- **Dynamism of aquaculture determines appeal and opportunities for women:** The slow growth of this sub-sector in some Member States (Bulgaria, Croatia, France, Romania) means that there are limited opportunities for investment and high-tech developments where highly-skilled women could secure positions. This contrasts with new technological advancements, such as off-shore aquaculture, in Member States in which this sub-sector is developing fast (e.g. Cyprus). As a younger sub-sector, aquaculture is also less laden with gender stereotypes than the more traditionally viewed catching sub-sector, attracting highly-qualified graduates, and therefore promoting a more “gender-inclusive” image. The sector, however, is vulnerable to economic downturns (due to diseases, such as the closure of shellfish farms in France), weakening its appeal for employment. This has direct consequences for women’s official employment opportunities in the sector, as well as their ability to fully benefit from social protection and benefits schemes associated with a formal employment status.

4.2.4 Regulatory changes needed and role of the EU

This section provides an examination of regulatory changes needed in the Mediterranean and the Black Sea and the role of the EU in addressing these changes. The analysis covers legal acts and public policies at EU and national level which concern women's role in the fisheries sector.

Directive 2010/41/EU on equal treatment of self-employed men and women

As explained in section 4.1.4, the incomplete implementation of Directive 2010/41/EU by Member States in both the Mediterranean and Black Sea, withholds the recognition of spouses/partners’ economic contribution to the sector. As one could expect, the

status of 'assisting spouse / life partner' applies predominantly to women rather than men and therefore the visibility of women working in the fisheries sector hinges in large parts on the legal (official) and adequate recognition of such status.

The European Commission, as guardian of the Treaty, is responsible for overseeing the Directive's implementation and to provide support as required. If there is no adequate transposition of the Directive in national law, and in the fisheries sector in particular, **women's legal status in fisheries remains a central challenge at different levels.** First, the lack of recognition of their work leads to economic insecurity for women (e.g. because they cannot obtain social benefits such as health coverage, pension, maternity leave, etc.). It also results in a lack of self-perception of the role they are actually playing. The creation of the 'assisting spouse / life partner' status represented a step in the right direction, but the current study revealed that it is still not available to all qualifying women in the EU.

Therefore, Directive 2010/41/EU needs not only to be formally transposed into national law, but **(i) transposed well, i.e. with specific provisions for the fisheries sector, and (ii) monitored and enforced by Member States.** Indeed, a study commissioned by DG JUST on the implementation of the Directive in all EU Member States showed that in circa half the countries, the agricultural sector was excluded from the scope of the implementation of the Directive¹¹². The current study revealed that **in at least six Member States in the Mediterranean and the Black Sea, the fisheries sector was excluded** too.

Moreover, there is also the issue of recognising life partners in varying forms, as well as **other women who 'lend a hand'** in the family-business e.g. daughters, mothers, etc. In relation to life partners, Bulgaria and Cyprus stipulate entitlement rights for assisting spouses (although there is no evidence that this is applied in practice in the fisheries sector) but recognise no other form of life partnership. In the case of other collaborative family members, evidence collected in this study showed that only Spain can ensure coverage of any assisting family members by applying the status of collaborative family of the self-employed. Although even in the Spanish case, there are limitations in its application¹¹³.

One additional issue is that currently it is the head of the enterprise / spouse (self-employed person) who has to submit the application for the status. An important change in this respect would be to **allow assisting spouses / life partners to submit applications for the status themselves.**

To finalise, it is important to highlight another finding of the DG JUST's study: that **ambiguity lies at the heart of the Directive.** This ambiguity concerns two central issues; first, it is not clear what the Directive was intended to achieve (equal treatment or a general improvement of the status of assisting spouse?). It was not clear either to whom the Directive was to be applied to (to self-employed workers or to spouses of self-employed workers?)¹¹⁴.

These general ambiguities are also useful to explain the inconsistencies found in the current study in relation to the implementation of the Directive, as well as the general

¹¹² European Network of Legal Experts in the Field of Gender Equality (2015), Self-employed: The Implementation of Directive 2010/41 on the application of the principle of equal treatment between men and women engaged in an activity in a self-employed capacity.

¹¹³ As explained in section 4.1.4, in Spain, to be considered as 'collaborative family', the person needs to carry out exactly the same activities as the self-employed, which could be a *de facto* limitation given that many women engage in on-shore activities that do not match their spouses' activities at sea.

¹¹⁴ European Network of Legal Experts in the Field of Gender Equality (2015), Op. Cit., page 2.

lack of clarity over the extent to which the Directive was applied in practice in the Mediterranean and Black Sea's fisheries sectors.

European Maritime and Fisheries Fund

The EMFF explicitly requires Member States to present measures for gender equality in their operational programmes. As such, the EMFF is one of the means to improve the situation of women in fisheries and related sectors. Indeed, this study found that the EMFF has played a key role in fostering equal opportunities and gender equality through the financing of entrepreneurship and innovation. For example, by enabling diversification opportunities through pesca-tourism and gastronomic activities, which are often out of the initiative of women (especially fishers' wives), as in Corsica.

However, the **contribution is made in a relatively indirect way**. This is not a new finding, as the ex-post evaluation¹¹⁵ of the previous fund (EFF) had pointed out already that although gender equality was one of the EFF's horizontal objectives¹¹⁶, the fund, as implemented by Member States, had done little to promote gender equality directly. The EFF's contribution to the promotion of gender equality had been mostly indirect, working at several levels such as information and awareness raising on the support available, and in planning and improvement to working conditions and environment. The main reason for this limited contribution was that Member States did not consider gender equality to be a key issue, and presumably this was reflected in poor interest, data and uptake of funding. The evaluation also concluded that the extent to which the EFF had effectively contributed to gender equality was difficult to determine due to a lack of reliable and comprehensive data on the situation of women's in fisheries in general, as well as on women's access and take up of EFF support in particular¹¹⁷.

Since the previous fund, awareness and recognition of women's multiple roles in fisheries has increased among stakeholders at all levels. Also, gender indicators have been incorporated to the evaluations of the funds' achievements at EU and Member State level. However, there is still a need to ensure that **gender equality is not only a horizontal objective, but that it is effectively streamlined across measures and projects at Member State level** and throughout the programme cycle.

In this sense, it is worrying that the **proposal for the 2021-2028 EMFF¹¹⁸ is gender blind**. Whereas in the EFF and EMFF 2014-2020, the promotion of equality between men and women was a priority measure enshrined in the Regulations' text, the proposal for the EMFF 2021-2027 has no specific gender equality priority measures and no references to 'gender', 'women' or 'equality' in its text.

Moreover, within the current EMFF, there are instances of **unconscious bias in the wording of the text of Member States' operational programmes** (e.g. Cyprus¹¹⁹),

¹¹⁵ MRAG, Coffey and others (2016), Ex-post evaluation of the European Fisheries Fund (2007-2013).

¹¹⁶ In the EFF, the promotion of gender equality was considered an integral part of the sustainable development of fisheries, to be achieved through gender mainstreaming. This approach supported by the EFF consisted of various measures including the promotion of gender-relevant exchange of experience and best practices (Art. 37(k)); the promotion of professional skills, worker adaptability and access to employment, particularly in favour of women (Art. 44.2); information and publicity on the funding available to bodies involved in promoting gender equality (Art. 51.2(a)); collection of monitoring data broken down by gender to increase information about the role of women in fisheries and raise awareness of their contribution to the sector (Art.66.3).

¹¹⁷ MRAG, Coffey and others (2016), Op. Cit, pg.147

¹¹⁸ Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on the European Maritime and Fisheries Fund and repealing Regulation (EU) No508/2014 of the European Parliament and of the Council {SEC(2018) 276 final} - {SWD(2018) 295 final}, dated 12.6.2018.

¹¹⁹ The text of the OP for the EMFF 2014-2020 for Cyprus says: "there are no limiting factors in Cyprus that prevent equal opportunities in the fisheries sector, other than working conditions. Working conditions are extremely difficult, mainly in sea fishing, but also in aquaculture units, so that the reduced presence of women is considered to be normal". The original text is in Greek and has been translated to English by the country

which reinforce the perception that some jobs in fisheries are better suited for men than women. Together, this is dampening the potential impact that the ongoing evolution of the sector could have on women's opportunities.

Soft approaches towards gender equality introduce the **risk of excessive reliance on implementing actors' willingness**, which might be especially problematic given that many consulted stakeholders in this study were not sufficiently aware of women's presence and role in fisheries and/or some did not consider gender issues as relevant and/or important. The loose streamlining of gender equality at Member State level dilutes the support and funds available for the promotion of gender equality, which is furthermore not adequately monitored.

The Commission and Member States should therefore **ensure that that gender perspectives and attention to the goal of gender equality are central to the EMFF**. Various instruments/measures can be explored:

- amending the text of the proposal for the 2021-2028 EMFF and making gender equality a horizontal objective, linked especially to community-led local development (CLLD)¹²⁰;
- promoting the involvement of women and organisations promoting gender equality in decision-making processes related to the next period of the EMFF, as well as in bodies that play a key role in its implementation (e.g. FLAGs boards);
- fostering women's awareness of the available support and their participation in EMFF-supported projects;
- promoting the use of gender criteria for the selection of projects to be supported;
- reflecting on the conditions Member States may impose on access to financial support where these conditions are a limiting factor (e.g. when beneficiaries can only be companies and not individual fishermen/women) and possibly to adopt guidelines on this issue; and
- supporting the implementation of vocational training and learning opportunities targeted at women, especially fishers' wives and other assisting family members.

Data collection and understanding of the situation of women in the sector

To increase the visibility and recognition of women in the sector, it is also important to improve the availability of data. As explained in section 3.5, the quantity and quality of statistics on women's participation in the fisheries sector and other sub-sectors was extremely variable and uneven across all the study countries. This constitutes a limitation to the design and implementation of policies that are adequate to women in fisheries' realities.

The Commission's **efforts to implement the DC MAP are a key step** in addressing this problem. Member States should continue providing sex-disaggregated statistics on aquaculture and processing and, from 2018, the Commission should ensure that all Member States start providing this for the catching sub-sector too. Also, to date, sex-disaggregated data in the catching sector is provided for boat owners only and not crew. Collecting sex-disaggregated data on women on board fishing boats should also be a

expert. The OP is available here (Page 104 under chapter 9. Horizontal Principles of the OP): https://ec.europa.eu/fisheries/sites/fisheries/files/docs/body/op-cyprus_el.pdf

¹²⁰ Priority 3, Art. 26 of the proposal for the next EMFF, Op. Cit.

priority that would help to combat gender stereotypes (e.g. that women do not go to the sea but stay on the land).

Other socio-economic variables including age, education level, employment status (employed, self-employed), types of jobs performed, pay scales are also important to collect. For those Member States where the status of 'assisting spouse / life partner' is applied in the fisheries sector, it would be key that they **provide data on the number and profile of women (and men) registered under this status.**

For small scale-fisheries, it would be important to **collect data on the multiple economic activities carried out as part of a family/homestead livelihood.** For example, register the individual income streams that complement one another, such as agriculture and freshwater fish farming or fishing and pesca-tourism. Recording the sex of manager(s), asset owners and staff/workers on these different operations would help to untangle and recognise the different streams as separate entities and improve the understanding of women's activities and contribution to the sector.

Finally, data gathering needs to advance from a descriptive analysis of the number and profile of women in a given sector to substantive topics. For instance, how many equality plans at work are in place or how many complaints about discrimination or workplace harassment have been presented by women.

Other EU interventions: FLAGS

Fishery Local Action Groups (Art. 61 EMFF) were the chosen delivery method for CLLD in most EU Member States. FLAGS propose and implement CLLD strategies. They are local partnerships that are composed of representatives of the public, private and civil society sectors. To ensure that these partnerships reflect correctly the local society, it is of utmost importance that women are adequately represented, in numbers but also in terms of their specific needs and interests.

As mentioned in section 4.1.5, the survey conducted by FARNET¹²¹ showed that **only 20% of people participating in FLAGS boards were women.** Out of the 588 projects funded by the Mediterranean and Black Sea FLAGS during the period 2007-2013, only 13% were specifically focussed on benefiting women in fisheries-related activities. Moreover, from survey data, it could be estimated that in these FLAG areas, over 20% of family-run, fisheries-related activities relied on women's unpaid work. However, supporting women's projects in fisheries and aquaculture, which would enable an increase in their visibility and benefits from their participation in the sector, was not considered a high priority for most FLAGS in these areas¹²².

Adding to FARNET's survey, the current study found that **FLAGS appeared to have limited effectiveness in including women** and to be of limited relevance when it came to further their interests in fisheries. Two exceptions were Slovenia, where women were particularly active in FLAGS initiatives, and Spain, where FLAGS were closely working with women's collectives.

According to FARNET's report, there is a **direct correlation between the proportion of women at decision-making level (FLAG boards) and the number of FLAG projects specifically targeted towards supporting women** in fisheries and aquaculture. It is therefore important to promote the participation of women (including, assisting spouses / life partners and other female relatives of fishers) in the decision-making process of FLAGS (as well as in other fisheries bodies such as Advisory

¹²¹ FARNET (2018), Op. Cit.

¹²² Average score of 3.14 on a 5-point Likert scale (1=low, 5=high).

Councils¹²³) to strive towards greater benefits and opportunities for them. Encouragingly, at EU level, an increasing number of FLAGS were reported to have placed priority on supporting women's projects and capacity building for the 2014-2020 period (FARNET report).

4.2.5 Communication and promotion of gender equality in the sector

Communication and dissemination can play an essential role in raising women's awareness of the opportunities that the sector offers, as well as of the rights, entitlements and benefits that workers (employed or self-employed) and assisting spouses / life partners are entitled to in each Member State. They can also help to combat the old-fashioned image and gender stereotypes pervading the sector, according to which women are unable to perform key tasks due to lack of physical strength and lack of flexibility due to caring responsibilities. These gendered perceptions of women's limitations and cultural norms regarding their place in the sector were found in most Member States surveyed in this study (see section 4.2.1).

Greater communication and promotion efforts are required throughout the sector to:

- make the opportunities it offers, for example, in expanding segments such as aquaculture, better known to younger generations of women (and men);
- promote vocational training opportunities and encourage women (especially fishers' wives) to attend;
- portray a more modern, younger and feminine image of the sector to combat prejudices and stereotypes;
- inform spouses / life partners of their rights and benefits as assisting family members of the self-employed;
- inform fishers and aquaculture producers and spouses about opportunities for economic diversification that can be created through the availability of, and access to, funds promoting women's entrepreneurship such as the EMFF; and
- ensure wide dissemination of results of EMFF-funded projects led by women and/or for women

Also linked to communication and awareness rising is the **support that the EU can provide to international/regional initiatives, as well as women's associations relevant to the fisheries sector**. These are networking platforms for fisheries stakeholders and fora for the exchange of information and best practices that can help to ensure that women's needs in the sector are addressed. This includes international organisations such as AKTEA and Women in Seafood Industry (WSI), which gather fishers' wives and women who play an active role in the industry.

Also important are **initiatives or organisations that may not be specific to the fisheries sector, but work on women's issues in the Mediterranean and/or Black Sea**. This includes, for example, the Regional Dialogue on Women Empowerment within the Union for the Mediterranean and the Union for the Mediterranean Conferences

¹²³ The Advisory Councils (ACs) are stakeholder-led organisations that provide the Commission and the Member States with recommendations on fisheries management matters. Increased regionalization is a key priority in the reformed CFP. The ACs are established with a mandatory 60/40 membership of fishing industry/other interest groups (OIGs). OIGs may comprise of NGOs (environmental or labour-related), recreational fishers and 'women in fishing' groups. Of particular importance is the Advisory Council for the Black Sea (BISAC - <https://www.blsaceu.eu/en/>)

(UfM)¹²⁴. Within the former, there is an Action Plan with transversal measures and committed activities and fisheries seem to be absent (not included in any of the current four working groups for women empowerment). The UfM Conferences held in November 2017 in el Cairo was on Strengthening the Role of Women in Society, but the voices of the women in the fisheries sector were not heard. The next UfM Women Conference is in October 2018 in Lisbon and includes a specific workshop about "Empowering women in rural and agriculture areas". However, fisheries, aquaculture and coastal areas will not be present.

Finally, the **EU plays a key role in leading different high-level policy initiatives** such as the MedFish4Ever Ministerial Declaration (March 2017), as well as initiatives promoted by FAO's General Fisheries Commission for the Mediterranean (GFCM) (e.g. the High-Level Conference on Black Sea Fisheries and Aquaculture in Sofia in June 2018¹²⁵, the Small-Scale Fisheries High-level Conference in Malta in 2018 and the regional Plan of Action for Small-Scale Fisheries). These activities address gender equality issues either directly or indirectly. They are the kind of initiatives that support the development of governance at regional scale and raise awareness and interest on gender-related issues in the fisheries sector.

4.2.6 Progress towards best practices

Based on evidence collected in this study, as well as on expert knowledge on progress achieved in gender equality in EU and international fisheries, we identified "good practices" that can serve as examples for Member States on how to improve women's presence and role in the sector.

The good practice examples presented below were categorised following FAO's guidelines to operationalise the gender equality principle in small-scale fisheries¹²⁶. It should be noted that the analysis of good practices is not limited to small-scale fisheries but also applies to larger segments.

Good practice 1: Documenting and understanding the role of women in fisheries

Findings from the study show that data on the presence and role of women in Mediterranean and Black Sea fisheries exist, but with significant gaps and limitations. For instance, in most Member States, there are sex-disaggregated data, but only for some sub-sectors. Catching, in particular, is a sub-sector for which sex-disaggregated data is rare. This can lead to "gender-blind" policy-making and, consequently, inadequate funding for sub-sectors and activities where the presence and contribution of women is unaccounted for yet significant according to qualitative evidence.

Projects or initiatives that can be considered good practices in this sense are those that, for example:

- have promoted the collection of sex-disaggregated data as part of the monitoring of their activities;

¹²⁴ <https://ufmsecretariat.org/>

¹²⁵ <http://www.fao.org/gfcm/meetings/blackseaconference2018/en/>. Point 26 of the Sofia Ministerial Declaration is about improving working conditions and promoting the role of women in fisheries and aquaculture (https://ec.europa.eu/fisheries/sites/fisheries/files/docs/2018-06-07-sofia-declaration_en.pdf)

¹²⁶ FAO (2017). Towards gender-equitable small-scale fisheries governance and development – A handbook. In support of the implementation of the Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication, by Nilanjana Biswas. Rome, Italy.

- have contributed to documenting and understanding the nature of women's work in the sector and their contribution to improve policy-making.

Example: Evidence-based action planning

Between 2016 and 2018, the Spanish Network of Women in Fisheries conducted a series of **in-depth studies on the experiences of women working in catching and aquaculture**¹²⁷. These studies aimed at promoting women's work and recognising their contributions to the sector, as well as highlighting their work experiences and barriers that they face. The research was based on quantitative data gathered through official statistics and surveys conducted by the network with different professional groups of women. Findings from these studies served as the basis for the development of measures to promote and advance gender equality and equality of opportunity in the sector.

Example: Enhanced monitoring of gender equality

A study on the place of women in the fishing and aquaculture sectors in France conducted by Monfort, Baelde and Vouhe in 2017¹²⁸ mention as examples of initiatives in favour of gender equality the **observatory of workplace equality** set up by the Maritime Cluster (*Cap sur l'égalité professionnelle*) to measure progression of women in the maritime sectors, including fisheries and aquaculture. It also mentions the "Conseil Supérieur des Gens de Mer", which set up a working group with a focus on women's issues to examine the situation of women in the maritime sector and collect statistical data on their presence.

Good practice 2: (Re) thinking fisheries through a gender lens

Findings from the study show that women rarely participate in representative organisations and that there is limited mobilisation of women on gender issues in the sector. This means that many developments in fisheries occur without the consultation of women and, consequently, could further disadvantage women in the sector.

Mainstreaming gender equality in the design, implementation and decisions made by fisheries management and aquaculture development initiatives is therefore important. Good practice examples include:

- actions aimed at progressive and gender-sensitive rethinking of fisheries governance;
- initiatives promoting the creation of women's organisations / networks and/or women's participation in decision-making bodies and professional organisations;
- initiatives aimed at further developing the fisheries sub-sectors and value chain to open new opportunities for women's participation.

Example: Women's mobilisation at EU-level

AKTEA¹²⁹ is the network of fisherwomen's organisations in Europe. Members of AKTEA are independent organisations acting at national or regional levels and representing wives of fishermen who carry out ancillary tasks linked to fisheries enterprises (selling fish, administration, etc.), as well as fisherwomen, shellfish gatherers and net menders. The network strives for the formal recognition of women's role in the sector and their

¹²⁷ https://www.mapama.gob.es/es/pesca/temas/red-mujeres/analisis_y_diagnosticos.aspx

¹²⁸ Monfort, Baelde, Vouhe (2017), Op. Cit.

¹²⁹ <http://akteaplatform.eu/>

access to decision-making at EU and national levels¹³⁰. Its main objectives also include creating a platform for the exchange of experiences, problems and solutions among women in fisheries in Europe, promoting sustainable development of fisheries and the preservation of fisheries communities, and fostering women's confidence¹³¹.

