



Action strategy of Läänemaa fisheries area for 2015–2025





Action strategy of Läänemaa fisheries area for 2015–2025

Approved by the decision of the General Meeting on 19 June 2015



Table of Contents

Table of Contents	2
Introduction	4
1 Summary of the action strategy of Läänemaa fisheries area for 2015–2025	5
2 Analysis of the current situation in the Läänemaa fisheries area.....	8
2.1 General characteristics of the fisheries area	8
2.2 Fishery	10
2.2.1 Trawl.....	10
2.2.2 Recreational fishing	10
2.2.3 Coastal fishing.....	11
2.2.4 Changes in the price of first sale of fish.....	12
2.3 Status of fish stock and changes	13
2.3.1 Status of fish stock	13
2.3.2 Reproduction of fish stock and restoration of spawning grounds	13
2.4 Employment and livelihood opportunities in coastal fishing.....	14
2.4.1 Fisherman's fishing authorisations.....	14
2.4.2 Age structure of fishermen	15
2.4.3 Seasonability of fishing.....	16
2.4.4 The incomes of the fishermen from fishing	16
2.4.5 Secondary activities of fishermen.....	17
2.5 Status of fishing fleet.....	17
2.5.1 Fishing fleet of Läänemaa.....	17
2.5.2 Investments to fleet.....	17
2.6 Ports and landing sites.....	18
2.7 Fish processing and direct marketing	20
2.7.1 First sale of fish and marketing opportunities	20
2.7.2 Fish processing.....	20
2.8 Fishing tourism.....	20
2.9 Training needs of fishermen	21
3 Implementation of the action strategy of Läänemaa fisheries area for 2009–2015	23
3.1 Allocation of funds among the strategy axes	23
3.2 Allocation of funding in Läänemaa fisheries area	23
3.3 Number of grants and structure of applicants	24
3.4 Evaluation to reaching the objectives of the fisheries area strategy for 2009–2015 in Läänemaa	26
3.4.1 Objective 1. Renovation of fishing ports and landing sites	26
3.4.2 Objective 2. Processing and direct marketing of fisheries products	26
3.4.3 Objective 3. Traditions of the Läänemaa coastal fishing have been preserved and integrated with the economy of the region	27
3.5 Expert assessment to the impact of the measure to the Läänemaa fisheries area	28
3.5.1 Impact of the measure to the Läänemaa fisheries area.....	28
3.5.2 Satisfaction with operations of LRS	28
3.5.3 The role of LRS	28
3.5.4 Audits conducted in the association	29
4 SWOT-analysis of the Läänemaa fisheries area	30
5 Relationships with other development plans and strategies	33

6	Mission and vision of LRS	35
7	Objectives of LRS until 2025	37
7.1	Renovation of fishing ports and landing sites	37
7.2	Processing and direct marketing of fisheries products	38
7.3	Diversification of economic activities for fishermen	39
7.4	Promoting and maintaining biodiversity	40
7.7	Objectives of the organisation	41
8	Action plan and work organisation of LRS	44
8.1	Action plan	44
8.1.1	Renovation of fishing ports and landing sites	44
8.1.2	Processing and direct marketing of fisheries products	44
8.1.3	Diversification of economic activities for fishermen	45
8.1.4	Promoting and maintaining biodiversity	46
8.1.5	Promoting and maintaining maritime and fishing heritage and improving social well-being	46
8.1.6	Training activities, national and international cooperation	47
8.2	Organisation of the work of MTÜ Läänemaa Rannakalanduse Selts (Läänemaa Coastal Fisheries Society, LRS)	47
8.2.1	Management of LRS	47
8.2.2	Competence and experience for implementing the local strategy	47
8.2.3	The measures for improving the applicants' performance in drafting and implementing the projects	48
8.2.4	Amending the strategy	49
8.3	Organising calls for proposals	49
8.3.1	Calls for proposals	49
8.3.2	Notification	50
8.4	Evaluation procedure and criteria	50
8.4.1	General principles	50
8.4.2	Appointment of the Proposal Evaluation Committee	50
8.4.3	Withdrawing from the Evaluation Committee	51
8.4.4	Evaluation criteria	52
8.5	Plan of communication	53
8.5.1	Partner organisations of Läänemaa Rannakalanduse Selts	54
9	Monitoring of the funded projects and performance evaluation of the strategy	55
10	Finance scheme	56
	Strategy drafting process	58
	Reference materials	59
ANNEXES		60
	Annex 1. Participation in strategy drafting seminars	60
	Annex 2. Studies undertaken and used for preparing the strategy	60
	Annex 3. Fisheries, fishermen, fleet	61
	Annex 4: Implementation of the Action Strategy 2009–2015	62

Introduction

Coastal fisheries strategy for Läänemaa is prepared for 2015–2025. Upon preparations of the strategy, the action group of MTÜ Läänemaa Rannakalanduse Selts (NGO Läänemaa Coastal Fishing Association (hereinafter LRS)) set a target to design strategic options and set objectives by the means of which it is possible to ensure the sustainable development of coastal fisheries in Läänemaa fisheries area and integrate fisheries better with other industry branches. The strategy was prepared during the period from December 2013 to May 2015. We regard the big and versatile amount of people involved in preparation of the strategy very important.

Preparation of the strategy was driven by the measure 3.2 “Implementation of the Community–Led Local Development Strategy” of the operational program of the European Maritime and Fisheries Fund, which financial support enables to implement the set objectives.

Consultants of Cumulus Consulting OÜ, Mihkel Laan and Aado Keskpaik, provided much assistance in implementation of engaging activities of the strategy, analysing collected information and preparation of the strategy text. Strategy text is translated by Tilde Eesti OÜ translator Kaja Kährik.

1 Summary of the action strategy of Läänemaa fisheries area for 2015–2025

The Läänemaa fisheries area is located in West-Estonia, in a relatively sparsely populated coastal area and it includes the rural municipalities of Hanila, Lihula, Martna, Noarootsi, Ridala, Vormsi, Nõva and Lääne-Nigula and the city of Haapsalu. The population of the area was 24 370 people as of 1 January 2015. The population of the area is continuously decreasing in almost all local governments. According to the estimates of the Statistics Estonia, the population keeps decreasing. The area is located outside of big centres; the catchment area on the county level is Haapsalu, and on the regional level Tallinn and Pärnu. Catchment areas are important to people for work opportunities as well as for services (culture, commerce, public services etc.). From the fishing perspective, catchment areas are important markets for the fishermen's products of the area. The area as a whole can be considered a periphery. Large part of Läänemaa is environmentally protected. There are altogether 180 protected objects in the area of which 16 are protected areas. Protected areas form 32% of the county's area.

There were 158 fishermen with fishing authorisations in the Läänemaa fisheries area in 2014. The number of coastal fishermen has slightly risen over the years. An average age of the fishermen is 53 years and this has remained stable, although structural ageing is taking place and the percentage of fishermen in the retirement age is growing. Only a small number of young people are entering the fishing sector.

The income received from catches and landings has improved significantly over the years. Fisheries scientists have not agreed upon the exact reasons for the substantial rise in landings and therefore scientists remain cautious about increase in landings and do not directly confirm the improvement of fish stocks.

The fishermen of Läänemaa get their income from fishing mainly during 5 months – from May to October. The seasonal nature of the catches puts the fishermen in a relatively difficult position and forces them to look for extra income options besides fishing. These extra income options include mostly agriculture, forestry, also providing tourism services and many fishermen are engaged in classic paid employment.

According to the Ministry of Rural Affairs, there were 43 landing sites in active use in the Läänemaa fisheries area in 2013. Over the years, the number of landing sites has decreased slightly. Most of the catches (89.3%) are landed in one of the 13 fishing ports or landing sites in the Läänemaa fisheries area.

8 coastal fishing companies are engaged in the processing and direct marketing of the fish, 2 companies have purchased modern equipment and are capable of

producing approximately 600 kg a day. 6 companies are engaged in processing and direct marketing of the fish on a smaller scale.

Between 2010 and 2013, LRS organized 8 calls for proposals for the EFF measure 4.1. 'Sustainable development of fisheries areas' where 2 567 426 euros were given out to fishing companies, local governments and fishermen's NGOs. The level of investment in the Läänemaa fisheries area amounted to 3 320 075 euros, own contribution was 752 694 euros. The proposition was made to PRIA to support total of 105 applications.

Over half of the funding (53.8%) went to the renovation of fishing ports and landing sites.

The preparation for the Läänemaa fisheries area action strategy for 2015–2025 started in December 2013. Altogether 12 meetings were held with more than 112 people attending. Most of them were professional fishermen. For the sustainable development of coastal fishing, the following objectives were set for 2025:

- To develop at least 7 ports in the Läänemaa fisheries area where a variety of services can be provided. Focus is put on development of the ports of Dirhami, Hara, Nõva, Puise, Topu and Virtsu and the landing site of Rälby.
- To increase the on-site fish processing and support establishment of a functional cooperative society of fishermen.
- To diversify fishermen's activities to secure year-round income for fishermen.
- To improve spawning grounds in cooperation with the Environmental Board and fisheries scientists.
- To secure preservation of fishing and maritime traditions and to strengthen the fishermen's community identity.
- To improve knowledge, skills and interoperability of fishermen.

To reach these goals, LRS decided to use all axes of the European Maritime and Fisheries Fund measure 3.2 "Implementation of the Community-Led Local Development strategy" based on the following distribution of funding:

1. Renovation of fishing ports and landing sites – 30%
2. Processing and direct marketing of a fisheries products – 30%
3. Diversification of activities – 27%
4. Reproduction of fish stock and restoration of spawning grounds – 3%
5. Preservation and promotion of fishing and maritime cultural traditions. Promotion of social wellbeing – 10%

The strategy and the axes will be implemented through different projects by Läänemaa fishermen, processors of fishery products, tourism companies in the coastal area, fishermen's organizations and by local authorities in the fisheries area together with LRS. The European Maritime and Fisheries Fund and the Estonian government support implementation of the projects financially. LRS is entrusted with the right and responsibility to choose the projects. Supported projects are selected based on annual calls for proposals. The evaluation

committee set up by LRS will evaluate applications for project funding; the committee will evaluate applications based on the criteria outlined in the strategy. The management board or General meeting of LRS makes the final decision depending on the financial volume of the application.

2 Analysis of the current situation in the Läänemaa fisheries area

2.1 General characteristics of the fisheries area

The Läänemaa fisheries area is located in West-Estonia, in a relatively sparsely populated coastal area. The length of the mainland coastline is approximately 400 km. The coast of Läänemaa has a low relief and the coastline is strongly split. There are 237 islands (with islets and reefs). Bigger islands are Vormsi with 92.6 km², Osmussaar with 4.9 km², Tauksi with 2.9 km² and Hobulaid with 0.8 km². There are permanent residents on Vormsi and Osmussaar.

The coastal fisheries area of Läänemaa is clearly demarcated in the sea. Väinameri is in the west (ICES subdivision 29–4) and the Baltic Sea and Gulf of Finland in the north (subdivision 32–1). Professional fishing can be performed in the described subdivisions only based on the fishing authorisation issued for Läänemaa.

The fisheries area covers rural municipalities of Hanila, Lihula, Martna, Noarootsi, Ridala, Vormsi, Nõva and Lääne-Nigula and city of Haapsalu, hence the whole Läänemaa except Rural Municipality of Kullamaa.

The population of the fisheries area in Läänemaa was 24 370 people as of 1 January 2015. The population is decreasing constantly. According to the Statistics Estonia, the population keeps decreasing.

The population of the Läänemaa fisheries area is aging and the important age groups of population of the fisheries area (children and age group 19–64) are decreasing faster than in the country as a whole. At the same time, the increase in age group 65+ exceeds the national average.

The area is located outside of big centres. There is a connection with Saaremaa, Hiiumaa and Vormsi via the Läänemaa ports Rohuküla and Virtsu. The catchment area on the county level is Haapsalu, and on the regional level Tallinn and Pärnu. Catchment areas are important to people for work opportunities as well as for services (culture, commerce, public services etc.). From the fishing perspective, catchment areas are important markets for the fishermen's products of the area. The area as a whole can be considered a periphery (except city of Haapsalu). Based on the research on commuting by Human geography and regional planning chair of the University of Tartu (Ahas 2010), it can be declared that the rural municipalities of Läänemaa fisheries area are rather the places of residence than the working places for their people. Hence big part of people work outside the home municipality. In the context of Läänemaa, the employment migration towards Haapsalu takes place from the

rural municipalities of Ridala, Lääne Nigula, Vormsi and Noarootsi. The rest of the local governments are more related to Tallinn.

2 209 different undertakings (988 of them were self-employed persons) with 4 195 employees were registered in Läänemaa in 2012. Majority (ca 1 400) working places were in manufacturing, followed almost equally by construction, commerce and healthcare and tourism (ca 400 working places in each). Majority of the companies are small businesses.

Ca 450 people have found work and service in fisheries (includes trawling, coastal fishing and fish processing). An average gross salary in the fisheries sector was 934 euros in 2012 (an average in Läänemaa was 697 euros). Investments made by the means of the measure of the European Fisheries Fund (support volume of the measure in Läänemaa was 6.2 million euros) have definitely contributed to relatively high employment and higher than average salaries. Still it is considered that the income from fisheries is relatively volatile since the situation of fish stock, climate and also the political developments in the eastern neighbourhood influence remarkably the sector (source: The economic survey of Läänemaa 2012).

Based on the absolute numbers, the percentage of unemployed people in Läänemaa fisheries area resembles the pattern by the local governments, county as well as whole Estonia. The global economic crisis that started in 2008 also influenced the labour market of Läänemaa. From 2009, the percentage of unemployment among the working age population has increased, proceeded by step by step decrease thereafter. The unemployment struck hardest the city of Haapsalu, still the percentage of unemployment in Läänemaa county and LRS remained below the average, as a rule. Unemployment dropped significantly by the end of 2013.

Large part of Läänemaa is environmentally protected. There are altogether 180 protected objects in the area of which 16 are protected areas. The biggest nature reserve is Matsalu National Park (50 000 ha). Approximately half of the area of the national park is covered with water. Protected areas form 32% of the county's area. Amplitude of nature conservation sites has set more restrictions to catches and movement on the sea for Läänemaa fishermen. Amplitude of the nature reserves puts the marine tourism undertakings to difficult situation since majority of the big islands in the area that could be attractive tourism destinations have nature conservation restrictions and staying there is prohibited (source: Environment Agency).

