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BASELINE STUDY REPORT

2nd part

ROMANIA

*“Sustainable protection of lower Danube sturgeons by
preventing and counteracting poaching
and illegal wildlife trade”*

Project number: LIFE15 GIE/AT001004

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EXECUTIVE SUMMARY

The **project** “Sustainable protection of lower Danube sturgeons by preventing and counteracting poaching and illegal wildlife trade” aims to achieve a consolidated and enduring improvement in the conditions of Danube sturgeons, through the work with key target groups: law enforcement agencies, members of fishing communities, and retailers.

The project is funded by the European Union, through the LIFE program of the European Commission and coordinated by WWF Austria. It is implemented within a time period of four years, between October 2016 and December 2020. The project is a follow-up of work initiated in a previous LIFE project which was implemented in Bulgaria and Romania and currently it covers Serbia and Ukraine, too. The project is being implemented by seven organizations in six countries, the sixth being Germany.

It is in line with the “European Union Strategy for the Danube Region” as well as the program for the protection of Danube sturgeons “Sturgeon 2020”, especially in three areas: Capacity building and law enforcement, socio-economic measures in support of sturgeon conservation, and raising public awareness.

The overall objective of the **consultancy** is to provide processed data from the questionnaires and its interpretation. Baseline data for Romanian fishing communities and law enforcement authorities has not been collected, as the evaluation uses endline data from the previous project. For Bulgarian fishing communities and law enforcement authorities, both endline data from the previous project and new data were used.

The endline questionnaires for all four countries (Bulgaria, Romania, Serbia, and Ukraine) are aimed to explore changes in levels of awareness, knowledge, attitudes, perceptions and ownership of the three target groups (law enforcement agencies, fishing communities, and retailers) in relation to various aspects of sturgeon conservation.

For **Romania**, the baseline data were collected in two different time periods. Between March and June 2015 the endline study data of the initial project were utilized as there were structured interviews conducted with representatives of law enforcement agencies and members of fishing communities. These answers were analyzed and summarized in previous report. Between July and September 2019 structured interviews were conducted with representatives of retailers and the summary of their answers is subject of this report.

Five **retailers** were interviewed during the baseline study, with respondents mainly being managers of the companies in charge of various departments. They represented either “large shop / supermarket” or “restaurant / bar / hotel” type of company. The number of years which the retailers have been in business varied from four years up to 27 years, and all of them are to a certain extent in business related to sturgeon.

The respondents’ opinions differed when asked why sturgeons are endangered species, but all of them agreed that “targeted fishing” is a serious threat. Other major threats identified by the large majority of respondents were “demand for sturgeon meat” and “demand for sturgeon caviar”. All retailers declared to be aware that commercial fishing of sturgeons is not allowed in Romania and they agreed that sturgeon fishing should be prohibited.

It seems that there are several main difficulties that some of the respondents face in their daily business activities related to sturgeons, such as “illegal trade”, “complicated regulations / burdensome administration”, “too many controls”, “lack of information”, and “corruption”. There were two respondents out of five in total who were aware of some national or international regulations aimed at controlling the sturgeon business in Romania, as well as institutions which are responsible for their enforcement. All were aware that trade in products from wild sturgeons caught in national rivers or seas was prohibited. One retailer has been offered to trade sturgeon, caviar or sturgeon meat that did not meet the legal requirements. None of the respondents had heard of other companies getting or accepting such an offer.

The majority of respondents agreed that companies dealing with sturgeons or sturgeon products, like caviar, are as well responsible for the protection of sturgeons, especially through only selling products from aquaculture, observing traceability and following legal regulations. However, one respondent does not see this responsibility.

The information level of the retailers about sturgeon related topics varied. There were two respondents who felt well informed about sturgeons in general as well as about regulations and requirements of national or international markets. The others either felt fairly or poorly informed. The respondents declared seeking information from various sources, mainly from internet or respective authorities. With regard to the kind of information the respondents need, there were two specific topics mentioned: “sturgeon protection represents a national interest and information events should be organized, including effects on the sturgeon products’ commerce and legal requirements” and “sources for getting legal breeds of sturgeons”. The best way to receive the information would be workshops besides videos and brochures.