Example: Women's mobilisation at national level

In 2010, the General Secretary of Fisheries in Spain (Ministry of Environment, Rural and Marine Environment) created the **Spanish Network of Women in the Fisheries Sector**¹³². Its objective is to promote the role of women in fisheries, as well as associations, communication and exchange of initiatives and best practices among women who work or wish to work in any of the fisheries sub-sectors. Throughout the years, the network has implemented different actions which have resulted in important achievements in terms of equality (e.g. improvements in the fisheries legislation in terms of gender equality, development of a Plan for Gender Equality in the Fisheries and Aquaculture Sector 2015-2020, participation in meetings and seminars in the sector to publicise the work of the network and give visibility to the role of women, support of different female groups and associations in the fishing and aquaculture sector, etc.).

In 2016, the **Spanish Association of Women in Fisheries** (Anmupesca)¹³³ was created to defend women's economic and professional interests and act as a platform for social dialogue. Today it gathers 21 organisations with over 10,000 women. The association aims to increase the leadership of professional women in fisheries and promote their effective participation in representative, consultative and/or decision-making bodies in the sector.

In Italy, the **Penelope Association** in Ancona is a legally recognised organisation and a member of AKTEA. It associates family members of fishermen, as well as women in aquaculture and scientific research. Its key objectives are (i) to promote the revision of national laws and collective agreements with respect to male and female workers who work in small and medium-sized fishing enterprises and are relatives of the business owner; and (ii) to recognise the social role of unregistered women in fishing. This association is currently campaigning for the fisheries legislation to be equalled to the agriculture one.

Example: Inclusion of women in decision-making

In Emilia-Romagna in Italy, the **Consortium Pescatori del Polesine integrates women at management-level**, including in the Board of Directors. Moreover, circa 50% of the 1,500 employees are women. Women who play a role in the Consortium's decision-making are managers of cooperatives where they are employed. The presence of women in this organisation is rooted in women's active participation in this sector since the 1980s, when economic downturn drove women to look for work in the sector.

In Spain, the Costa da Morte **FLAG takes gender into account throughout its strategy**. This includes gender-sensitive FLAG management and paying special attention to women in its operational reality. Moreover, meetings of the board are called at a time suitable for women with families, and particularly women aged 25-45 are consulted to ensure that they can participate in board meetings. Moreover, if the FLAG

¹³⁰ 2nd AKTEA Conference, Analong April 2007.

¹³¹ AKTEA by laws, www.fishwomen.org

¹³² <https://www.mapama.gob.es/es/pesca/temas/red-mujeres/>

¹³³ <http://www.anmupesca.org/>

is invited to an event, the board strives for gender balance to ensure visibility of women through representative activities¹³⁴.

Example: Creating opportunities for women to obtain key roles

The modernisation of the **fish market of Ajaccio**, Corsica led the local fishing community to come up with a new way of selling their fish. The Corsican Regional Fisheries Committee, together with the local fisher's organisation (prud'homie), submitted a project to the local and regional authorities suggesting that the **selling places were run by fishers and their families**. As soon as the project was accepted at local level, it received the financial support of EMFF. 20 fish selling pitches were created and were allocated to fishers' families interested in practicing direct sale. Each fish selling pitch was shared by different fishers' family members (more than 20 fishers were interested in practicing direct sale at that time). Women (wives, partners, mothers or daughters of fishers) occupied this new job and operated the sale pitches. The freshness and price of the fish sold by these women the key selling point which ensured customers' loyalty. Direct sale of fish or shellfish became a strategy for many small-scale fishers in the French Mediterranean coast, as well as in other coastal areas. Direct sale of fish can be organised in fish markets (like in Corsica) or near the boat (like in Saint Cyprian, Port La Nouvelle or Port Vendres).

Example: Professionalisation of women-led fishing activities

In Galicia (Spain), the establishment of local organisations for female shellfish gatherers (*mariscadoras*) enabled **women to professionalise their activities and regulate the market**. With support from regional fisheries authorities, they successfully established the word *mariscadora* (female form of the Spanish word for shellfish gatherer) thereby gaining dignity, confidence, and public status.¹³⁵ These local organisations were integrated with male-dominated fishermen's organisations (*cofradías*), the joining of which **allowed women to gain access to decision-making bodies and to the national social security system**. The success of the *mariscadoras* became an example to be followed by all regional women practising various fisheries related activities, for example women mending nets (*rederas*) or women transporting and selling fish.

Good practice 3: Creating an enabling environment for gender equality and supporting the implementation of gender equality objectives in the sector

Legislation (e.g. on working conditions, remuneration, legal status), affirmative actions and public policies can help to create and ensure an enabling environment for gender equality in the fisheries sector. This includes initiatives that:

- improve legal status and social protection of women;
- enhance public policy coherence and/or institutional coordination within the fisheries sector;
- use gendered selection criteria of projects for public funding;
- promote equal opportunities in training and education;
- raise awareness on / promote women's participation in the sector.

¹³⁴ FARNET (2018), Op. Cit.

¹³⁵ Frangoudes K., Marugán & Pascual, From open access to co-governance and conservation: the case of women shellfish collectors in Galician (Spain), Marine Policy 32 (2008), 223-232.

Example: Improving legal recognition and social protection of women

In France, the Fisheries Act of 1997 granted spouses of fishers and shellfish farmers the **status of collaborative spouse** (under the EU regulation 86/613/EEC¹³⁶). Between 1998 and 2007¹³⁷, the status was obtained on a voluntary basis; however, few women opted for it. Since July 2007, based on Act 2005-882, all spouses or partners of fishers and shellfish farmers engaged in the family fishing enterprise are legally obliged to choose one of the following statuses: employee, associate, collaborative spouse.

The collaborative spouse status is granted by the fisheries' social security system called ENIM (Établissement National des Invalides de la Marine). It allows the spouses or partners who conduct a regular activity within the family enterprise without a remuneration to access maternity benefits and retirement pension. The application to obtain the status is made by the person in charge of the fishing enterprise, usually the man. Other benefits of the collaborative spouse status include: access to the same training funds as fishermen, participation in decision-making processes of fishermen's organisations and acting on behalf of the enterprise/carrying out managerial and administrative tasks.

The fact that the husband (as business owner) has the right to submit the application to obtain the status was contested for many years by women's associations, but the fisheries social security system has still not addressed this demand. Though incomplete, the collaborative spouse status has brought visibility to women in French fisheries. Indeed, women in other EU Member States were found to be keen to obtain this kind of recognition.

Example: Demonstrated political will to improve gender equality in the sector

Political will to improve gender equality in the sector is exemplified by the Spanish government's **Plan for the Equality of Gender in the Fisheries and Aquaculture Sector (2015-2020)**. Policy developments have also led to the implementation of a social protection scheme for self-employed sea workers. In some provinces in Spain, specific roles performed by women in fisheries have been recognised (*neskatillas*, *empacadoras*, *mariscadoras*), which could potentially be recognised at national level in the future.

Example: Training opportunities to promote women's presence in the sector

The **Social Cooperative Enterprise of Kalymnos "Panagia Ipapandi"** in Greece is an example of social capital formation (women's organisation) *cum* diversification. The cooperative gathers the wives of the fishermen of Kalymnos Island. Women are shareholders who are involved in the value chain, including salting and smoking and use fish. Women were trained by Italian experts to use fish of low market value (caught by local fishermen) to produce gourmet products, providing an opportunity for entrepreneurship and alternative ways of working in fisheries. This diversification initiative illustrates a way to revive the appeal of the sector and give women a stronger hold in it.

¹³⁶ Directive 86/613/ECC, Article 6, on the application of the principle of equal treatment between men and women engaged in an activity, including agriculture, in a self-employed capacity and on the protection of self-employed women during pregnancy and motherhood.

¹³⁷ Act n° 2005-882 of 2nd August 2005 in favour of small and middle-sized enterprises, and its implementing decree n° 2006-966 of 1st August 2006 pertaining to the status of Collaborative Spouse.

5. CONCLUSIONS

Based on research findings presented in chapter 4, this section outlines the main conclusions of this study, which inform the recommendations listed in the final chapter.

Women's invisibility

The invisibility of women in fisheries is a persistent issue in both the Mediterranean and Black Sea basins. It is directly related to the lack of systematic collection of sex-disaggregated data on participation and positions occupied by men and women in the sub-sectors, especially in catching but also in aquaculture and processing. The pronounced gaps in sex-disaggregated data relate to various socio-economic variables such as employment, age, education levels, types of jobs performed, pay scales, etc.

Women's invisibility is also a consequence of gaps in Member States' legal framework concerning women's role in the sector, especially regarding the recognition of the status of assisting spouses / life partners (see below). Moreover, even in Member States where such status is applied, there is no data on the number, profile and occupations of women that hold it.

Women's invisibility in the sector is further influenced by the scale and dynamism of sub-sectors. Smaller-scale, family-run businesses rely more heavily on women's "invisible" (i.e. unaccounted) support, while larger enterprises and more commercially-oriented operations offer women formal employment contracts. Moreover, the decline in small-scale fisheries in some Member States has led to a decline in women's informal employment opportunities, and thus, a decline in their invisibility by pushing women (and men) in the formal labour market outside of the sector. The restructuring of the sector from fleets run by individuals and cooperatives into enterprises is also changing the employment landscape in catching fisheries, providing more opportunities for women's formal participation and recognition of their roles.

The evidence collected in this study also shows that this phenomenon is more extensive in the catching and aquaculture sub-sectors, as well as in pesca-tourism and post-harvest activities (including processing and sale of fish) carried out as part of family or small-scale businesses.

Presence and role of women in sub-sectors and related activities

The statistical evidence collected in this study shows that the total number of women who work in catching, aquaculture and processing in the Mediterranean and Black Sea can be estimated to be over 14,000. However, this combined figure is based on data from diverse sources (and years) and therefore it is subject to a large margin of error. The estimate should be treated cautiously.

Catching

Statistical data and qualitative interviews confirmed that catching is heavily dominated by men. The proportion of women formally employed in this sub-sector is minimal both in small and large-scale fisheries of all Member States studied (from 1% to 6% of the workforce, depending on the Member State).

Available data on the age and level of education of female workers in this sub-sector is extremely limited. Where age data is available, they highlight disparate trends (e.g. older population of female workers in Greece and a younger one in Malta). Data on

education levels point towards a generally low level of education everywhere (primary to secondary level).

Across all Member States studied, catching was identified as the sub-sector with the highest number of (unreported) women who work in assisting roles without a specific legal status or remuneration. This is particularly the case in small-scale, family-run businesses. These are fishers' wives, daughters, mothers, who assist with operations of the family business on a full-time or ad-hoc basis. In some Member States, women are often employed in other sectors on a full-time or part-time basis and still support their family's fishing business, for example, during tourism season.

Women in informal assisting roles ("invisible" women) are predominantly found at land and in small-scale businesses. They perform administrative tasks such as permits, licences, registrations, contracts, etc., as well as accounting and marketing activities. In Greece, stakeholders estimated that there were over 90 "invisible" female workers in the catching sub-sector, and 550 to 650 in Malta. In medium to large-scale fisheries women in these roles tend to be formally employed. In some Member States, women are also involved in cleaning and maintenance of certain fishing equipment (such as netting and mending).

There are individual examples of women who work on boats in Cyprus, France, Greece, Italy, Malta, Romania and Spain (where they are ship-captains, skippers, crew, cleaners and cooks). Although these examples highlight some progress in terms of women's access to the catching sub-sector, they are far from constituting the rule. These women are more frequently found in small rather than large-scale fisheries. As vessel size increases (from mid-range onwards), women return to the land and perform the managerial and administrative duties mentioned before.

Aquaculture

Evidence collected in this study showed that aquaculture is also a sub-sector dominated by men, with women representing 17% to 26% of the workforce, depending on the Member State. But the study also showed that this sub-sector is increasingly providing more opportunities for women. Women's formal employment is more widespread than in the catching sub-sector and aquaculture activities tend to be more entrepreneurial and commercial than catching (except for shellfish farming which is more traditional). In Italy, for example, there was a reported increase of women formally employed in this sub-sector from 2008 to 2014 due to several factors, including the improvement of statistics which now register female aquaculture workers, but also related to generational change (particularly in the trout breeding sector, where producers' daughters have become more engaged in the activity), increased presence of women in clam breeding and selection/marketing of products, and the vertical integration of aquaculture farms where the presence of women was high.

Data on the age of women in aquaculture are scarce and point to disparate trends (e.g. in Greece and Romania, nearly half of women who work in this sub-sector is relatively young (under the age of 40) and in Cyprus most are over 45 years old).

As in the catching sub-sector, there is an unreported number of "invisible" female workers in this sub-sector, particularly in small-scale freshwater aquaculture and shellfish farming. In Italy, stakeholders estimated that there were 500 to 800 women who played assisting roles without a specific legal status or remuneration. In Malta, it was estimated to be 50 women. These women are usually the farmers' wives, daughters, mothers who assist in the family operations (either full-time or part-time) performing

administrative, accounting and marketing tasks. In finfish farming though, which is capital-intensive and high-tech, women are highly-skilled and formally employed.

The sourcing and management of inputs (e.g. broodstock, fingerlings or spat, aquafeeds etc.) and quality controls are being increasingly performed by women too, both formally and informally. These ancillary occupations are essential for the success of enterprises and constitute an important sub-sector and source of employment for women. However, women's recognition as formal employees tends to depend on the size and nature of the enterprise, as well as the legal status given to assisting spouses / life partners in each Member State.

In aquaculture, women tend to have higher levels of education than in other sectors (tertiary education); therefore, they are increasingly found in managerial roles (quality control, research activities, and/or work in nurseries and hatcheries). However, despite a handful of women having blazed a trail on their own volition and now at the head of large aquaculture companies, they are still few and scattered across the Member States studied.

Processing

Statistics and qualitative evidence showed that in the processing sub-sector, women either constitute the majority of workers or are in the same numbers as men. Only in two Member States, the reported proportion of female workers in this sub-sector was below 40%.

As in catching and aquaculture, sex-disaggregated data workers' age is very scarce and, where available, points to disparate trends (e.g. data from Greece showed that nearly a third of female employees are aged 25-39, whereas in Spain the average age is 45-49).

Comparatively to the other sub-sectors, processing is where "invisible" female workers are found in fewest numbers, possibly because the processing industry is bound by employment laws on decent work conditions, equal opportunities and non-discrimination in pay. However, in smaller businesses, it is likely that seasonal demand of fish products is covered by involving women in the family who work without a specific legal status or remuneration.

In processing, where women's education levels tend to be lower, they tend to perform unskilled tasks in production, particularly in labelling, packaging, filleting and canning – including quality control. In some Member States, women with higher levels of education work in administration, accounting, marketing, innovation and experimentation. However, there is a glass ceiling in the progression of women to leadership positions as direction posts in processing companies are mostly occupied by men.

Fisheries-related activities

Given a generalised lack of data, it was difficult to identify trends with regards to the presence of women in fisheries-related activities. Women were considered to play a vital role in the sale of fish, especially in small-scale fisheries. Fishers' wives (and other female relatives of fishermen) are the main actors in this segment (from wholesale to retail). They run fish shops or stands in local markets. In small-scale fisheries, there is also an increasing number of fishers' wives / female relatives who are leading initiatives on pesca-tourism and gastronomic activities as part of diversification.

Female workers are also largely present in fisheries policy-making and research. The latter was generally found to have provided women with increased opportunities for participation in recent years. The development of aquaculture research, in particular, has spurred openings in specialised fields (e.g. veterinarians, food processing experts

and health and safety experts, hatchery management and feed formulation experts) that have been increasingly taken up by women.

Remuneration of women

In Member States that collect sex-disaggregated data on formal female workers in the sector, women were predominantly found in lower-level jobs with less pay than men. This pointed towards occupational segregation and, consequently, a gender pay gap in the sector. This is also confirmed by qualitative evidence in Member States that do not collect sex-disaggregated data. Moreover, more women than men are engaged in formal or *de-facto* part-time work (they “lend a hand” on an ad-hoc basis, often working formally outside of the sector), resulting in lower wages.

Legal status of women

Many inconsistencies were found in the transposition of Directive 2010/41/EU in Member States within both sea basins and between the different fisheries sub-sectors. Findings show that transposition of this Directive into national laws does not necessarily lead to the enforcement of the assisting spouse / life partner status in the sub-sectors. Moreover, in Member States where the status is recognised (France, Greece, Malta, Spain), assisting spouses / life partners are not captured by official statistics, except in the case of Greece, where some estimations exist. The gaps in the legal framework add to women’s invisibility in the sector and, in Member States where the status is not recognised (i.e. the Directive was not fully enforced) at all, it prevents them from accessing social protection.

The study also found that small-scale, family-run enterprises often find it difficult to comply with tight employment regulations and costs associated with formally employing a person and/or registering an assisting spouse / life partner. This constrains the participation of women in smaller-scale operations, especially in those where certain flexibility is required to match the seasonality of fishing, tourism, and farming cycles.

Challenges and opportunities for change

Gender stereotypes (e.g. that physically demanding activities such as fishing are impossible for women to conduct, that women should work near their homes to look after their families, etc.) are found in all ten Member States, but appear stronger in the Black Sea region. These perceptions exist mostly in the catching sub-sector, and to a lesser extent in aquaculture and processing.

Although there is a strong representation of women in fisheries policy, women are rarely found in professional organisations, trade unions and workers’ councils (with a few exceptions), and there is limited mobilisation of women on gender-related issues in this context. Only three out of the ten Member States surveyed in this study have representative organisations specifically dedicated to women in the sector. This has led to an environment in which the promotion of gender equality in fisheries is progressing at a slow pace.

Findings from this study coincide with results of a survey of FLAGs conducted by FARNET, which show that a strong female presence in FLAGs, including in leadership positions, corresponds with a higher number of FLAG projects in support of women. Moreover, female policy leadership in Spain over the past ten years could be linked to stronger political will to progress women’s issues in the sector.

Evidence collected from Member States suggested that advances in gender equality in the sector are more likely to originate in the aquaculture sub-sector, which is fast evolving and relatively less laden with gender stereotypes, offering new employment opportunities for women. Aquaculture activities tend to be more entrepreneurial and

commercial than catching given that in many cases they are part of the diversification of coastal economies. Despite the barriers that women still face in this sub-sector, it offers potential for the formal employment of women at all levels.

Addressing the invisibility and lack of recognition of women in the Mediterranean and Black Sea fisheries sector requires taking a holistic approach to address their multiple sources simultaneously. Recommendations to this effect are provide in the next chapter.

6. RECOMMENDATIONS

Improving the legal and policy framework at all levels is fundamental for (i) enhancing the visibility and recognition of women's role in fisheries; (ii) helping their access to the sectors' labour market; and (iii) increasing their social inclusion. In this sense, the role that EU regulations and policies play in mainstreaming gender equality in the Mediterranean and Black Sea is of outmost importance as it is likely that the focus on gender would receive even less attention without such frameworks.

In relation to **EU legal acts and regulations**, we recommend that:

- (1) **As Guardian of the Treaties, the European Commission should ensure the enforcement of Directive 2010/41/EU in the Mediterranean and Black Sea fisheries sectors, and in particular of the assisting spouse / life partner status.** The uneven application of the Directive has left many women unprotected, despite their key contribution to the fisheries enterprises. Ensuring its effective application implies guaranteeing coherence in the rights, entitlements and benefits that the assisting spouse / life partner status provides to women working fisheries, aquaculture and related sectors. It is also necessary to revise the scope of the status, which currently applies to spouses and life partners only. This leaves out other women who assist in the business (e.g. daughters, mothers, etc). In this sense, the Spanish status of collaborative family seems to be more appropriate to ensuring full coverage of assisting family members. An important change would be also to allow assisting spouses / life partners to submit applications for the status themselves and not through their husbands (as business owners). Finally, the Commission can also consider undertaking information and awareness raising activities on the status and the social security benefits that come with it.
- (2) **The European Commission should continue the efforts on the application of the DC MAP and support Member States in providing sex-disaggregated statistics for the fisheries and aquaculture sectors.** This implies ensuring that all Member States *continue* providing sex-disaggregated statistics on aquaculture and processing, and that from 2018 all Member States *start* providing this for the catching sub-sector.
- (3) **The European Commission could consider also an amendment to the Data Collection Framework to ensure that the collection of sex-disaggregated data on the fisheries sub-sectors includes socio-economic variables** such as age, education level, employment legal status (employed, self-employed), types of jobs performed, pay scales, etc. Data on number, gender, age, education, etc. of registered assisting spouses could also be provided by Member States.

In relation to **EU public policies**, we recommend that:

- (4) **Gender equality is a cross-cutting objective of the EU fisheries financial instrument.** Gender perspectives and the goal to achieve gender equality should be mainstreamed to all activities throughout the different phases of the programme life cycle. Key actions to be undertaken in this respect are:
 - a. **Revising the priorities of the EMFF 2021-2027¹³⁸ to mainstream gender equality and make them gender sensitive.** In particular, Priority 3 (Enabling the growth of a sustainable blue economy and fostering prosperous coastal communities) should cover specific measure(s) and

¹³⁸ Proposal for a Regulation of the European Parliament and of the Council on the European Maritime and Fisheries Fund and repealing Regulation (EU) No 508/2014 of the European Parliament and of the Council, SEC(2018) 276 final, SWD(2018) 295 final.

action(s) aimed at improving gender equality in the coastal communities. In this sense, community-led local development (CLLD) support should be thought through a gender lens and aimed at increasing the number of CLLD initiatives led by women.