Regular monitoring catches are performed in Läänemaa fisheries area and fisheries related research is carried out primarily in Matsalu Bay and Silma Nature Reserve. Still the fishermen think that the collected data do not give an adequate overview of the actual situation of fish stock and future scenarios of the fisheries. Väinamere and Gulf of Finland region should be investigated more thoroughly.

2.2 Fishery

2.2.1 Trawl

Pre-requisites for large scale (mainly trawl) fishing and fish processing are very good in Läänemaa. Three enterprises possessing remarkable part of Estonian sprat and Baltic herring quota are active in Läänemaa. 38% of the whole sprat and Baltic herring catches were landed in the ports of Läänemaa in 2014, including 32% of fish in port of Dirhami, 1,5% in port of Westmeri and 4.3% in the port of Virtsu. Also significant investments have been made on trawl sector concerning fish storage and processing. The trawl sector as the fish buyer is important for those coastal fishermen who are actively deal with large-scale Baltic herring fishing.

2.2.2 Recreational fishing

It is very difficult to estimate the quantities of fish caught as recreational fishing and value of catches since submission of catch data of recreational fishermen is incomplete and it is difficult to connect it to a certain catch area.

Table 1. Quantity of fish caught on recreational fishing and estimated value for 2006–2014

year	recreational fishing*		commercial fishing	
	fishing kg	estimated value €	fishing kg	estimated value €
2006	12 000	7 000	117 833	57 439
2007	12 000	8 000	101 623	57 782
2008	11 000	7 000	103 512	55 109
2009	13 000	7 000	208 153	82 109
2010	13 000	8 000	343 407	111 108
2011	15 000	11 000	322 956	146 041
2012	12 000	11 000	247 192	161 278
2013	N/A		345 652	319 779
2014	N/A		348 633	299 097

Note: recreational fishing quantities and estimated values are calculated based on ratios. Recreational catch ratio is taken from commercial fishing of subdivisions 29 and 32, from there in turn the ratio of recreational fishing performed in Läänemaa is calculated. Source: Ministry of the Environment, Ministry of Rural Affairs and calculations by the author

Table 1 shows that even according to the most modest calculations, the recreational fishermen catch considerable amount of fish with considerable value. According to the laws of the Republic of Estonia, it is forbidden to sell fish caught during recreational fishing. Despite that, it is still done and hence there is a reason to believe that the recreational fishermen are the competitors for professional fishermen. On the other hand, a big number of recreational fishermen means an unused resource for the maritime tourism undertakings in Läänemaa.

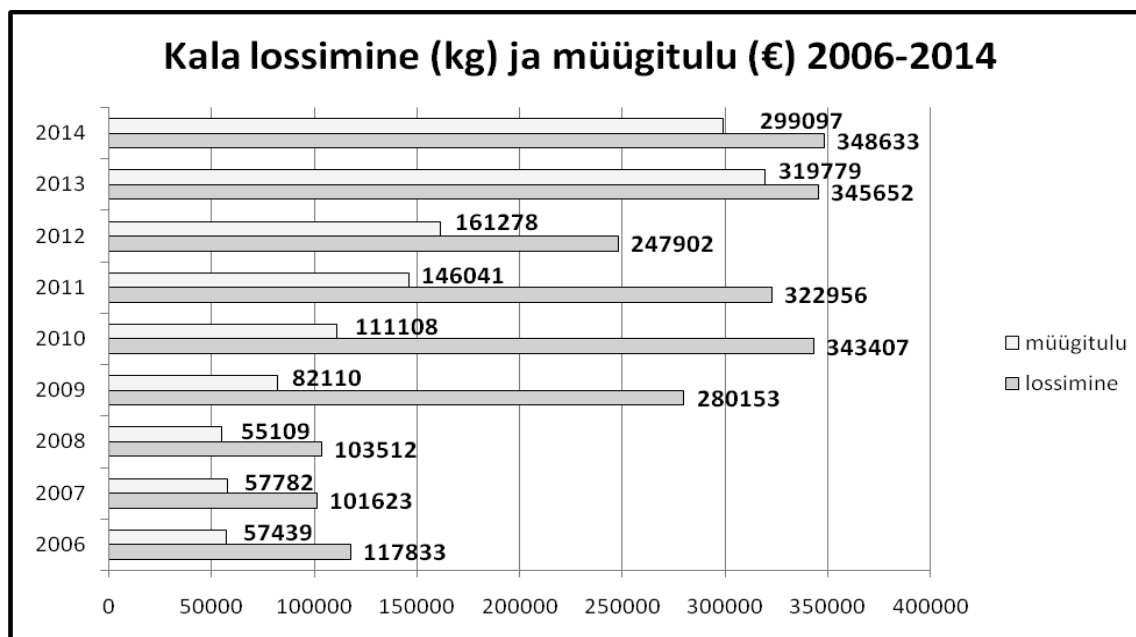
2.2.3 Coastal fishing

Coastal fishing takes place in the extent of 12 nautical miles from the coast or up to the 20 m isobath (§13 2 of the Fishing Act). In addition to restrictions of the laws, the protection order rules of the Matsalu and Silma Nature Reserve regulate the coastal fishing in Läänemaa fisheries area. Besides the numeric restrictions of the fishing gear, also temporal restrictions on fishing are applied that consider the bird migration and nesting times.

The following fishing gear was available for use in professional fishing in Läänemaa in 2015: 30 pound nets, 30 open water nets, 85 fyke nets with mouth height of 1–3 m and 70 fyke nets with mouth height of up to 1 m, 945 eel traps, 2140 gillnets, 130 longlines. 45 gillnets are available for commercial fishing in Vormsi island. 50 lamprey cone traps are available in internal water bodies River Nõva and Riguldi and 15 gillnets in Sutlepa sea. The number of permitted fishing gear has remained stable during the years, only the number of eel traps has diminished by 30%.

Landings of fish caught at coastal fishing and calculated sales revenue has increased year by year.

Figure 1. Fish landings and sales revenue changes during 2006–2014



Source: Ministry of Rural Affairs

The most productive fish species in the Läänemaa fisheries area are perch, pike, Baltic herring, flounder and garfish. Roach and crucian can be highlighted as perspective fish species. Yield of these fish species in the coastal sea of Läänemaa is considerable, unfortunately fishermen do not get due price for these fish. Volumes of more productive fish species has sharply risen during last years (see Table 2 and 3).

Table 2. Fishing of more productive fish species (kg) in 2006–2014

Fish species	2006	2007	2008	2009	2010	2011	2012	2013	2014
Perch	8 568	10 234	6 982	9 111	15 382	9 458	15 999	65 000	68 221
Pike	8 119	5 709	6 679	5 362	9 036	14 698	21 528	37 776	35 890
Flounder	31 734	23 829	21 762	28 230	35 756	30 036	28 559	30 796	29 908
Baltic herring	4 262	10249	11 383	181 200	219 599	195 679	140959	138454	104851
Garfish	30 065	8 308	1 008	6 980	14 746	16 554	5 273	955	1 308
perspective fish species									
Roach	8 600	9 219	10 059	11 270	9 761	13 141	13 048	16377	20 927
Crucian carp	12 682	16 191	24 202	17 367	10 246	20 496	21 472	16 246	31 457

Table 3. Sales revenue (€) of more productive fish 2006–2014

Fish species	2006	2007	2008	2009	2010	2011	2012	2013	2014
Perch	13 451	20 979	14 732	15 944	30 917	22 982	45 917	142350	116573
Pike	6 820	5 252	6 478	4 129	8 042	16 756	26 264	49 864	52 399
Flounder	14 280	11 199	9 793	12 704	16 448	18 022	15 421	19 401	23 627
Baltic herring	511	1 435	1 821	28 992	32 940	54 790	43 697	52 612	34 562
garfish	8 418	3 074	393	3 350	7 668	11 753	3 902	1 232	1 558
perspective fish species									
Roach	1 376	2 581	2 515	2 254	1 757	2 891	3 914	5 241	7 533
Crucian carp	1 775	1 943	3 630	2 084	2 025	3 279	3 436	4 062	7 865

Source: Ministry of Rural Affairs

2.2.4 Changes in the price of first sale of fish

The prices of most caught fish species has significantly increased. Still the price increase has not ensured relatively higher incomes for the fishermen. Inflation and price increase of inputs necessary for fishing (fuel, gear material, fleet, etc) has swallowed the income from catch. Also the periodicity of catch influences the income of fishermen that essentially impacts the price of first sale by months.

Table 4. Change of first sale price of more productive fish species for coastal fishing (€) 2006–2014

Fish species	2006	2007	2008	2009	2010	2011	2012	2013	2014
Perch	1.57	2.05	2.11	1.75	2.01	2.43	2.87	2.19	1.71
Pike	0.84	0.92	0.97	0.77	0.89	1.14	1.22	1.32	1.46
Flounder	0.45	0.47	0.45	0.45	0.47	0.6	0.54	0.63	0.79
Baltic herring	0.12	0.14	0.16	0.16	0.15	0.28	0.31	0.38	0.33
Garfish	0.28	0.37	0.39	0.48	0.52	0.71	0.74	1.29	1.19
Perspective fish species									
Roach	0.16	0.28	0.25	0.2	0.18	0.22	0.3	0.32	0.36
Crucian	0.14	0.12	0.15	0.12	0.1	0.16	0.16	0.25	0.25

Source: Ministry of Rural Affairs (average first sale prices for coastal fishing)

2.3 Status of fish stock and changes

2.3.1 Status of fish stock

Considering the increase in landings in the Läänemaa fisheries area, it could be believed that the status of fish stock in coastal sea of Läänemaa has improved (see Figure 1 and Table 2). The CPUE has been specially fast during 2010–2013. The feedback from fishermen confirms that during last years, there has been lot of fries and undersized fish that must be discarded.

Active monitoring catches in fisheries area of Läänemaa take place in Matsalu Bay from 1993. Monitoring catches of 2011 confirm that the CPUE on that year in Matsalu Bay was record-shattering. The monitoring catches confirmed the increase in abundance of roach, bream and pike, the CPUE of perch has risen slightly less (Eschbaum 2012). Baltic herring stock in the Väinameri is in good state according to the fishery scientists. Hence the Baltic herring quotas have been increased during last years.

Fisheries scientists have not agreed upon clear reasons for the substantial rise in fish catches and therefore researchers remain cautious about increase in landings and do not directly confirm the improvement of fish stocks.

Fish stock is also influenced by the abundance of piscivorous animals and birds (grey seals and cormorants). In addition to fish stock, the grey seals also significantly threaten the traps of the fishermen. To solve the problem, the seal-safe fykes should be primarily introduced.

2.3.2 Reproduction of fish stock and restoration of spawning grounds

Rein Järvekülg ja Gustav Lauringson have systematically dealt with need and possibilities of reproduction (restocking) of fish stock and recovery of spawning grounds in Läänemaa. The research is mainly focusing on investigating trout and salmon rivers. Despite relatively extensive research, systematic reproduction of fish stock and recovery of spawning grounds has not started in Läänemaa.

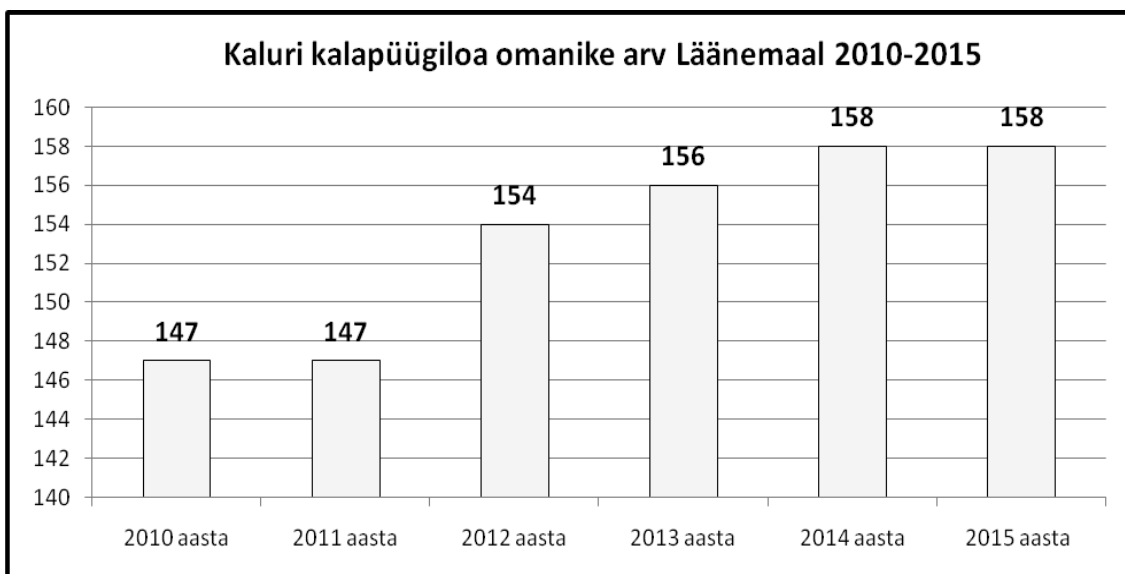
To initiate systematic recovery of spawning grounds in the Läänemaa fisheries area, the cooperation with fishery scientists and Environment Board must be first strengthened, and perspective spawning grounds to be recovered must be found out.

2.4 Employment and livelihood opportunities in coastal fishing

2.4.1 Fisherman's fishing authorisations

158 fishermen's fishing authorisations were issued in Läänemaa fisheries area in 2015 with 264 fishermen entered to the authorisation of who 106 were assistant fishermen. 17 owners of the fishing authorisation are registered outside Läänemaa fisheries area. Number of fishing authorisation owners has a little increased over the years (Figure 2).

