

Integration of Turkish Fisheries Sector and Fishing to the European Union

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Abstract: Fishing sector would be considered as one of the most important parts of Turkey's EU membership process. For Turkey, the most challenging issue is, as in the case of agricultural sector as well as fishing, not having a macro Turkish Fisheries Policy. Structural problems of fisheries in Turkey, namely production mostly based on hunting, unconscious and destructive hunting, technical and technological incompetence and lack of entrepreneurship and incentives are the main problems reducing the competitiveness of fisheries policy in Turkey. The ambiguous governmental policies are defined as the primary reason the current situation at the sector of fisheries. Fisheries and aquaculture sectors still have no holistic, encouraging, supporting and managing state mechanism in Turkey. Therefore, when Progress Report of Turkey on compliance with the EU *acquis* is analyzed, the issues of the Fisheries Act, resource and fleet management, supervision and control, market intervention system in the area of market policies, state aid and international treaties and structural actions are mentioned as the issues that almost no progress has been achieved under the title of fisheries. Furthermore, even the necessary pre-conditions and fundamental reforms in the sector are not in compliance with the *acquis*. In this study, the phases of EU integration process in terms of fisheries in aquaculture sector are examined, deficiencies are determined and some solutions to these problems are tried to be proposed.

Key words: Fisheries, fishing, European Union, legal *acquis*, Turkey

INTRODUCTION

Recently, the food industry gives danger signal against the facts that the resources on earth started to go down due to global warming, the agricultural lands diminish, water sources get polluted and the population on earth increases very fast.

On the other hand, fast diffusion of diseases all around the world closely connected to the nutritional habits put the concepts of healthy and right nutrition to the fore. The healthiness of humankind necessitates the healthiness of the environment lived in and the naturalness of the foods consumed. What should be understood, with the concept of healthy fisheries is that those products that are not diseased contain no residues harmful for human health, are genetically not modified and are produced with advanced technologies and techniques under hygienic conditions (Savas, 2002). Through, globalization some very crucial efforts are being made on the provision of safe fish consumption both all over the world and especially in the EU. Following these efforts, some criteria that bind whole countries have been determined and the implementation of these criteria is an obligation for those countries. In case of a violation, some strict barriers may be applied against the fisheries trade (such as the problems experienced between the EU

and Turkey in 1998). Such limitations or barriers may have damaging effects on Turkey as a net fisheries exporter (Turkyilmaz and Hasaltuntas, 2003).

It is certain that the volume of fish consumption is directly linked with the consciousness of nutritional criteria and healthy life.

However, in Turkey, a member of developing-countries category, no compete success has been achieved in terms of encouragement and realization of fisheries consumption as a source of nutrition and the correction and compensation of imbalanced and inadequate nutrition levels. Consequently, the per capita fish consumption quantities in the world, in the EU and in Turkey are 16, 23 and 8.9 kg sec⁻¹, respectively (Anonymous, 2007a).

Besides being a good source of nutrition, fisheries are a crucial source of income for developing countries, especially the consumption of developed countries is taken into account. The fisheries exportation of Turkey in 2007 was worth approximately, 158 million \$ (Anonymous, 2008a). Although, the area, on which fisheries are cultivated in Turkey is >26 million hectares, the contribution of the sector concerned has not reached to desired levels (Dogan, 2003a; Yenigun *et al.*, 2001; Celikkale *et al.*, 1999; Aydin *et al.*, 2005). However, the sector has further economic meanings with its direct

and indirect linkages with the sectors of food and manufacturing, health, environment, tourism and transportation.

MATERIALS AND METHODS

Basically, the material of the study obtained from secondary data. At first fishery sector was reviewed generally in the study. Various published statistical data from national and international literature was used for observe the importance of fishery in this study. Main literature sources are FAO, EUROSTAT, TurkStat, Ministry of Agriculture and Rural Affairs, State Planning Organizations, Treasury and Under secretariat of the Prime Ministry for Foreign Trade.