- b. **Promoting the organisation of women into fisheries and aquaculture-related organisations** by, for example, setting aside a portion of the EMFF funds to financially support women's organisations at all levels (for them to be more structured, better organised, to be able to mutualise their efforts, better represent women's interests, travel and attend high-level meetings etc.). The weaknesses of women's representation in policy-making and the lack of resources, including the insufficient professionalisation of the representatives of women's organisations generally inhibit the promotion of gender issues.
- c. **Sponsoring the participation of women and organisations promoting gender equality in fisheries and aquaculture consultative and decision-making bodies by, for example, introducing gender quotas.** This could be the case in FLAGs boards and Advisory Councils. According to FARNET¹³⁹, there is a direct correlation between the proportion of women at FLAG boards and the number of FLAG projects specifically targeted towards supporting women in fisheries and aquaculture.
- d. **Enabling women who are not owners of a fisheries business but are actively involved in it (e.g. assisting spouses / life partners) to apply for funding under EMFF.** This should help to strengthen women's entrepreneurship and channel family support to women involved in coastal family-businesses and diversified activities such as pesca-tourism and gastronomy.
- e. **Raising women's awareness of the available support and their participation in EMFF-supported projects.** Information and publicity of activities supported by the EMFF, including education and training opportunities, could help to address obstacles to women's participation such as lack of awareness and information. Communication activities targeting fishers' wives and other female family-relatives (independently of if they are legally registered as assisting spouses, life partners or collaborative family) are fundamental.
- f. **Facilitating assisting spouses / life partners' access to vocational fisheries and aquaculture training and learning opportunities** to provide them with more access to specialised and managerial jobs. This could be achieved through scholarships and funding targeting women, facilitating childcare support, setting flexible training opportunities such as online and distance learning. The training activities should provide women with diplomas or certificates (nationally and EU recognised) to promote the professionalisation of their jobs. This would also allow women to assert their abilities in case of divorce, separation from the work, etc.
- g. **Measuring and monitoring women's access and take up of the EU fisheries fund.** For this, it is necessary to include gender indicators for the evaluation of the EU fisheries fund (e.g. number of women beneficiaries from fisheries measures). Comprehensive sets of relevant (meaningful and useful) output and outcome gender-related indicators should thus be identified to monitor progress and to measure the impacts of EU support in relation to gender equality. To ensure consistency these indicators should be harmonised

¹³⁹ FARNET (2018), Op. Cit.

across Member States.

- h. **Ensuring that FLAGs are a means for enhancing gender equality in fisheries at local level.** This could be achieved by reviewing the conformation of FLAGs boards and guaranteeing that there is gender parity (i.e. 50% of members are women). Moreover, in the selection or validation of FLAGs strategies, it should be ensured that support of women in fisheries and aquaculture is a priority. Assessing the main achievements of FLAGs in relation to the support provided to women or for women is also key. This would provide visibility (and therefore improve legitimacy and buy-in) of FLAGs actions in relation to gender equality. In this sense, the survey of FLAGs support to women in fisheries and aquaculture carried out by FARNET in 2018 constitutes a significant first step in that direction.
- (5) **Member States' design, implementation, monitoring and evaluation of EMFF operational programmes include a gender dimension.** This should help to increase awareness of the issue and a progressive cultural change. In this sense, it is important that Member States include a gender dimension in some (if not all) of the following processes:
- a. **selection of projects for funding**, using positive action for the selection of projects proposed by women owners and/or organisations that have, for example, a gender-equality plan in place. These criteria should determine selection and not become a factor only when requests for funding exceed the allocation;
 - b. **assessment of the aims of projects implemented**, ensuring that a portion of the total number of projects funded support women in fisheries and aquaculture;
 - c. **setting of targets for funding allocation** (e.g. number of projects co-financed by the EMFF that are owned by women or support women, number of beneficiaries who are women, etc.);
 - d. **setting of output and result indicators** that allow to monitor and evaluate progress in improving gender equality in the sector and to assess the adequacy of Member States' strategies. This includes providing data on indicators broken-down by gender (e.g. number of jobs created per gender, number of operations and EMFF expenditure per gender, etc.). In addition, both quantitative and qualitative impact indicators should be considered.
 - e. **collection of beneficiaries' profiling information**, by recording the gender of projects' leaders and/or individual responsible for the application for funding.
- (6) **The European Commission supports the adoption of gender-sensitive policies at all levels that give due consideration to the specificities of the different sub-sectors of the fisheries and aquaculture sectors.** This includes policies to reduce pay gaps, promote work-life balance, return of women to work after childbirth, parental leave, childcare, and dedicated financial support initiatives. Small-scale fisheries, large-scale fisheries, freshwater fish farming, marine finfish farming, shore-based shellfish, each one carries a different weight and potential for women's participation, visibility and recognition, and each merit tailored interventions to promote gender equality. Of particular relevance to small-scale fisheries are FAO's 2015 "Voluntary Guidelines for Securing Sustainable

Small-Scale Fisheries in the Context of Food Security and Poverty Eradication”¹⁴⁰, and related handbook on gender-equitable small-scale fisheries governance and development¹⁴¹.

- (7) **The European Commission acknowledges and takes the lead on initiatives that are being promoted in the Mediterranean and Black Sea regarding women and/or the future of the fisheries and aquaculture sectors** to ensure that women’s needs in the sector are addressed. The Commission has taken the lead already on the MedFish4Ever Ministerial Declaration and Regional Plan of Action for Small-Scale Fisheries in the Mediterranean and the Black Sea (RPOA-SSF). But there are other relevant initiatives that could be considered, including the Regional Dialogue on Women Empowerment within the Union for the Mediterranean and the Union for the Mediterranean (UfM) Conferences. The Commission can seek to include the topic in the agendas of these initiatives.

In relation to **EU information and communication policies and campaigns** in the fisheries sector, we recommend that:

- (8) **Information and communication actions portray a modern, younger and ‘female’ image of the sector to combat prejudices and stereotypes.** In particular:
- a. advertise and promote fishery-related jobs and opportunities for young women (and men, where underrepresented)
 - b. showcase technological developments that ease physically challenging fishing tasks and occupations for both men and women
 - c. promote women role models that challenge cultural norms and social perceptions in the sector (e.g. professional fisherwomen, women who own boats, fishers’ wives who are members of the crew, women who manage a processing company or are part of the board of directors of an aquaculture company, etc.). These women could also mentor / train other women in the sector.
- (9) **Support and collaborate with international organisations and networks such as AKTEA and Women in Seafood Industry (WSI) to raise awareness in the Mediterranean and the Black Sea on the role played by women in the sector.** These organisations gather and raise the voice of fishers’ wives and women in the industry and are platforms for dialogue among the [male and female] stakeholders of the sector and for the exchange of good practices and networking of women’s organisations. Increased visibility of these organisations could also give raise to other national and regional women’s organisations in the Mediterranean and the Black Sea.

¹⁴⁰ <http://www.fao.org/3/a-i4356en.pdf>

¹⁴¹ FAO (2017), Towards gender-equitable small-scale fisheries governance and development - A handbook. In support of the implementation of the Voluntary Guidelines for Securing Sustainable Small-Scale Fisheries in the Context of Food Security and Poverty Eradication, by Nilanjana Biswas. Rome, Italy. <http://www.fao.org/3/a-i7419e.pdf>

ANNEX 1: METHODOLOGY

The study and analysis of the presence and role of women in fisheries in the Mediterranean and the Black Sea had one initial Structuring Phase and four Work Packages (WP), as defined in the Technical Specifications. During the **Structuring Phase**, the methodology and work plan for the study was validated with Steering Group. **WP 1** consisted mainly of collection of existing statistics and legislation by ten country experts using desk research and direct contact with key stakeholders to access available data. **WP 2** involved gathering of additional quantitative and qualitative evidence on the subject matter, focusing on specific sub-sectors and fisheries-related activities, and using in-depth interviews and focus groups. Once the data collection in all Member states was completed, a socio-economic analysis of the role and presence of women in the Mediterranean and Black Sea fisheries was conducted in **WP 3**. At this stage, trends and best practices were identified and the study team conducted a SWOT analysis of each Member State. During **WP 4**, based on the findings of the above, the evaluators drew conclusions, made recommendations to enhance the presence and role of women in fisheries in the Mediterranean and the Black Sea, and produced the final deliverable of the study.

Structuring Phase

The structuring phase was dedicated to revising the rationale and purpose of the study and developing the main research questions. The study team also drafted a data collection template to compile the quantitative and qualitative evidence from WP 1 and 2.

During the structuring phase, as well as over the analysis phase (WP3), we conducted a set of interviews with stakeholders who provided their general views on the role of women in fisheries and how this can be enhanced in the future. These interviews provided context to the drafting of conclusions and recommendations of the study.

Name	Position / Organisation
Katia FRANGOUEDES & Marie-Christine MONTFORT	Women in Fisheries Experts
Marja BEKENDAM	Chairperson, AKTEA
Sandra AMÉZAGA	Asociación De Mulleres Do Mar De Arousa
Christos MARAVELIAS	DG MARE, Policy officer
Yesmina MASCARELL	Researcher, IGIC – Universidad Politecnica de Valencia
Carmen SERRANO SOLER	Asociación of Tyrius Valencia
Marta CARRERAS	Marine Scientist, Oceana

WP 1: Compilation of existing datasets/statistics

The main objective of WP 1 was to obtain existing information and statistics on the presence and role of women in the fisheries sector in all Mediterranean and Black Sea coastal EU Member States. For this, the evaluators engaged ten country experts who searched for and collected the data using the data collection template that the study team provided.

Country experts searched for and compiled any available data on the topics/questions specified in the data collection template. They also provided their views in terms of the quality of existing statistics and the challenges foreseen in collecting additional evidence. In addition to the data collection template, country experts provided the study team with initial lists of stakeholders to interview during WP 2.

There were no major challenges encountered during this stage, except in the case of Spain where existing fisheries data were not disaggregated by coast and therefore covered both the Atlantic and Mediterranean basins. The country expert in Spain made additional efforts to access disaggregated data by contacting relevant public authorities and relying on her network of contacts. By the end of WP 2, she could obtain data for the Mediterranean coast, which she integrated to the country report.

By looking at the data sent by experts, the study team identified the main data gaps in each Member State. The data collected in WP1 were very variable, especially in terms of disaggregation by demographics, sex and sub-sectors. The main data gaps are presented on a country-by-country basis in Annex 2.

WP 2: Collection of additional qualitative and quantitative evidence

The objective of WP 2 was to collect additional information, particularly qualitative data on various aspects of the presence and role of women in fisheries. As requested in the study's Technical Specifications, the focus was on obtaining data for the different fisheries sub-sectors (including catching, processing, and aquaculture) and related activities and professions (such as science, administration, quality control, trade and marketing chains, training and education).

The evidence was collected mainly through primary research in the ten Member States, comprising of in-depth interviews with institutional stakeholders and women playing an active role in fisheries, as well as focus groups in Greece, Romania and Spain.

Institutional stakeholders engaged in interviews included:

- Public bodies in charge of fisheries management from social, economic and/or environmental perspective (e.g. ministries/directorates for fisheries);
- National social security bodies in charge of social aspects related to fisheries activities.
- Representative organisations: organisations representing workers and professionals involved in fisheries sub-sectors (e.g. fishers' organisations);
- Organisations or professionals involved in fisheries-related activities (e.g. port authorities, wholesales, auctions, etc.);
- Women associations and networks (where they existed) e.g. Penelope Association in Italy which is a member of AKTEA;
- Universities and/or research institutes involved in coastal and marine studies and research;
- Private companies involved in aquaculture or in seafood processing; and
- Local organisations (e.g. FLAGS).

Institutional stakeholders supported country experts in identifying women that could be interviewed and setting-up phone or face-to-face interviews with them. Between two and seven women were interviewed in Bulgaria, Croatia, Cyprus, France, Italy, Malta,

and Slovenia (focus group with women took place in the rest of the Member States). In most cases, the women approached were directly involved in fisheries sub-sectors and related activities (e.g. were fisherwomen or fish farmers, worked in processing companies, research institutions or FLAGS etc.) and/or in representative organisations active in these sectors (e.g. in women associations, fishermen organisations, etc.).

Altogether, 113 interviews with institutional stakeholders and women otherwise engaged in the sector were conducted in all ten Member States, amounting to 7 to 19 interviews per country. 59 interviews were conducted face-to-face and 51 were on the phone. Three stakeholders provided information via email. The Table below presents a summary of the interviews carried out in each Member States.

Table: Interviews conducted in all ten Member States

Member State	Nr of interviews	F2F	Phone	Written feedback (via email)	Institutional stakeholders	Women with an active role in fisheries sub-sectors & related activities
Croatia	9	5	4	-	7	2
Cyprus	10	-	9	1	8	2
France	17	6	11	-	12	5
Greece	13	10	3	-	13	N/A (focus group)
Italy	19	9	9	1	12	7
Malta	11	10	1	-	7	4
Slovenia	8	5	3	-	5	3
Spain	7	2	5	-	7	N/A (focus group)
Bulgaria	9	8	-	1	6	3
Romania	10	4	6	-	10	N/A (focus group)
TOTAL	113	59	51	3	87	26

The interviewees were approached by e-mail and phone calls. In most cases, they responded positively to our request. However, some stakeholders in a few countries (e.g. the national fishing co-operative in Malta, the Regional Committee of Maritime Fisheries and Aquaculture of PACA in France, the National Association of Fisheries Cooperatives in Italy) were not available to participate in the fieldwork given its timeframe. A few stakeholders were reluctant to participate in the study because the subject matter was not a priority or because they did not have relevant evidence to provide (e.g. several seafood processing companies in France, ISPRA Ambiente research institute in Rome, the Fisheries Organisation of Escala in Spain).

Focus groups allowed country experts to examine women's specific interests, needs and aspirations, as well as the barriers and challenges they faced in their work in the fisheries sector. The focus groups complemented the findings collected through the interviews with additional evidence generated through the interaction and discussion among women.

The selection of Member States for the focus groups (Greece, Spain and Romania) was based on geographical representativeness, the sector's size and the importance of fisheries in local economies. Additionally, the study team considered the willingness of

local stakeholders to help in the recruitment of women for the group discussions or on the ability of country experts to recruit them themselves.

The following focus groups were organised:

- **Greece:** organised the focus group on 31 May 2018 in Kavala (one of the major fishing areas in the North of Greece). The Regional Division of Fisheries in Kavala supported the country expert to recruit the focus group participants. Seven women with different profiles participated in the discussion. Two were fishermen's wife and mother, one was a fisherwoman, two were running small shellfish farms together with their husbands, one worked in Kavala's fish auction and another one represented the fisheries regional administration. Women were between 40 and 49 years old.
- **Spain:** the focus group was held on 12 June 2018 in Gandía (Valencia). Women active in fisheries were individually approached and invited to participate in the group discussion by the country expert. Five women participated: three were the presidents and vice-president of local associations (women and shipowners' associations), one was a biologist who provided technical support to fisheries and aquaculture associations, and another one was a representative of a local FLAG. Two additional women from Andalucía could not attend the focus group, but to give voice to their views, the expert organised phone interviews with them and integrated their views to the focus group's findings.
- **Romania:** held the focus group on 18 May 2018 in Constanta (in the South of Romania, central location). 15 women participated in the group discussion (7 of these participated via Skype). These women were from public (national or local) bodies, local organisations (e.g. FLAG) and national and regional research institutes. Women were between 29 and 62 years old.

Italy was selected for holding a focus group too. However, due to logistical constraints (women approached were all in various locations across the Italian coast), it was not possible for women to attend the group discussion. Therefore, the expert organised individual interviews with them (4 face-to-face and 3 on the phone). Seven women with different profiles were interviewed. These included one professional fisherwoman, three employees of fisheries cooperatives, one employee of a producers' organisation, one co-owner of a fish company in charge of the import and export of fish, and one researcher who worked on-board.

By the end of WP 2, country experts delivered country reports integrating evidence and findings from WP 1 and 2.

WP 3: Cross-country analysis of evidence obtained in WP1 and 2

The purpose of WP 3 was to bring together the evidence and findings from the preceding WPs and conduct a socio-economic analysis of the presence and role of women in the Mediterranean and Black Sea fisheries. Looking to the evidence in perspective, the study team also aimed to identify specific trends. Finally, SWOT analyses of gender equality were developed for all ten Member States. These are presented in Annex 4.

The different analyses that were conducted during WP 3 considered the wide range of issues tackled in WP 1 and WP 2, focusing on those where the evidence at hand (or lack thereof) allowed the evaluators to draw meaningful conclusions. The analytical tasks depended on the quality of data available and its level of disaggregation by gender and sub-sector in each of the Member States covered in this study.

Overall, the analysis focused on describing what occurs, how and why. For this, the study team reviewed and mapped the data to different themes, using triangulation (of

types of data, sources, methods and groups of informants) to develop robust evidence-based findings. The study team also checked and validated findings with the country experts. Importantly, wherever possible comparisons were drawn between Member States and sub-sectors to identify trends and examine causal factors behind.

While working at WP 3, the study team found that the methodology followed to collect the information (both qualitative and quantitative) had proved robust. It was also noted that the participation of (and inputs from) the stakeholders consulted was satisfactory. This also applied to the responses indicating a lack of interest in participating in the study, which was treated as an indicator of the attention given to the subject of gender equality in the fisheries sector. Moreover, given that the analysis was essentially of a qualitative nature, we did not encounter any further limitations or challenges related to the analytical tasks.

Moreover, as part of WP 3, the study team finalised the identification of good practices. This work was conducted using the evidence from the previous WPs and relying on Women in Fisheries Experts (Katia Frangoudes and Cécile Brugère) knowledge of where the gender approach is more advanced in the EU. The evaluators analysed how these good practices can generate knowledge and raise awareness on the role of women in fisheries.

WP 4: Development of the study's over-arching conclusions and recommendations

WP 4 was dedicated to drafting the main conclusions of the study and developing a set of recommendations to enhance women's presence and role in the Mediterranean and Black Sea fisheries. The study team synthesised the results of the analytical tasks carried out in WP 3 into a set of structured conclusions, with a view to improving the knowledge of the role and presence of women in the fisheries sector and to supporting DG MARE in assessing policy orientations.

Drawing on the assembled evidence, the study team then formulated recommendations on how to address relevant issues. These took the form of changes in the current legal and policy framework, information and communication actions, among other things. Although the development of conclusions and recommendations for the study involved a judgment, the evaluators based these on valid evidence, and made their judgment criteria and values clear and explicit.

ANNEX 2: ASSESSMENT OF EXISTING DATA AND GAPS IDENTIFIED

The table below provides a summarised assessment of existing data that was collected in all ten Member States through desk research.