ABBREVIATIONS

WWF	World Wide Fund for Nature / formerly known as World Wildlife Fund
DCP	Danube-Carpathian Program now WWF in Central and Eastern Europe (CEE)
NGO(s)	Non-governmental organization(s)
EU	European Union
ToR	Terms of References
SRL	Societate cu raspundere limitata (original language); Limited company
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
CSR	Corporate Social Responsibility
GEO	Government Emergency Ordinance; OUG - Ordonanța de urgenta (original language);
NAFA	National Agency for Fishing and Aquaculture
DDBRA	Danube Delta Biosphere Reserve Authority
Romsilva	National Forest Administration; Regia Nationala a Padurilor (original language);
MADR	Ministry of Agriculture and Rural Development; Ministerul Agriculturii și Dezvoltării Rurale (original language);
GD	Government Decision

1 INTRODUCTION

1.1 Project description

The project “Sustainable protection of lower Danube sturgeons by preventing and counteracting poaching and illegal wildlife trade” (in short “LIFE for Danube Sturgeons”, LIFE15 GIE/AT/001004) **aims** to achieve a consolidated and enduring improvement in the conditions of Danube sturgeons, through the work with key target groups (Law enforcement agencies, Fishing communities’ members, Retailers).

The project is **funded** by the European Union, through the LIFE program of the European Commission and **coordinated** by WWF Austria (Umweltverband WWF Österreich). It is **implemented** over four years (October 2016 – December 2020) and **builds** on the work initiated in a previous LIFE project (LIFE11 INF/AT/902), where fishermen, enforcement agencies and other key stakeholders in Bulgaria and Romania were engaged in the protection of sturgeons from illegal fishing and trade, mainly via knowledge and awareness raising.

Besides **Bulgaria and Romania**, the current “LIFE for Danube Sturgeons” project covers as well **Serbia** (below the Iron Gate dams) and **Ukraine** (part of the Danube delta and north-western Black Sea coast). An overview of the project area is shown in Picture 1.

Picture 1 – Map of the region and particular project localities



The project, “*LIFE for Danube sturgeons*” **focuses** on saving the “flagship” fish of the Danube – sturgeons. The reasons for the decline in sturgeon stocks are complex, but lack of awareness and information seems to be a root cause of the most important factor, which is overexploitation. Despite strict legal protection, illegal fishing and trade in meat and caviar from wild sturgeons still endanger the last survivors of these ancient and iconic fish species.

The project **aims** to contribute to halting and reversing losses in sturgeon stocks, specifically adding to the “*EU Strategy for the Danube Region*” as well as to the program for the protection of Danube sturgeons “*Sturgeon 2020*” in the following sections:

- Capacity building and law enforcement,
- Socio-economic measures in support of sturgeon conservation,
- Raising public awareness.

Thus the project aims to attain three main **objectives**. With their **estimated results** and **potential indicators** they are summarized in Table 1.

Table 1 – Project objectives, estimated results and potential indicators

Objective 1 By 2020, <u>law enforcement</u> is implemented more effectively through enhanced capacity and practical knowledge of authorities and higher acceptance – and consequently compliance – by stakeholders to achieve a long-term reduction of illegal sturgeon fishing and trade in the lower Danube region; 50% of authorities in Ukraine and Serbia have increased their commitment by 2 levels, 30% of authorities in Bulgaria and 50% of authorities in Romania reach Level 3.	
Estimated results 1.1 By 2018, improved norms and procedures are developed together with competent agencies and followed-up with decision makers. 1.2 By 2020, more than 150 law enforcement officials are personally enabled to apply enhanced skills and perform controls and investigations effectively, transparently and with higher acceptance; they act as multipliers in their agencies, supported by targeted factsheets and training videos. 1.3 An alert system to report illegal activities targeting sturgeons is set up as a model case in Romania, generating at least 12 reported cases, with concepts developed in other target countries. 1.4 A system of 30 volunteer "Sturgeon Watchers" supports enforcement agencies in protecting spawning sturgeons as a model case in Romania.	Potential indicators <ul style="list-style-type: none"> • Willingness of authorities to participate in project activities; • Level of implementation of proposed recommendations by project end and feedback from concerned stakeholders; • Number of officials in capacity building measures; • Feedback to these measures; • Reach of information material; • Trends in control measures and seizures; etc.

Objective 2

By 2020, targeted fishing communities positively take on ownership for sturgeon conservation and are willing and able to use alternative income sources to compensate profits from sturgeon fishing and to give stocks a break to recover; in 60% of communities in Ukraine and Serbia ownership is raised 2 levels, 50% in Romania and Bulgaria reach Level 3.