Data from mentioned resources were depicted briefly in tables and evaluated. Also in this study, Turkish and the EU fishery policies evaluated comparatively and necessary precautions were discussed about Turkish Integration to the EU. In this context, legal documents (law, legislation, regulation, amendments etc.) were investigated for many aspects. Additionally, some studies, which have done utilized during the accession period. Finally, problems regarding fisheries necessary policy suggestions were indicated by using supplementary studies about the subject.

RESULTS

Economic aspects of fisheries in Turkish economy:

Fisheries have a very crucial place in Turkish economy as they considerably contribute to human nutrition, supply raw material to industry and create employment opportunities and export potential. Furthermore, the sector of fisheries is one of the four fundamental elements of agricultural sector in Turkey.

In order to grasp the importance of the sector of fisheries in agricultural sector, it would be enough to look at the share of fishery, which is under agricultural sector, in GDP. Namely, the share of fishery in agricultural sector is 4.5% (with current prices), while the share of agriculture in GDP is 8.8% (Gros, 2005). On the other side, the contribution of fisheries to Turkish economy in 2,412 million TLs with current prices and the numbers of people employed by the sector is 45,543. The data of the Ministry of Agriculture and Village Affairs reveals that 92% of that is created by off shore fishing, while 8% is by inland fishing. As a result of the increases in aquaculture and fishing, the share of fisheries in GDP has increased year by year, the value added of the sector in national

economy has increased parallel to the expansion of production, but these developments have remained inadequate (Dogan, 2003b).

As of 2007, approximately, 701,000 tons of fisheries production was made. About 73.9% of the total production was marine fish, 19.9% was aquaculture and 6.2% is inland fish production. In 2007, with an annual growth rate of 16.4% off-shore fishing production was about 518,000 tons, inland production decreased to 43,000 tons (2.3% negative growth rate) and aquaculture increased to 139,000 tons with an annual growth rate of 8.9% (Table 1).

With the current geographical structure and climate conditions in Turkey, nearly 500 species in Mediterranean Sea and nearly 240 species in Black Sea are known but only 100 species are economically meaningful roughly. If the regional distribution of production is analyzed, it is seen that because of anchovy hunting the Black Sea Region produces 79.6% of the whole production by itself. The Marmara, Aegean and Mediterranean Regions follow (Table 2).

As can be realized from the Table 2, fisheries have become a crucial field of activity under agricultural sector as Turkey is surrounded by seas from three directions. However, despite this huge potential and the investments made in recent years it cannot be claimed that the sector concerned could not be utilized well enough. As a matter of fact, as of 2006 the total fisheries production in the world in about 141 million tons and only 0.4%, of which belongs to Turkey. The leadership in fisheries production belongs to countries such as China, the EU, Peru and Japan and Turkey ranks only 36th in hunting and 23rd in aquaculture (Table 3).

Although, the average contributions of the sector to the gross national products are <1% in the EU, the sector still preserve its importance in terms of a source of employment in some countries that have restricted alternative employment opportunities. Further, after China, the EU ranks the second with a production of 7,293,000 tons.

The leader country in the EU in terms of fish aquaculture is Spain and Denmark, France and Britain follows (Eurostat, 2007). These countries meet 2.5% of global production. The EU is the world leader in trout, bream-bass, eel and turbot productions and Turkey is the 5th in bream-bass production in the EU. Among saltwater fish, horse mackerel, sardines, whiting fish, grey mullet and blue fish follow anchovy that has the highest economic value (385,000 tons) (Table 4).