Study of the role of women in fisheries in the Mediterranean and the Black Sea

Member State	Sea basin	General assessment of existing data and gaps identified	Key findings of desk research
Croatia	Mediterranean	No data broken-down by sub-sector was available. There were no data either on “invisible” female workers. Job profiles were based on anecdotal evidence collected by the country expert. There was some limited information on high-level jobs in fisheries-related occupations, such as in research and marketing. The expert found no legal provision for the collection of gender-disaggregated data in fisheries.	General decline in marine commercial fishing, although the share of women has increased in aquaculture in the last years. But this is based on data from 2012-2015, depending on the sector. The status of assisting spouse is not recognised in the fisheries sector. No fisheries-related women’s organisations found, and fisheries-related unions did not have data on how many women they represent or work for them. Representation of women in FLAGs administration was 2/7.
Cyprus	Mediterranean	Data collected from the national statistical authority and a national fisheries authority. There was data available for several years (2012-2016), which allowed the identification of some trends. No demographic available for the different sub-sectors, except for boat ownership. Occupational data available for fisheries-related activities and aquaculture, and unquantified – for other sub-sectors. No data available on “invisible” female workers, and no gender-disaggregated data on remuneration, nor data on women’s representation in unions, workers’ councils or employers’ organisations.	Processing and fisheries-related activities sub-sectors are relatively gender-balanced. In aquaculture, women constitute a quarter of the workforce. Women a particularly absent in the catching sub-sector, and, unlike in some countries, in no sector they constituted the majority. Among women, 77% are registered as ‘employees’ and 22% as ‘boat’ or ‘company owners’. In fisheries-related activities, women are predominantly involved in sales. The EMFF OP for Cyprus recognises that conditions at sea limit women’s employment in fisheries, especially catching. Interviewees affirmed that onshore jobs are more gender-equal. There are no women’s organisations in the country, but women are represented in unions and fisheries-related public bodies. Representation in FLAGs administrations was 1/8.
France	Mediterranean	Data available is from a few years ago (2014-2015), but of good quality. Sub-sector data is broken-down into specific occupations. Demographic data is generally available (gender, age, nationality). However, no data was found on “invisible” female workers.	Catching is the most male-dominated sub-sector, although clams fishing by foot is relatively gender-balanced (43% women). Women represent the majority of workers in the processing sub-sector (56%), and in aquaculture, inland fish farming companies’ managers are 50-50% men and women. Women were also strongly represented (over a third of the workforce) among wholesalers, fishmongers and researchers. Age profiles of female and male fisheries workers are similar, and the share of foreigners among female workers is slightly lower. In shellfish farming, over a half of both men and women are seasonal workers, and women are more likely to work in processing and wholesaling. More women than men work part-time in the

Study of the role of women in fisheries in the Mediterranean and the Black Sea

Member State	Sea basin	General assessment of existing data and gaps identified	Key findings of desk research
			<p>fisheries sector. Where remuneration data were found, gender pay gaps between men and women were registered. The status of assisting spouse is legally recognised. Since 2007, it is mandatory for spouses to choose one of the three statuses available (i.e. spouse partner, employee partner or assisting spouse). These statuses give women access to social benefits and vocational training. There are women's organisations in fisheries and women are also represented in trade unions and fisheries administrations (less so in employers' organisations). In FLAGS administrations, women are a majority (70/108).</p>
Greece	Mediterranean	<p>Old-dated, but detailed sub-sectoral and demographic data is available. There are very detailed age, education and nationality break-downs of data. There is some indication on the extent of "invisible" female work.</p>	<p>Women constitute a relatively large share of fisheries' workforce, with 7.5% women in the catching sub-sector, 26% in aquaculture, 46% in processing and 53% in public bodies. In FLAGS, women are 18/63. There is a stronger presence of non-Greek fisheries workers than in other countries. In aquaculture, female workers hold higher levels of education than men, but in catching, this is the case for men. Gender pay gap is higher in fisheries than in other industries in the country. Women are more likely to work part-time, and 13% women in catching are assisting spouses. But it is also estimated that 90% of women's work in this sub-sector is unpaid. Spouses and life partners are legally recognised. Social security was recently reformed and unified. There are no specialised women's organisations, but women were represented to some extent in unions and employers' organisations.</p>
Italy	Mediterranean	<p>No gender-disaggregated data on the catching sub-sector. Limited demographic data too. On remuneration, only data available on standard or sectoral average wages.</p>	<p>Processing and fisheries-related occupations are relatively gender-balanced, whereas catching and aquaculture are male-dominated. However, the share of women in the latter has more than doubled over the last decade. It is estimated that in the clams' sector, circa 30% of workers are women. In general, in the shellfish segment, circa 25% are women. Nearly all female workers in the shellfish segment are Italian and 90% are self-employed. In the fishing-related activities, women are involved in trade</p>

Study of the role of women in fisheries in the Mediterranean and the Black Sea

Member State	Sea basin	General assessment of existing data and gaps identified	Key findings of desk research
			<p>unions or trade associations that help fishermen with tax, legal and market aspects. Legal protection of assisting spouses is more limited than for housewives. Women's organisations in fisheries have regional coverage and there also cooperatives and producers' organisations with a large presence of women (e.g. the regional producers' organisation in the Tyrrhenian area, a cooperative in Tuscany, and the Goro fish market). Pay is based on a flat-rate in catching, and informal female workers do not have access to social security. In aquaculture, women are generally contracted for low-profile jobs, such as secretaries, administrative employees and workers. Collective agreements are in place in large processing companies, which standardise wages. Outside of those, pay is per-piece, often seasonal and depends on negotiation.</p>
Malta	Mediterranean	<p>Gender-disaggregated data for the different fisheries sub-sectors is available (including, a break-down of data for different occupations) There is an estimate of "invisible" female workers. Data on standard wages are available, but not on gender pay gap.</p>	<p>The fisheries' workforce is less gender-balanced than in other countries, with 5% women in catching and 31% in processing. Women's jobs in catching and processing are related mostly to sales. Only in aquaculture, women are involved in actual production. Male fisheries workers are generally younger than female ones. Women's part-time rate is five times higher than men's, and many workers hold other jobs as well. There are no women's organisations in fisheries, and some stakeholders contacted pointed that there is a lack of interest in developing one. Stakeholders also indicated that since the sector is in decline, it is unlikely that more women will integrate to the sector.</p>
Slovenia	Mediterranean	<p>No gender-disaggregated data available.</p>	<p>The sector was reported to be very small and no data could be collected through desk research. Soča Valley FLAG reported four women working in fisheries out of 17 employees. Posavje FLAG reported 11 employees in fisheries, none of them women. Five out of 12 FLAGs contact persons in Slovenia were women. There are no specific fisheries organisations, and fisheries workers can only be represented in agricultural organisations.</p>

Study of the role of women in fisheries in the Mediterranean and the Black Sea

Member State	Sea basin	General assessment of existing data and gaps identified	Key findings of desk research
Spain	Mediterranean	Data from the Ministry of Agriculture, Food and Environment (MAPAMA), based on official sources are rather detailed, but partly 'guesstimates'. There are no estimates of the number of "invisible" female workers. Sub-sectoral and even more detailed analyses have been carried out between 2012 and 2018, except in the case of processing and fisheries-related activities where there are limited data and analyses available.	Spain follows the pattern of other countries: by far, processing is the sector that engages most women (over 50% women). Aquaculture engages circa 25% women and the catching sub-sector only a marginal share. Few young women are entering the sector though, and there are nearly no immigrants. In sale of fish, the presence of women ranges from 25 to 50% of workers. There is one women's organisation in fisheries (Spanish Network of Women in the Fisheries Sector) and 47 out of 128 FLAGS' contact persons were women. There is legal recognition of certain unpaid ancillary tasks traditionally performed by women. There is also a phenomenon of some women formally registering as ship owners, without performing any duties onboard. Although low-skilled jobs in the processing sub-sector are dominant among women, some women have gained managerial positions. Gender pay gap in fisheries is lower than the Spanish average. Collective agreements contribute to closing gender gaps. There is a special law that regulates social protection for fisheries workers, covering healthcare, welfare, parental and sickness benefits, and retirement. A specific framework is available for self-employed workers. The provisions are comprehensive, including recognition of cohabiting spouses and professions that are traditionally unpaid. Women enjoy high visibility in the sector's political agenda and new networking opportunities are emerging for women.
Bulgaria	Black Sea	Gender-disaggregated data was collected from national authorities, but there were no data on "invisible" female workers. However, stakeholders believe that due to decreasing fishing volume the demand for unpaid assistance has dwindled and is barely existent. National Agency for Fisheries and Aquaculture (NAFA) 2017 data offer age breakdowns, but no data on nationalities, occupations, type of contracts	It is difficult to encourage women's entry into the sector when fisheries experiences general downsizing in Bulgaria. Women hold 1% of fishing licences and the same share of catching jobs. In aquaculture, they constitute a third of the workforce. Women are mostly engaged in processing (70% in the case of <i>rapana</i> and 88% of total processing workforce) and selling of fish, as well as on administration tasks. The status of assisting spouse is mentioned in the law but is unknown whether it is applied in practice. There are unions for female workers and self-employed women.

Study of the role of women in fisheries in the Mediterranean and the Black Sea

Member State	Sea basin	General assessment of existing data and gaps identified	Key findings of desk research
Romania	Black Sea	Gender-disaggregated data is available. There is also data on the age and type of employment of female and male workers, but not on nationality. There is no data remuneration and "invisible" female workers, nor on the proportion of women in administration, unions and other organisations.	Representation of women in FLAGs administrations was 2/15. Workforce in the processing sub-sector is relatively gender-balanced, catching being the most male-dominated one. Full-time work patterns do not differ by gender. Women's work is mostly in administration, maintenance and preparation of products. 20/56 FLAGs contact persons in Romania were women.

ANNEX 3: SUMMARY OF FINDINGS BY MEMBER STATE

In this Annex, we present a summary of key findings for all ten Member States, starting with those in the Mediterranean basin and followed by those in the Black Sea region.

3.1 Croatia¹⁴²

Research methodology

The research conducted in Croatia involved desk research (official statistics, studies, reports from national authorities, etc.) and interviews with 7 institutional stakeholders from an array of institutions including the Directorate of Fisheries of the Ministry of Agriculture, FLAGs, fisheries cooperatives and representatives of freshwater aquaculture and processing. 4 of these interviews were face-to-face and 3 were on the phone. Also, 2 interviews (one face-to-face and one on the phone) were carried out with one woman who was a FLAG manager and one who was the co-owner and manager of a family-business company involved in catching and aquaculture.

In Croatia, the data on women in the fisheries sector and related activities are scarce. Gender disaggregated data on employment in fishing and aquaculture started to be collected in 2014 but are not publicly available yet.

According to qualitative and quantitative evidence collected through interviews and desk research, **women are underrepresented in traditional and physically demanding sectors** such as fishing and aquaculture, however they have a significant presence in the processing sector, research, sale of fish, pesca-tourism, and fishery and aquaculture policy-making. Women generally perform important tasks such as administration, marketing, sales, which are central for businesses development and growth. Women sometimes take care of diversification into other activities too, such as running fish shops, fish food stands or organising pesca-tourism.

Within the processing sub-sector, women are dominant in production and are strongly represented in management and administration, according to an interview with a processing company. In production, women work on cleaning, gutting, cooking, tinning and quality control, while men mostly work in refrigeration, sorting and maintenance. For this interviewee, women tend to be more precise, efficient and attentive to hygiene standards than men. Some of the women in this sub-sector are directors or heads of marketing, technology managers and others.

In aquaculture, the share of women formally employed is higher than in other sub-sectors according to the Croatian Bureau of Statistics. According to interviewees, they work mostly in administration, accounting, sales and care for veterinary and sanitary aspects. Nevertheless, it is expected that they step in whenever it is necessary and perform also other tasks, such as feeding and delivery/logistics. Some women (usually family members of businesses' owners) have started to link the aquaculture to various forms of tourism, including fishing and educational activities. Packaging and other manual activities in small aquaculture businesses are likely to be performed by men as part of their work on ponds, cages and similar.

According to the national Directorate of Fisheries, the involvement of **“invisible” female workers** is estimated to be quite significant, but there are no data available on this. Such women work especially as support of individual fishermen and in family-run SMEs, but it has not been possible to quantify their presence. There is a 'grey' economy

¹⁴² Research in Croatia was conducted by Mojca Hrabar and Jurij Kobal from Oikos.

in several segments (e.g. supplies for the operation, sale of fish) where “invisible” or non-formally employed workers are especially present. This is the case in fishing and aquaculture, particularly in family businesses, where women are often a “reserve” workforce. These women usually perform administrative, accounting and marketing tasks, manage the sales, oversee the trends in the sector and help with cleaning and/or maintenance of equipment. Some of them perform subsistence fishing. They are rarely remunerated and it is perceived that their financial compensation is part of the breadwinner’s provision for all the costs and expenses in the family. Some of the “invisible” female workers have jobs in other sectors, but this is more common among the older generation than among young women as youth unemployment is very high in Croatia.

In the processing sector, “invisible” female workers are present mostly in small family businesses, especially when processing is a diversification activity supplementing fishing and/or aquaculture, or seasonally when the demand is increased and all family members (including wider family) and friends are activated. These women assist mostly with cleaning, sorting and packaging. But “invisible” female workers are far less frequent in processing than in catching or aquaculture.

The presence of “invisible” female workers is likely to be significant in pesca-tourism too, as this is often run as a family business and is very seasonal, which makes it difficult to ensure permanent employment. Often, women involved in this segment are employed in other sectors and help temporarily during the tourist season by performing tasks that can be done from home (over the internet and/or on the phone) or activities like reception and sending off the tourists, which take little time.

Female interviewees reported that they must **work harder and meet higher standards and expectations** than their male counterparts and receive lower salaries than male colleagues in the same positions. However, they also believe that their good organisational and communication skills help them to manage their work and time better.

In the opinion of interviewed women, the main **barriers that women face** in terms of participating in decision-making in this sector are the high expectations related to such high-level positions, the low self-esteem and the burden of conciliating work and family life. Moreover, certain stereotypes on gender roles are still present, although a lot depends on the region and whether the area is rural or urban. There are still some cultural norms that view certain jobs as less suitable for women.

The **legislation does not recognise the status of ‘assisting spouse/life partner’** for either aquaculture or fisheries. The only option to include a spouse in the economic activities is to formally employ her; however, this is usually not economically viable for small-scale coastal fishing businesses due to administrative burden and related costs.¹⁴³ Legislative changes are required to make the job market more flexible and to reduce the administrative burden and costs associated to the creation and registration of jobs/occupations. This would help to combat the grey economy and youth unemployment, as well as to facilitate the legal recognition and remuneration of “invisible” female workers.

There are **no specific sectoral women organisations**. Women are mostly active in FLAGS and/or in various local associations, for example local tourist associations, folklore and similar. According to interviewees, women have a good overview of the

¹⁴³ No recent data exists on the monthly costs associated to formally employing workers; however, according to the Croatian Bureau of Statistics, the average total monthly cost of labour in 2004 in fisheries was 6.423 HRK (864,08 EUR) per person, in processing industry 6.991 HRK (940,50 EUR) per person, while the national average was 7.889 HRK (1061,30 EUR) per person; it is likely that the costs are significantly higher now.

sector and an extensive network of contacts. However, so far there have been no initiatives for closer organisation/association, possibly due to the costs associated with operation and meetings. Establishing one might be beneficial, especially for exchange of experience in tasks that are usually performed by women and experience with taking up jobs and roles in male-dominated sub-sectors/segments.

3.2 Cyprus¹⁴⁴

Research methodology

The research conducted in Cyprus involved desk research (official statistics, reports from national authorities, etc.) and interviews with 8 institutional stakeholders from an array of institutions including the Department of Fisheries and Marine Research, FLAGs, fisheries associations, and a research company. Also, 2 interviews were carried out with one woman who worked in the sector as professional fisherwoman and was Vice-president of the Association of Polyvaent Fisheries of Cyprus, and one assisting spouse of a fisherman who regularly fished herself with the vessel. All, but one interviewee who provided written answers to a questionnaire sent by the country expert, we interviewed on the phone.

Cyprus is a small insular country with a relatively small fisheries sector. Its fishing fleet consists of a total of 854 professional fishing vessels, out of which 827 are small-scale coastal fisheries (0-12 metres). In 2016, the total catch was estimated at 1,479 tonnes and the total value of aquaculture production at EUR 41.9 million.¹⁴⁵ Furthermore, there were three marine fish hatcheries, one inland shrimp hatchery/grow-out unit and nine private offshore cage grow-out units (mainly for sea bass and sea bream were) in operation, along with seven small fresh water aquaculture units for rainbow trout.¹⁴⁶

The **economic crisis** had a serious impact on the sector: the overall income of Cypriots was reduced and therefore their buying power also decreased. This had an effect especially in the catching sector, along with the overall national and EU policy to reduce the impacts of fishing in the marine environment through the lessening of the fishing pressure and the scaling down of the fishing fleet.

In general, the **presence of women in the sector is quite limited and poorly documented**, especially in the case of “invisible” female workers involved. Considering that the total amount of personnel (including self-employed) involved in fisheries was 2,209 in 2016, and that 82% of these were men and only 18% were women, this is a sector that is heavily dependent on men.¹⁴⁷

Women have a particularly low presence in catching, but of those who worked in this sub-sector in 2016 (18 women), four were boat owners. The small processing sub-sector and fisheries-related activities (wholesale and retail sales of fishery products) are more gender-balanced as women represent 37% and 44% (respectively) of formally employed workers.¹⁴⁸ In the aquaculture subsector, about one quarter of the workforce are women.¹⁴⁹ In positions that do not require heavy manual labour such as administrative, scientific and marketing/sales responsibilities, the representation of men and women is more balanced.

¹⁴⁴ Research in Cyprus was conducted by Evangelos Paravas.

¹⁴⁵ The Cyprus National Data Collection Programme Annual Report of 2015.

¹⁴⁶ Data from the Department of Fisheries and Marine Research.

¹⁴⁷ Data from Cyprus Statistical Service.

¹⁴⁸ Data from Cyprus Statistical Service.

¹⁴⁹ Data from the Department of Fisheries and Marine Research.

Although there are no official estimates on the number of **“invisible” female workers**, interviewees pointed out a strong dependency on informal onshore activities to support catching (e.g. netting, mending and collecting the fish from the nets during the landing of the catches). The presence of women who are not formally employed is quite prominent in these activities. These are usually spouses/daughters/companions/partners and members of the fishermen’s families.

In Cyprus, there is no national legal framework that explicitly recognises the presence and role of women in the fisheries sector or that state specific social security provisions for this group. This is addressed generally in the different legal acts that request equal treatment for men and women in employment, as well as in other areas. In addition, although the Directive 2010/41/EU on self-employment has been transposed to the Cypriot legislation through Laws 59(I)/2010¹⁵⁰ and 40(I)/2009, the **status of ‘assisting spouse/life partner’ is not formally recognised.**

There are **no fisheries-related women organisations** in Cyprus. Moreover, there is little information available on the number of women that are members of (or are represented by) fisheries-related trade unions, producer organisations, and workers’ councils.

The main **factors that push women away from the sector**, as identified by the interviewees, are women’s physical strength/competences, the dangers and difficult working conditions of the profession, especially on board, and the fact that women need to refrain from work during labour and child care. It should be mentioned that interviewees, including two fisherwomen, did not consider that these factors were related to stereotypes or social perceptions of women’s role. For them, these were ‘natural’ constraints. Moreover, interviewees mentioned that the social mentality and perceptions changed over the last 30 years, and fisheries did not constitute anymore a “solely men-related profession”. These perceptions contrast with the available data, especially for the catching sub-sector, which shows that the presence of women is marginal.

A similar perception of women’s situation is presented in Cyprus’ OP for the EMFF 2014-2020, which explains that the limited presence of women in sea fishing and in aquaculture units “is considered to be normal” given the “difficult working conditions, and the increased physical strength that is a pre-requisite for these professions”. Therefore, the employment of women is mainly in packaging centres, administrative/management positions and processing plants.

Fisherwomen identified that **education, training and further involvement of women in fishermen associations**, would substantially promote their presence in the sector. Moreover, it would formally acknowledge the role they play especially in family-owned businesses, where female contribution is still “invisible” and not officially monitored. They also noted that, to increase female involvement in the sector, spouses/partners/daughters of family-dependent fisheries vessels and businesses should establish joint organisations/partnerships and thus acquire of formal legal entity that would ensure their registration and documentation as proper employees/workers.

3.3 France¹⁵¹

Research methodology

¹⁵⁰ Law 59(I)/2010 on Social Security (in Greek) available at: http://www.mlsi.gov.cy/mlsi/mlsi.nsf/index_gr/index_gr?OpenDocument

¹⁵¹ Research in France was conducted by AND-International

The research conducted in France involved desk research (official statistics, studies, reports from national authorities, etc.), interviews with 11 institutional stakeholders (representative and producers' organisations, port authorities, training and research institutions, Regional Committee in Corsica etc.) and with 5 women who worked as fisherwoman and head of a shellfish company, as well as two assisting spouses (one in fisheries and the other in aquaculture) and the mother of a fisherman. 6 of the 16 interviews were conducted face-to-face and 10 were on the phone.

In the French Mediterranean region, fishing activities are mainly small-scale using vessels with less than 12m of length. Aquaculture activities mainly concern shellfish farming and finfish farming. Fisheries-related activities are also important, and they include sale of fisheries and aquaculture products, as well as related processing activities.

Fishing, as well as aquaculture, are mainly in the hands of family companies in which **women play a key role** in, for example, administrative/accounting management of boats' activities, direct selling of fisheries products¹⁵², land-based activities of shellfish farming (sorting and crating), etc. It is worth noting that, in national aquaculture, 50 % of the heads of companies in inland fish farming are women¹⁵³ and that in clams fishing by foot in the Mediterranean Sea basin, women represent 43% of the workforce.¹⁵⁴

According to interviewees, the presence of women is more significant in aquaculture than in the catching sector because fisheries is mainly small-scale, allowing one person onboard only. Moreover, the perceived difficult working conditions and the long working-hours of fish trips are the main factors discouraging women from working in the fisheries sector. In contrast, aquaculture offers a wide range of land-based jobs/positions that require different skills and levels of education, and with better working hours and conditions (more compatible with personal life).

Despite women's presence in both fishing and aquaculture, both sub-sectors have been historically **male-dominated**, one of the reasons being the male-ownership of means of production (boats and concessions in marine culture).

In processing and fisheries-related activities, women are involved in all sorts of positions and occupations. In processing, women represent 56% of the workforce¹⁵⁵ and are present in production, administration, labelling, packaging, shipping, etc. According to interviewees, their representativeness in processing companies depends more on the size of the company than on other factors.

The **presence of women in fisheries-related activities is important** and their role in these activities has been emphasised by all the stakeholders consulted. Women are especially involved in occupations that require higher education levels and qualifications (e.g. in quality control, R&D, administration of port activities, commercial management, wholesalers and fishmongers, etc.). Women in processing and fisheries-related activities are usually formally employed and therefore receive fair remunerations for their work and have access to social benefits. Moreover, they enjoy certain social esteem as they bring a different vision/perspective to the business, as well as innovative ideas, which is considered as a benefit for the whole sector.

¹⁵² For example, the fish market of Ajaccio in Corsica where there is a significant involvement of women in direct sale of fish (for additional details on this please refer to Annex 4).

¹⁵³ Data from the French Ministry of Agriculture and Food/AGREST, 2008 at national level.

¹⁵⁴ Data from ENIM, social security scheme, 2014, the Mediterranean Sea basin.

¹⁵⁵ Data from the National Institute of Statistics and Economic Studies, 2009.

The evidence collected shows that **“invisible” female workers** constitute a significant share of women who work especially in catching and shellfish farming activities. In finfish farming, the share is lower as farmers’ spouses are usually formally employed in the farm and have a higher level of education than women in other aquaculture occupations. Although an important share of these “invisible” female workers are formally recognised as ‘assisting spouses’, they are not included in the official statistics of the fisheries sub-sectors workforce.

According to interviewees, **the number of these women is growing in large-scale fishing** mainly due to the need of additional resources to take care of the increasing administrative and regulatory requirements of the sector. But in small-scale fishing and shellfish farming, it is decreasing due to the economic difficulties that affect the sector (women need to find other remunerated jobs to complement the family income). In shellfish farming, the share of ‘assisting spouses’ is also decreasing because women have more access to education/training opportunities than in the past and therefore can access other more qualified jobs.