Estimated results

- 2.1 By 2020, work of Sturgeon Advocated with fishing communities is intensified and expanded to further regions (Ukraine and Serbia; Black Sea coast), including 1000 personal meetings in 15 villages, and fishermen understand the environmental problem and cooperate in mitigating it.
- 2.2 Fishermen accept scientific facts regarding sturgeon population decline and - as demonstration activity in Bulgaria – 20 of them are actively involved in sturgeon research and conservation to develop understanding and ownership for sturgeon protection as well as skills for income generation in monitoring projects.
- 2.3 Alternative income sources in key fishing communities in the project region are assessed, concrete business plans developed for at least 6 cases and at least 1 business case is set up to make fishermen less dependent on profits from illegal activities harming wild sturgeons.

Potential indicators

- “Taking on ownership” will be assessed through rating change on a scale of pre-defined desirable behavior of fishermen such as releasing bycatch, cooperating with authorities, etc.
- Willingness of fishermen to participate in project activities;
- Numbers of fishermen involved in meetings with Sturgeon Advocates, in research and monitoring or in alternative income development;
- Observed interest in alternative income opportunities; etc.

Objective 3

By 2020, the availability of legal and illegal sturgeon products on the market is better known and under stronger surveillance by authorities, and respective retailers are aware of legislation and enabled to prevent illegal products from reaching the market; 50% of targeted retailers in the 4 target countries have increased their awareness by 1 level.

Estimated results

- 3.1 By 2020, in 300 visits to shops, restaurants or street vendors, an overview of domestic markets in sturgeon meat and caviar is available for 4 target countries.
- 3.2 Genetic and isotope analysis of at least 100 obtained samples deliver reliable data on the occurrence of illegal products.
- 3.3 Responsible authorities are provided with results to increase surveillance and enable targeted investigations.
- 3.4 At least 200 relevant national market actors are informed about the need and relevant legal requirements to protect sturgeons.

Potential indicators

- Number of controls and findings;
- Number and quality of follow-up investigations based on findings from survey;
- Reach of information material; etc.

1.2 Project partners and other stakeholders

The project is being implemented by **seven organizations in six countries**, namely: **WWF** Austria, WWF Danube-Carpathian Program (DCP) Bulgaria, WWF DCP Romania, WWF in Serbia (Svetska organizacija za prirodu), WWF DCP in Ukraine, the Danube Delta Biosphere Reserve Authority in Romania (DDBRA, English acronym for Rezervația Biosferei Delta Dunării) and Leibniz Institute for Zoo and Wildlife Research in Germany (IZW, English acronym for Leibniz-Institut für Zoo und Wildtierforschung).

The Project activities are aimed at **three main target groups**, which are also the focus of the baseline and endline studies for impact evaluation. These groups and their planned activities are:

1. Authorities (especially law enforcement agencies)

Planned activities:

- National workshops to facilitate networking and exchange of experiences of all national agencies responsible for implementing regulations concerning sturgeon fishing, aquaculture and trade.
- Discussions of problems and best practice approaches to enhance law enforcement and investigation processes.
- Engagement of prosecution and judicial authorities to strengthen the essential cooperation of the entire enforcement chain.
- Organization of a regional workshop with agencies from neighboring countries to foster the crucial cross-border coordination and collaboration.
- Specific training courses, study visits, targeted information packages and newsletters to respond to the needs of individual authorities and enhance expertise and practical skills of officials.

2. Fishing communities and fishermen (including young people)

Planned activities:

- Field work of Sturgeon Advocates, who act as mediators, raising awareness of fishermen for the need for sturgeon protection and for observance of legislative measures.
- Elaboration of business plans and concrete business cases to facilitate alternative income sources in major fishing communities.
- Engagement of fishermen in sturgeon research.

3. Retailers (shops, restaurants, markets, catering companies offering sturgeon meat or caviar)

Planned activities:

- Market research, in order to better understand availability of sturgeon products (caviar, meat) in the 4 target countries and provide information on illegal activities to enforcement agencies for further investigations.
- Awareness raising of respective retailers regarding legislation that prevents illegal products from reaching the market.