In Turkey, there are 1,470 fisheries breeding facilities and 1,159 of which locate inlands and 311 off-shore and

Table 1: Fisheries production by major groups in Turkey (tons, %)

Years	Marine fish		Inland		Aquaculture		Other marine fish		Total	
	Quantity	%	Quantity	%	Quantity	%	Quantity	%	Quantity	%
2000	510000	80.1	50190	7.9	63000	9.9	13634	2.1	636824	100.0
2001	441690	75.8	42824	7.4	79031	13.6	18831	3.2	582376	100.0
2002	465180	78.2	43323	7.3	67244	11.3	19230	3.2	594977	100.0
2003	493446	78.6	43938	7.0	61165	9.7	29298	4.7	627847	100.0
2004	416126	70.8	44698	7.6	79943	13.6	46948	8.0	587715	100.0
2005	456752	70.9	45585	7.1	94010	14.6	48145	7.5	644492	100.0
2006	409778	61.9	44354	6.7	129100	19.5	78778	11.9	662010	100.0
2007	518201	73.9	43321	6.2	139873	19.9	0	0.0	701395	100.0

Anonymous (2007a)

Table 2: Regional distribution of the fisheries production in Turkey (%)

Years	Black sea			Marmara	Aegean	Mediterranean	Total
	Eastern	Western	Total				
2000	56.0	22.0	78.0	10.0	9.0	3.0	100.0
2001	46.5	26.5	73.0	15.0	9.0	3.0	100.0
2002	51.0	26.4	77.4	13.8	6.6	2.2	100.0
2003	49.2	25.7	74.9	14.7	7.6	2.8	100.0
2004	51.0	25.8	76.8	13.3	7.4	2.5	100.0
2005	51.1	18.8	69.9	13.4	11.6	5.1	100.0
2006	56.1	12.4	68.5	16.4	11.6	3.6	100.1
2007	65.8	13.8	79.6	8.6	8.6	3.2	100.0

Anonymous (2007a)

Table 3: Fisheries production of the major countries in the world and EU (1000 tons)

World			EU		
Countries	Production	Share (%)	Countries	Production	Share (%)
China	55,688	47.6	Spain	1,210	16.9
EU-25	7,293	6.2	Denmark	1,063	15.0
Peru	6,111	5.2	France	955	13.4
Japan	6,036	5.1	Britain	823	11.5
Indonesia	5,961	5.1	Netherlands	593	8.3
India	5,913	5.0	Italy	487	6.8
Chile	4,563	3.9	Germany	335	4.8
USA	4,410	3.8	Ireland	329	4.6
Philippines	3,621	3.2	Sweden	293	4.2
Thailand	3,590	3.1	Portugal	221	3.1
Russian Fed.	3,413	2.9	Poland	215	3.0
Norway	3,132	2.7	Greece	195	2.7
Vietnam	2,634	2.3	Lithuania	160	2.2
South Korea	2,493	2.1	Finland	135	1.9
Iceland	2,009	1.8	Latvia	115	1.6
Total	116,867	100.0	Total	7,129	100.0

FAO (2007) and Eurostat (2007)

they have a common annual capacity of 148,760 tons. Despite the fluctuations in market conditions and market expectancies, 42.2% of the total aquaculture in Turkey is inland trout production, 29.9% is offshore bass production and 23.9% offshore bream production. As of 2007, 42.2% of the whole aquaculture production is made inlands and 57.7% off-shore. In 2007 the growth rate of inland breeding was 3.9%, while off-shore breeding was 10.2% (Table 4).

The total fishing and fisheries trade in the world is worth nearly 60 billion \$. While, the most important exporters are China and Japan, the crucial importers are the OECD countries. Although, Turkey has not any coasts to high-seas or oceans, she is still luckier than the

countries having similar conditions. Because Turkey is one of the countries that are self sufficient in terms of fishing and fisheries and further, make a little bit export, she is the second largest breeder in Near East after Egypt (FAO, 2007).

Therefore, the sectors of fishing and fisheries in Turkey fairly contribute to national economy in terms of export capacity, especially with enhanced production through increased production capacity. The only meat product exported to the EU from Turkey is the fisheries products and constitutes about 70% of Turkey's total fishery exportation. As could be shown from Table 5, the share of fishery export in the agricultural sector has been increasing gradually (Anonymous, 2008a).