It is important to note that the French law recognises **two additional status for spouses** working in a family business: spouse partner (spouse is a partner of the company) and employee spouse (spouse is employed in the company and receives a remuneration). However, during the interviews with women who worked in fisheries, we noticed that women’s knowledge of the different status available was quite limited and that they were only aware of the status of ‘assisting spouse’. This could explain why the latter is the status most used by women in fisheries.

In recent years, the **presence of female employees in representative organisations has increased**. Indeed, according to interviews with stakeholders, in local and regional representative organisations (e.g. Regional Committees for Maritime Fisheries and Aquaculture, producers’ organisations, etc.), the presence of female employees is quite significant now. For example, in the Mediterranean Association of Producers Organisations, two of six employees are women (one is assistant director and the other is an employee working in the technical and commercial service). In the Regional Committee of Maritime Fisheries and Aquaculture in Occitanie, three out of four employees are women. In the Regional Committee of Corsica, three out of seven employees are women, including the Committee’s director. Although all of these women are not necessarily involved in the organisations’ decision making, they play an important role managing the organisations, assisting other professionals and providing advice.

However, it should be noted that the presence of women in the organisations’ governing bodies is still limited and therefore decision-making is still in the hands of men. Moreover, in the Mediterranean region, few women are involved in Prud’homies, which are communities of fishermen in charge of establishing fisheries local management measures¹⁵⁶. Among the 33 Prud’homies in the French Mediterranean region, only three women were identified: a woman who was elected local Prud’homme and two secretaries.

There are some challenges which still need to be addressed to ensure full recognition of women’s role in the sector:

- ‘Assisting spouses’ have access to some social benefits and training opportunities, but they receive no remuneration for their work¹⁵⁷ and the

¹⁵⁶ These professional organisations, which are historically frequent in the Mediterranean basin, have continued in France. Fishers elect within the Prud’homies, a Prud’homme responsible of managing fishing on their territory.

¹⁵⁷ Their remuneration is considered to be part of the total income generated by the family-business.

pensions they obtain are relatively low. Moreover, they do not have the right to work on other activities beyond a part-time job.

- Even though the number of other family members involved in fisheries activities (mothers, sisters, etc.) is not significant, there is still no specific status for them and their contribution to the business remains “invisible”.
- There is a lack of awareness and information about the requirements and benefits of the different status for spouses provided in the French law.
- General social perceptions regarding women's physical strength and the difficult working conditions discourage women from accessing certain occupations in the fisheries sub-sectors (e.g. working on board fishing vessels, doing manual work in aquaculture sub-sector).
- The work schedule of some fisheries activities is incompatible with family and household responsibilities, which usually fall on women.

The opportunities to further promote the presence and role of women in the fisheries sector, at least in the shorter-term, are linked to helping women to organise themselves and operate collectively. Over the last 15 years, the three women organisations¹⁵⁸ that existed at national level considerably lost their political weight.¹⁵⁹ Women should therefore be helped and encouraged to become **more involved in representative organisations and decision-making**. The fishermen wives' association of Corsica could be considered as a model to follow. In fact, despite the lack of fund, the association has succeeded to undertake actions aiming at promoting the fishing activities and in particular the role played by women as well as being involved and considered in local discussions and debates. Some of these actions were supported by the EMFF.

It is also important to facilitate women's participation in training/education as this will give women the possibility of acquiring qualifications needed for specific activities in the sector. It would also help them to take advantage of the job opportunities that the growth of specific fisheries activities (e.g. algae farming) opens to them.

Although the status of assisting spouses constitutes a step forward the recognition of the presence and role of women in fisheries sub-sectors, some challenges still have to be tackled and the status has to evolve and to be improved to meet the new requirements of women's work. First, the status has to provide women with access to training programmes adapted to their status and needs. Then, the status has to provide women with full social rights (including covering work accidents and providing better retirement pension). The status should also provide women with the right to be further involved in decision making (by providing them the right to take part of high level meetings and discussions and the right to vote in representative organisations). Finally, the women role as 'assisting spouses' and their significant contribution to the fishing enterprises, need to be recognised by a diploma allowing them to be able to assert their abilities¹⁶⁰.

Finally, it is important to highlight that, during the field work, we engaged women who had '**stories of success**' to share with us (women interviewed were generally recommended by representative organisations). Women who face specific difficulties

¹⁵⁸ The three women associations that were identified in this study are: *Fédération Interrégionale des Femmes du Littoral*; *Femmes entre Terre et Mer* and *Fédération de Femmes du Milieu Maritime*.

¹⁵⁹ Monfort, Baelde, Vouhe (2017), Op. Cit.

¹⁶⁰ These improvements were suggested by the fishermen wives association in Corsica, during the interview.

and challenges in the sector are not easy to identify as, in many cases, they are “invisible” to the sector’s stakeholders.

3.4 Greece¹⁶¹

Research methodology

The research conducted in Greece involved desk research (official statistics, studies, reports from national and EU authorities, sub-sectoral associations etc.) and interviews with 13 institutional stakeholders from national and regional public bodies, research institutes, fish market central organisation, aquaculture and processing industry representatives, and a boat owner and very active fisherwoman). 10 of these interviews were face-to-face and 3 were on the phone. In addition to this, the expert conducted one focus group with 7 women who played an active role in small scale coastal fisheries, small mussels farming units, local fish auction and regional public administration for fisheries. The discussion took place in Kavala city, an important fishing centre in Northeast Greece.

Greece has a coast line of 15,021 km covering more than 6,000 islands. Among fisheries sub-sectors, catching is the most important one from an employment perspective, whereas aquaculture contributes significantly to the external trade balance. In small communities and islands, fishing plays a particularly important economic role as it is either the only source of income or the activity that complements the income earned in other occupations. It is also an integral part of the local cultural and social identity.

Women constitute a relatively larger share of fisheries workforce in Greece, from 6% in catching to 53% in national policy, with 26% in aquaculture and circa 50% in processing.¹⁶² In small-scale fisheries, women (both formally and informally employed) are involved in tasks such as management and administration tasks (accounting, relations with banks and fisheries administration), post-harvest activities such as first processing, distribution and marketing, net maintenance, and for some of them (at least up to a certain age), working on board too. In the middle-range fleet segment, fishermen’s wives and other family members perform managerial and administrative duties mostly.

In aquaculture, when the size of the farm is very small, and it is family owned (usually trout and mussels’ farms), women (formally or informally employed) undertake the same tasks as men at least up to a certain age. In the industrial aquaculture and processing sector, women usually represent 90% of the packaging and filleting workforce, whereas the laboratories and administration departments are more gender-balanced.¹⁶³

National Census figures from 2011 state that there is a 13% of women employed under the status of **‘assisting family members’**, although according to interviewees there are many more women playing assisting roles in small-scale fisheries. Indeed, one of the fisherwomen interviewed, who is also ex-president of a local fisheries association, estimated that *“for every male boat owner, there is at least one female family member*

¹⁶¹ Research in France was conducted by Valeria Lampridi

¹⁶² Data from a Labour Force Survey (catching), National Census (aquaculture) and the National Plan for Fisheries Data Collection Programme (processing).

¹⁶³ According to interviews with industry representatives.

who assists him". In some cases, in addition to their assisting role, these women are formally employed in jobs in other sectors.

In aquaculture, the share of 'assisting spouses' is marginal given the presence of a few large companies that absorb the major part of this sector's employment. It has not been possible to find data on informal female employment; however, it is likely that there are many women working in small fish trout farming who are non-registered employees or 'assisting spouses'.

Gender pay gap is higher in fisheries than in other sectors, which has to do with the distribution of working hours and payment per catch. Women are also more likely to work part-time and to be 'unskilled workers'. Spouses and life partners are legally recognised, but **protection for assisting spouses is lacking in some areas** – they are only entitled to healthcare and not to a retire pension and maternity allowance.

There are **no specialised women's organisations**, although there were attempts to found them. Women were represented to some extent in unions and employers' organisations, with rather gender-balanced public administration in fisheries. Domestic responsibilities are named as the main obstacle for many gaps – from participating in offshore fishing operations to obtaining a more active role in fisheries associations.

The lack of a cooperative culture (which also characterises male coastal fishers) along with low organisational skills was also highlighted by women as a major challenge affecting their self-organisation. The lack of trust in the effectiveness of fisheries' associations in protecting fishers' interests discouraged them from being more actively involved. Strong encouragement and steady coaching are needed in order to facilitate women's organisation and/or further participation in existing associations in the sector.

Promoting a **diversification of activities** related to fishing could provide women of a diversity of opportunities to upgrade from the status of 'assisting member' to self-entrepreneur. Diversification can be implemented only through training, and mainly through persistent and long-term coaching.

The establishment of a **Social Cooperative Enterprise of Kalymnos "Panagia Ipapandi"**¹⁶⁴ in 2012, gathering the wives of the fishermen of Kalymnos Island, can be considered a good practice of what can be achieved with adequate training and coaching. Its shareholders were trained by Italian experts to use fish of low market value (caught by local fishermen) to produce gourmet products, providing an opportunity for entrepreneurship and alternative ways of work in fisheries.

3.5 Italy¹⁶⁵

Research methodology

The research in Italy involved desk research (official statistics, studies from research institutes, reports from national authorities, certification bodies, professional associations etc.) and interviews with 12 institutional stakeholders (MEDAC, regional public bodies, fisheries cooperatives, producers' organisations, processing companies, trade unions, association of women in fisheries etc.). 5 of these interviews were face-to-face (3 on Skype), 6 were on the phone and one interviewee provided written answers to a questionnaire sent by the country expert. Due to logistical constraints, the country expert could not organise the foreseen focus group with women active in fisheries (women approached for the focus group were all in various locations across the Italian coast). Therefore, the expert organised 7 individual interviews with

¹⁶⁴ <http://www.ksf.com.gr/the-company>

¹⁶⁵ Research in Italy was conducted by Maria Cozzolino from NISEA.

women. Three of these women were employees of fisheries cooperatives, with one being the director of the cooperative's wholesale market. One was a professional fisherwoman who became recently involved in fishing tourism (pescaturismo/ittiturismo) and another one was co-owner and manager director in charge of import and export of fish of a family-owned company. One was an employee of a producers' organisation and manager of a fish market and restaurant run by the organisation. One was a researcher in charge of on-board sampling and laboratory at a cooperative society. Three of these interviews were conducted face-to-face on Skype, three on the phone, and one who was interviewed at the expert's office.

Italian fisheries are historically **male-dominated**. The difficult working conditions associated to many of the sector activities are seen to require considerable physical strength, resistance and a spirit of sacrifice. In this context, women have always found it difficult to enter the sector in a structured and formal way. In practice, however, the **work of women is decisive**, particularly in performing duties that men are unable to deal with because of their long fish trips. Women play a key role in performing land-based duties such as marketing of fish¹⁶⁶, repairing the nets, taking care of tax and social security obligations, carrying out bureaucratic procedures, maintaining relations with shipyards and service cooperatives, and interacting with the port authorities.

The catching sector is the main fisheries sub-sector in terms of employment (in 2016, there were a total of 21,119 full-time employees (FTEs)).¹⁶⁷ However, the lack of gender-disaggregated statistics avoided us from providing an estimate of the share of women who work in this sub-sector (either formally employed or as "invisible" female workers). According to qualitative evidence collected through interviews, in the case of family-fishing enterprises, women rarely own boats, but as mentioned before, they often perform **land-based duties** that are key for the business. These women are usually the wives, daughters and other relatives of the fishermen.

Women have also a **significant (and increasing) participation in the processing sub-sector** (they represent circa half of workers). From 2008 to 2015, the number of female workers increased 10%, whereas total workers increased 9%.¹⁶⁸ It should be noted that these figures consider women in capital companies only, and not in family/micro/ small companies. However, it is estimated that women play an even more significant role in small-family enterprises, especially on the production side (commercial, legal and administrative aspects are usually managed by men).

In aquaculture, the latest reported percentage of women (15% - 2014)¹⁶⁹ is likely to underestimate the presence of women in this sub-sector, especially in freshwater aquaculture, clam and shellfish farming. Wives, daughters and family members of the male owners/employees are usually involved, but they are among the unpaid workers. These women deal with administration, commercialisation and sometimes production. In the Northern Adriatic regions there are areas (e.g. Goro) where **entire clam farmers' cooperatives formed and owned by women** who are involved in the entire production chain, from the breeding stage to the sale. Women also play an important

¹⁶⁶ For example, in the fish market of Porto Garibaldi (which director is a women), but also in the ports of Civitanova Marche (Marche Region) and Ancona where there are many women who perform sales activities.

¹⁶⁷ 2016 STECF Annual Economic Report (issued in July 2018).

¹⁶⁸ The processing industry's estimates are based on employed people only in relation to capital companies (corporations and capital cooperatives, limited liability companies, joint-stock companies). There are no official data for enterprises of individuals and for small-family businesses, for which national data will be available in the framework of the EU MAP from 2019.

¹⁶⁹ 2014 STECF Report.

role in the Boards of Directors of the consortiums or in the producers' cooperatives in these sectors.

Moreover, according to the STEFC data, the **presence of women in aquaculture increased considerably from 2008 to 2014 (153%)**, whereas the total population of aquaculture workers increased 10% in the same period. This increase responds to improved statistical surveys which resulted in a higher number of women being recorded in aquaculture statistics, but also to an increased presence of women in aquaculture more generally and especially in the trout breeding segment and in companies and cooperatives of mussels, clams, oysters (at the sea and in land-based activities such as administration, quality assurance, processing and, to a lesser extent, in the hatcheries).

In terms of fisheries-related activities, the evidence collected shows that women have a significant presence, generally in public / private research institutes in fisheries, university and university laboratories, fisheries national associations, certification bodies for sustainable fishing products and NGOs. However, the leading/decision-making roles are still held by men.

Despite there are no official data on **"invisible" female workers** in the fisheries sub-sectors, according to interviewees, the phenomenon is widespread throughout Italy. According to the Penelope Association in Ancona (which is a fisheries' women association and member of AKTEA), there are entire areas of fish production (fishing) entrusted to women, employed both on boats and on land, for repairing nets, marketing fish, maintaining boats, handling practices with port authorities and with the public and bureaucratic control bodies. Moreover, **"invisible" female workers** have helped to mitigate the effects of increases in production costs for small-scale coastal fishing. The most critical sector in this sense is small-scale artisanal fishing, where wives, mothers and/or daughters work 3-4 hours a day, systematically, for their family-businesses while their husbands, brothers and fathers are at the sea.

Italy's fisheries legislation **does not recognise the status of 'assisting spouses / life partners'**, as the agricultural legislation does. Consequently, women who are not formally employed, but that assist their spouses in their businesses cannot be formally registered and receive no social security benefits. Also, when women are not legally employed, there is no formal wage / salary and their remuneration depends on variable criteria. According to interviewees, women working in fisheries are less protected than women who are housewives, for whom many protections have been incorporated to the national legal framework in the last years.

From a social perspective, the role of women working in fisheries is no longer **"invisible"**, as it was 10 years ago. Local community and stakeholders recognise their role and agree that their presence is key for the development of the sector. Moreover, women in fishing are aware themselves of their significant role and have greater confidence in voicing their views, ideas and experiences at institutional and social levels, as well as making legitimate requests to obtain legal recognition. However, 'invisibility' in legislation and official statistics is still a serious issue.

On the positive side, there is one **association of women in fisheries**, the Penelope Association, which is a member of AKTEA¹⁷⁰ and associates women involved in fishing. This association is currently campaigning for the fisheries legislation to be equalled to the agriculture one. Moreover, according to representatives from trade unions contacted, there are current plans to revise the national collective labour agreement that applies to people who work in activities at the land related to both fishing and

170 The Penelope Association is the only association in Italy that groups women in fishing. The association is legally recognised. No information was found of other similar associations in Italy even if not legally registered.

aquaculture. The objective is to include 'new' occupations which emerged in the last 5-10 years and where women are heavily involved.

Finally, to increase the presence of women in the sector, and based on evidence collected in this study, further actions are needed:

- improve the collection of gender-disaggregated employment statistics, especially covering micro, small and medium segments of the fishing industry;
- revise the current fishing regulations to incorporate new occupations and professions such as those in pesca-turismo/ittiturismo
- work on social / cultural norms that push women out of the sector (e.g. family/household responsibilities that usually fall on women, reluctance of boat crews to have women on board)
- help women to access training/education opportunities as well as take advantage of growing activities in the sector such as online marketing and sales, labelling, product certification, import/export of fish products, research, consultancy and pesca-turismo.

3.6 Malta¹⁷¹

Research methodology

The research in Malta involved desk research (official statistics from the employment and statistical authorities mainly) and interviews with 7 institutional stakeholders (national and regional public bodies, research institutions, processing company, fishmonger, etc.). In addition, four interviews with women who worked in fisheries complemented the research. These were a hawker and hawker helper, a Scientific Officer who worked at the Malta Aquaculture Research Centre, and a Senior Fisheries Protection Officer at the national Department of Fisheries and Aquaculture. All of the interviews were conducted face-to-face, except for one which was on the phone and also provided written feedback by email. Not all relevant stakeholders could be reached due to seasonal time pressures.

Despite the fishing and aquaculture sectors represent a relatively small share of the Maltese economy (all agriculture and fisheries constitute less than 2% of employment)¹⁷², Malta's **long history of fishing tradition** makes the sector important. Fisheries contribute significantly to the crucial tourism industry, since local restaurants depend on the high quality local seafood provided by local fisherman.

The **workforce is less gender-balanced than in other countries**, from 5% female employment in catching (32) to 11% in aquaculture (25) and 31% in processing (299).¹⁷³ Of the total of 32 women who are formally employed in the catching sub-sector, 9 are deep-sea workers (skippers or members of fishing vessel crews who catch deep-sea fish for sale or delivery to wholesale buyers, marketing organisations or at markets)¹⁷⁴, 6 were sales persons, 3 fishmongers and 3 managers. The remaining

¹⁷¹ Research in Malta was conducted by Ramon Muscat.

¹⁷² <https://www.cia.gov/library/publications/the-world-factbook/geos/mt.html>

¹⁷³ Jobsplus Malta (jobsplus.gov.mt). Data from 2016-2017.

¹⁷⁴ The category of 'deep-sea worker' includes the following tasks: (a) preparing and repairing nets and other fishing gear and equipment; (b) commanding and operating fishing vessels to, from and at deep-sea fishing grounds; (c) determining areas for fishing, plotting courses and computing navigational positions using compass, charts, tables and other aids; (d) steering vessels and operating navigational instruments and electronic fishing aids; (e) directing fishing operations and supervising crew activities; (f) recording fishing

women are distributed between the jobs of cleaners, labourers, ship crew each, accountants and ship captains. It is worth noting that none of the interviewees (public authorities and others) speaking about the catching sub-sector could recall any women involved on board of vessels going out to sea. They all highlighted that, to their knowledge, women are primarily involved in selling the catches, cleaning the fish, weighing the catch, distributing the fish, as well as in administrative tasks.

Women formally employed in the processing sub-sector are mostly salespersons, merchandisers and shopkeepers. There are also various managerial and administrative roles performed by women (managers, accounting clerks, and clerical support).

In aquaculture, women are more involved in the production side as hand packers or members of ship deck crew. Various women also hold administrative and clerical positions. In the Gozo island, there are no processing or aquaculture activities and the catching activities are performed by men mostly.¹⁷⁵

Female fisheries workers are usually younger than male ones. Women's part-time rate is five times higher than men's, and many workers hold other jobs as well. Self-employment rate is low among women.¹⁷⁶

As in most other countries, there are no official data on **“invisible” female workers** in the fisheries sector. However, interviewees pointed out that the presence of “invisible” female workers' is estimated to be in the range of 500-600 individuals, with the majority being present in catching and its related activities. These women are generally the spouses and relatives of fishermen. They undertake administrative work and sell their husband's catches.¹⁷⁷

In the sale of fish, the Department of Fisheries and Aquaculture (as well as female hawkers interviewed) confirmed that, in the last years, there have been on-site inspections carried out by the Department which obliged all women selling fish (who were usually the wives of fishers or hawkers) to register as employed (or else they could be subject to fines).

A national fish cooperative (the Koperattiva Nazzjonali tas-Sajd Ltd) confirmed that the **status of assisting spouse/life partner is recognised and applied in the fisheries sector in Malta**. The interviewee also provided an example of one female assisting spouse in Euphemia Farrugia who works on-board and carries out most of the tasks that fishermen normally do.

Although there are initiatives to facilitate women's employment, it still remains low in Malta overall, including in fisheries. There were **no women's organisations in fisheries**, and female interviewees pointed out to a low interest in creating one, as well as in participating in representative bodies in general. Female hawkers interviewed pointed out that since the whole fisheries sector is in decline, young women and men are rarely entering it either. According to them, women who currently work in the industry (primarily hawkers) are discouraging their children (irrespective of gender) from pursuing a career in fisheries in view of the hardships and limited remuneration the sector has to offer *“... because there are other sectors such as accounting and*

progress and activities, as well as weather and sea conditions, on the ship's log; (g) baiting, setting and hauling in fishing gear; (h) cleaning, freezing, icing or salting catch on- or offshore; (i) selecting and training vessel crews. Examples of the occupations classified under this category include trawler skipper, fishing operations manager, coastal fishery skipper, fisher (coastal waters), fisher (inland waters), fishery labourer.

¹⁷⁵ Data was provided by the Ministry for Gozo (Agriculture and Fisheries Department)

¹⁷⁶ Jobsplus Malta (jobsplus.gov.mt)

¹⁷⁷ Department of Fisheries and Aquaculture in Malta

financial services which provide better working environments, more opportunities for career progression, greater flexibility and good wages”.