Figure 2. Fisherman's fishing authorisation owners in 2010–2015

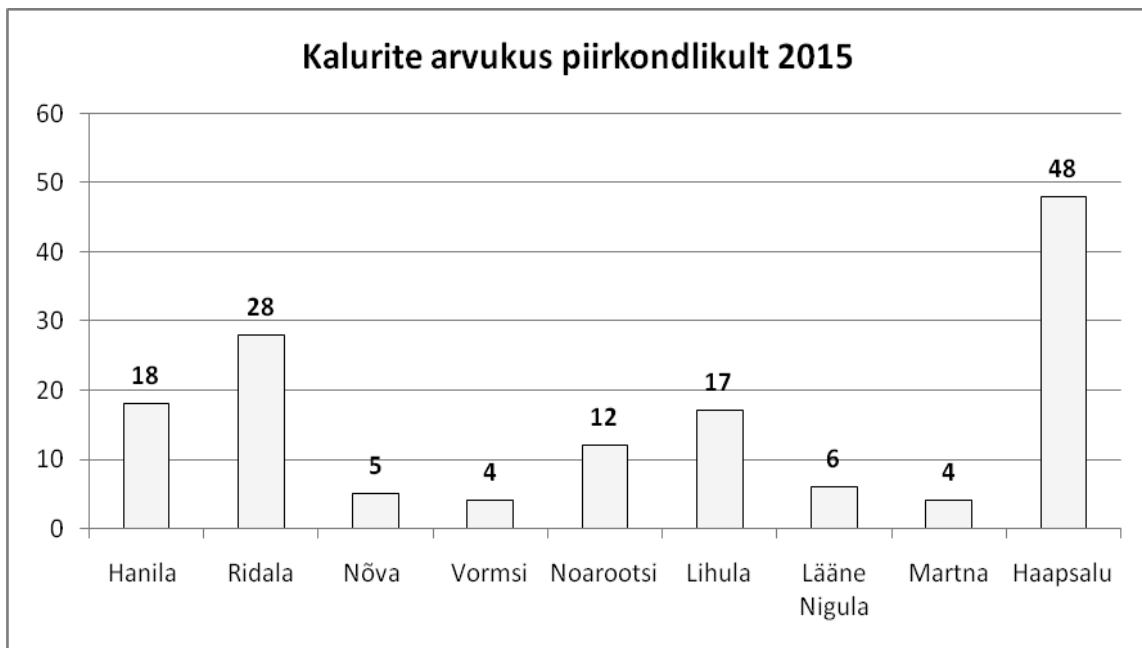


Source: Ministry of Rural Affairs

Legal form of undertaking of majority of owners of fishing authorisation is self-employed person, still the percentage of companies has lately increased remarkably. The main reason for it is launching of measure 4.1 'Sustainable development of fisheries areas' of the European Fisheries Fund. It is complicated to make large scale investments as the self-employed person. Estonian taxation policy does not favor the economic activities of the self-employed persons, also an access to the loan facilities of the self-employed persons is limited (see the change in Figure 1 of Annex 3).

Most of the fishermen (34%) are registered to city of Haapsalu. There are also more fishermen in Rural Municipality of Ridala (20%) than in other areas.

Figure 3. Location of fishermen by the local governments of LRS area in 2015

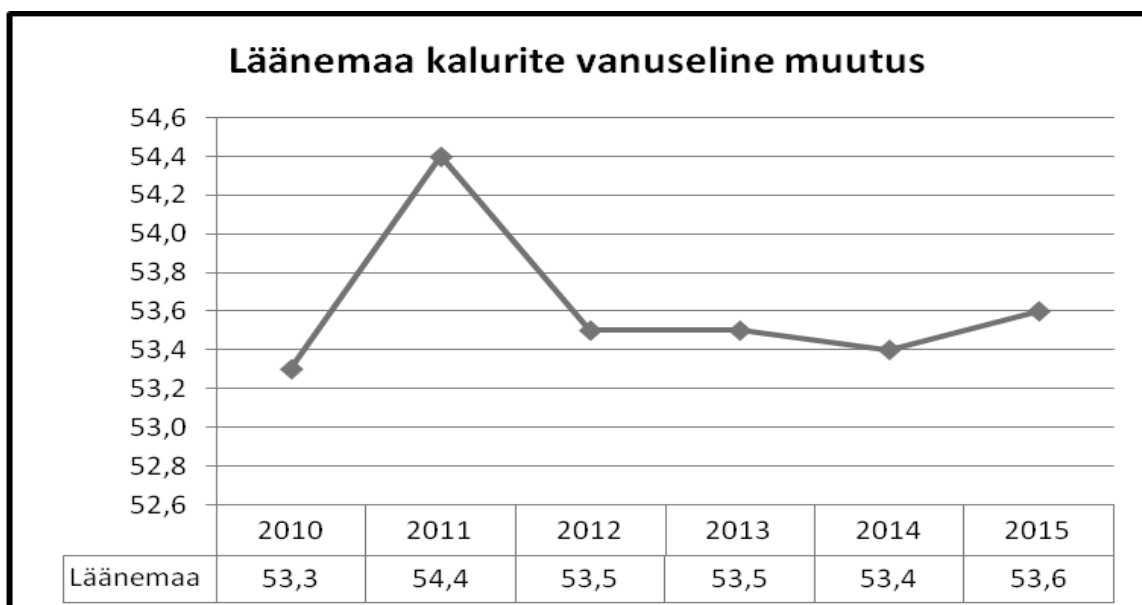


Source: Ministry of Rural Affairs and calculations by the author

2.4.2 Age structure of fishermen

An average age of the fishermen in Läänemaa fisheries area is relatively stable. 6 young fishermen who have obtained the right to fish and 15 assistant fishermen who are entered to the fishing authorisation and fish actively have joined the community of fishermen in Läänemaa during the period of 2010–2015.

Figure 4. The change in the average age of Läänemaa fishermen during the period of 2010–2015



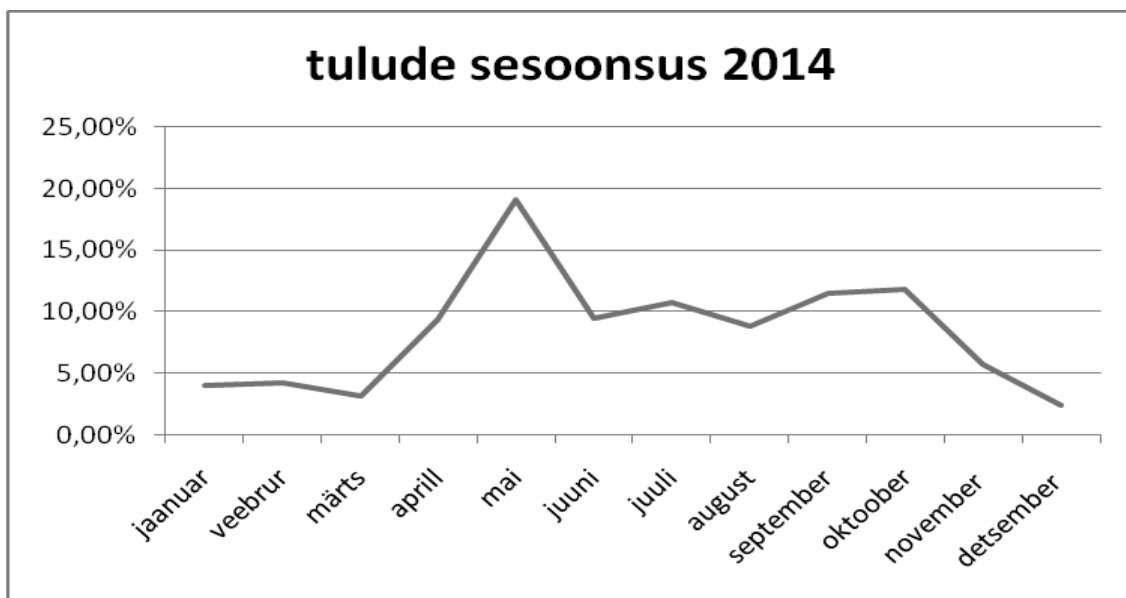
Source: Ministry of Rural Affairs and calculations by the author

Still the added young fishermen have not stopped the structural ageing of Läänemaa fishermen. The number of economically active (19–64 years) fishermen is decreasing slowly, but steadily.

2.4.3 Seasonability of fishing

Läänemaa fishermen earn their income from fishing during May–September. During last years, when the situation of fish stock has improved, the active catching period has extended to October. Independent of how good is the situation of fish stock and how active is fishing, the Läänemaa fishermen earn their income from fishing during maximum of 5 months (see change in Table 1 of Annex 3).

Figure 5. Breakdown of income from fishing by months in Läänemaa in 2014



Source: Ministry of Rural Affairs and calculations by the author

2.4.4 The incomes of the fishermen from fishing

Calculations are based on the fact that the income from fishing is received during maximum of 5 months. Minimum gross salary of 5 months is €1775 (€355 per month); an average gross salary of 5 months in Läänemaa is €3485 (€697 per month).

Table 8 shows that more than 2/3 of the fishermen get income from fishing below an average minimum salary. Still there is a considerable number of fishermen whose incomes exceed an average salary in Läänemaa. Business expenses have not been deducted in the calculation.

Table 5. The incomes of the fishermen of Läänemaa from fishing in 2014

	€0 –1775	€1776 – 3485	€3486 +
City of Haapsalu	37	3	10
Rural municipality of Vormsi	4	0	0
Rural municipality of Ridala	20	4	3
Rural municipality of Lääne-Nigula	4	1	1
Rural municipality of Nõva	4	2	1
Rural municipality of Noarootsi	8	3	2
Rural municipality of Lihula	7	4	7
Rural municipality of Hanila	12	3	4
Rural municipality of Martna	4	0	0
LRS area	100	20	28
%	67.5	13.5	19.0

Source: Ministry of Rural Affairs and calculations by the author

2.4.5 Secondary activities of fishermen

The survey conducted among the fishermen and analysis of income groups show that the fishing and sales in 2014 was 100% source of livelihood only for 6 fishermen in the Läänemaa fisheries area. 84 fishermen (79%) from the economically active ones received their main income from the paid employment and 22 fishermen (21%) had other various businesses beside fishing.

Big part of fishermen are active in agriculture, cattle farming and forestry, 5 fishermen provide tourism services. beside fishing. In addition, people harvest the reed and build thatched roofs and make fishing nets.

2.5 Status of fishing fleet

2.5.1 Fishing fleet of Läänemaa

According to the data of the fishing fleet register of the Ministry of Rural Affairs, there were 150 fishing vessels in active use in Läänemaa fisheries area as of the end of 2013. An average age of the fleet is 20.9 years. Majority of the fleet (76.7%) consists of vessels with the length below 7 m. 23.3% of the fleet consists of vessels with the length of 7 m – suitable for large-scale catches. Predominantly the vessels used in Läänemaa have plastic hulls (62.7%), there are 32% of vessels with wooden hull and only 5.3% of the fleet has vessels with metal hull.

2.5.2 Investments to fleet

The situation of the fleet used by the fishermen in Läänemaa during the period of 2010–2013 has significantly improved. The hulls have been modernised and new engines and gears have been acquired by the means of measure 1.4 “Small-scale coastal fishing” of the European Fisheries Fund.

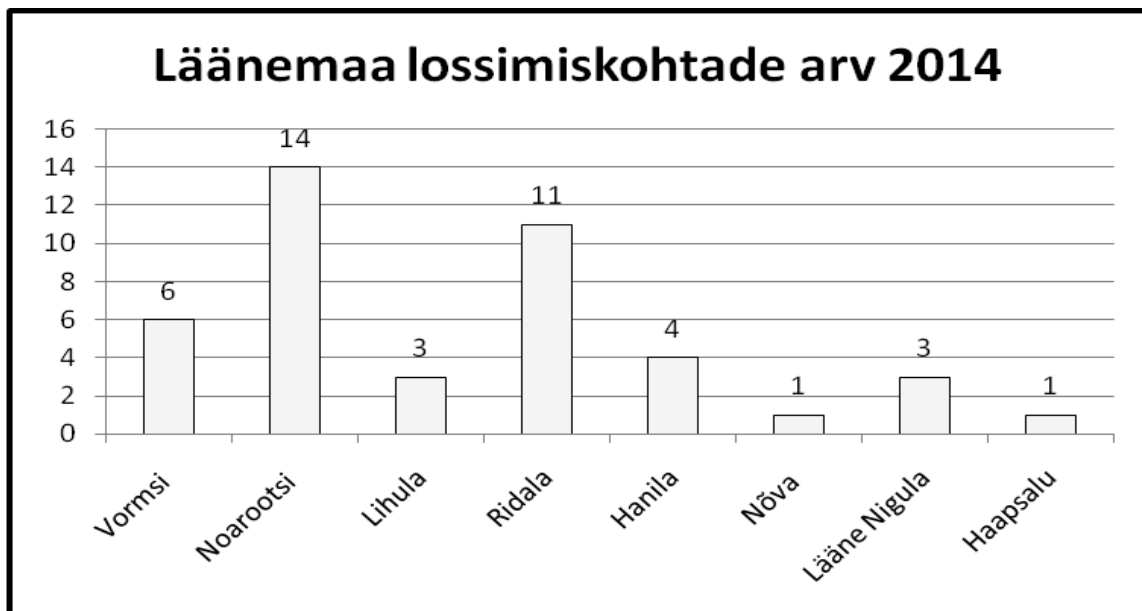
Essential investments have been made to modern rescue and navigation equipment. Seal-resistant fishing gears have been obtained. During the period

of 2010–2013, the fishermen of Läänemaa have invested 469 319 euros to their fishing gear, including 285 278 euros of funding. Total of 45 support applications were submitted during that period (see detailed breakdown of grants in Table 2 of Annex 3).

2.6 Ports and landing sites

According to the data of the Ministry of Rural Affairs, there were 43 active fish landing sites in Läänemaa in 2014. The number of landing sites has decreased over the years (by 9 compared to 2009). Most of the landing sites are located in Noarootsi and Rural Municipality of Ridala. Fishermen of Haapsalu and Nõva have concentrated to one port.

Figure 6: number of landing sites by the local governments in 2014



Source: Ministry of Rural Affairs and calculations by the author

Majority of catches in Läänemaa (89.3%) are landed in 13 fishing ports or landing sites. The most actively used landing sites are clearly established in all local governments.