Table 4: Production volume of fisheries (1000 tons)

Years	2000	2001	2002	2003	2004	2005	2006	2007
Volume of off-shore hunting	442	465	493	416	457	334	410	518
Anchovy	280	320	373	295	340	139	270	385
Horse mackerel (Kraca)	15	16	19	16	18	14	14	23
Horse mackerel (Karagoz)	7	11	7	12	9	14	12	9
Grey mullet	27	22	12	11	12	11	9	8
Blue fish	4	13	25	22	20	18	8	7
Sardines	17	10	9	12	13	21	16	21
Whiting fish	18	10	9	8	8	8	9	13
Baccalaureate berlam	18	21	11	8	4	4	3	3
Other salt-water fish	56	43	29	33	32	106	69	49
Aquaculture production	79	67	61	80	94	118	129	140
Inland	43	38	34	40	44	49	57	59
Trout	43	37	34	40	43	48	56	58
Carp	1	1	1	1	1	1	1	1
Off shore	36	30	27	40	50	70	72	81
Trout	2	1	1	2	2	1	2	3
Bream	15	13	12	17	20	28	28	34
Bass	18	16	14	21	26	37	38	42
Mussel	0	0	0	1	2	2	2	1
Others (Turbot, Dentex, Red Drum and Scad)	27	-	-	-	-	2	2	2
Volume of Inland Hunting	43	43	44	45	46	46	44	43
Pearl mullet	16	16	15	14	14	14	12	12
Carp	14	12	13	14	13	14	12	12
Shiraz	1	1	1	1	1	1	1	1
Bass (Zander)	2	2	2	2	2	2	2	2
Atherina	2	2	2	2	2	5	7	7
Snail	2	2	2	2	2	2	1	1
Cray fish	2	2	2	2	2	1	1	1
Other inland fish	5	8	8	8	9	8	8	8

Table 5: Foreign trade by economic activities (million \$)

Export	2000	2001	2002	2003	2004	2005	2006	2007
Agriculture and forestry (value)	1,659	1,976	1,754	2,121	2,542	3,329	3,481	3,724
Fishery (value)	25	30	51	81	103	140	131	158
Share (%)	1.5	1.6	2.9	3.8	4.1	4.2	3.8	4.3
Import	2000	2001	2002	2003	2004	2005	2006	2007
Agriculture and forestry (value)	2,123	1,409	1,703	2,535	2,757	2,801	2,902	4,641
Fishery (value)	2	1	1	2	8	24	33	31
Share (%)	0.09	0.07	0.06	0.07	0.29	0.86	1.14	1.89

Anonymous (2008a)

DISCUSSION

EU common fisheries policy and harmonization process in Turkey:

As widely known, Turkey is at the stage of EU membership and makes harmonization efforts in the fisheries sector, as well as any other sectors. The fisheries activities in the EU are carried under the extent of Common Fisheries Policy. The aims of the Common Fisheries Policy that is in the scope of the agricultural policy part of Rome Treaty are determined to be to improve the living standards of those employed under fishing sector, to assure price stability and supply warranties, to supply products to the consumers with fair prices and to protect the fish resources. Although, having been a part in the Rome Agreement till its beginning, in the EU the legislation concerning the Common Fisheries Policy (CFP) initiated to be formed till 1970s, the expansion of the union towards north with the Denmark, Britain and Ireland's membership has increased the

importance of the fisheries policy and CFP went into effect in 1983. Crucial legal adjustments in CFP were made especially, between 1985 and 1995 in terms of stocks, protection of the fishermen and consumers, in 1994 all the financial instruments formed for the support of CFP at the Union level were combined under the Financial Instrument for Fisheries Guidance (IFOP) aiming all the coastal regions and that was determined in the context of structural funds (Erhan *et al.*, 2008).