The other **stakeholders** involved in the project, but not part of the key target groups (and thus not engaged in baseline and endline surveys) are:

- Civil society actors
- Academia (e.g. scientists),
- Non-governmental organizations (NGOs),
- Decision-makers and other policy actors on national, local and EU level (e.g. EU and international bodies),
- Local authorities (e.g. protected area administration),
- Media (local, national as well as international),
- General public (e.g. potential caviar consumers and residents of the Lower Danube and Black Sea regions who are not directly involved in fishing but are still somehow engaged with the activity as such).

2 SURVEY METHODOLOGY

2.1 Purpose and focus

The **overall objective** of the consultancy is to provide processed data from the questionnaires and its interpretation following the aim of the consultancy as defined in the Terms of Reference (ToR – Annex 3). Besides questionnaires there are two other evaluation tools being used (Visit Tracker Tool and Impact Evaluation Tool) by the project team.

The **baseline questionnaires** are aimed at:

- Analyzing the initial status of awareness / knowledge and attitudes / perceptions within target groups and determine a baseline for the monitoring and evaluation of project impact;
- Engaging target groups in the project from the start, gaining their support and initiating project ownership;
- Clarifying overlap or division of current responsibilities of enforcement authorities;
- Analyzing specific needs or gaps of knowledge in order to produce tailor-made communication tools for each target group.

Baseline data for **Bulgarian and Romanian fishing communities and authorities** has largely not been collected again, as the evaluation uses endline data from the previous project (besides some additional interviews with law enforcement agencies and with fishermen from the Black Sea communities).

For **Serbian and Ukrainian fishing communities and authorities (and new interviews in Bulgaria)**, improved questionnaires were developed based on questionnaires from the previous project avoiding any major changes that would create large inconsistencies between previous and current project data.

For **retailers in all four project countries** new questionnaire was developed (Annex 1).

The **endline questionnaires** are aimed to explore changes in levels of awareness, knowledge, attitudes, perceptions and ownership of the three target groups in relation to various aspects of sturgeon conservation.

All questionnaires are developed in **English language** and filled in via online web application Survey Monkey (instructions for the interviewer are provided in case the data is collected by third parties). The translation into country languages is done by local project teams.

The **baseline study report** was conducted following an in-person meeting with the Project Manager and Regional Technical Coordinator in Vienna and several Skype discussions to get more in-depth information on the current and previous projects.

The analysis relies on questionnaires answered by representatives of the key target groups between March and May 2015 in Bulgaria and Romania (including few additional responses collected by end of 2017), between June and December 2017 in Serbia and Ukraine, and then during mid of 2019 in all four countries with the focus only on retailers.

Each questionnaire is composed of several sections which are thematically different and following the logic of various topics which are to be analyzed:

1. Law enforcement agencies

- Basic information
- Introduction
- Knowledge
(with regards to control and / or protection of wild sturgeon, caviar trade and finally sturgeon breeding, caviar production or processing)
- Awareness and attitudes – threats
- Awareness and attitudes – situation
- Information level
- Interviewer notes

2. Fishing communities

- Basic information
- Introduction
- Fishing
- Knowledge about sturgeons
- Awareness about sturgeons and sturgeons threats
- Knowledge about the ban
- Attitude towards the ban
- Attitude towards poaching
- Protection of sturgeons
- Information level
- Interviewer notes

3. Retailers

- Basic information
- Introduction
- Questions about sturgeons
- Questions regarding sturgeons / caviar – business related
(including questions on CITES – ‘Convention on International Trade in Endangered Species of Wild Fauna and Flora’ permits only for companies that trade internationally and questions only for companies that deal with caviar)
- Information level
- Interviewer notes

The data collected for the baseline study relied on **purposeful sampling**. It is difficult in all four countries to find sufficient respondents for the interviews / questionnaires as people sometimes do not want to talk about sturgeons – especially about negative issues such as illegal fishing, trade or lacking law enforcement – or they are too busy to talk.

Key **selection criteria** for the questionnaires’ respondents included:

- Competence within analyzed target group (e.g. member of the targeted fishing community and preferably a fisherman or in the case of law enforcement agencies and retailers, the respondent had to carry out work related to sturgeon protection and trade).
- Availability and willingness to participate in the survey.

In regard to law enforcement authorities, there was always the intention to bring in several views and different hierarchies and areas of responsibility (i.e. respondents) within the same institution, in order to offer a more comprehensive picture of the situation. It is an additional difficulty that a significant staff turnover is being observed in the agencies or sometimes an entire institution might change its mandate or role regarding sturgeon issues.