Table 6. Important landing sites in Läänemaa by the municipalities in 2009–2014 (landings kg)

Municipality	landing	important ports	landing	%	other ports	%
Haapsalu	37 472	Haapsalu	37 472	100	0	0
Vormsi	1 348	Rumpo ; Rälby	614	45.5	734	54.5
Ridala	46 371	Topu; Puise	32 941	71	13 430	29
Lääne Nigula	5 644	Saunja	5 124	90.7	520	9.3
Nõva	22 080	Nõva	21 794	98.7	286	1.3
Noarootsi	29 005	Dirhami, Spithami, Hara	20 934	72.1	8 071	27.9
Lihula	24 958	Keemu; Suitsu	16 898	67.7	8 060	32.3
Hanila	153 214	Virtsu	150 492	98.2	2 722	1.8
Total LRS	320 587	13 landing sites	286 269	89.3	34 318	10.7

Note: calculations are based on average landings during the period of 2009–2014. Source: Ministry of Rural Affairs and calculations by the author

The fishermen of Läänemaa use actively 16 fishing ports or landing sites for landing their catches. Ports with highest landings and actively used by the fishermen coincide substantially.

Table 7. Fishing ports and landing sites most used by the fishermen by municipalities

City of Haapsalu	2009	2010	2011	2012	2013	2014	average
Haapsalu fishing port	32	33	52	34	44	38	38.8
Rural Municipality of Noarootsi	2009	2010	2011	2012	2013	2014	average
Port of Dirham	17	18	17	16	18	14	16.7
Port of Hara	0	0	35	33	31	28	21.2
Landing site of Spitham	0	1	34	29	23	27	19
Rural Municipality of Vormsi	2009	2010	2011	2012	2013	2014	average
Landing site of Rälby	0	0	3	2	2	2	1.5
Sviby port	2	6	0	1	0	1	1.7
Rural Municipality of Lihula	2009	2010	2011	2012	2013	2014	average
Keemu port	5	5	8	5	8	6	6.2
Saastna port	9	8	6	8	7	10	8
Landing site of Suitsu	0	2	4	2	4	3	2.5
Rural Municipality of Ridala	2009	2010	2011	2012	2013	2014	average
Kiideva port	7	7	6	7	9	9	7.5
Puise port	6	9	11	14	13	13	11
Pullapää port	9	10	12	13	14	13	11.8
Topu port	15	14	16	16	25	21	17.8
Rural Municipality of Hanila	2009	2010	2011	2012	2013	2014	average
Fishing port of Virtsu	12	15	16	17	18	21	16.5
Rural Municipality of Nõva	2009	2010	2011	2012	2013	2014	average
Nõva port	20	16	17	22	16	16	17.8
Rural Municipality of Lääne Nigula	2009	2010	2011	2012	2013	2014	average
Landing site of Saunja	0	0	9	12	10	13	7.3

Note: calculations are based on the owners of the fisherman's fishing authorisation who have landed their catches in a specific port at least once a year. Source: Ministry of Rural Affairs and calculations by the author

2.7 Fish processing and direct marketing

2.7.1 First sale of fish and marketing opportunities

Virtsu and Dirhami provide the opportunities for primary storage of fish. As a rule, the fishermen store their catches in home fridges but this is possible only for small catches. In case of bigger volumes, the fishermen depend on the purchasers of fish. The solution to that problem could be building of bigger refrigerating chambers to the main ports.

According to the data of the Food and Veterinary Office, there are 13 coastal fishing undertakings in Läänemaa fisheries area in 2014 who deal with fish processing, buying-in and marketing.

In case of smaller fish volumes, the fishermen realise their catch through the already established network. In case of bigger catches, fish is sold to the buyers in Pärnu or Tallinn.

2.7.2 Fish processing

Two coastal fisheries undertakings – Derhamn OÜ and Kipper Kala OÜ– deal with large-scale processing of fish in the Läänemaa fisheries area. Both companies have acquired state-of-the-art processing equipment and upon full-scale operation, these companies can give ca 600 kg of production a day. The companies employ six people and 28 different fish products have been developed. The biggest problem of the companies is the lack of qualified staff and difficulties in securing stable raw material flow.

Six coastal fisheries undertakings deal with small-scale processing of fish. As a rule, they process their own catches and market these to the visiting tourists and local people.

2.8 Fishing tourism

Thirteen companies provide services related to fishing and maritime tourism in the Läänemaa fisheries area. Nine of them provide complex services including accommodation, catering, seminar service and active holiday or an opportunity to go to sea with a fisherman, rent a boat for fishing, etc. Companies organise sea trips on boats, sea kayaks and sailing boats. Four undertakings are focused only on providing fishing tourism service.

The potential, among others, for providing fishing tourism service has not been used for the full. Läänemaa as a whole is well known as a region of pure nature and bird watching region with great opportunities. Although the material infrastructure of the coastal villages has long gone, there are still tales, stories and natural surroundings of the old coastal villages that can be used for promoting the region.

With skillful marketing and further development of complex services, it is possible to make better use of the fishing tourism as service diversifying fishermen's activities.

The large number of nature conservation areas in the Läänemaa fisheries area is certainly impeding development of tourism. Almost all islands in the sea that could be interesting and attractive tour destinations, are closed and staying there without special permissions is prohibited.

2.9 Training needs of fishermen

Information about the training needs of the fishermen was mainly collected from the regional development forums held for preparation of this strategy. The training needs can be divided into five directions:

- Professional training – trainings that help the fishermen cope better with their professional work (e.g. building of traps, using navigation devices, small-scale processing of fish, training for skippers of small ships, marketing and sales training, and other).
- Professional information days – help the fishermen to be well-informed with the changes in fisheries related legislation.
- Activities diversifying trainings – trainings that help the fisheries undertakings to take new technologies into use or design new service diversifying the activities of the fisheries undertaking.
- Training of own employees – concerns mainly the undertakings dealing with processing of fisheries products. There is a demand for people who are well informed about the modern fish processing technologies and product development.
- Trainings expanding the horizon – concern primarily the exchange of experience on domestic and global level (study visits and visiting professional fairs).

2.10 Preservation of fishing and maritime cultural traditions

Preservation and promotion of fishing heritage is not systematically dealt with in Läänemaa fisheries area. To some extent, these tasks are performed by the Rannarootsi Museum (www.aiboland.ee), where traditional ways of smoking fish have been introduced and that has a selection of old fishing gear. 2 village societies (in Puise and Kiideva) deal with preservation of fisheries related traditions to smaller extent, but their activities are mainly limited to storing of images.

NGO Wooden Boat "Vikan" (www.vikan.ee) deals with preservation and promotion of maritime cultural heritage. The society builds true to era sailing boats and organises systematically the shipping trainings aimed mainly at young people. In addition, NGO NordEstNõva (building of viking ships) and OÜ Vormsi Paat deal with preservation of maritime cultural heritage.

Providing of fisheries related hobby education and promoting of fishery is not systematically addressed in Läänemaa fisheries area on the recreational as well as commercial fishery. Fisheries specific skills are passed on mainly inside the family.

3 Implementation of the action strategy of Läänemaa fisheries area for 2009–2015

3.1 Allocation of funds among the strategy axes

The General assembly of the association decided to change the allocation of funding between the strategy axes twice during the period; the fundings were increased in the axis of renovation of fishing ports and landing sites and fish processing and direct marketing of fisheries products. The changes cannot be regarded as essential but they helped to use the funds more expediently and flexibly.

Table 8. Change in the allocation of the support budget (€) of the Läänemaa fisheries area during the period of 2009–2013

Strategy axis	2009	%	2013	%
fishing ports and landing sites	1 283 713	50	1 381 435	53.8
processing and direct marketing of fisheries products	513 485	20	544 982	21.2
development of fisheries-related tourism	385 114	15	351 198	13.7
diversification of activities	308 091	12	233 088	9.9
training activities	77 023	3	56 723	2.2
total	2 567 426		2 567 426	

Source: LRS databases and calculations by the author

3.2 Allocation of funding in Läänemaa fisheries area

Between 2010 and 2013, LRS organized 8 calls for proposals for the EFF measure 4.1. 'Sustainable development of fisheries areas' where 2 567 426 euros were given out to fishing companies, local governments and fishermen's NGOs. The level of investment in the Läänemaa fisheries area amounted to 3 320 075 euros, own contribution being 752 694 euros. The proposal to support 105 applications was made to PRIA, 1 applicant discontinued implementation of the application.

Over half of the funding (53.8%) went to the renovation of fishing ports and landing sites. Bigger part of it to Rural Municipality of Ridala and a little less to rural municipalities of Hanila and Noarootsi.

Table 9. Distribution of grants for fishing ports by municipalities (€)

Municipality	ports	grant (€)	%	grant per fisherman (€)
Rural Municipality of Noarootsi	Ports of Dirhami and Österby	387 103	28	35 191
Rural Municipality of Ridala	Ports of Puise and Topu	559 498	40.5	20 722
Rural Municipality of Hanila	Fishing port of Virtsu	434 834	31.5	25 587
LRS region	5 ports	1 381 435	100	9 938

Source: LRS databases and calculations by the author

46,2% of the total volume of grants were assigned to support fish products processing, fishing related tourism, diversification of activities and training activities. Majority of the grants were allocated to the entrepreneurs of rural municipalities of Noarootsi, Ridala, Hanila and Lihula. Tables 3–6 of Annex 4 show detailed allocation of grants.

Table 10. Allocation of other grants given to strategy axis by municipalities (€)

Municipality	grant (€)	%	grant per fisherman (€)
Rural Municipality of Noarootsi	294 564	24.8	26 778
Rural Municipality of Ridala	447 212	37.7	16 563
Rural Municipality of Hanila	133 489	11.3	7 852
Rural Municipality of Lihula	228 740	19.3	13 455
Rural Municipality of Nõva	31 192	2.6	6 238
Rural Municipality of Lääne Nigula	18 214	1.5	3 642
Rural municipality of Martna	15 890	1.4	3 178
Rural Municipality of Vormsi	15 629	1.4	3 907
Total of LRS region	1 184 930	100	8 524

Note: Table 10 does not consider the grants for renovation of fishing ports.

Source: LRS databases and calculations by the author

3.3 Number of grants and structure of applicants

126 grant applications were submitted to the association during the implementation period of the action strategy 2009–2015 of which 105 (83.3%) were satisfied. The cause for rejecting the application was always running out of resources in the strategy axis. There were no project applications below the amount of minimum 3 points.

Table 11. Projects submitted and supported during 2009–2013

Strategy axis	projects submitted	projects supported
renovation of fishing ports and landing sites	13	10
processing and marketing of a fisheries products	24	21
development of fisheries-related tourism	38	32
diversification of activities	38	30
training activities	13	12
Total of LRS region	126	105

Source: PRIA

Majority of the applications (47.6%) were received from the entrepreneurs of Rural Municipality of Ridala. Many applications were also received from rural municipalities of Noarootsi, Hanila and Lihula (see detailed overview from Table 7 of Annex 4).

40 different applicants asked for project support from the association during the implementation period. Given that there are ca 200 eligible applicants in the fisheries area of Läänemaa who could ask for a grant from measure 4.1 'Sustainable development of fisheries areas' of the European Fisheries Fund, an estimated of 20% of the potential applicants were covered. Majority of the applicants were self-employed persons (40%) and companies (35%). There were 12.5% applicants outside the fisheries sector and 7.5% from municipalities.

28 (70%) applicants receiving support were members of the association and 12 (30%) were outside the association.

In the majority, one applicant submitted 1–3 projects. Still there were active applicants who submitted 4 and more support applications.

Table 12: allocation of grants by applicants

number of supported projects	number of beneficiaries	Total amount of support in the group (€)	an average support amount in the group (€)
1 project	14	67 718	4 837
2 projects	8	98 155	49 077
3 projects	3	70 874	23 624
4 projects	4	190 676	47 669
5 projects	2	353 453	70 690
6 projects	3	92 159	15 359
7 projects	2	310 325	44 332

Note: grants for renovation of fishing ports and landing sites have not been taken into account Source: LRS databases and calculations by the author

3.4 Evaluation to reaching the objectives of the fisheries area strategy for 2009–2015 in Läänemaa

3.4.1 Objective 1. Renovation of fishing ports and landing sites

Outputs

During the strategy implementation period, 1 505 962 euros were invested to 5 fishing ports of the fisheries area, including support instruments of 1 381 435 euros of measure 4.1 'Sustainable development of fisheries areas' of the European fisheries fund and 124 527 euros of the own contribution of the applicants. The following fishing ports were reconditioned.

Table 13. Investments to Läänemaa fishing ports in 2009–2013

fishing port	investment volume	EFF grant	own contribution of the applicant
Port of Österby	190 371	190 371	0
Port of Dirhami	253 489	196 732	56 757
Port of Virtsu	451 824	434 834	16 990
Puise port	462 963	441 647	21 316
Topu port	147 314	117 851	29 463

Source: Estonian Agricultural Registers and Information Board (PRIA)

Assessment to achievement of the objective

Objective was partially achieved. 5 fishing ports out of 7 ports that were set as target level were reconstructed where the main focus was on improvement of mooring and landing opportunities. Additional services like primary processing and storage of fish, amenities were developed only in one port, due water and power supply in 2 ports. No port receiving the support can be deemed as finally completed. The reason primarily lies on restrictions of implementing regulation of measure 4.1 'Sustainable development of fisheries area' of the European Fisheries Fund that sets the maximum amount of aid to the applications by year as well as period. Shortage of support instruments was also an impeding fact.

3.4.2 Objective 2. Processing and direct marketing of fisheries products

Outputs

During the strategy implementation period, 911 558 euros were invested to the fish products processing and direct marketing, including support instruments of 544 982 euros of measure 4.1 'Sustainable development of fisheries areas' of the European fisheries fund and 366 576 euros of the own contribution of the applicants. 21 applications of 9 applicants were supported

Assessment to achievement of the objective

The objective is achieved partially. The economic association was not established, also the objective that 40% of the catches are sold as processed or via direct marketing channels. Still the outcomes achieved during the implementation period of the strategy are remarkable. The number of fishermen processing their own catch has essentially increased and the conditions for primary storage have improved. 2 companies who deal with large-scale fish processing have been added and their impact may appear later. There are already success stories and people have more and more recognised the inevitability of cooperative activity.