Although, the relationship between Turkey and European Economic Community (EEC) was initiated with the Ankara Agreement signed in 1963, the Luxemburg Summit caused the suspension of political dialogue between Turkey and the EU in December 1997, in the Summit for Turkey European Strategy was prepared only for the development of the relations. However, although, the Turkey-EU relations affected negatively from the Summit, as it is accepted in the agriculture part of strategy document that Turkey would need European aid during

the Common Agricultural Policy harmonization process, a crucial success was achieved for the agricultural sector, further an agriculture action plan was given place (Anonymous, 2007b). As a matter of fact, it is firstly mentioned in the Luxemburg Summit in 1997 that Turkey would need European need during the Common Fisheries Policy harmonization process. Later on, in 1999 the candidacy of Turkey was confirmed in the Helsinki Summit and the accession and the need for harmonization between Turkish agricultural sector and the Common Agricultural Policy (CAP) entered to an irrevocable process; 1 of the 8 sub-committees for the harmonization with the CAP was determined as Agriculture and Fishing Sub-Committee (Diler and Bolat, 2006).

As known, the Accession Partnership Document is a road map prepared by the EU that determines the necessary actions that should be taken by candidate countries and simultaneously is a commitment accepted by the national governments that indicates how the road map is perceived in National Programmes of candidate countries and what will be done in this context. Consequently, in the first Accession Partnership Document that was approved after Helsinki period in 2001 by the EU, it is anticipated that the decisions connected to the management of fisheries resources should be finalized in the short-term. In this context, the monitoring of market and structural developments with a resource management policy, formation of administrative structures for the enhancement of fisheries fleet registrations with supervision and control precautions were resolved. In the medium term, it was aimed that the Common Fisheries Policy should be put into force and the capacity enhancement for implementation should be completed (Anonymous, 2007c).

The issues having part in Turkish National Programme (as of March 2001) on fisheries are as follows: a unique and central unit that is responsible for fisheries should be founded. The quota and annual fishable quantity assignments should be compatible with the system applied in the EU. It is necessary to amend the international market conditions related articles of Law of Fisheries no. 1380 in order to activate the control activities of the Ministry of Agriculture and Village Affairs for the realization of quality controls and production and to harmonize the fisheries regulations with the EU legislation. Additionally, a new article should be added to the Law no. 1380 in order to form a fisheries fund. Producer associations and a pricing system should be accomplished. Current lack of coordination should be resolved through re-organization of the Ministry of Agriculture and Village Affairs, not only the Ministry, but also the institutions and non-governmental organizations concerned should be equipped with enough and qualified

staff for the EU *acquis* harmonization. It is also necessitated that in order to realize research activities and enhance control protection services new boats and remote sensing systems should be purchased; new investment should be made on computer networks and supervision equipments (Anonymous, 2007b).

Consequently, although, some sub-work groups such as Control and Resource Management, Collective Market Organization, Structural Policies, Vessel Registration and Information System, Breeding and International Agreements have been formed for the realization of the aforementioned targets in June 2001 with the coordination of the Ministry of Agriculture and Village Affairs, Directorate-General of Protection and Control and with the participation of various institutions and foundations, it is highlighted in the annual evaluation meeting for Turkish Progress Report for 2001 that in the fisheries sector no significant progress has been achieved in terms of harmonization with the CFP and despite a pilot-project carried on a more advanced registration system of 1,500 boats under structural actions, there is a necessity for a modern fleet registration system (Anonymous, 2008a).

In the 2002 Progress Report, it is mentioned that the desired achievement could not be attained for resource management, supervision and control, structural actions, market policy, governmental aids and International Fisheries Agreements and the pilot implementation of fleet registration system realized in 2001 is not entirely compatible with the EU *acquis*. Therefore, it is envisaged that efforts for the modernization of fleet registration system and the enhancement of management, supervision and control systems through the formation of producer associations should be finalized and financed (Anonymous, 2007b).