2.2 Baseline data analysis for Romania

For Romania, the endline data (related to law enforcement agencies and fishing communities) from initial project evaluation were utilized for the purpose of the actual project baseline assessment. These data were collected between March and June 2015. There were no additional questionnaires distributed and data collected in Romania.

The baseline survey assessing Romanian retailers was conducted between July and September 2019 and subsequently the data were entered into Survey Monkey web application to be processed and presented in this report.

The **actual sample for each target group** was the following:

- | | |
|---|-----------------|
| 1. Number of Law enforcement agencies / institutions' representatives | 19 |
| 2. Number of Fishing communities' members' representatives | 33 |
| 3. <u>Number of Retailers' representatives</u> | <u>5</u> |

The local project team in Romania did not provide **estimates** of numbers of the project beneficiaries at the beginning of the current project.

For comparison, the **initial project** had following numbers of respondents during baseline and endline study:

	2013	2015
1. Law enforcement agencies	22	19
2. Fishermen	31	33
3. <u>Companies</u>	<u>3</u>	<u>0</u>
4. Decision makers	5	5

Based on the experience from the initial project, the response rate can be assumed at 50%. However, **representative number** of respondents for Romania could not be calculated (with the aim of 95% confidence level and 5% margin error), as the estimates of project beneficiaries were not provided.

3 SURVEY RESULTS OF RETAILERS

The next sub-chapters are following the logic of the questionnaire for the retailers (Annex 1) and the connection to particular questions is always provided.

3.1 Basic information

In **Romania (question no. 1)** the surveys were conducted by **one interviewer (question no. 2)** between July and September 2019 (**question no. 3**). For this country, there is a sample of five respondents which is considered sufficient.

Table 2 – Names of the respondent's company (question no. 4)

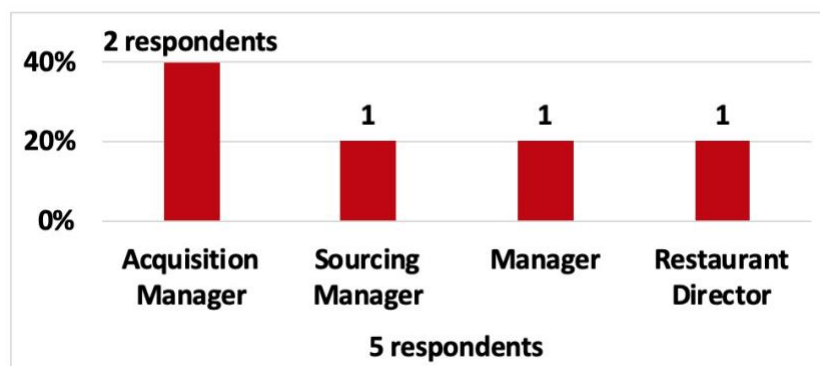
5 companies in total:	
1.	Hotel Delta
2.	Restaurant Ivan Pescar
3.	Mega Image SRL
4.	SC Romania Hypermarche SA (present on the market under the name Cora)
5.	SC Lidl Discount SRL

3.2 Introduction

All five respondents stated their **names (question no. 5)** while filling in the questionnaire.

The various positions or functions of the companies' representatives are shown in Graph no. 1.

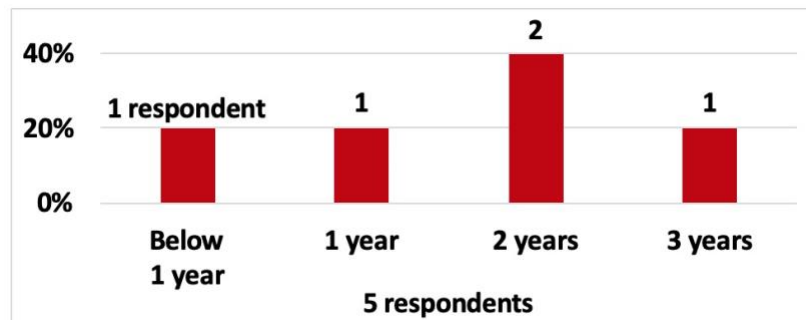
Graph 1 – Position / function of respondents (question no. 6)



One respondent added that besides being an Acquisition Manager he / she is also Corporate Social Responsibility (CSR) Manager.