3.4.3 Objective 3. Traditions of the Läänemaa coastal fishing have been preserved and integrated with the economy of the region

Outputs

Investments made during the strategy implementation period:

- To reviving of fishery-related tourism and coastal villages. 492 065 euros, including support instruments of 351 197 euros of measure 4.1 'Sustainable development of fisheries areas' of the European fisheries fund and 140 867 euros of the own contribution of the applicants. 32 applications of 18 applicants were supported.
- 352 993 euros to diversification of activities, including support instruments of 233 088 euros of measure 4.1 'Sustainable development of fisheries areas' of the European fisheries fund and 11 ,906 euros of the own contribution of the applicants. 30 applications of 17 applicants were supported.
- To training activities. 57,496 euros, including support instruments of 56 723 euros of measure 4.1 'Sustainable development of fisheries areas' of the European fisheries fund and 773 euros of the own contribution of the applicants. 12 applications of 7 applicants were supported.

Assessment to achievement of the objective

Large part of the objective is attained. Tourism-related infrastructure has been supported in the coastal villages of Läänemaa, and new tourism services have emerged. The fishermen have found possibilities of additional income that compensate the drop in income due to cyclicity of fishing. Some young fishermen have joined.

3.5 Expert assessment to the impact of the measure to the Läänemaa fisheries area

3.5.1 Impact of the measure to the Läänemaa fisheries area

On request of the Ministry of Rural Affairs, Ernst & Young Baltic AS has compiled the impact analysis of measure 4.1 'Sustainable development of fisheries areas' about all activity groups of fishery. Telephone surveys and focus group interviews with applicants and management of the activity group were conducted in Läänemaa fisheries area. The research shows that implementation of the measure has had remarkable impact on improvement of the condition of the fishing ports and landing sites and increased competence and activity of people active in fisheries sector (trainings and study visits). It has also impacted positively the enhanced income opportunities of fishermen and implementation of the measure has created an opportunity to receive incomes also outside the fishing season. The impacts are more modest in fish processing and direct marketing and revival of coastal villages. The analysis shows that the measure has not had positive impact on joining of young people to fisheries sector.

Majority of survey participants think that the measure has improved the income opportunities of people active in fisheries sector and the region has become more attractive for the undertakings. The region has also become more attractive for the visitors and the living environment has improved.

3.5.2 Satisfaction with operations of LRS

The respondents thought that allocation of supports takes place considering the interests of the region as a whole and membership of the activity group does not influence entitlement to the support. Some respondents found that the activity group is a closed organisation and for representing the narrow interest group but 80% of the survey participants did not share this opinion. Allocation of grants was estimated as transparent, also majority of respondents said that persons interested can participate in the work of the activity group.

3.5.3 The role of LRS

Respondents regarded distribution of information about fishing grants and happenings in the fisheries sector as the role of the association. To a little smaller extent, designing of joint development vision and representation of fishermen interests on municipality and state level were indicated as an essential role of LRS.

Source: Ernst & Young Baltic AS 2014 „Impact of the sustainable development of fisheries area measure to the fishery of coastal and inland waters and local development" pp. 51–58.

3.5.4 Audits conducted in the association

Activities of LRS have been audited 8 times during 2009–2013, including:

- Internal audit department of the Ministry of Agriculture for three times.
- Internal audit department of PRIA for three times.
- European Commission Directorate-General for Maritime Affairs and Fisheries once.
- Estonian State Audit Office once.

Use of EU support instruments and proceeding of project applications was audited. The association passed all audits without essential observations.

4 SWOT–analysis of the Läänemaa fisheries area

The following SWOT–analysis indicates main strengths, weaknesses, opportunities and threats of Läänemaa fisheries area.

Strengths

- Essential ports are renovated and network of fishing ports is formed of these ports
- LRS is functional
- Fishermen have become more active
- Partly, there are entrepreneurs who have designed the network of loyal buyers
- Valuable seaside natural and heritage landscapes
- Coastal villages with interesting history and cultural heritage
- Good bird–watching places

Weaknesses

- Development of services in ports is modest
- Certain ports and landing sites need investments
- Low capability to clean the ports regularly from sediments
- Few possibilities for primary processing, cooling and primary storage and relevant means of transport
- Fishing tourism is poorly developed
- There are few efficient leaders for development of common activities
- Lack of qualified staff for fish processing and direct marketing
- Little joint action and cooperation with different partners
- Little direct marketing, incl retail sales
- Ownerships issues impeding renovation of certain ports
- Few new fishermen have joined
- Seasonality of coastal fishing
- There is no systematic approach to enhancement of fishery/maritime traditions

Opportunities

- Diversified EU supports
- Improvement of fish stock
- Increasing demand for quality fish products and local food in Estonia as well as EU
- Increasing networking and cooperation
- Increasing interest of local communities and local governments towards ports
- Development of fishing tourism and domestic tourism
- Promoting consumption of domestic fish
- Promoting the profession of a fisherman
- Development of rural and nature tourism

Threats

- Decreasing and ageing population in the area
- Reduction of fishing quota
- Worsening of the situation of fish stock
- Worsening of the situation in essential foreign markets (Russia, Ukraine, Byelorussia)
- Nature and environment protection related restrictions that impede operations on coastal areas
- Unstable situation of fisheries-related legislation
- Worsening of general economic situation
- Unregulated increase in number of tourists and fishermen not caring about the environment

Current situation of the Läänemaa fisheries area, feedback about the needs and expectations of fishermen collected from development forums and strengths, weaknesses, threats and opportunities regarded as important at steering group of the strategy were analysed for designing the strategy. The following analysis of needs and potential has been submitted by the axis of the sustainable development of fisheries areas implemented by the European maritime and fisheries fund.

Potential of Läänemaa fisheries area has strengthened and the network of fishing ports has broadly completed. Still, all the fishing ports who received support, need development of additional services. Ports where investments were not made during the previous period (fishing ports of Hara and Nõva and Rälby landing site on Vormsi island), need modernising.

Despite the made investments, essential development of fish processing and direct marketing is necessary. There are still few possibilities for primary processing and storage of fish. Obstacles include lack of qualified labour in fish processing and little cooperation in marketing. Promoting of consumption of domestic fish favors and encourages development of fish processing.

Fisheries-related tourism and diversification of activities that enable to mitigate the seasonality of receipt of incomes are continuously poorly developed in Läänemaa fisheries area. Efforts in that direction should be continued by relying on the specific tourism pre-requisites of coastal areas in Läänemaa and general growth trends of Estonian fishery and nature tourism.

Preservation and promoting of fishery/maritime traditions are not addressed systematically. Fishery and maritime area hobby education is also not provided.

Lack of training is not of priority among the weaknesses but training is always of supporting interest at solving new tasks and it must be constantly continued. Trainings must pay special attention to development of cooperation and joint action that is essential for solving several joint problems.

Strategy until year 2025

Based on the highlights of the SWOT–analysis, the new period must focus of mitigation of main weaknesses by relying on existing strengths and using opportunities of external environment.

Strategy of LRS:

1. Further development of infrastructure and services of ports is continued by using growing interest of different parties towards the ports.
2. Contributions to development of fish processing and direct marketing are made by using growing demand for quality fish products.
3. Diversified engagement opportunities are established for fishermen to mitigate the insecurity caused by seasonality of coastal fishing.
4. Development of fishing tourism is supported that relies on general growth of the tourism sector and uses existing strengths of the region.
5. Attention is paid to development of joint action and cooperation by relying on the general growth of networking developing in the society and functioning LRS.

To summarise, the implementation of previous measures creates opportunities to increase the profitability of the coastal fishing as a line of business and ensures the progeny of coastal fishermen.

5 Relationships with other development plans and strategies

Total of 32 different development documents (development plans, strategies, plannings) were analysed during preparation of the overview of Läänemaa development plans. 12 development documents have direct or indirect connections with the objectives and activities of the strategy of the Läänemaa fisheries area.

Table 14: handling of coastal fishing axes in other development documents

	Ports and landing sites	Fish processing and marketing	Fishing/maritime tourism, training, other activities of fishermen	Recovery of fish stock
Development plan 2013–2020 of Rural Municipality of Noarootsi	Hara, Österby, Osmussaare, Dirhami		Regarded important	
Development plan of Rural Municipality of Hanila for 2008–2020	Virtsu, Rooglaiu, Pivarootsi	Readiness to support processing	Regarded important	
Development plan of Rural Municipality of Ridala for 2013–2022	Topu port, Puise port	Regarded very important	Regarded very important	Regarded important
Development plan for 2011–2025 of Rural Municipality of Vormsi	Rumpo, Rälby, Diby, Saxby, Hosby	Supporting of local trademark	Regarded important	Regarded important
Development plan for 2012–2016 of Haapsalu			Regarded important	
Development plan for 2011–2018 of Rural Municipality of Lihula			Regarded important	
Development plan of Rural Municipality of Martna for 2012–2022			Regarded important	
Development plan of Rural Municipality of Nõva for 2007–2017	Nõva port		Regarded important	
Strategy of Lääne county for 2011–2025			Regarded important	
Development plan of Läänemaa tourism for 2006–2015			Regarded important	
LEADER strategy 2014 – 2020			Regarded important	
Estonian fisheries strategy for 2014–2020	Regarded very important	Regarded very important	Regarded very important	Regarded very important

Continues on next page

	Ports and landing sites	Fish processing and marketing	Fishing/ maritime tourism, training, other activities of fishermen	Recovery of fish stock
Estonian marine policy 2014–2020	Dirhami, Westmeri, Sviby, Rohuküla; Virtsu; Suur-Holmi		Regarded important	
European Social Fund (ESF)			Relationship is important	Relationship is important
Cohesion Fund (CF)				Relationship insignificant
Agricultural Fund for Rural Development (EAFDR)			Relationship is important	
European Regional Development Fund (ERF)	Relationship is important	Relationship is important	Relationship is important	Relationship insignificant

From the state development documents, Estonian fisheries strategy for 2014–2020 is undoubtedly the most important document and it is the source document for this strategy. The action strategy for 2015–2020 of the Läänemaa fisheries area sets similar objectives and helps to implement the state development plan.

6 Mission and vision of LRS

LRS is an organisation associating Läänemaa professional coastal fishermen, local governments of the region and developers of the life in coastal villages. The activity of the association is based on the Articles of Association and action strategy of Läänemaa coastal fishery for 2015–2025.

Mission of LRS

- To ensure sustainable development of coastal fishing in Läänemaa and help to preserve the coastal life and fishery traditions.

The main values of the activities of the association:

- The association is open to admission of new members and the list of association members is public.
- Activities of the association are transparent and all decisions and other documents of the organisation are public.
- The association represents the interests of all professional fishermen in Läänemaa despite their membership to the organisation.
- Implementation of fisheries-specific support measures means interests of Läänemaa coastal fishing as a whole for the association and it follows the objectives set in the coastal fishing strategy of Läänemaa.
- The association is a constructive cooperation partner to different institutions on the state and county level.

Activities of the association:

- Providing fishing-related information to fishermen as well as general public.
- Representing fishermen on rural municipality, county, state and international level, if needed.
- Participating in development of fisheries related legislation and development plans on state and international level.
- Providing professional trainings, study visits and visits to fairs for the fisheries undertakings in Läänemaa. Organising cooperation with domestic as well as cross-border fisheries areas.
- Introducing different support opportunities of the fisheries sector.
- Organising project competitions based on the strategy of the fisheries area in Läänemaa.
- Providing necessary assistance upon preparation of project applications and their further implementation.
- Preparing the strategy of the Läänemaa fisheries area and organising implementation and monitoring of the strategy in the Läänemaa fisheries area.

Vision of LRS

Port network providing diversified services is developed in the area in 2025. Big part of fish production is processed on site. So far undervalued fish species but still perspective are taken into use. Functioning marketing society has been established in the region. Businesses of fishermen are diversified, additional services outside fishery ensure year-round income for fishermen.

7 Objectives of LRS until 2025

7.1 Renovation of fishing ports and landing sites

Objective: at least 7 ports providing variety of services have been completed.

Mooring and launching of vessels, fish landing and primary storage (cooling, ice machine), supplying ports with power and water, non-work rooms, sheds and possibilities for storing traps are ensured as main services. All ports do not need to provide all services, detailed service packet depends on local needs.

Required performance indicator: at least 7 ports are completed with all main services necessary for the fishing port.

Basic level	Target level	Measures/methods
5 ports have been partially reconstructed and covered with elementary services	7 ports meet the at least the minimum sanitary and maritime safety requirements	Measure: number of submitted and implemented development projects of the ports Method: content analysis of made investments Fish volumes landed in ports (stable or increasing), number of fishermen using the port (stable or increasing). Databases of the Ministry of Rural Affairs form the basis for the analysis.

List of ports needing investments

According to the data of the Ministry of Rural Affairs, there were 43 active fishing ports or landing sites in Läänemaa in 2013. Importance of the fishing port was primarily considered upon completion of the fishing ports reasonably covering the whole fisheries area and preparation of the list of ports needing investments. Fish volumes landed in the port and number of fishermen using the port and location of the port in the territory of the Läänemaa fisheries area was evaluated. Ports that had already received support were preferred and also the capability of the port owner and its wish to implement investments was taken into account. The needs of the fishermen in Vormsi island were handled as an exception where the local community defined the port to where it is most reasonable to invest.

Fishing port of Dirhami is owned by Mellson Grupp OÜ and MTÜ Dirhami Kalurite Koda and its seat is in village Dirhami in Rural Municipality of Noarootsi.

Fishing port of Hara is in the ownership of the municipality of the Rural Municipality of Noarootsi and its seat is in village Hara in Rural Municipality of Noarootsi.

Fishing port of Nõva is in the ownership of Rural Municipality of Nõva with the right of superficies. The port is located in the village of Rannaküla in Rural Municipality of Nõva.

Fishing port of Puise in the ownership of municipality in Rural Municipality of Ridala and is located in village Puise in the Rural Municipality of Ridala.

Fishing port of Topu is in the ownership of MTÜ Rannakalurite Selts Topu and it is located in the village of Kiviküla in Rural Municipality of Ridala.

Fishing port of Virtsu is in the ownership of Rural Municipality of Hanila based on the contract of right of superficies and it is located in small town Virtsu in Rural Municipality of Hanila.

Landing site of Rälby is in the ownership of Rural Municipality of Vormsi and it is located in village Rälby in Rural Municipality of Vormsi.

7.2 Processing and direct marketing of fisheries products

Objective 1: on-site fish processing has increased, including so far undervalued but perspective fish species.

Objective 2: there is a functioning marketing society in the region.

Requested performance indicator 1:

- 50% of main fish species (perch, flounder, pike) are processed on site.
- 20% of so far undervalued but perspective fish species (roach, crucian carp) are processed on site.