As may be understood from 2001-2002 Progress Reports during the EU membership process the assessments on *acquis* harmonization are not so pleasant. Therefore, the Accession Partnership Document (APD) announced in April 2003 for the harmonization with EU-fisheries legislation was renewed, the responsibilities of Turkey in terms of the harmonization with the EU fisheries policies were re-assessed.

Accordingly, what Turkey should realize was determined as: in the short-term: the EU *acquis* harmonization should be assured in terms of fisheries management, supervision, marketing and structural policies; in the medium-term: re-organization and extension of institutional capacity of the fisheries management, harmonization of the implementations of control, marketing and structure of fisheries operations, development and implementation of computer supported fisheries vessel registration and statistical information system harmonious with the *acquis*.

In the revised Turkish National Programme on the commitment of European Union Acquis that came into force in 2003 and involves more concrete targets it is specified that the fundamental problems of the fisheries are Financial Instrument for Fisheries Guidance (FIFG) and Multi-Annual Guidance Programme (MAGP), the lack of an administrative structure and legislation for the fundamental management and mechanisms. In this context the formation of a legal framework for the CFP harmonization was accepted as basic priority and development dates, financial instruments and the legislation harmonization schedules for the expectation and targets under 7 sub-titles (Formation of Legal Framework for harmonization with Common Fisheries Policy, Structural Policies, Protection and Control Policies, Marketing Policy, Fishing Boat Registration System, Information Systems and Statistics, Food Hygiene for Fisheries, Breeding) were introduced clearly (Anonymous, 2007b).

When the studies on this issue are analyzed, it attracts attention that in the first step a Draft Amendment for Fisheries Law (instead of Fisheries Framework Law) was prepared aiming the necessary legal adjustments and a twinning programme of Legal and Structural Harmonization of Fisheries Sector with the EU Fisheries Acquis for the elaboration of harmonization efforts the was realized (Anonymous, 2007c).

In the Progress Report published on November 5th, 2003 by the European Commission it is mentioned that only limited progress has been achieved by Turkey. According to the report, although, a strategy was accepted towards the acquis harmonization in the fisheries sector, especially in the fields of resource management and supervision some crucial differences with the EU acquis still last. Further under the body of the Ministry or its control, foundation of a separate directorate or an agency whose responsibilities (including aquaculture) are determined comprehensively and clearly is advised (Anonymous, 2007c).

Afterwards, Turkey has gone under significant adjustments in the regulation published in the Official Gazette date: 14.07.2004, no. 25522 and especially, on the 13th issue, Fisheries of the EU negotiations (Anonymous, 2004). However, while the adjustment of the regulation have been mostly on the structure and operation of marketing channels and the formation of technical and hygienic conditions of these channels, there was no adjustment for price interventions.

For the rest of the process (full accession process) acceptance of the political face of the Copenhagen Criteria as the precondition of the negotiations has overshadowed the acquis harmonization criteria. After the completion of political criteria, the screening

Table 6: Legislation monitoring of Turkey

Legislation screening	No.
Number of legislation concerning fishery	623
Number of legislation related to Turkey	102
Number of legislation analyzed	86
Number of compatible legislation	7
Number of semi-compatible legislation	21
Number of incompatible legislation	58
Anonymous (2008b)	

process for the acquis harmonization criteria was initiated on October 3rd, 2005 and the result in Table 6 have been achieved. According to the legislation screening given in Table 6, the fisheries legislation in Turkey is to a vast extent incompatible with the EU legislation.

In this period, the initiation of an EU harmonization project by the Ministry of Agriculture and Village Affairs for the purpose of harmonization with CFP was a positive development for the sector. In the scope of the project supported by the EU and carried by the Directorate-General of Protection and Control, it was aimed that the harmonization of the infrastructure and legislation of the fisheries sector with the EU by the end of 2006. The project funded by the EU with 6.2 million Euros was initiated as of January 10th, 2005 and the first stage was envisaged as the harmonization of legislation (Table 7).