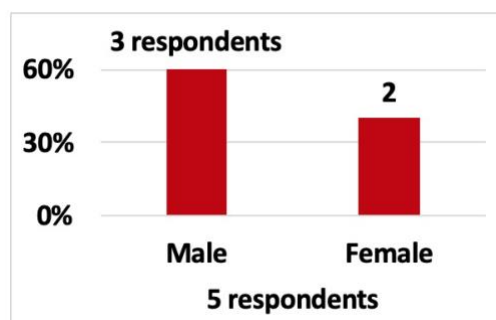
When asked about the number of years spent in their particular position, the answers varied from less than one year to three years of experience, as seen in the below graph:

Graph 2 – Number of years in the position (question no. 7)

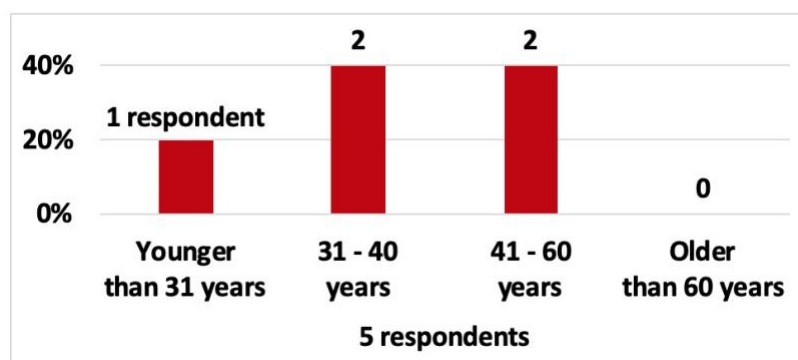


Some basic demographic information about the respondents was collected as well:

Graph 3 – Gender of respondents (question no. 8)



Graph 4 – Age group of respondents (question no. 9)



All five respondents provided **basic description of their responsibilities concerning sturgeons / caviar (question no. 10):**

- *“Coordination of CSR strategy; ensuring the compatibility between strategic objectives of the company; analysis of specific subjects for product acquisition; proposition of adequate programs which reflect the stakeholders’ / clients’ / employees’ / partners’ expectations and environmental requirements.”*
- *“Sustainable commerce; demand / offer identification; company strategy; negotiation; pricing, etc.”*
- *“Ordering, traceability, quality assurance.”*
- *“Restaurant operations and event coordination.”*
- *“Fresh products acquisition.”*

Part of the respondents are representing either “large shop / supermarket” (60%) or “restaurant / bar / hotel” (40%) type of company as displayed in Graph no. 5.

Graph 5 – Key word(s) best describing respondents’ companies (question no. 11)



Although LIDL representative declared the following category: *“Discounter of alimentary and non-alimentary products”* under the option ‘Other’, for the purpose of this survey it will counted as large shop / supermarket.

When asked what activities the company is engaged in, the respondents selected out of 18 options. The overview is shown in following table:

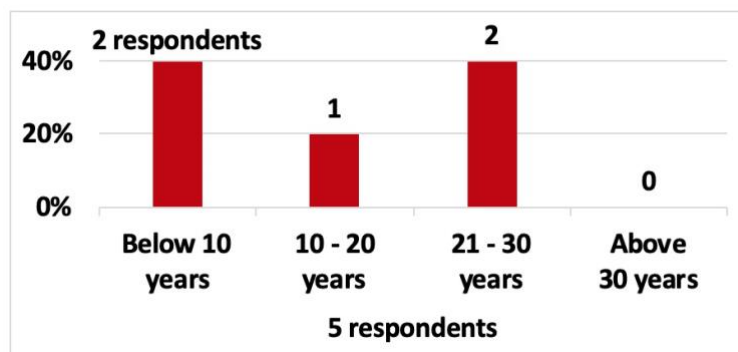
Table 3 – Activities of the retailers (question no. 12)

5 companies (100%) are involved in:
- national trade (selling and / or buying) with sturgeon meat
3 companies (60%) are involved in:
- national trade (selling and / or buying) with caviar
None of the companies are involved in:
- breeding sturgeons (aquaculture)
- producing sturgeon meat from aquaculture
- producing caviar from aquaculture
- producing other sturgeon products from aquaculture (please describe in "other")
- processing sturgeon meat

- processing caviar
- processing other sturgeon products (please describe in "other")
- (re)packaging sturgeon meat
- (re)packaging caviar
- (re)packaging other sturgeon products (please describe in "other")
- national trade (selling and / or buying) with live sturgeons
- national trade (selling and / or buying) with other sturgeon products (please describe in "other")
- international trade (import / export) of live sturgeons
- international trade (import / export) of sturgeon meat
- international trade (import / export) of caviar
- international trade (import / export) of other sturgeon products (please specify)