Requested performance indicator 2:

- Functioning cooperative company (from catch to sales) that manages transport, preservation of products, processing and sales and that has retail sales places in Haapsalu and Tallinn has been established.
- At least 30% of fish caught by Läänemaa coastal fishermen (except Baltic herring) is marketed via joint company.

Basic level	Target level	Measures/methods
The following fish were sold after processing in 2013 Perch – 10.2%, flounder – 12.5%, pike – 2.6% of the catches of Läänemaa fishermen. Roach and crucian carp were not sold after processing	50% of perch, flounder and pike is sold after processing. 20% of roach and crucian carp	Measure: volumes of fish which value has been increased in any way (smoking, baking, drying, filleting). Method: analysis is based on feedback collected from the companies operating in coastal fishing and comparison of databases of the Ministry of the Rural Affairs.
There is no company operating on cooperative basis	Company acting based on cooperative and checked by the Läänemaa coastal fishermen is established.	Measure: number of companies acting on cooperative basis. Methods: fish quantities marketed via cooperative. The analysis is based on collected feedback and comparison of databases of the Ministry of the Rural Affairs.

7.3 Diversification of economic activities for fishermen

Objective: additional activities outside fishery ensure year-round income for the fishermen.

Requested performance indicator: Pre-requisites for year-round coping have been created for 25 fishermen.

Basic level	Target level	Measures/methods
15 fishermen have completed services that diversify activities or improve existing services by the means of the support	At least 25 fishermen have developed one or many services diversifying the activities or improving already provided service	Measure: number of fisheries undertakings having asked for support from the activity diversification strategy axis and implemented the application. Method: feedback collected from applicants about the list and content of completed or improved services

7.4 Promoting and maintaining biodiversity

Objective 1: mouths of more important watercourses (spawning grounds) have been dredged.

Requested performance indicator 1: free access to spawning grounds has been ensured for migratory fish in the mouths of rivers.

Basic level	Target level	Measures/methods
There has not been systematic recovery of spawning grounds in Läänemaa	Important spawning grounds are mapped. At least 1 spawning ground recovery project important for the Läänemaa fisheries area has been initiated and implemented.	Measure: number of submitted and implemented applications. Method: impact analysis about recovery of the spawning grounds. Evaluations of the Environmental Board and fisheries researchers

7.5 Preservation and promotion of fishery and maritime traditions. Improving social well-being.

Objective 1: fisheries and maritime traditions are preserved and promoted in the fisheries area

Objective 2: fishermen's community identity is strengthened, opportunities for social communication and professional development in the fisheries area are created, popularity and sustainability of the fishery as the line of business is ensured in the fisheries area.

Requested performance indicator 1: Permanent exposition that introduces coastal fishery and fishery in general has been established and properly furnished in Läänemaa.

Basic level	Target level	Measures/methods
Preservation and promotion of fisheries and maritime traditions are not addressed systematically	At least one permanent exposition introducing coastal fishing is established and properly furnished	Measure: number of composed permanent expositions. Method: expert assessments are asked from specialty experts about the relevance of the permanent exposition.

Requested performance indicator 2: at least 2 traditional events related to fishermen and fisheries are introduced, fisheries related hobby education course aimed at young people are organised.

Basic level	Target level	Measures/methods
1 fisheries related event is organised. Providing of fisheries related hobby education is not systematically addressed	At least 2 regularly held events on fisheries topic targeting general public have been launched. At least three fisheries area hobby education trainings are organised with at least 30 young participants	Measure: number of organised events promoting fisheries Number of organised hobby education training and number of young people participating there.

7.6 Training activities, national and international cooperation

Objective: knowledge and skills of fishermen have improved.

Requested performance indicator: at least 100 people are involved in activities.

Basic level	Target level	Measures/methods
Systematic training of fishermen started in Läänemaa fisheries area during the period of 2009–2013. 7 different trainings with 65 participating fisheries undertakings were organised	Training activities of the fishermen has become more systematic, training organisation in the form of NGO has been established. At least 100 fisheries undertakings have participated in different trainings	Measure: number of submitted and implemented applications. Method: impact analysis about the performance of the training prepared based on feedback from the trainings

7.7 Objectives of the organisation

LRS implements the Läänemaa fisheries area action strategy for 2015–2025. For effective implementation of the strategy, it is necessary to ensure continuous development and sustainability of the organisation.

Objective of LRS as organisation: LRS is a sustainable organisation uniting and servicing the fishermen of Läänemaa.

Core activities:

- Providing fisheries-related information among fishermen as well as general public.
- Representing fishermen on rural municipality, county, state and international level, if needed.
- Participating in development of fisheries-related legislation and development plans on state and international level.

- Providing professional trainings, study visits and visits to fairs for the fisheries undertakings in Läänemaa. Organising cooperation with domestic as well as cross-border fisheries areas.
- Providing support opportunities of different fisheries sector.
- Organising project competitions based on the strategy of the fisheries area in Läänemaa.
- Providing necessary assistance upon preparation of project applications and their further implementation.
- Preparation of Läänemaa fisheries area strategy and organising strategy implementation and monitoring.
- Development of cooperation within the region.
- Training the management board and inspection board.
- Development of IT communication channels (homepage, social media).
- Development of public relations and other communication channels.

Requested performance indicator: LRS strategy has been implemented as requested, the planned performance indicators are reached.

7.8 Hierarchy of objectives. Description of the integrated and innovative nature of the strategy.

Objectives set in the strategy are based on the need to ensure the sustainable development of the coastal fishing in Läänemaa fisheries area and integrate the fishery as the business branch typical for the region with the economic space. In conjunction with development documents concerning the region, the action strategy of Läänemaa fisheries area gives an important contribution to achievement of general objectives in Läänemaa like employment growth, enhancement of living environment, introduction of new technologies and areas of activity, better use of natural resources typical for the region, supporting of business activities, etc. LRS sets the following performance indicators to support employment and business activities for 2025.

- number of established companies – at least 15
- number of created long-term jobs – at least 10
- number of preserved long-term jobs – at least 20

Achievement of set objectives is evaluated based on surveys conducted among the applicants who have used the investment supports and analysis of data highlighted in the applications.

LRS regards implementation of strategy axis of fish products processing and direct marketing and diversifying activities of fishermen very important since both axes help to introduce innovative technological solutions and to implement new areas of activities among fishermen. Impact of the measure can be expanded by integrating training opportunities with investments.

Cooperation and joint action is important keywords for setting objectives. Majority of the ports that need investment in the fisheries area is possessed by

the municipality or fishermen associations. There was good cooperation between different interest groups during development of ports' infrastructure in 2009–2013 (municipality and fishermen). Interests of the fishermen, tourism undertakings as well as local community were considered during planning of port investments during 2015–2025 to ensure maximum benefit from investments and complete fully the network of multifunctional ports in the fisheries area. The joint action concentrates mainly on fish products processing and direct marketing.

New keywords include environment conservation, ensuring biodiversity, preservation of fisheries / maritime areas traditions and increasing professional development of fishermen and social welfare. The set objectives ensure preservation and enhancement of identity of the fishermen community. The set objectives also contribute to sustainable development and growth of popularity of fishery as typical line of business in Läänemaa.

The nature of the described approach is innovative and enables to move towards the vision of the strategy systematically. Novelty of the strategy lies on its integrity and integration. During the previous period, the strategy was of rather linear nature (problem–measure–applicant–outcome) and the strategy focused on preservation of fisheries in the region. Approach of this strategy is essentially more broad-based, the objectives and measures complement each other and the strategy rather focuses on integration of fisheries as typical area of activity for Läänemaa with other economic sectors.

8 Action plan and work organisation of LRS

8.1 Action plan

Action plan of LRS for implementation of this strategy is prepared based on problems and challenges set on regional development forums and description of the current situation in Läänemaa fisheries area and socioeconomic analysis.

The regional development forums and strategies evolved an understanding that it is expedient to implement all five courses of action that the coastal fisheries support measure of the European maritime and fisheries fund enables. Beside the funds of coastal fishing development measure, funds must be searched also from other sources. LRS and activities implemented by it play an important role in reaching the objectives.

8.1.1 Renovation of fishing ports and landing sites

Rationale for the implementation of the axis

Marine activities are traditionally inherent in Läänemaa. To develop sustainable fishing, further development of the network of small ports with at least 7 ports complying with the marine safety and food hygiene requirements is urgent. These ports should also have necessary conditions for mooring of fishing boats, fish landing, primary processing and storage. Beside fisheries, also other activities benefit from the renovated small ports. A small port performing interests of all users helps to enliven local economy, increase attractiveness and competitiveness of the region and will become the development engine for the coastal village.

Core activities:

- Investments for completing the ports that already have received support.
- Investments to other ports accessible for fishermen. Ports with bigger landings, growing activity of use and number of interested professional fishermen are preferred.

8.1.2 Processing and direct marketing of fisheries products

Rationale for the implementation of the axis

Fishing catches in the coastal sea of Läänemaa are relatively unstable and do not ensure the income for fishermen. One of the opportunities for increasing incomes is processing of caught fish and producing fish products and direct marketing. These activities enable to increase income without increasing catch volumes. By creating conditions for fish processing and direct marketing, fishermen will be able to check the value chain better (catch, processing,

marketing) and earn income that otherwise would go to the purchaser or distributor. In addition to investments to equipment, there is a need for professional training and upgrading of skills. The changing fish products market and fierce competition set new conditions to products, packages and marketing. Enhanced opportunities for fish processing and marketing increase the fishermen's revenue from fisheries and create jobs for fishermen's family members.

Core activities:

1. Investments:
 - 1.1 Fish processing plant and equipment
 - 1.2 Fish storage and transport facilities
 - 1.3 Retail sales management
2. Product development, including research, testing, technology, packaging, etc
3. Training events for improving skills and raising qualification levels
4. Marketing, incl trade shows, marketing material, advertising, etc

8.1.3 Diversification of economic activities for fishermen

Rationale for the implementation of the axis

The current state analysis of Läänemaa fisheries area shows that the bulk of the income from fishing industry (80% on the average) is earned during the five months from May to September, irrespective of the situation of the fish stocks. Outside the fishing season, the majority of the fishermen in the region engage in some other type of business or works as a paid employee.

Economic diversification is instrumental for the sustainable development of coastal fishery in Läänemaa. Additional income opportunities for fisheries communities help the fishermen plan their work more efficiently during the fishing season and reduce their dependency on employers. With additional sources of income supplementing their earnings from fishing, the fishermen can make the most of the fishing season. It may also increase the attractiveness of the job. Supporting the development of new activities, we make better use of human resources and fishermen's skills. The availability of new products and services enlivens and diversifies the business and entrepreneurship scene in Läänemaa.

Core activities

- Investments in buildings, plant and equipment required for additional activities
- Training (focusing, among other things, on finding and implementing innovative ideas)
- Marketing activities

8.1.4 Promoting and maintaining biodiversity

Rationale for the implementation of the axis

There are numerous flowing watercourses in Läänemaa fisheries area, which are important spawning grounds for various species of fish. Until now, such water bodies have been cleaned on a haphazard basis as no organisation has shown considerable interest. The process has been further complicated by restrictions imposed for nature conservation purposes. The axis will be implemented in cooperation with ichthyologists in order to identify the most important spawning grounds and the effects of the spawning ground creation on the fish stocks. Planning and environmental impact assessment require closer cooperation with experts from the Environmental Board.

Core activities:

- Mapping the current state
- Preparatory activities, incl planning, environmental impact assessment, etc
- Deepening and cleaning of river mouths
- Removal of beaver dams
- Restoration of spawning grounds

8.1.5 Promoting and maintaining maritime and fishing heritage and improving social well-being

Rationale for the implementation of the axis

We need to take a more systematic approach to maintaining maritime and fishing heritage and popularising fishing and maritime activities in Läänemaa fisheries area. We need to increase significantly the number of public recreation areas and boat havens to open up access to sea for recreational fishing and for the local community. Until now there has been no systematic planning and organisation of events targeted at strengthening the local community and popularising fishing. There are practically no fishing-related educational projects for young people.

The axis helps to preserve maritime and fishing heritage and create opportunities for younger generations to learn fishing skills. Implementation of the axis strengthens the identity of the local fisheries community by creating a favourable environment for social interaction and self development.

Core activities:

- Establishing a training organisation for the fishermen aimed at popularising fishing, organising fishing-related educational projects and community-building events, etc
- Investments in boat havens and recreational areas
- Organising children's camps
- Organising fishing-related events (Fishermen's Day, various competitions)

- Creating a permanent maritime and fishing exhibition in Läänemaa fisheries area
- Visiting fisheries-related trade shows

8.1.6 Training activities, national and international cooperation

Rationale for the implementation of the axis

All the priority axes call for improved training opportunities. Läänemaa fishermen need training to increase their overall competency in order to be able to handle fishing gear and to learn about fishing methods, the processing and storage of fish, marketing, etc. Raising the general awareness of the fishermen and establishing contacts in Estonia and abroad are also important.

Core activities:

- Training events aimed at increasing overall competency
- New skills acquisition
- Study visits
- Visits to trade shows
- Cooperation with other fisheries areas in Estonia and abroad

8.2 Organisation of the work of MTÜ Läänemaa Rannakalanduse Selts (Läänemaa Coastal Fisheries Society, LRS)

8.2.1 Management of LRS

LRS is managed by the General Meeting and the Board, and audited by the Revision Committee. Day-to-day management is the responsibility of the Managing Director (a salaried employee). The project proposals are ranked by the Proposal Evaluation Committee. LRS' activities are based on the Memorandum of Association and on this Strategy.

In their work, the Board and the Managing Director respect the principles refined in the course of the earlier activities of Läänemaa Rannakalanduse Selts and during the development and the implementation of the current strategy, aiming to ensure that all members and stakeholders can participate actively in LRS' activities and apply for support from the European Maritime and Fisheries Fund.

8.2.2 Competence and experience for implementing the local strategy

As part of the Läänemaa Fisheries Area Action Strategy 2015–2025, the experiences gained during the first period of Läänemaa Rannakalanduse Selts were analysed by the Strategy Task Force as well as in regional development forums. The main achievements of the first period and the challenges for the new period are described below.