Yet, with the Progress Report prepared by the European Commission and announced on November 9th, 2005 the state of Turkish fisheries sector in terms of harmonization was defined as: Turkey has not achieved any significant progress in the harmonization of legislations in the fisheries sector. The implementation of the acquis for the resource and fleet management, supervision and control, structural actions, price support regimes and governmental aid has not been initiated. The administrative structures of the fisheries sector in Turkey remain inadequate because of the allocation of fisheries authorities among various ministries and the problems this allocation causes. Besides the dispersion of the structure and the allocation of responsibilities do not create any contribution for the management. Turkey should enhance her efforts for the improvement of necessary supervision and extension of control capacity through resource management. The certification and registration of fisheries and fisheries breeding activities should be further improved. A comprehensive improvement for the monitoring and reporting of hunting, landing and fisheries activities is necessitated. In the field of market policy, there is limited governmental intervention on the control of public supply, prices and market withdrawal issues hence, it is necessary that Turkey should develop a general marketing system for fish and fisheries products (Anonymous, 2007b).

The response of Turkey would be to combine the fisheries and fishing related, units still operating under

Table 7: Contributions from the budget for the infrastructure needs of fishery sector

Budget items	Euro	TL
Construction of fishing port	14,785,554	26,407,000
Maintenance of fishing port	1,119,821	2,000,000
Budget for fishery researches, including breeding	1,931,775	3,450,150
National Common Finance Contribution to the Legal and Institutional Harmonization to EU Acquis on Fisheries Sector Project	351,008	626,901
Additional Construction Needs of 30 ports	215,258	384,451
Vessel Monitoring System	135,750	242,450
Total	18,188,158	32,484,051

Anonymous (2006) (1 Euro = 1.786 TL)

four Directorate-Generals in the body of the Ministry of Agriculture and Village Affairs with the new the Law of Ministerial Organization, to construct the Directorate-General of Fisheries, therefore to renew the Fisheries Law in the context of legislation harmonization. Also, the Law authorizing the Ministry to determine hunted fish quantity quotas for the protection of fish species, also involves the classification of landing points of the fish in order to chain the quantity of fish hunted. In the scope of the EU harmonization project in the fisheries sector, the enhancement of market places for the marketing of fish as well as the strengthening of fishing associations (Anonymous, 2007c).

In fact, for faster and more fluent execution of the studies desired for a better interpretation of this harmonization, Fishing Legislation Harmonization Centre initiated its operations in this process as a condition of FIFG with the EU technical help team and the staff of the Ministry and Fisheries Research Centres of Trabzon, Egirdir and Keban and Akdeniz Fisheries Production Institute on January 6th in Ankara. The targets of the centre about fishing are the institutional strengthening and the formation of fishing information system with incentive and training (Ekiz, 2006).

Although, there is a system for market information compilation in Turkey, the system is incompatible with the EU system. While, the system envisages that before the hunted products are presented into the markets, product information should be given to the authorities at the place of landing, the market information in Turkey is compiled from the market or the sales centres. Although, registration is done through the journal system initiated by the Ministry of Agriculture and Village Affairs for the boats over 12 m at the place of landing to some extent, there is still no reference price regime. Further there is no corresponding system for information flow (Anonymous, 2008b).

It is expected that the realization of all these and the significant potential of the sector will solve current problems of the sector in terms of contribution to production and employment. In this respect, it is envisaged that the necessary support to the sector should immediately be given by the municipalities, by the governorships and by the Government.

Therefore, as mentioned in the table, Turkey has devoted a budget of 18,188,158 Euros in the fiscal year of 2006 to the fisheries sector for the structural transformations and infrastructure services for the EU-CFP harmonization (Anonymous, 2006).