Though there has been considerable marketing and promotion at national level over the past couple of years related to equality and the sharing of family responsibilities, interviewees pointed out that, at a local level, the general perception is still that it is the woman's role to stay home and care for the children. Indeed, given that fishing activities require certain physical strength and availability to be at the sea for long periods of time, this is viewed not to be opportune / viable for women with family obligations. Because of cultural and traditional factors, women (particularly in this sector) are dependent on their husbands and are generally required to leave employment upon marriage to take care of family and the home.

3.7 Slovenia¹⁷⁸

Research methodology

The research in Slovenia involved desk research (statistical data, annual Green Reports, evaluations of OP EFF 2007-2013, OP EMFF 2014-2020, Rural Development Programme 2007-2013 and 2014-2020, national registers) and interviews with 5 institutional stakeholders. 3 of these interviews were face-to-face and 2 were on the phone. Interviewees were representatives from national public bodies, FLAG and a fishing and tourist company. The research also included 2 face-to-face and 1 phone interview with women who were the owner of a fish shop, the head of events, trainings and visits to shellfish farms of an aquaculture company, and the co-owner of a small processing company.

In Slovenia, the **fisheries sector is very small**. Freshwater fishing is limited to recreational activity, while marine commercial fishing is in decline. There are only 171 registered vessels, mainly small-scale (shorter than 12 m)¹⁷⁹, with 101 fishermen.¹⁸⁰ Aquaculture is a small sector too, with a total of 212 persons employed. Freshwater aquaculture consists of small-scale fish farms, mainly for salmonid production (trout). Marine aquaculture (mainly shellfish) has, in contrast, experienced a strong increase in the last years (more than 25% between 2011 and 2016), due to the support from EMFF. The processing sector is small, with only five companies for seafood processing.¹⁸¹

The data on the presence of women in the fisheries sector and related activities are scarce. Apart from some statistical data on employment in fishing and aquaculture, little is known as there are no gender-disaggregated data available and not much research has been done on the fisheries sector and on the role of women.

Overall, women's representation in the fisheries sector and related activities in Slovenia varies between the various sub-sectors. Currently, the **number of women employed in fishing and aquaculture is very small**, with one woman in fishing and four women in aquaculture. However, **women are significantly present in processing** (115 women, 55% of the workforce).¹⁸² No official data is available on the number of women employed in fisheries-related activities.

¹⁷⁸ Research in Slovenia was conducted by Mojca Hrabar and Jurij Kobal from Oikos.

¹⁷⁹ Report on the state of agriculture, food industry, forestry and fisheries in 2016, Agricultural Institute of Slovenia, 2017

¹⁸⁰ Ministry of Agriculture, Forestry and Food.

¹⁸¹ SI-STAT Data Portal (Statistical Office of Republic of Slovenia) and Report on the state of agriculture, food industry, forestry and fisheries in 2016, Agricultural Institute of Slovenia, 2017 (Green Report)

¹⁸² Fishing register data provided by Ministry of Agriculture, Forestry and Food

There are no official data on the involvement of **“invisible” female workers**, but it was estimated to be quite significant by stakeholders contacted (regional public body and FLAG), especially in fishing and aquaculture family businesses. The Agricultural Advisory Service explained that in aquaculture, “invisible” female workers are most likely to be present in fish farms that operate as an additional activity of farms (usually family business). There are women who provide help with daily feeding and simple maintenance activities. But there are also cases in which men are registered as holders of the aquaculture activity, but it is their wives or daughters who run the business. In the catching sub-sector, “invisible” female workers are usually fisherman spouses who run the fish shops, perform administrative, accounting and marketing tasks, manage the sales, oversee the trends in the sector and legislative requirements/ changes and help with cleaning and/or maintenance of equipment. They are rarely financially compensated for their work and often have jobs in other sectors to provide certain financial stability to the family.

According to interviewees, women are **appreciated for their skills**, especially for the administration and management tasks, spotting the trends and opportunities in the sector, and driving the initiatives for diversification and innovative approaches to marketing. Often, they are more capable than men of assessing the viability of potential investments and to secure financial support (applying for bank loans or for EMFF funds). Moreover, they aim to expand their knowledge and skills.

As most of the activities in fishing, aquaculture and processing are run as **family business** and it is passed down to the children regardless of gender. There are cases where the successors were sons, whose spouses got heavily involved too and switched job to be employed in the family-business. Lack of successors within the family can be an obstacle for further viability and development of the business.

According to interviewees, the strongest representation of women in policy-making is in the national and local administrations (either as heads of departments or as project managers). According to information provided by a representative of the Municipality of Piran, in all three coastal municipalities, women were heading the investments in fishing ports supported by OP EFF 2007-2013. They prepared project proposals in consultation with fishers, obtained support from the mayors, and prepared the application for OP EFF funding. Once the funds were granted, they managed all the implementation process (including the selection and supervision of contractors, consultation with fishers, communication and negotiation with national authorities, reporting and audit requirements).

There are **no specific sectoral women organisations** as confirmed both by sectoral stakeholders and FLAG. The only activities where women get organised and act collectively are the organisation of local festivals and ethno-culinary events in the coastal area such as Fishing Festival in Izola, Salt pans Festival in Piran and Tastes of Istria in Koper.

Generally, the **professions in the sector and related activities are not well known**, thus they should be promoted, especially among girls and young women to increase the knowledge about them and the possibilities they offer. Closer sectoral cooperation, possibly by forming a sectoral organisation (whether formal or informal) could additionally help with the promotion of the sector.

The current **legislation does not recognise the status of ‘assisting spouse/life partner’** in either marine aquaculture or fisheries. But it does recognise it in agriculture. Therefore, women who work in freshwater aquaculture, in fish farms which are registered as a supplementary activity of an agricultural holding, are entitled to the

status of 'assisting spouse / life partner'¹⁸³. However, this status does not ensure any social protection or benefits; it only gives access to certain training activities and funding opportunities. For fishermen, there is a 'registered fisherman' status, defined by Marine Fisheries Act similar to a self-employed status; however, this does not extend to his/her family members. The only way to include a spouse in the activities is to register him/her as self-employed and employ him/her as partner; however, the monthly costs (taxes and contributions) are too high to make this option attractive and viable, especially for small businesses.¹⁸⁴

Legislative changes are required to make the job market more flexible and reduce administrative burden for job creation. Flexible arrangements such as part-time jobs, temporary jobs or flexible work schedule are particularly important because of the small size of the fisheries sector and the seasonal nature of many jobs in this sector. Often, there is not enough work for an additional permanent job position, but too much work for the currently employed. Such arrangements could help fishermen and entrepreneurs in aquaculture and processing to easily employ their assisting spouses and pay them for their contribution. This could offer opportunities for "invisible" female workers to become formally employed receive financial compensation for their work.

3.8 Spain¹⁸⁵

Research methodology

The research in Spain involved desk research (official national and regional statistics, companies' databases, studies and reports from research institutes, women's associations and networks, FLAGs, etc.) and interviews with 5 institutional stakeholders (representatives of national bodies, women's fisheries associations, professional association, and researcher/anthropologist). 2 of these interviews were face-to-face and 3 were on the phone. The country expert also organised one focus group with 5 women which took place in Gandía (Valencia). Participants included one shipowner and president of the Shipowners Association of Santa Pola, the president and the Vice-president of the recently created Association of Fisheries Woman de Gandía, the Manager of the Fisheries Local Action Group of Murcia, and one biologist who provides technical support to the Cofradía of San Pedro del Pinatar. The participants from Andalucía could not attend the focus group, but to give voice to their views, 2 phone interviews were set up with the presidents of the Association of Fisheries Women Galatea and of the Producers' Organisation of Almería.

Spain is the main fisheries country in the European Union, with the largest production of fisheries and aquaculture.¹⁸⁶ But beyond statistical figures, fisheries have been a social and cultural hallmark of the Spanish coastal communities for centuries.

¹⁸³ Agricultural Land Act (Official Gazette no. 71/11, 58/12, 27/16, 27/17 – ZKme-1D, 79/17) allows for the head of an agricultural holding to have a special status akin to self-employed person and members of his/her household can account for and get paid for their work on the farm. Moreover, they have access to certain activities and funding opportunities based on their status.

¹⁸⁴ In 2016, the average total monthly cost of labour in agriculture, hunting, forestry and fishing (separate data for fishing are not available) was 1817,55 EUR per person, in processing industry (separate data only for processing of fisheries products are not available) 2.223,42 EUR per person, while the national average was 2,177.31 EUR per person

¹⁸⁵ Research in Spain was conducted by Rosa Chapela and Marta Ballesteros from Cetmar.

¹⁸⁶ Figures available for all EU-countries. Data for: fishing fleet (2015); fisheries employment (2013); aquaculture employment (2012); processing employment (15%); catches (2012), aquaculture production (2013), fisheries and aquaculture organizations (2015); expenditure of fish consumption (2016). Updated data only for Spain are available in official sources. For an overview of the country profile visit <http://www.eumofa.eu/documents/20178/61322/Spain.pdf/2f6c4ed1-bc1c-4cec-8166-82e9e1eaf761>

The state of knowledge regarding the presence and role of women in the fisheries sector in Spain has advanced significantly in the last five years, as a result of the **proactive strategy developed by the government**. The General Secretary of Fisheries (Ministry of Environment, Rural and Marine Environment) has implemented and coordinated actions including several quantitative and qualitative diagnosis about the current situation of women in the sector and the creation of the Spanish Network of Women in the Fisheries Sector in 2010 to foster visibility, empowerment, associationism and exchange of initiatives and best practices.¹⁸⁷

These actions have contributed significantly to enhancing the knowledge and understanding of women's presence and role in Spain's fisheries. However, this is still hampered by the **limited availability of quantitative data** (for example, the available datasets do not consider the "invisible" workers in coastal communities). Although there have been improvements in the data collection and harmonisation, gender-disaggregated data are still missing for the processing industry as well as for the fisheries-related activities.

In the Mediterranean area, this situation is aggravated by the low position of fisheries in the public agenda. In fact, only Andalucía has a detailed record of employment by gender and type of activity, including profiles (age, nationality), types of employment (full/partial), type of contract (open-ended/temporary) and professional categories. This constituted a challenge in this study, as well as the fact that available fisheries data are not disaggregated by coast (they cover both the Atlantic and Mediterranean basins). Various contacts with national/regional authorities and stakeholders were needed to obtain some data for the Mediterranean coast.¹⁸⁸

An overview of the available data on the main fisheries activities shows that the female workforce is concentrated in Galicia (approximately 2/3) followed by Andalucía (10%). It also shows that the **presence of women in Mediterranean fisheries is definitely less significant** than in the mentioned regions. Moreover, two specificities should be borne in mind when examining the Mediterranean fisheries: first, fisheries have less relevance in the economy than in the Spanish Atlantic coast; second, small-scale and coastal fisheries prevail, conditioning the development of fisheries-related activities.¹⁸⁹

In the Mediterranean region, in 2017, women represented 2% of the fisheries' workers of the fleet operating in the Mediterranean, 11% of the aquaculture professionals and an estimated 59%¹⁹⁰ of the fish processing staff. There is limited demographic data available for female workers of this region (most data available is from the national level).¹⁹¹

In the **catching sub-sector** (both in small and large-scale fisheries), their main roles are ship-owners, skippers, crew and cooks.¹⁹² Despite the limited number of women involved in the catching sub-sector, data from the Economic Survey of Marine Fisheries 2005-2015 (MAPAMA) show a progressive incorporation of some roles, as well as a higher presence of women in more qualified jobs.¹⁹³ According to interviews with institutional stakeholders and focus group, women also play a key role in shore-based

¹⁸⁷ Other actions implemented by the General Secretary of Fisheries to improve the situation of women are presented in the Spanish report in Annex 10.

¹⁸⁸ For a full overview of the data collected for the Mediterranean coast, please refer to the Spanish report in Annex 10.

¹⁸⁹ MAPAMA, 2016

¹⁹⁰ Data "guesstimated" from companies' reports and official data (MAPAMA) for 2015.

¹⁹¹ MAPAMA, ISM and Aquaculture Economic Survey.

¹⁹² Economic Survey of Marine Fisheries 2005-2015 (MAPAMA) and Diagnosis of the Situation of Women in the Catching Sector, 2017, MAPAMA.

¹⁹³ In 2005 women were only skippers or crew and in 2015 there were also chief engineers and forewoman.

administration and support. These tasks are critical for the businesses' performance, but the productive jobs to develop them are poorly regarded and frequently are unpaid.

In **aquaculture**, there is certain degree of gender-based labour division at the operational level: physical tasks in marshes and salines, as well as those with limited automatization of processes, are carried out by men, whereas in other activities as manipulation, processing, nurseries, hatcheries, administration, most of the staff are women. Previous stages with a higher technological development (nurseries and hatcheries) show a more balanced distribution, whereas administrative tasks are clearly dominated by women.¹⁹⁴ From the secondary information available (MAPAMA, projects funded by the FLAGs) it should be noted that women entrepreneurship in aquaculture has a distinctive profile, focusing in more innovative companies or in species less exploited (as algae or phytoplankton).

In the **processing sub-sector**, women have been historically over-represented. Although low-skill jobs are still prevalent among women, women have gradually gained access to managerial positions (quality control, human resources, law and corporate social responsibility). According to institutional stakeholders interviewed, despite the fact of this increasing professionalisation in the roles and activities developed by women, CEOs and Board representatives are mostly men.

In relation to **fisheries-related activities**, if at the national level the presence of women among net makers/repairers is dominant (89% of the total workforce), in the Mediterranean, the number of net makers officially registered are mainly men (86% of a total of 35 net makers). Nevertheless, women are significantly present throughout the value chain, from the first sale markets to the retail at traditional fish markets and shops or the fish counters of large distribution companies. The number of women involved in fisheries and aquaculture policy is also important.¹⁹⁵

According to institutional stakeholders and women who participated in the focus group, particularly in the Mediterranean region, **women have been proactive in launching new activities** related to the fisheries sector. For example, pesca-turismo has been a major course of action, as well as raising awareness about fisheries, sustainability and environmental concerns in schools or to tourists, or opening new marketing channels for the seafood products, whether online or through tailoring strategies to well-defined targets (e.g. elderly care homes). In this sense, the role of the FLAGs has been determinant in fostering women empowerment and diversification initiatives.¹⁹⁶

Regarding the **legal status of women** who work in fisheries, any women formally employed in the sector has guaranteed legal and social rights in equal conditions to men. In addition, there have been several reforms in the legislation oriented to improve working conditions, integrate equality principles, develop strategic plans and empower women through the fisheries value chain.¹⁹⁷ Some of these reforms have been enabled through the recognition of unregulated or "invisible" jobs. Indeed, the Law 47/2015

¹⁹⁴ http://www.mapama.gob.es/es/pesca/temas/red-mujeres/diagnosticoacuiculturamayo2016_tcm30-77153.pdf

¹⁹⁵ MAPAMA, 2014-2016

¹⁹⁶ There are no quantitative data easily available to support this statement. For collecting such data, it would be necessary to contact each individual FLAG. From qualitative information collected in interviews, we are aware that the FLAGs have organised events and initiatives that have allowed women to meet and start discussing common issues. They have also organised training courses where there has been participation of women.

¹⁹⁷ The Law 33/2014 (modifying Law 3/2001) that regulates Maritime Fisheries includes a horizontal policy of equal opportunities in all the areas of public action, forbidding discrimination of any kind within the sector. Moreover, Law 47/2015 regulates the social protection of the people working in the maritime-fisheries sector. Law 1/2004 establishes measures of protection against gender violence, Law 39/1999 promotes the conciliation of family and professional life of the workers, and Law 3/2007 is on the effective equality of women and men.

integrates new employees to the Special Regime of the Sea. Art. 4 regulates the **figure of 'collaborative family' of a self-employed**, defined as the spouse and family members (relatives with consanguinity/affinity up to second grade) that usually work with the self-employed, live with him/her and have an economic dependence of him/her. To promote the official registration of collaborative family, the Law 6/2017 established **bonuses (financial benefits/discounts)** to be provided to those registering 'collaborative family members' in the social security system of the self-employed (Art. 35). However, to be considered as collaborative family, it is required that the family member carries out identical activity to the one of the self-employee. This could be a de facto limitation, as many women develop on-shore activities that do not match the identical criteria established in the regulation.

The **political will has proven to be a powerful driver for improving the recognition of women in the sector**. For instance, the net makers were recognised as a profession in 2009, allowing for the organisation and development of official training courses. Similarly, the *neskatillas* and *empacadoras* were integrated in the *Special Regime of Sea Workers in 2015*.¹⁹⁸ This figure describes the woman that takes care of fish when it arrives at the port, a similar role to the one played by the *poceras* in the Mediterranean coast.¹⁹⁹ However, the legal framework recognised *neskatillas* and *empacadoras* as a profession associated to a specific province (Bizkaia NUTS 3 level). Therefore, female workers in other provinces might need to achieve political will to introduce a similar reform, which would be easily addressed by giving recognition to the activity at national level.

From the focus group and the interviews with representatives of women organisations in fisheries there are **three issues that call for further analysis**. First, this comprehensive legal framework does not imply –in practice– any differential coverage of the fisheries woman compared to the women working in other sectors. This means, for instance, that the conciliation measures are not fine-tuned to the specificities of the fisheries and aquaculture activities. Second, the mechanisms in place have not so far been able to overcome the barriers that women face to start or to reincorporate to the activity. Last, but not least, the framework does not generate positive incentives to increase the attractiveness of the activity for the new comers and the new generations.

Due to these limitations, in the Mediterranean coast there are many women who carry out multiple on-shore tasks without having granted an employment and/or wage (**"invisible" female workers**). Their jobs usually include landing, classification, packaging and sale of fish, vessel supplies (including ice), paperwork, financial issues, and dealing with the public administrations (licenses, administrative procedures, etc.). Frequently the women performing them are assisting spouses and family relatives that do not receive a retribution for the tasks performed. They have been involved in fisheries for their entire life, usually belonging to fisheries families. The current legal framework may allow for the formal recognition of this role in some cases, but, as explained by women who participated in the focus group, it is usual that these women are nevertheless not officially registered (many times to reduce the social security costs or maximise profit for the business). This strategy creates a weakness in situations where the assertion of rights is critical (divorce, pensions, etc.).

Indeed, an analysis of the retirement figures (at the national level, ISM) provides complementary information on this. In 2017, women's pensioner from the Special Regime of Sea Workers were only 9% of the total, and their retribution reached 54% of the men. On the other hand, women represented 99% of the widowhood pensioners.

¹⁹⁸ The number of *neskatillas/empacadoras* officially registered in 2016 were 40 (ISM, 2016)

¹⁹⁹ Diagnosis of the situation of women in the catching sector (2017), in the processing sector (2018), in aquaculture (2016) and others.

Women in the Mediterranean coast have had a **slow incorporation to decision-making bodies**. This may be explained by the prevalence of small-scale fisheries with traditional organisations (*cofradías* - federations of fishermen organisations) and the limited presence of women associations. Currently, only 3 out of the 89 *cofradías* in the Mediterranean are presided by women.²⁰⁰ The producers' organisations (15), are all presided by men and only 1 is managed by a woman,²⁰¹ although women steer two ship-owners associations. Similarly, the Regional Aquaculture Associations (3) are presided by men. In Valencia, in the 21 *cofradías* that exist in that region, in 2015, only 2.5% of the members were women, and in a third of them, there were no single women.

It is worth noting though that in Andalucía, the Fisheries Advisory Body (Art. 5 Decree 95/2018) includes two representatives of the Andalucía Federation of Women in the Fisheries Sector. Moreover, there are two women from the Mediterranean basin represented in the Executive Committee of the National Federation of *Cofradías*, out of the 3 (11%) that are in the directive bodies of the organisation.

The launching of the FLAGs has generated a **window of opportunity for women's collectives**. In the Spanish Mediterranean basin there are 16 FLAGs integrated by 403 members of which 4% are explicitly labelled as women organisations. Only one FLAG is presided by a woman, although women manage 42% of them.

At national level, women are significantly present in fisheries policy and administration. During the last ten years, the Heads of Departments at the Fisheries General Secretary have been held by women. These women promoted and facilitated the generation of networks and training opportunities for women. Indeed, the creation of the **Spanish Network of Women in the Fisheries Sector** boosted associations both at national and at the Mediterranean level. In 2001, there was no specific female association in fisheries in the Mediterranean, and the collective action of women was mainly informal responding to concrete issues at specific moments. In 2008, the **Association Galatea** was created in Almería (Andalucía). In 2018, two other female workers associations were created: Adomar Grau de Gandía (local level, Valencian Community) and the Andalucía Association of Fisheries Women (regional level). Such associations and networks are **playing a key role in giving visibility to women in the Mediterranean**, increasing their voice and influencing policy-making.

The analysis of evidence collected in this study confirms that **gender inequality** in the fisheries sector is due to the 'classic' components: entrance barriers in some occupations/professions, the precariousness of labour conditions for "invisible" workers, and a general horizontal and vertical segregation.²⁰²

Below, we present the main findings of the research conducted in Spain:

- Despite the government's efforts to improve the state of knowledge regarding the presence and role of women in the Spanish fisheries sector (which has advanced significantly in the last five years), there is still **limited availability of quantitative data**. Gender-disaggregated data are still missing for the processing industry, as well as for the fisheries-related activities. In the Mediterranean basin, this situation is aggravated by the low position of fisheries in the public agenda.