Achievements:

- The aims of the strategy were largely met.
- There have been no funding appeals and the majority of the projects submitted by LRS to PRIA received full funding.
- The organisation respected the principles agreed at the beginning of the period.
- There has been a significant improvement in the status of the fisheries industry, which is now much more visible.
- LRS has promoted cooperation between fishermen.
- LRS has organised a number of awareness-raising training events and study visits
- The circle of applicants is rather wide and a considerable share of applicants are not associated with LRS.
- The applicants appreciate the support of LRS in drafting project proposals as well as in implementing the projects.

The feedback from the development forums suggests that there is no need to change the patterns and principles used in the management of LRS.

8.2.3 The measures for improving the applicants' performance in drafting and implementing the projects

The following measures are applied for enlarging the circle of applicants and improving the applicants' performance:

- Calls for proposals are announced at least 60 days in advance in the local newspaper, LRS website and e-mail lists. An earlier announcement gives the applicants more time for planning and drafting their project proposals.
- Supporting material for drafting the project proposal and completing the application forms, as well as for project implementation, are available on LRS website.
- The website also provides information on projects implemented in Läänemaa Fisheries Area. The aim of the measure is to inspire potential applicants with success stories.
- LRS also increases general awareness of EU fisheries funds by publishing regular overviews in local and national media.
- Applicants may contact LRS for free personal consultations at planning, drafting or implementing stage.
- LRS staff also assists the applicants in contacts with PRIA.

8.2.4 Amending the strategy

The Läänemaa Fisheries Area Action Strategy 2015–2025 may be amended only by the General Meeting of MTÜ Läänemaa Rannakalanduse Selts. A strategy amendment is approved if at least 2/3 of the members of LRS vote in its favour. The strategy may be amended only if the amendment is based on the analysis of strategy monitoring and evaluation results.

An amendment may be proposed by

- the Board
- the Proposal Evaluation Committee
- at least 1/10 of the members in writing

The impact analysis and justification for an amendment in the Action Strategy is discussed by an extended Board including the members of the Proposal Evaluation Committee, the members of the Revision Committee and the members of LRS who wish to participate in the discussion. Experts will be invited to participate in the work of the extended Board as necessary.

Members of LRS are notified of a forthcoming meeting for discussing a strategy amendment at least 20 business days before the date of the meeting by way of a notice in the local newspaper. Notice of the meeting and the subjects for discussion (amendment proposals) are published on LRS website and members of LRS are informed thereof by e-mail.

An amendment will be presented to the General Meeting for discussion if it is supported by at least 2/3 of the members of the Board; the Board is obliged to consider the views and opinions of other parties.

8.3 Organising calls for proposals

8.3.1 Calls for proposals

In line with its strategy, LRS announces each year a main call for proposals and an additional call for proposals. The deadline for submitting proposals for the main call is no less than 60 days after the announcement of the call for proposals. An additional call for proposals is announced in case the project funding budgeted for the fiscal year has not been fully used in the main call. The Board decides if an additional call for proposals is to be announced and which strategy axes are to be opened 140 days after the deadline of the first call for proposals at the latest. The deadline for submitting proposals for the additional call is no less than 60 days after the announcement of the additional call for proposals.

8.3.2 Notification

LRS announces a public call for proposals at least 60 days prior to the opening of the call. An additional public announcement will be made at least 20 days before the opening of the call.

The calls for proposals are announced in the newspaper 'Lääne Elu', at LRS website www.lrs.ee and by e-mail.

The following information will be published:

- The axes to be targeted by the call for proposals and the budget available for each axis
- Evaluation procedure and criteria
- Deadline, place and terms and conditions for submitting the applications
- References to supporting materials and consultation opportunities.

8.4 Evaluation procedure and criteria

8.4.1 General principles

For the evaluation of the proposals, LRS appoints a Proposal Evaluation Committee. The Committee consists of nine (9) members, five (5) of whom are the authorised representatives of LRS members and four (4) are not associated with LRS membership.

Substitute members are appointed in case a member of the Proposal Evaluation Committee has withdrawn or cannot participate in evaluation for other reasons.

Salaried employees of LRS and members of the Board of LRS are not allowed to participate in the Proposal Evaluation Committee.

Government or municipal officials must account for less than 49% of votes.

Members of the Proposal Evaluation Committee are independent in evaluation and voting. Ratings given by individual members of the Proposal Evaluation Committee are not to be disclosed.

Documents relating to evaluation (evaluation sheets) are not to be made public and may be disclosed only to the Revision Committee upon reasoned request. Any such request is subject to approval by the Board of LRS.

8.4.2 Appointment of the Proposal Evaluation Committee

The Proposal Evaluation Committee of LRS will be appointed for two (2) years by secret ballot.

Members of LRS as well as external experts may be nominated as Candidates for the Committee (in case of an external expert, an explanation must be

provided as to why the candidate would be eligible to evaluate the proposals). The number of candidates each member of LRS may nominate is not limited. There are no educational or qualification requirements established for the members of the Proposal Evaluation Committee.

All members of LRS may nominate candidates for the Proposal Evaluation Committee; the General Meeting will appoint the members of the Evaluation Committee from amongst all nominated candidates. A candidate must agree to his/her nomination.

In the appointment of the Evaluation Committee, each member of LRS has nine (9) votes and each member may vote in favour of nine (9) candidates. Five (5) members of the Evaluation Committee are elected from among the candidates who are members of LRS and four (4) members are elected from among the candidates who are not members of LRS.

The candidates receiving the most votes are appointed full members of the Evaluation Committee in the order of their number of votes; the rest of the candidates are appointed substitute members.

8.4.3 Withdrawing from the Evaluation Committee

Members participate in the Evaluation Committee on a voluntary basis and a member may withdraw from the Committee; in this case he/she is replaced by a substitute member.

Prior to the beginning of evaluation, members of the Evaluation Committee submit a conflict of interest declaration. A member must withdraw from evaluation if he/she is

- party to the proceedings or represents a party to the proceedings;
- a relative, spouse or family member of a party to the proceedings;
- in an employment, service-related or other relationship with a party to the proceedings or his/her representative;
- in some other way personally interested in the outcome of the proceedings or other circumstances give cause to doubt his/her impartiality.

A member of the Evaluation Committee withdraws from the evaluation of the project proposals under the particular axis and the particular call for proposals where one of the applicants is a party related to such member. He/she can participate in the evaluation of project proposals under other axes.

8.4.4 Evaluation criteria

MTÜ Läänemaa Rannakalanduse Selts evaluates project proposals on the basis of a number of general as well as axis-specific evaluation criteria. There are five general evaluation criteria, applied to all proposals. For each axis, there are two axis-specific criteria, applied only to proposals under the particular axis. All evaluation criteria carry equal weight.

Table 15. Evaluation criteria for project proposals

General evaluation criteria for all proposals	
1	Consistency with the aims of Läänemaa Coastal Fisheries Strategy
2	The proposed activities benefit the fishermen, coastal fisheries and Läänemaa Coastal Fisheries Area
3	Sustainability of the proposed investments and activities
4	Internal coherence and systemic consistency of the project proposal
5	Feasibility of the proposal and availability of human resources
Axis-specific evaluation criteria	
Axis 1: Renovation of fishing ports and landing sites	
1	The port serves several purposes, providing new and high-quality services
2	Integration of the port with the economy of the region – cooperation with various stakeholders of the coastal region in port management and provision of services. Need for a fishing port or a landing site in the area concerned
Axis 2: Processing and direct marketing of a fisheries products	
1	The processing and marketing of fisheries products is carried out in cooperation between fishermen
2	Processing and marketing focuses on products that have high added value and which are sold directly to the consumer. Creation of added value to underused fish species
Axis 3: Diversification of activities	
1	The proposed activities are based on local resources and help to maintain coastal fishing traditions Development of new services or activities reducing the fishermen's dependency on their employers
2	Provision of local opportunities for earning additional income improving the livelihood of fishermen and their family members
Axis 4: Reproduction of fish stock and restoration of spawning grounds	
1	The proposed activities are based on research and ichthyologists' expert assessment
2	The investment is targeted at a spawning ground listed by the Environmental Board or Ministry of the Environment as valuable and it has been evaluated and approved by a competent official of the Environmental Board
Axis 5: Promoting and maintaining maritime and fishing heritage Improving social well-being	
1	The proposed activities are aimed at wide audience
2	The proposed activities contribute to promoting and maintaining maritime and fishing traditions

8.5 Plan of communication

The plan of communication of Läänemaa Rannakalanduse Selts encompasses three-directional outreach activities and description of feedback channels. The main outreach activities include:

1. Organising calls for proposals
2. Distribution of fisheries-related and other information
3. Raising awareness of fisheries and the activities of LRS

The following channels can be used for outreach purposes:

- LRS website at www.lrs.ee, including
 - information on the activities, members, management and decisions of LRS (reports and minutes of meetings)
 - References to legal acts concerning fisheries, maritime industry and food processing
 - Detailed information on the submission of project proposals for funding (legal bases, application forms, supporting materials, members of the Evaluation Committee, the relevant procedures, evaluation criteria, the list of funded projects and examples of implemented projects)
 - Useful links to research and training materials and various grants available
 - References to services provided by the members of LRS
- E-mail lists (152 members)
- Notices in the local newspaper 'Lääne Elu' and at the website www.laanlane.ee
- Articles in county and national newspapers
- Meetings and development forums with Läänemaa fishermen's communities
- Outreach activities carried out by the members of the Board of LRS in municipalities for this part of fisheries communities who cannot be reached by electronic means and local media
- National and international events introducing Läänemaa fisheries

Increased attention needs to be paid to the target group who cannot be reached by electronic channels. The following measures are taken to extend outreach to this target group:

- Strategically placed paper notices on municipalities' information boards, shops, bus stops, etc
- The members of the Board of LRS engage in direct personal information exchange in their respective areas, contacting the people (fishermen) who cannot be reached by electronic channels
- LRS staff members identify a suitable information channel (phone, home visit, etc) for each fisheries undertaking and use it for delivering important notifications
- Thematic information days for introducing the activities of LRS, changes in the fisheries policies and fisheries-related funding schemes

The Board of LRS is responsible for the implementation of the communication plan; a salaried member of LRS staff is in charge of carrying out the daily outreach activities.

8.5.1 Partner organisations of Läänemaa Rannakalanduse Selts

LRS is engaged in active cooperation at national as well as county level.

Besides the Ministry of Rural Affairs, the Ministry of the Environment and PRIA, the main partners of LRS at the national level include

- the Fisheries Information Centre – collects and analyses fisheries-related information and organises trainings;
- fisheries local action groups – sister organisations of Läänemaa Rannakalanduse Selts (MTÜ Hiiukala, MTÜ Saarte Kalandus, MTÜ Liivi Lahe Kalanduskogu, MTÜ Võrtsjärve Kalanduspiirkond, MTÜ Peipsi Kalanduspiirkonna Arendajate Kogu, MTÜ Virumaa Rannakalurite Ühing, MTÜ Harju Kalandusühing): implement fisheries-related support measures and represent the local fisheries industry at county and national level.

At the county level:

- Lääne County Government – responsible for ensuring the integrated and balanced development of the county;
- Association of Läänemaa Local Governments – represents the interests of the municipalities of the region;
- SA Läänemaa Arenduskeskus – county development centre, which provides advisory services to the entrepreneurs, municipalities and citizens' associations of the county;
- MTÜ Läänemaa Turism – county-level umbrella organisation that offers its members opportunities for tourism-related cooperation, development and marketing in Haapsalu and Läänemaa;
- MTÜ Kodukant Läänemaa – organisation uniting the citizens' associations, entrepreneurs and municipalities of Läänemaa; manages the projects of the LEADER programme in the county;
- Hiiu–Saare–Lääne region of the Environmental Board – manages the protection of natural resources in Läänemaa fisheries area (Matsalu National Park and Silma Nature Reserve).

9 Monitoring of the funded projects and performance evaluation of the strategy

With a view to evaluating the performance of Läänemaa fisheries area strategy and monitoring the projects, the following data are collected:

- Database of Läänemaa fishermen – contains data reflecting changes in Läänemaa fishermen community (the number and geographic location of fishermen, age structure, etc);
- Läänemaa fisheries database – contains data on landing, fishermen's estimated revenue, utilisation of ports, etc.
- Project database – contains data on funded and non-funded projects by municipalities and axes, as well as data on the implementation of projects.
- Project performance database – description of changes achieved by the implementation of the funded, against the identified benchmarks.

The data are collected and analysed on a regular basis. The data are collected, analysed and maintained by a salaried employee of LRS.

Monitoring and evaluation of the strategy is carried out at two levels.

- Project proposals and their performance indicators are monitored on a regular basis. The Managing Director of LRS gives the Board and the General Meeting an annual report on the utilisation of funds and the main performance indicators of the strategy.
- Twice in the period, in 2018 and in 2020, the implemented projects will be subjected to closer scrutiny and the strategy will be evaluated with regard to its actual results and outcomes.

This monitoring report may form the basis for the amendment of the strategy at the annual general meeting of LRS.

10 Finance scheme

Budget allocation between strategy axes was based on the insights gained at regional development forums and meetings of the strategy task force, as well as on the experiences of the previous financing period. Renovation of fishing ports and landing sites is the most expensive axis and port network creation calls for considerable investment.

The continuing enhancement of fish processing and direct marketing enables fishermen to add value to their catches and improve their livelihood.

There is a great need for economic diversification. Provided with additional jobs and income, a fisherman is less likely to move away and leave the industry altogether.

Reproduction of fish stocks and restoration of spawning areas is another key aspect of the strategy of Läänemaa fisheries area. With 3% of the budget, the goals set in the strategy should be feasible.

The axis of maintaining maritime and fishing heritage and improving social well-being focuses on popularising fishing, identity building for fisheries communities, improving public access to the sea and organising awareness-raising training events and trade show visits.

Table 16. Distribution of funds between the axes

Axis	%
1. Renovation of fishing ports and landing sites	30%
2. Processing and direct marketing of a fisheries products	30%
3. Diversification of activities	27%
4. Reproduction of fish stock and restoration of spawning grounds	3%
5. Promoting fisheries and maritime heritage; improving social well-being	10%

Table 17. Distribution of funds by years of the programming period

Year	Share of funds
2015	0%
2016	30%
2017	30%
2018	20%
2019	20%
2020	Calls for proposals with funds carried over from previous years
2021	Calls for proposals with funds carried over and with additional funds
2022	Strategy monitoring and calls for proposals, given the availability of funds

In the light of the experiences gained from the previous period, the strategy focuses on five years of the programming period. The allocation of budget described in Table 17 allows for major projects to be launched at the beginning of the period and helps to avoid accumulation of funds at the end of the period. Funding is, however, sufficiently competitive within strategy axes, which helps to ensure the high quality of the projects selected for financing. The applicants whose project ideas can be realised only towards the end of the period are also eligible for investment aid.