When, the *acquis* harmonization at the EU Progress Report for Turkey in 2006 is analyzed, the emphasis that no progress has been achieved in terms of Fisheries Law, resource and fleet management, supervision and control under the Fisheries Heading; implementation of the *acquis* under structural actions; market intervention system, governmental aid and international agreements under market policy is interesting (Anonymous, 2007b).

All the progress reports are analyzed together, there is the emphasis that Turkey is inadequate in terms of *acquis* harmonization, the structural actions and transformations are hesitant and insufficient. It is clearly mentioned that the pre-conditions and fundamental reforms for the harmonization are not parallel with the *acquis*. Therefore, although, some crucial adjustments were done with the amendment announced with the Official Gazette date: 27.04.2007, no. 26505 on the issue of Fishing, Turkey have not still managed to attain any significant achievement in terms of the harmonization of Turkish fishing legislation with the *acquis* (Anonymous, 2007d). The *acquis* has not been initiated to be implemented for resource and fleet management, supervision and control, structural actions, price support regime and governmental aid.

The difficulties caused by administrative structure in the fisheries sector and the dispersion of authority among ministries still last in Turkey. Besides, the scattered structure and the dispersion of responsibilities do not contribute to efficient management.

CONCLUSION

For the re-arousal of the fisheries sector that should be one of the most competitive sectors in Turkey, a new fisheries framework law should be prepared and various relevant regulations should be issued. The administrative capacities, especially in terms of controls and supervisions, of the Ministry of Agriculture and Village Affairs and the Coast Guard Command should be

strengthened, the fishing boat registration and vessel monitoring systems should be combined and the fish stock determination studies should urgently be initiated. May be most importantly, the Directorate-General of Fisheries organized with operational and qualified technical staff directing the sector should be formed and put into practice and the public mechanism should follow firm and robust policies both financially and structurally. Again the certification and registration procedures for fishing and fisheries breeding should be bettered of. Some comprehensive enhancements should be realized for hunting, landing and monitoring and reporting of fishing activities. The limited governmental intervention for the control of public supply, prices and market withdrawal in the market policies field should be increased.

Turkey needs to develop the general marketing system for fish and fisheries products. Today, there is no system for quantity determination of hunted and marketed fish in the market places. Due to mistrustful data the savings and investments could not achieve the desired or planned results.

If the horizontal elements that should be realized for the harmonization with the Union's legislation are taken into account, one important element is that the EU bylaws directly bind candidate countries without any adaptation in the fisheries part of national legal systems. Therefore, it is primarily demanded from those countries desiring to be a member of the Union that they form operational mechanisms for administrative structure enabling the implementation of legislation and Union's policies. EU candidate countries need an administrative mechanism in order to manage the Common Fisheries Policy. The EU fisheries legislation does not envisage any organization model for this administrative mechanism. Yet the *acquis* brings some detailed amendments in terms of especially market policy, resource protection, fleet registration, supervision and control, methods to be followed and instruments to be used.

As EU Common Fisheries Policy aims at especially, the control of hunting and sustainable utilization of resources, the hunting in Turkey would be more efficiently be controlled and fishery stocks would be utilized with a sustainable manner if the concerned policies are implemented and the information on fisheries and fleet registration would be achieved. However, as there is no marketing strategy and marketing organization organized at national level for the marketing of species raised, there occur significant losses. Hence, there is the need for fish exchanges like the one established in the developed countries that hinders unfair competition and enables single price for the producers.

Briefly, the fisheries sector is a sector that shouldn't be neglected in Turkey surrounded by seas from three dimensions as it is a source of nutrition and is a gainful activity with a significant potential. In this respect, the precautions taken in the context of EU harmonization efforts may be perceived as an opportunity. On the other hand, the EU should support Turkey technically and financially, while Turkey is trying to harmonize with the fisheries policy that is one of part of the EU common policies.

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