²⁰⁰ The Confradia de Pescadors de l'Escala (Catalonia), the Cofradía de Pescadores de Vélez-Málaga (Andalucía) and the Cofradía de Pescadores del Campelló (Valencian Community) are presided by women.

²⁰¹ PO-51 Organización de Productos Pesqueros de Almadraba (Andalucía)

²⁰² Vertical segregation: men are in charge of steering the vessel, managing the engines and catching, whereas women are higher as cooks or cleaning staff. Horizontal segregation: even when they carry out the same activity that their male colleagues, they tend to develop it under a different rank or authority.

- Women have become visible and the legal framework ensures –with some limitations- formal equality in the fisheries sector. However, there is a persistent **horizontal occupational segregation of women** which is frequently associated with professional profiles, vocational preferences, or the perceived gender-associated skills. There are also economic costs associated to the registration of ‘assisting family members’ that avoid women from being registered under this status more widely.
- The Social Security system must create **selective positive incentives**. In this sense, the use of bonuses to reduce the financial costs as well as the red tape associated to formally employing workers and registering their activities has proven successful in other regions. Other dedicated tools based on positive discrimination would allow matching the visibility that women have gained in male-dominated sectors to an economic incentive to remove entrance barriers.
- **Women leadership** is connected to a profile: a combative woman, well-known by the community and willing to accept the cost associated to a proactive action in defence of the continuity of the activity and of women’s interests. They are role models, but not a reference to a normalised situation to attract new comers or younger generations.
- Bridging the **gap between fisheries and the general society** could improve the current situation. As an example, catching fisheries has been largely an isolated and androcentric activity. Nowadays, there are well trained professionals that can raise awareness and approximate the society to the fisheries activities. But this needs to be combined with a strategy to use role-models and to make fisheries workers, and especially female fisheries workers, visible to the rest of the society.
- There is a need to **further examine women’s self-perceptions** and identify the implications of how they perform and orient their current and future activities (for instance, women that have developed a career in fisheries could be classified into two broad categories: (i) those highly engaged and with a strong identity that relates to the activity that they perform and (ii) those that, having a life-career in the sector state that “I will continue until my husband retires”).
- **Women’s future in fisheries** needs concrete actions at present. Women in the sector feel that whatever advance they achieve now, this will come late for them, but others will benefit from it. **Role models** are critical to remove entrance barriers and stereotypes especially in traditional activities, but also to define new ones through diversification and ranging from pesca-turismo to a seafood specialised advertising firm.

3.9 Bulgaria²⁰³

Research methodology

The research in Bulgaria involved desk research (official national statistics and data provided by producers’ organisations) and interviews with 6 institutional stakeholders (one national authority, one regional stakeholder, one professional organisation, one research institution, one aquaculture company and one fishermen association). 5 of these interviews were conducted face-to-face and one provided written feedback via email. In addition, 4 face-to-face interviews were carried out with women working in fisheries. These included two women who worked in processing (one separating Rapa

²⁰³ Research in Bulgaria was conducted by Violin Raykov.

whelk meat from shells and the other worked in a processing factory) and one was a researcher and associated professor in marine biology.

The Bulgarian fishing fleet is suffering from **structural drawbacks and general downsizing**.²⁰⁴ Serious efforts are needed at European and national levels to create incentives, promote and maintain favourable conditions for the development of the sector and the involvement of women.

According to data from the National Agency for Fisheries and Aquaculture (NAFA), in 2015 women held 1% of fishing licences (only data available regarding the presence of women in the catching sub-sector). They also represented 13% of workers in aquaculture, 90% in processing, and 70% in fisheries-related activities. The processing sub-sector is subject to seasonal fluctuations, but it is still female-dominated. In terms of fisheries-related activities, there is a limited presence of women in port activities and fishing supplies, but in fish markets/sales, the presence of women is significant, according to institutional stakeholders interviewed.

There are limited data on women's occupations, but the evidence collected through interviews showed that the typical jobs for women include mostly manual labour in aquaculture and processing. However, in family businesses, women are often in charge of administration and accounting. According to interviews with women who worked in the processing sub-sector, women are mostly engaged in the processing of rapana and bivalve and in fish packaging. They work as gutters, filterers, and canners.

There are no official data on **"invisible" female workers**, but fishers consulted believed that since small scale fisheries has become unsteady and unprofitable in the last 5 to 10 years (due to a significant decrease of fish resources), no women are assisting their husbands in repairing and cleaning nets anymore, as they did 10 or 20 years ago. These women have had to look for jobs in other sectors. According to the desk research and interviews undertaken, there is no evidence on women working without contracts in the processing sub sector either. Women are generally engaged in full time or part-time basis receive social benefits and pension insurance.

The Bulgarian Code on Social Insurance (COSI), which was amended in view of compliance with the Directive 2010/41/EU, contains a legal definition of distinct groups of the self-employed for the purposes of social security law. These groups are: persons registered for performing freelance activities and crafts; persons exercising commercial activities; single owners of companies; owners or associates in trading companies; registered agricultural and tobacco producers; and the spouses of the categories of persons mentioned before when they participate in their activities with their consent²⁰⁵. Therefore, spouses of the self-employed are subjects of insurance rights. However, in practice, we have found **no evidence that assisting spouses/life partners working in the Bulgarian fisheries sector are entitled to and/or receive social and insurance coverage**.

There are **no fisheries-related women's organisations**, but there are active women's employees and business associations. Some women in leadership positions in policy-making, businesses and trade unions have been identified. Women are generally more represented than men in the public sector, and research is also an attractive area for women. Fisheries-related activities were identified as a sub-sector where the role of women is likely to increase, and which is attractive mostly to educated women.

²⁰⁴ Operational Programme for Maritime Affairs and Fisheries (2014-2020): <http://evropeiski-programi.com/окончателно-преустановяване-риболов>

²⁰⁵ <https://www.equalitylaw.eu/downloads/4426-bulgaria-country-report-gender-equality-2017-pdf-1-42-kb>

The European Maritime and Fisheries Fund and the Structural Funds should be used in the country to provide more **vocational training and education to women** working in the fisheries sector to provide them with more access to specialised and managerial jobs. There is also a need to better dissemination information on existing training and funding opportunities. Bulgaria should take steps to **promote and achieve greater recognition of the work of women in the fisheries sector**, both legally and socially, and to ensure that women working full time or part-time in family businesses or helping their spouses, receive legal recognition and social benefits equivalent to those available for employed or self-employed people.

3.10 Romania²⁰⁶

Research methodology

The research in Romania involved desk research (official national statistics and baselines for EU funding and national strategies etc.) and interviews with 10 institutional stakeholders (public authorities (national administration and social security), organisations of fish producers, federation of fisheries organisation at the Black Sea, aquaculture and processing companies, and research and education institutions). 4 of these interviews were face-to-face and 6 were on the phone. The country expert also organised one focus group with 12 women in Constanta (six women were present and six other participated via Skype). The average age of the participants was 44 years old. They were all university graduates (fishery experts, biologists, audit, marketing, custodian of protected area, etc) and from different locations on the coast (Constanta, Mangalia, 23 August, Agigea), as well as Bucharest, Galati, Targoviste, and Giurgiu.

Fisheries have always been connected to the Romanian space, being part of the economic and cultural identity of the country. Although the contribution of the fisheries sector to the economy is relatively low,²⁰⁷ it is still considered an important sector. The financial resources that the fisheries sector generate support a relatively large population, especially along the coastline. The fisheries sector also contributes to the protection of wetlands and biodiversity of the Romanian waters. The main sub-sectors include aquaculture, marine and inland fisheries, as well as processing and marketing.²⁰⁸

In Romania, the fisheries sector has various degrees of labour specialisation. In addition to a **gender division of labour**, there are other related factors such as differential access to resources, technology, family roles, participation in decision making, political participation etc. All these factors result in differential vulnerability, requiring specific coping and adaptation strategies for men and women, in view of the dynamic changes that are taking place in the sector. The exclusion of women from many spheres of the fisheries sector is a symptom of this, evidenced, for example, in the reduced participation of women in marine fishing.

Gender equality in Romania is a subject that continues to give rise to controversy, although more women have managed, over time, to occupy important positions in society. Romania has a national gender equality strategy that aims to respond by concrete measures and activities to problematic situations that have been identified over time, and to direct specific interventions in education, the labour market, life social roles and gender stereotypes, participation in the decision-making process. Although the

²⁰⁶ Research in Romania was conducted by Tania Zaharia.

²⁰⁷ FAO (2012) National Aquaculture Sector Overview. Romania. National Aquaculture Sector Overview Fact Sheets. Text by Zaharia, T. In: *FAO Fisheries and Aquaculture Department* [online]. Rome. Updated 16 September 2012. [Cited 22 June 2018]

²⁰⁸ <http://www.anpa.ro/date-statistice/>

Gender Equality Index increased in Romania in the last few years (from 49.9 in 2005 to 52.4 in 2015), it remains the lowest in the EU (66.2).²⁰⁹

Interviews with stakeholders as well as discussions with women in the focus group highlighted that, in Romania, **women actively participate in all stages of the fisheries supply chain**, from pre-capture to capture and post-capture, but especially in processing and research / academia. Their participation is not the same in every sub-sector. For example, in catching, there are very few women (2%) and in aquaculture, they account for 14% of the workforce. Processing is the sub-sector where the participation of men and women is more balanced (58% women).²¹⁰

It is worth noting that the tasks performed by women are not recognised by any of the stakeholders as such. Indeed, no institutional stakeholder recognised the existence of women engaged in non-remunerated jobs (e.g. in family-businesses where they undertake activities like maintenance, cleaning, book-keeping, etc.); however, during the focus group discussions, some of the women accepted that there are women who "helped" the fisher husband without being paid, and that they worked especially in the administration of the activity. Only one case was reported in sea fishing where a woman goes on a boat with her fisherman husband and participates in the fishing process.

Institutional stakeholders interviewed explained that the country's legal framework recognises the role of women in the sector and, in particular, it **recognises the status of assisting spouses / life partners** (Law no. 202/2002 on equal opportunities and treatment of women and men; Art. 7.2).

Women's participation and access to leadership roles in specialised organisations are marked by enormous challenges. The existence of these barriers ultimately reflects that despite having obligations, fisherwomen do not enjoy full rights. To date, there are **no fisheries-related women organisations** in Romania and the share of women members of trade unions, producers' organisations or workers' councils is not known (and neither is the share of woman elected in advisory or management boards). Continuous advocating for women's rights with a special focus on mobilising fisherwomen to get organised as a means to make their voice heard is becoming urgent to start reversing this situation. In addition, more research should be conducted on the roles and benefits of women's participation in fisheries organisations. Lessons should be drawn to provide the applied solutions to address gender inequalities through social mobilisation and women's integration into organisations.

Romania should invest sufficient resources in **acquiring detailed knowledge of the fisheries sector in the country**, as well as in documenting the historic and current roles of women, in order to be able to promote context-specific organisational solutions that ensure that the voices of all groups are heard by the administration.

It is necessary to know the correct and concrete situation of women in the fisheries sector, starting from clear statistics enabling the identification of the "invisible" women' behind the 'successful fishermen'.

The activity of the **Romanian fisheries sector has diversified in many ways in the last decades**, with new sectors appearing where women have been able to find a well-defined role. For example, the financing of high performing aquaculture systems through

²⁰⁹ A composite indicator that measures the complex concept of gender equality and, based on the EU policy framework which assists in monitoring progress of gender equality across the EU over time) <http://eige.europa.eu/gender-equality-index/2015/countries-comparison>

²¹⁰Programul Operational pentru Pescuit Romania (2007-2013); 2015; <http://www.madr.ro/docs/fep/2015/Programul-Operational-pentru-Pescuit-Romania-v5.pdf>; Strategia Nationala a Sectorului Pescaresc 2014-2020; 2012; and <http://www.madr.ro/docs/fep/programare-2014-2020/Strategia-Nationala-a-Sectorului-Pescaresc-2014-2020-update-dec2013.pdf>

the European Fund for Fisheries and Maritime Affairs has led to the emergence of new jobs that require a lot of skills and patience, in which women have a distinct advantage. Women are beginning to "become a voice" in the Romanian fisheries sector, occupying leading positions even if they are still numerically in minority.

Generally, women are involved in activities that do not require much physical effort, but mainly in those that require more finesse and accuracy; some of them occupy top positions in higher education or management of firms.

At the individual level, there is limited quantitative data on the presence and roles of women in the Romanian fisheries sector. There are new data provided by the national authorities, but these data are unofficial and unreported. It is necessary that "invisible" women in the sector acquire a status equal to men and not be regarded as 'supportive' wife / family.

General information regarding the situation of women in Romania was provided by the National Agency for Equal Opportunities between Men and Women. In the general context, the maintaining of women's vulnerability in the labour market (including fisheries) results in the **occurrence and perpetuation of gender discrimination** evidenced through: the existence of a gender pay gap, the imbalance between personal, family and work life, the lack of representation of women in the decision making process and managerial positions, as well as situations such as harassment at work, violation of legal rights of women returning from maternity leave and parental leave, etc.

ANNEX 4: SWOT ANALYSIS OF MEMBER STATES

Overleaf we present the identified strengths, weaknesses, opportunities and threats (SWOT) in relation to gender equality in the fisheries sector for each of the ten Member States.

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4.1 Croatia

<p>Strengths</p> <ul style="list-style-type: none"> - Higher share of female workers in aquaculture than catching. - Women mostly in administration, processing, pesca-tourism, accounting. - Some women directors/in decision-making positions in well-established, larger, fisheries enterprises. - No "invisible" women in research and government institutions. - Good representation (though not necessarily equal) of women in high-level decision-making bodies (e.g. Directorate of Fisheries of the Ministry of Agriculture), fisheries workers' councils and trade unions. - Women's educational levels in aquaculture are higher than in catching sub-sector. - Women active in FLAGS and various local and/or sectoral associations. 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Very short value chain, fish sold through local markets or directly to consumers and restaurants, no auctions. - No sex disaggregated data, even for processing industry. - Revealed inequalities in pay between men and women. - No financial compensation for "invisible" female workers in all sub-sectors. - Legislation does not recognise the status of assisting spouse. - No specific sectoral women organisations. - Fewer women participate in vocational training. Attendance split by gender: women= financing, diversification and marketing, men=tech development - Low attractiveness of the sector, expectation of physical strength requirement, few youth.
<p>Opportunities</p> <ul style="list-style-type: none"> - Shift in the organisation of fleet from individual fishermen and cooperatives into companies. - Important tourism sector (pesca-tourism, hotels and restaurants) associated with fishing. - Growing aquaculture sub-sector, esp. mariculture, and corresponding employment opportunities. - Women behind diversification into other activities (related to fisheries), and as guarantors of livelihood stability. - Relatively poor economic situation means that both men and women take any jobs available, regardless of what is considered 'appropriate' for a particular gender. - New innovative technologies open the door to women's involvement. - Growing export markets thanks to EU membership = more opportunities for women in sales and marketing. 	<p>Threats</p> <ul style="list-style-type: none"> - Many family-run SMEs in fishing = many "invisible" female workers. Fishing business passed on to sons who tend to perpetuate this situation (when business is small). - Prevalence of 'grey economy' in some sub-sectors, e.g. supplies for operations, and unregistered work - Ingrained expectation that women in posts (production and admin) have to 'prove' their worth, even if there is no discrimination at the time of employment. - Flexible work arrangements are not part of the work culture (result of rigid legislation, admin and cultural factors) - Important cultural norms regarding family values and obligations. - Youth is increasingly resorting to emigration and companies find it difficult to find workers.

4.2 Cyprus

<p>Strengths</p> <ul style="list-style-type: none"> - In aquaculture, prevalence of women in administration and marketing/sales. - All female workers are generally formally employed and receive same social benefits as men. - Some of the data is sex-disaggregated (for boat owners and fisheries workers) but no legal act on this matter. - No women working 'invisibly' in aquaculture (only in catching – see Threats). - Equal pay for women and men enshrined in law. - No reported discrimination and equal treatment reported by all stakeholders. 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Limited involvement of women in the sector: only 18% of women employed in fisheries overall (incl. aquaculture and processing), and only 1.53% registered as professional fishers (decrease over time, though re-bouncing since 2016) - Men dominate in the processing sector as well (63%). - Only 25% of women in aquaculture (least represented in fish fattening and fry production facilities) - no official statistics available on wages of men and women working specifically in the fisheries sector, no data on the gender pay gap in fisheries (but more women found at lower end of salary scales). - No official (legal) recognition of spouses - Lack of data on number of women members of fisheries-related trade unions, producer organisations, etc.
<p>Opportunities</p> <ul style="list-style-type: none"> - Decreasing importance of the weight of social norms on women's participation in the sector. - Equal employment (in numbers) in retail, no discrimination. - Aquaculture considered an engine of development and economic growth, which is increasingly hiring women (as it's growing). - Women more accustomed to using IT tools in fisheries (e.g. e-logbooks, VMS etc.) which would in principle make them equally valued crew members (on board and on land). - Pioneering development of off-shore cage aquaculture: opportunities for well-educated women. 	<p>Threats</p> <ul style="list-style-type: none"> - Economic crisis affecting Cypriots. - EU policy to reduce the impacts of fishing and scaling down the fleet. - Lack of attractivity of the catching sub-sector (danger, physical strength) - No recognition of the spouse status despite reported heavy involvement, esp. given the importance of family-based activities. - Most of the women employed in aquaculture are between 35 and 54 years old: low recruitment of new female graduates in the sector (most young graduates are male). - Unconscious bias in the text of the OP for the EMFF 2014-2020: "there are no limiting factors in Cyprus that prevent equal opportunities in the fisheries sector, <i>other than working conditions</i>. Working conditions are extremely difficult, mainly in sea fishing, but

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	<p>also in aquaculture units, so that <i>the reduced presence of women is considered to be normal</i>²¹¹).</p> <ul style="list-style-type: none">- No fisheries-related women organisations in Cyprus.- Little evolution in the recruitment of women in policy and decision-making bodies.- Lack of acknowledgement of the stereotypes affecting women's participation in fisheries. Stereotypes that low representation of women is normal and fishing too hard for them are not questioned and deeply engrained.
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²¹¹ The original text is in Greek and has been translated to English by a member of the research team. The OP is available here (Page 104 under chapter 9. Horizontal Principles of the OP): https://ec.europa.eu/fisheries/sites/fisheries/files/docs/body/op-cyprus_el.pdf

4.3 France

<p>Strengths</p> <ul style="list-style-type: none"> - Big fishing nation. - Women mobilised for legal recognition and status. - With over half of processing sector constituted by women (56:44), most 'egalitarian' sub-sector of all. - Significant role of women in post-harvest activities (sale etc.) of small-scale fisheries. - The nature of the responsibilities of "invisible" women has changed (increased): from repairing nets to accounting tasks. - In aquaculture, women are performing high quality and important tasks (quality control, negotiation and communication). - The status of "assisting spouse" is legally recognised and provides access to social rights and training opportunities [but limitations - see Weaknesses] 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Traditional male ownership of the means of production (boats and concessions); statistics dominated by men (except for heads of freshwater fish farming companies) - Low level of disaggregation of data for the Mediterranean region. - Assisting spouses are not included in official statistics for fisheries workforce. - General and persistent social perceptions regarding women's physical strength and the incompatibility of fisheries work with personal life and family duties. Persistent preconception that men work on board, women on land. - Occupational segregation, with women's skills confined to specific meticulous tasks. - Assisting spouses receive no remuneration and the pensions received are low. - Limited knowledge among women about the legal status and benefit entitlements of the status of "assisting spouse" and other statuses. - Overall low representation of women at higher-level positions in fishery and aquaculture organisations. - Low level of mobilisation of women at regional level (only one women local association identified in the Mediterranean region in the catching sector). - Low political weight of the existing national women associations in fisheries in the last decade (their role has been marginal in recent years).
<p>Opportunities</p> <ul style="list-style-type: none"> - Availability of training opportunities in the fisheries sub-sectors to start a career or to enhance/strengthen skills already achieved (assisting spouses also have access to training). - Technological innovations alleviate the physicality of the work = potential encouragement for women to get involved. - Influential participation in some decision and negotiating bodies, but not all (e.g. few women are involved in Prud'homies). - Social perceptions both a blessing and a hindrance (=threat) 	<p>Threats</p> <ul style="list-style-type: none"> - Decreasing share of women working in their husbands' shellfish enterprises (because declining income and higher education = other jobs) + aging of current female workforce. - Episodes of shellfish disease have weakened the sector (its growth, profitability and appeal). - Slow growth of the finfish farming sector (and number of women in it) due to complex administration, no development of new sites. - Sluggish growth of the sector, low prices.