Table 18. Upper limits of grants to individual projects within a call for proposals

Axis	Grant limit
1. Renovation of fishing ports and landing sites	Based on the Regulation governing the measure
2. Processing and direct marketing of a fisheries products	100 000 €
3. Diversification of activities	60 000 €
4. Reproduction of fish stock and restoration of spawning grounds	Amount available for the axis
5. Promoting fisheries and maritime heritage Improving social well-being	40 000 €

Table 19. Breakdown of operating costs of the local action group and strategy animation costs

Name of expenditure	Activities
Operating costs of the local action group – 90%	<ul style="list-style-type: none"> • Day-to-day management of LRS • Implementation of Läänemaa Fisheries Area Action Strategy 2015–2025 and the action plans. • Organising calls for proposals • Facilitating information exchange • Monitoring projects and drafting monitoring reports • Action strategy monitoring • Other activities
Strategy animation costs – 10%	<ul style="list-style-type: none"> • Preparation and printing of supporting material to facilitate the preparation of project proposals and implementation of projects • Organising information days • Provision of personal advice during the preparation of project proposals and project implementation • Regular provision of information about funding opportunities • Recruiting consultants and experts as necessary • Publishing success stories at LRS website and in local and national media

Strategy drafting process

The preparation of the action strategy for the programming period 2015–2025 began in autumn of 2013, when consultations were launched with the Ministry of Rural Affairs for identifying the opportunities for the new period. At the same time, work was started on analysing the results of the previous period (2009–2015).

Läänemaa Fisheries Area Strategy was drafted in December 2013 – May 2015. The strategy was based on the following:

- Socioeconomic analysis of the region and fisheries' state of affairs
- Seminars held in Central Läänemaa (the rural municipalities of Ridala and Lääne-Nigula and the city of Haapsalu), Southern Läänemaa (the rural municipalities of Hanila, Lihula and Martna), Northern Läänemaa (the rural municipalities of Noarootsi and Nõva) and in the island of Vormsi
- Strategy task force meetings
- Analysis of the activities and strategy of LRS

In total, over 112 people participated in discussions, 85 of whom (76%) were professional fishermen of Läänemaa. 81 participants (73%) were members of LRS; 31 participants (27%) were not associated with LRS.

Reference materials

1. 'Kala ja kalatoodete turg Eestis 2011' (Market for Fish and Fish Products in Estonia 2011) Estonian Institute of Economic Research
2. 'Kala ja kalatoodete turg Eestis 2014' Estonian Institute of Economic Research
3. 'Tööjõu kompetentside ja oskuste taseme ning tööturuvajaduste väljaselgitamine kalandussektoris' (Identifying the Level of Labour Force Competences and Skills and Labour Market Needs in the Fisheries Sector) Eesti Uuringukeskus OÜ
4. 'Kalanduspiirkondade säästva arengu meetme rakendamise mõju ranna- ja sisevete kalandusele ning kohalikule arengule' (Impact of the sustainable development of fisheries areas measure on fisheries in coastal and inland waters and on local development) Ernst & Young Baltic AS
5. Läänemaa Aastaraamat 2013 (Annual Review of Läänemaa 2013)
6. Survey 'Läänemaa majandusülevaade 2012' (Läänemaa: Economic Survey) Läänemaa Arenduskeskus SA
7. 'Läänemaa rahvastikuränne' (Migration in Läänemaa) OÜ KT Europrojekt Management 2010
8. 'Regional Commuting in Estonia' Rein Ahas, Siiri Silm, Kadri Leetmaa, Tiit Tammara, Erki Saluveer, Olle Järv, Anto Aasa, Margus Tiru 2010
9. 'Re-study of Regional Commuting in Estonia' Rein Ahas, Siiri Silm 2013
10. Statistics Estonia website www.stat.ee
11. Fisheries Database of the Ministry of Rural Affairs www.agri.ee
12. Fisheries Database of the Ministry of the Environment www.envir.ee
13. Development Plan of Hanila Rural Municipality 2008–2020
<http://www.hanila.ee>
14. Development Plan of Ridala Rural Municipality 2013–2022
<http://ridala.kovtp.ee/ulinfo>
15. Development Plan of Vormsi Rural Municipality 2011–2025 <http://vormsi.ee>
16. Development Plan of the City of Haapsalu 2012–2016
<http://www.haapsalu.ee>
17. Development Plan of Lihula Rural Municipality 2011–2018
<http://www.lihula.ee>
18. Development Plan of Martna Rural Municipality 2012–2022
<http://martna.kovtp.ee>
19. Development Plan of Nõva Rural Municipality 2007–2017
<http://www.novavald.ee/index.php/1>
20. Development Plan of Noarootsi Rural Municipality 2013–2020
<https://noarootsi.kovtp.ee>
21. Development Strategy of Lääne County 2011–2025 www.lmv.ee
22. LEADER Strategy for 2014–2020 by MTÜ Kodukant Läänemaa www.kklm.ee
23. Estonian Maritime Policy 2014–2020 www.mkm.ee
24. Estonian Fisheries Strategy 2014–2020 www.agri.ee

ANNEXES

Annex 1. Participation in strategy drafting seminars

Seminar	participants	fishermen	fishermen %	other
Extended Board 20.12.13	8	6	75	2
Seminar in Central Läänemaa 24.01.14	19	14	73	5
Seminar in Southern Läänemaa 30.01.14	25	16	64	9
Seminar in Northern Läänemaa 31.01.14	18	13	72	5
Seminar in the island of Vormsi 20.02.14	21	6	29	15
Strategy task force 21.02.14	16	11	69	5
Strategy task force 23.04.14	11	10	91	1
Strategy task force 14.05.14	15	13	86	2
Strategy task force 11.11.14	20	13	65	7
Strategy introduction / preliminary approval 19.12.14	54	47	87	7
Strategy task force 24.04.15	15	9	60	6
Approval of the strategy 19.06.15	69	67	97	2

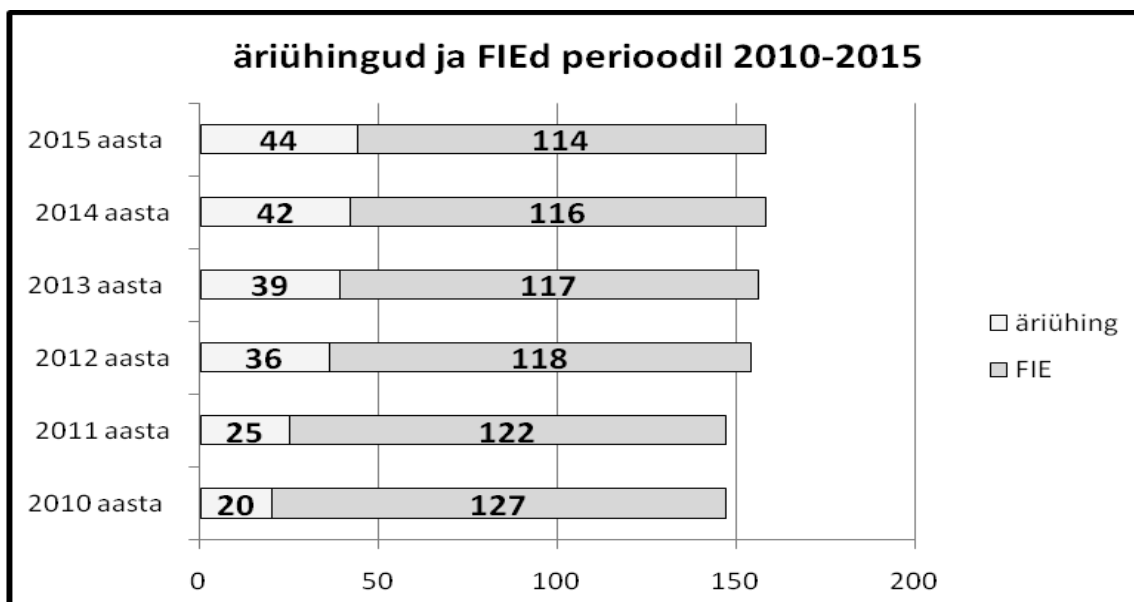
Annex 2. Studies undertaken and used for preparing the strategy

The following research and analysis was carried out:

- **Dynamics Of Catches And Revenue In Läänemaa Fisheries Area in 2006–2013** – statistics of catches by fish species and the estimated sales of fish;
- **Fish Landing In Läänemaa Landing Sites in 2009–2013** – statistics of landing by fish species and the estimated sales of fish by landing sites;
- **Dynamics Of Läänemaa Fishermen's Catches And Revenue In 2011–2013** – statistics of catches and revenue for each holder of fisheries licence. The study provided insights into fishermen's revenue from fisheries and into the share of the catches by the largest enterprises of total catches, as well as information on the seasonality of fishermen's income.
- **Database of Läänemaa Fisheries Community** – comprehensive data relating to Läänemaa fishermen, including geographic location, boats and gear, age structure and dynamics, additional activities.
- Public databases of the Ministry of Rural Affairs and the Ministry of the Environment were consulted for the purposes of the research

Annex 3. Fisheries, fishermen, fleet

Figure 1. Dynamics of the share of companies and self-employed workers of all holders of fisheries licence in 2010–2015



Source: Ministry of Rural Affairs and calculations by the author

Table 1. Läänemaa fishermen's revenue from catches by fishing seasons in 2009–2014

Year	Season May – September		Season October – January	
	Revenue from catches €	%	Revenue from catches €	%
2009	63 988	78.2	21 314	21.8
2010	91 730	88.4	19 304	11.5
2011	115 607	79.0	30 623	21.0
2012	210 573	72.9	43 639	26.9
2013	228 476	73.3	83 607	26.6
2014	173 475	59.4	118 143	40.6

Source: Ministry of Rural Affairs and calculations by the author

Table 2. Grants under Measure 1.4 'Small Scale Coastal Fishing' in 2010–2013: breakdown by municipalities

Municipality	Applications	Investment volume €	Grant €	Grant per fisherman €
City of Haapsalu	7	54 973	32 883	671
Rural municipality of Hanila	4	21 732	13 672	804
Rural municipality of Noarootsi	2	11 781	7 030	639
Rural municipality of Ridala	18	245 811	150 710	5 581
Rural municipality of Lihula	6	63 068	37 816	2 224
Rural municipality of Nõva	5	57 701	34 617	6 923
Rural Municipality of Vormsi	1	1 027	616	154
Rural municipality of Lääne Nigula	2	13 227	7 933	1 587
Total LRS	45	469 319	285 278	2 037

Source: Estonian Agricultural Registers and Information Board (PRIA), calculations by the author

Annex 4: Implementation of the Action Strategy 2009–2015

Table 3. Grants for the fish processing and direct marketing axis: breakdown by municipalities

Processing and direct marketing of a fisheries products				
Municipality	Grant (€)	%	Number of fishermen 2014	Grant per fisherman (€)
Rural municipality of Lihula	216 123	39.7	17	12 713
Rural municipality of Ridala	42 890	7.9	27	1 588
Rural municipality of Hanila	87 139	16.0	17	5 126
Rural municipality of Noarootsi	189 976	34.9	11	17 270
Rural municipality of Nõva	8 854	1.6	5	1 771
LRS area	544 982	100	139	3 920

Table 4. Grants for the fish processing and direct marketing axis: breakdown by municipalities

Development of fisheries-related tourism and revival of coastal villages.				
Municipality	Grant (€)	%	Number of fishermen 2014	Grant per fisherman (€)
Rural municipality of Ridala	290 715	82.8	27	10 767
Rural municipality of Hanila	4 107	1.2	17	241
Rural municipality of Noarootsi	40 339	11.5	11	3 667
Rural municipality of Nõva	6 359	1.8	5	1 272
Rural Municipality of Vormsi	7 327	2.1	4	1 832
Rural municipality of Lääne Nigula	2 290	0.7	5	458
LRS area	351 198	100	139	2 526

Table 5. Grants for the diversification of activities axis: breakdown by municipalities

Diversification of activities				
Municipality	Grant (€)	%	Number of fishermen 2014	Grant per fisherman (€)
Rural municipality of Ridala	95 640	41.0	27	3 542
Rural municipality of Hanila	37 106	15.9	17	2 182
Rural municipality of Noarootsi	35 430	15.2	11	3 221
Rural municipality of Nõva	16 979	7.3	5	3 396
Rural Municipality of Vormsi	8 302	3.6	4	2 076
Rural municipality of Lääne Nigula	15 924	6.8	5	3 185
Rural municipality of Lihula	7 817	3.4	17	460
Rural Municipality of Martna	15 890	6.8	5	3 178
LRS area	233 088	100	139	1 677

Table 6. Grants for the training activities axis: breakdown by municipalities

Training activities				
Municipality	Grant (€)	%	Number of fishermen 2014	Grant per fisherman (€)
Rural municipality of Lihula	4 800	8.5	17	282
Rural municipality of Ridala	17 967	31.7	27	665
Rural municipality of Hanila	5 137	9.1	17	302
Rural municipality of Noarootsi	28 819	50.8	11	2 619
LRS area	56 723	100	139	408

Source: LRS databases and calculations by the author

Table 7: Breakdown of funded project proposals by municipalities

Municipality	Number of applications	%	Number of fishermen 2014	Applications per fisherman
Rural municipality of Ridala	50	47.6	27	1.85
Rural municipality of Hanila	15	14.3	17	0.88
Rural municipality of Noarootsi	16	15.2	11	1.45
Rural municipality of Lihula	9	8.6	17	0.53
Rural municipality of Nõva	5	4.8	5	1.00
Rural municipality of Lääne Nigula	4	3.8	5	0.8
Rural Municipality of Martna	1	1.0	5	0.2
Rural Municipality of Vormsi	5	4.8	4	1.25
LRS area	105	100	139	0.75

Source: LRS databases and calculations by the author