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<ul style="list-style-type: none">- Increasing number of women in highly-skilled, high-level occupations (e.g. quality control in aquaculture).- Development potential of high-value activities, e.g. algae farming.- Equal opportunities promoted by the Operational Programme for the European Maritime and Fisheries Fund.	<ul style="list-style-type: none">- Growing involvement of women in governing bodies as number of female managers/employees is growing but their involvement in decision-making is still limited.
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4.4 Greece

<p>Strengths</p> <ul style="list-style-type: none"> - Big fishing nation. - Economic and cultural importance of fishing in coastal communities. - Strong, export-oriented aquaculture sector, operating mostly through SMEs (but only 3 companies represent 66% of employment in finfish mariculture). - Important post-harvest transformation. - Sex-disaggregated employment data in fisheries and aquaculture (but not catching). - Processing sector is gender-balanced (46-47% are women). - Women's presence strongest in policy institutions (53-55%) and in research institutions (but only still 35-46%). - In catching, 13% of women work under the status of 'assisting family member' (none in processing and very few in aquaculture). - Repartition of tasks is more equal in small-scale activities than in larger ones (women in admin jobs mostly but without much decision-making). - Right to equal pay enshrined in law. - Some women in decision-making positions in processing and aquaculture companies. - Old superstitions about women on boats have disappeared. - Full protection received by women in the national insurance scheme [but constraints in the fisheries sector – see Weaknesses]. 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Low data quality and availability. Different sources = different figures on employment. - Unequal distribution of jobs in catching sub-sector (95% men) and aquaculture (75-80% men), sales (85%). - Weaknesses and unreliability of employment estimates due to procedural gaps. - In processing, 42% of female workforce are unskilled (31% of men); despite more equal representation in employment overall, only 2% of women are in managerial positions in processing. - Gender discrimination and pay gap is significant and evidenced in enterprises of all sizes (despite legislation but aligned with pay gap at EU level). - Only partial transposition of Directive 2010/41/EU (recognition of self-employed and spouses and life partners of the self-employed) in Greek law. - In the catching sector, fishers' spouses have to get an individual fishing license in order to be independently insured i.e. to have a pension of their own. Otherwise they are covered only for health by their husband's insurance scheme. - No fisheries-related women organisations in Greece, and unsuccessful stories of trying to set some up due to lack of funding, cooperation etc. - Physical strength mentioned as key constraint for women, but not for tasks requiring hand dexterity. - Lack of appreciation of women's contribution. - Agriculture sector most advanced when it comes to recognising spouses.
<p>Opportunities</p> <ul style="list-style-type: none"> - Younger female workforce in aquaculture. - More educated women in aquaculture. - Training opportunities available to women in processing and aquaculture. 	<p>Threats</p> <ul style="list-style-type: none"> - Decline of the catching sector (reduction in fleet capacity, catches) - Aging female population involved in processing and catching with low educational levels. Young women tend to not enter the sector.

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	<ul style="list-style-type: none">- Dire economic situation of Greece with high unemployment (has affected men and women equally, but part-time workers, mostly women, are impacted the most).- Pay gap not on the agenda of authorities, negative impact of austerity measures on women's employment (in general).- Low level of mobilisation of women in the catching sector, lack of cooperative spirit assigned to lack of time and mistrust in motives of associations and leaders.- Uncertain impact of innovative technologies on women's work in fisheries because of the digital literacy that many workers do not have in processing or aquaculture and the nature of some tasks that cannot be changed.- Social constraints (e.g. childcare) only mirroring those pervading other sectors.- Confusion over eligibility of fishers' wives to EMFF funds (against the very objective of the fund).- Women currently engaged in the sector see it as a default (not by choice) job..- Lack of impact of the National Plan for Gender Equality on the sector.
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4.5 Italy

<p>Strengths</p> <ul style="list-style-type: none"> - Large fisheries sector, economically and culturally important. - Sex-disaggregated data available for processing industry and aquaculture, except for catching (the largest employer) until 2018. - Balanced employment: 52% men to 48% women in processing and in fisheries-related sectors (e.g. research) (estimation). - Shellfish: women are involved in the entire production chain and in decision-making positions in cooperatives etc. - Women involved in all activities in small-scale aquaculture production (though men more in post-harvest =reversed situation in larger enterprises). - Very large increase of women’s participation in aquaculture (+158% between 2008 and 2014) = greater visibility of presence of women thanks to better data collection (esp. since 2018) and reporting - There is one association of women in fisheries, the Penelope Association, which is a member of AKTEA and gathers all the women involved in fishing. - Transferable skills and knowledge of trade unions of women previously employed in the textile industry to the shellfish farming industry (cf. Consortium of producers of Polesine in Goro). 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Historically male-dominated, women perform mostly land-based activities (e.g. network repair, accounting / tax administration and marketing to local markets (retail and / or wholesale). - Aquaculture dominated by men (85%). - Women’s workforce in aquaculture underestimated as many are unpaid workers (10-15% estimate). - In larger aquaculture companies, women deal mainly with administration and post-harvest activities. - Women rarely own boats. - As scale goes down (production in catching and aquaculture), so does data on employment. - Some discrimination (lower pay) in the processing sector reported. - Italy’s fisheries legislation does not recognise the status of assisting spouses / life partners, as the agricultural legislation does. - Very few women involved (<20%) in trade unions, producers’ organisations and fisheries working councils. Only 25% of women in higher decision-making government bodies, and only 27% in FLAGs. - Women who have “made it” recognised that it was difficult, and recognition only came after success was achieved.
<p>Opportunities</p> <ul style="list-style-type: none"> - Shellfish cooperatives of women (Adriatic) can set an example for other products. Women are involved in the entire production chain and in decision-making positions in cooperatives etc. - In freshwater aquaculture, daughters and grandchildren (if second generation) are staying involved, which is a sign of attractiveness of the sector and sign of evolution of mentalities regarding the perception of women and of their role (also decision-making) in companies (fresh-water sector – trout fish-farms) historically managed by men. - Some female role models and starting to establish trends, e.g. as executive secretaries of an increasing number of FLAGs [though few women are actually members – see Weaknesses] 	<p>Threats</p> <ul style="list-style-type: none"> - “invisible” female work throughout Italy. In fisheries, reliance on women to mitigate increases in costs of production. - (Seemingly) no realisation on behalf of the women themselves that there is some discrimination in pay and opportunities. - Loophole in the collective labour agreements covering labour contracts (for small-scale fishing, industrial fishing and professions on land), but perhaps a chance to revise one related to professions on land (LegaCoop). - Paradox in legislation regarding assisting spouse status. - No interest from authorities to equate the agriculture legislation regarding assisting spouses to fisheries. - Shortage of specialised figure professionals to adequately support the fishing sector at regional level.

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| <ul style="list-style-type: none">- Equal access to training and education and opportunities for women's training promoted by women's association and trade unions.- New technologies (e.g. online sales, new processed products, especially in the freshwater / trout segment, high-end products, such as caviar, of which Italy is among the major European producers).- Growing opportunities in specialised consultancies in support of fisheries and aquaculture, in which women can equally participate.- Growing 'visibility' of women in aquaculture and processing compared to 10 years ago: signs of change in practice.- Pesca-tourism is an emerging sector where women have a role to play. | <ul style="list-style-type: none">- Weight of social norms (poor acceptance of women on board, boats, and awkward cohabitation with male crew, importance of family duties).- Revealed sense of 'sacrifice' that women feel is normal to undergo to support their husbands, communities etc. and belief in their 'mission' to do this. |
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4.6 Malta

<p>Strengths</p> <ul style="list-style-type: none"> - Close links between fishing and tourism industry. - Important cultural contribution of the sector, even if small in size (traditional fisheries). - Women involved are younger than in other countries and their male counterparts. - Formal employment contracts revolve mostly around land-based administrative or post-harvest tasks. - More diversity in tasks and employment levels in the processing sector. - No pay gap nor wage discrimination in processing and aquaculture. - Principle of 'Non-Discrimination' is enshrined in the Maltese constitution and can be seen in the Equality for men and women Act (incorporates the EU Directive 2010/41/EU), as well as tax incentives to attract women back to work after childbirth. - Some women in high decision-making positions in research and government institutions 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Very low presence of women in catching (5%) and aquaculture (11%) and only 31% in processing. - No data on "invisible" female workers, despite estimates of 500-600 working in supporting, unpaid activities to help out the family business. - No women's organisations. - The marketing and promotion campaigns have had little impact on changing mentalities. - Physical strength as a constraint mentioned by both men and women. - Pay gap in the catching sector.
<p>Opportunities</p> <ul style="list-style-type: none"> - Upward employment trend (for both men and women) to cater for increasing administration of the sector (regulatory measures, inspections, etc.). - Growing awareness of the sector's potential thanks to public campaigns [though somewhat contradicted in Weaknesses]. - The evolution of the sector could open opportunities for more advanced, niche, posts (e.g. in finance or allied sectors) for women. - In principle, IT and new technologies could help provide the flexibility that women need to achieve a work-life balance (but such changes are not yet happening). - Expected continuous growth of aquaculture = opportunities for women. 	<p>Threats</p> <ul style="list-style-type: none"> - Women's employment in general is very low compared to the rest of the EU, same situation in fisheries. - Dependence of catching fisheries on high-value species (tuna) and vagaries of the quota system. - Aging workforce in some islands (e.g. Gozo). - Weight of preconceived ideas on what women and men can and are good at. Strong stereotypes in the catching sector. - Some discrepancies in what statistics reveal in aquaculture (i.e. women involved in production) and what stakeholders reveal (they are involved in post-harvest and administration). - Lack of awareness about labour rights and the transposition of EU legislation in Maltese law. - Rather negative perception (by women) of the benefits of women's organisations (they say no time to participate). - Traditional society in which men take a back seat when it comes to family duties, which prevents women from being away home. - Lack of role models to incentivise women to join the industry.

4.7 Slovenia

Strengths	Weaknesses
<ul style="list-style-type: none"> - Increasing production from mariculture-shellfish (though number of employment is stable). - Employment in processing dominated by women (marketing, production and admin, men: logistics and leadership). - No "invisible" women in mariculture (registered enterprises). - More women in research and state institutions, no "invisible" workers there (key positions held by men though). Also active in FLAGS. - Equal opportunities for men and women enshrined in law. - No reported gender discrimination (even though sector dominated by men). - Recognition of status of assisting spouse in freshwater aquaculture operations (because they are registered as a supplementary activity at an agriculture holding and an assisting spouse status is possible in agriculture). - National decision-making body about the fisheries sector, i.e. the Fisheries Directorate of the Ministry of Agriculture, Forestry and Food is dominated by women. - Training and capacity building events usually well attended by women, esp. in relation to diversification, finance, administration, marketing (men more on technological development). - Agricultural Advisory Service provides training and support for funding applications (e.g. business plans, support with filling out forms etc.) 	<ul style="list-style-type: none"> - No sex-disaggregated data. - Very small fisheries sector, on the decline, subsidies-dependent, 90% small-scale. - Fishing is at the edge of economic viability, thus most of the spouses are employed elsewhere - Low education level of workers in catching fisheries. - Marine aquaculture smaller than freshwater aquaculture (freshwater aquaculture bigger than catching + mariculture combined in terms of employment). - Small processing sector - Only 1% of registered fishers is female. - Estimated high number of "invisible" women in the sector, particularly fishing and freshwater aquaculture. - Very little information on "invisible" women – likely to be more present in small-scale operations, family-run businesses or farms. - Gendered division of labour, with women said to be good at some tasks, planning, attention to detail etc. - Women provide important but unrecognised support in aquaculture (e.g. loan guarantors, daily accounting and management, etc.) - Legislation does not recognise the status of assisting spouses/life partners in aquaculture and fisheries (but <u>yes in agriculture</u> and other forms of support in agriculture which aren't available in fisheries – thus possible in case aquaculture is a supplementary activity at an agriculture holding) - Lack of flexible working arrangements e.g. part-time work due to rigid legislation, preventing entry in fisheries and spouse work on a short-term (but official) basis - No specific sectoral women organisation, owing to too few women in the sector and the fact that the fisheries sector is small. - Physical strength mentioned again as a barrier to female participation, despite technological improvements. - No promotion of the sector among the youth.

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	<ul style="list-style-type: none"> - No fisheries and aquaculture-specific vocational training, learning opportunities for obtaining specific knowledge on technology and management are very rare and it is up to individual women to find them. - Current FLAG is not functioning well.
<p>Opportunities</p> <ul style="list-style-type: none"> - Positive image of fishing - Some innovative initiatives on behalf of women to diversify their activities and add value to products, helped by technological developments and internet. - Examples of success female mariculture directors as potential role models. - Aquaculture in a legal 'loophole' regarding self-employment and employment of partners (standard, and different from agriculture and fisheries). - Cultural norms are not very strong. - Technological change and positive impact of the internet to access information. 	<p>Threats</p> <ul style="list-style-type: none"> - Low attractiveness of the sector for more educated people (e.g. children of fishers). - Freshwater aquaculture operations in most cases considered as part of a farm (agriculture holding registered in the man's name), but agriculture in transition and not very equalitarian either. - Stereotyped idea that women pay attention to detail, etc. - Current fiscal status of self-employed people wishing to employ partner is not attractive. - Women's rather low self-esteem and poor listening skills from men. - Risk-averse culture. - Family obligations hampering willingness to take risks, esp. in context of economic hardship. - Difficulty to pass on farm (inheritance) to successor due to low attractiveness.

4.8 Spain

<p>Strengths</p> <ul style="list-style-type: none"> - Huge fishing nation and sector, in all parts of the value chain (but concentrated on Atlantic coast, less so on Med coast). - Strong aquaculture sub-sector (1st producer in the EU). - Existence of a Spanish Network of Women in the Fisheries Sector since 2010. - Establishment of the Spanish Association of Women in Fisheries in 2016, created to defend their economic and professional interest, being also a platform for social dialogue. - Proactive and supportive role of the government. - Reports available on the situation of women in sector. - Overall better education level of women involved in catching and aquaculture compared to men. - Only slightly more women than men employed in the processing industry (59%). - Significant presence of women through the value chain, from the first sale markets through the retail at traditional fish markets and shops or the fish counters of large distribution companies - Women well represented in ministerial and leadership positions - Women have a central role in shore-based administration and support, essential for business performance. - The system of Collective Bargaining Agreements controlling the salaries in fisheries enables to break the gender pay gap. - Comprehensive coverage of women and equal opportunities in the legal apparatus. - Social protection schemes cover women and self-employed sea workers (many are women) have their own social protection. - Recognition by law of the “collaborative family of a self-employed” (which is not perfect though, but still positive to recognise family helpers and includes unmarried partners). 	<p>Weaknesses</p> <ul style="list-style-type: none"> - limitations of official statistics (despite improvements, data still not disaggregated enough), esp. on Med coast. - Lower figures of women’s participation in the Med compared to Atlantic coast fisheries. - Some ancillary activities, e.g. net making, traditionally the domain of women, are dominated by men on the Med (but not elsewhere). - Even if legal status of spouses exists, women often help unregistered. - Horizontal gender segregation on board vessels: women occupy lower ranks than men for same activity or role) = significant entrance barrier if not part of a family activity. - Gender-based labour division also found in aquaculture (production, low mechanisation = men, post-harvest=women). - Lower progression of women’s salaries (in general) compared to men’s = reveals a gender pay gap. - Women at the head of fisheries or aquaculture organisations are still a minority. - Unattractiveness and uncertainty of the fishing jobs for women. - In some age groups women continue to perceive their activity as simply complementary to the men’s main source of family income. - Red tape around specialised training and courses not always designed with needs of participants (i.e. women) in mind. - Small-scale fisheries and small companies are excluded from the Collective Bargaining Agreements, lacking mechanisms to address the working conditions and the pay gaps.
<p>Opportunities</p> <ul style="list-style-type: none"> - Historically recognised contribution and appreciation of women’s role in the sector (even if not shown in stats). 	<p>Threats</p> <ul style="list-style-type: none"> - Aging of female population involved in fisheries, incl. processing and replacement issue.

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| <ul style="list-style-type: none">- Proactive initiatives from women towards diversification, e.g. pesca-tourism, niche markets.- More regulation = progressive disappearance of “invisible” jobs.- Strong political will towards recognition of women in the sector, e.g. Plan for the Equality of Gender in the Fisheries and Aquaculture Sector (2015-2020).- FLAGs = window of opportunity for women’s collectives.- Real impulse given by existing women in fisheries associations for the creation of others in other parts of the country.- Technological developments to overcome physical limitations faced by women.- New market niches / opportunities: find new alternatives that reinforce the economy of coastal communities. The Strategic Plan of Fisheries and Aquaculture Diversification (2013-2020) includes tourism (local integration, legal recognition, quality labels), processing and marketing (valorisation and new markets), environment (green growth, conservation and valorisation of the natural patrimony) and social (participation, entrepreneurship, cooperation and training for diversification). | <ul style="list-style-type: none">- Integration of female workforce has not changed over the last few years = sign of low attractiveness. Increase very slow in aquaculture.- Increased use of technology in the processing industry has not altered the labour structure (women still in more menial jobs) and during the economic crisis more women than men lost their jobs.- Some positive changes in the representation and roles (now in more skilled jobs) of women in processing but still a glass ceiling (CEOs are men mainly).- Still some implicit gender bias (in wording of laws for example).- Still some deeply anchored machist attitudes to fishing (e.g. exclusive male membership to <i>confréries</i> – ‘cofradías’).- Perpetuation of stereotypes under the label of ‘beneficial specialisation’.- Difficulty for women to realise their potential. Career path in fisheries still very linked to that of husband.- Gender plans are focused on the labour market. The SSF that prevail in the Mediterranean do not have a labour regulation or collective agreement. Legal instruments to deal with the pay gap or conciliation are designed for the labour framework. |
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4.9 Bulgaria

<p>Strengths</p> <ul style="list-style-type: none"> - High involvement of women and gender balance in the public sector, administration and research. - 88% of employees in processing are female. - There are no “invisible” women workers (e.g. those helping husbands, fixing nets etc.) owing to the decline in small-scale fisheries where they are mostly found. - No evidence of women working informally or without social security in the processing sector: all women and men are formally employed on full/half working days. 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Only 1% of fishing licenses are for women owing to lack of interest of women to participate in the catching sector. - Unreliable figures of women’s participation (number of employees) in aquaculture. - Calculated figure: only 12.7% of women working in aquaculture. - Unknown participation of women engaged in the mariculture sub-sector. - No information available regarding the remuneration of women working in fisheries. - There is recognition of the status of assisting spouses in legislation, but this is not applied in practice. - Unclear involvement and decision-making powers of women in Bulgarian fisheries and aquaculture authorities, and in the General Fisheries Commission of the Mediterranean, to which Bulgaria belongs. - Childcare responsibilities and demanding nature of fishing are keeping women off the sector. - No sex-disaggregated data collection: data collection tools would need to be amended.
<p>Opportunities</p> <ul style="list-style-type: none"> - Relatively large processing factories (50+ employees), providing opportunities for formal employment contracts and a greater chance of “decent” working conditions. - Equal opportunities between men and women enshrined in Bulgarian laws (promoted with joining the EU), incl. regarding equal access to business development opportunities and entrepreneurship. - Few but growing trend of female role model entrepreneurs/business managers in catching and processing, and growing number of women in NGOs and trade unions. - Fisheries seen as growing sector where women should be given additional incentives. 	<p>Threats</p> <ul style="list-style-type: none"> - Sluggish aquaculture sector (though increase in production in 2015 compared to previous years), decreasing number of posts in mariculture → limiting potential employment opportunities for women. - No fisheries-related women organisations in Bulgaria (but representation of female self-employed/entrepreneurs by the Council of Women in Business in Bulgaria and the Association of Women Entrepreneurs in Bulgaria “SELENA”, and also BISAC (Cf. Romania).

4.10 Romania

<p>Strengths</p> <ul style="list-style-type: none"> - Well-developed and diversified post-harvest/transformation sector where women dominate the workforce. - Women in highly specialised (but only related) positions, e.g. academia and research, where their status is well recognised (30% of staff with higher education is female) - Processing sector is more egalitarian: women involved in packaging, quality control, filling cans and supervision. - Employment in aquaculture is more formal in general, compared to catching fisheries. - In principle, strong legal and governance framework to prevent gender discrimination and promote equal rights: <ul style="list-style-type: none"> - Gender pay equality is enshrined in the country's Constitution. - Non-discrimination is mentioned (on paper at least) in strategic development plans for aquaculture and fisheries & maritime affairs. - The status of assisting spouses is legally recognised. 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Lack of traceability in the seafood value chain, which fails to expose any differences in work conditions and employment between men and women (some certification schemes (e.g. BAP) would pick on these issues). - Labour force in formal employment in fisheries and aquaculture is highly divided (e.g. 97% men in catching sector, 86% in aquaculture production): a result of gender stereotypes in the overall fisheries and aquaculture industry and perception of the physically demanding nature of the activities. - Lack / unreliability of official employment data, no data on informal posts/helping partners. - Evidence of women in managerial and decision-making positions is weak. - In practice, inadequate enforcement and implementation of the legal provisions preventing unequal pay between men and women. - Women are not organised in fisheries-related women's organisations but some de facto belong (and are in relatively high positions) to some fisheries-related organisations (e.g. BISAC).
<p>Opportunities</p> <ul style="list-style-type: none"> - Seemingly important role of the EFFMA in financing new developments in fisheries and its obligation to give equal opportunities to men and women (NB: but this body is external to Romania itself). - Emergence of highly-skilled jobs in high-tech aquaculture ventures (funded by EFFMA), for which women are well placed. - Increasing number of women in allied sectors, e.g. environment: park rangers, sports/recreational fishing. - Equal number of men and women in decision-making positions in the administration (but not in the private sector in general). - The Agency for Equal Opportunities between Men and Women = enabling environment for equality in work to happen (from which fisheries and aquaculture should eventually benefit). 	<p>Threats</p> <ul style="list-style-type: none"> - Sluggish growth of aquaculture sector (freshwater only), and declining attractiveness of the sector. - Some conflicting views and perceptions between women (focus groups) and institutional stakeholders (e.g. regarding age of women, extent of formal and informal employment), suggesting that that policy makers are unaware of realities. - Heavy weight of gender stereotypes, which are compounded by lack of childcare services to give women more opportunities to return to work after a maternity break. - Rigid employers' mentality regarding the implementation of flexible work measures (e.g. flexitime) that could facilitate women's (re)entry in the sector.

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