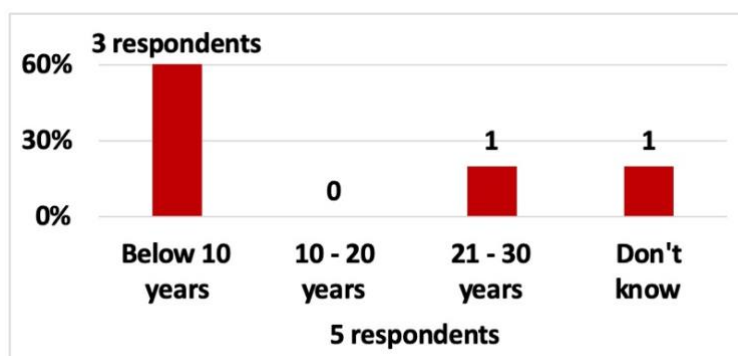
None of the respondents used the option 'Other' to specify or explain more about the product(s) of his / her company.

Graph 6 – How many years have the companies been in business for (question no. 13)



There are at least two companies (as shown also in the following graph), carrying out a sturgeon-related business ever since they were established.

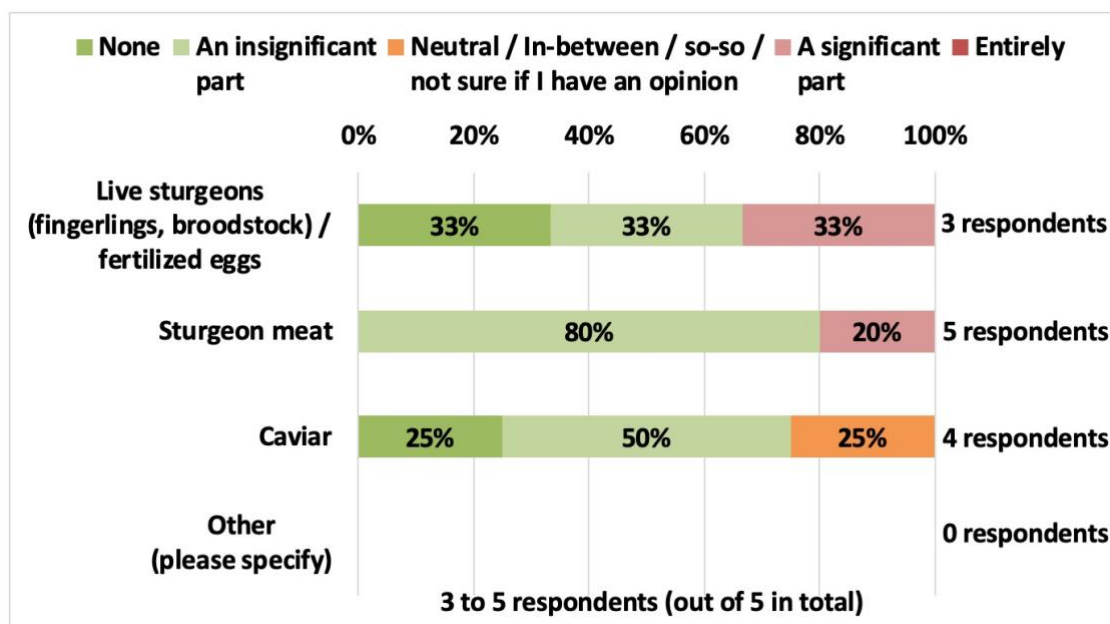
Graph 7 – How many years have the companies been working with sturgeons (breeding, trading, etc.) (question no. 14)



One respondent distinguished the activities of his / her company as: *“nine years in caviar business and two years in sturgeon meat business”*.

The interviewed companies were rather not dependent on sturgeon / caviar income as shown in Graph 8.

Graph 8 – Estimation of the company’s income dependency on sturgeon / caviar during last year (question no. 15)



As shown in the previous graph, the income of the majority of companies is only slightly depending on live sturgeons or sturgeon meat (only one company each depends to a significant part on the commodity). One company (33%) declared not depending at all on the sale of live sturgeons (fingerlings, broodstock) and / or fertilized eggs. One company (25%) declared not depending on caviar trade at all.

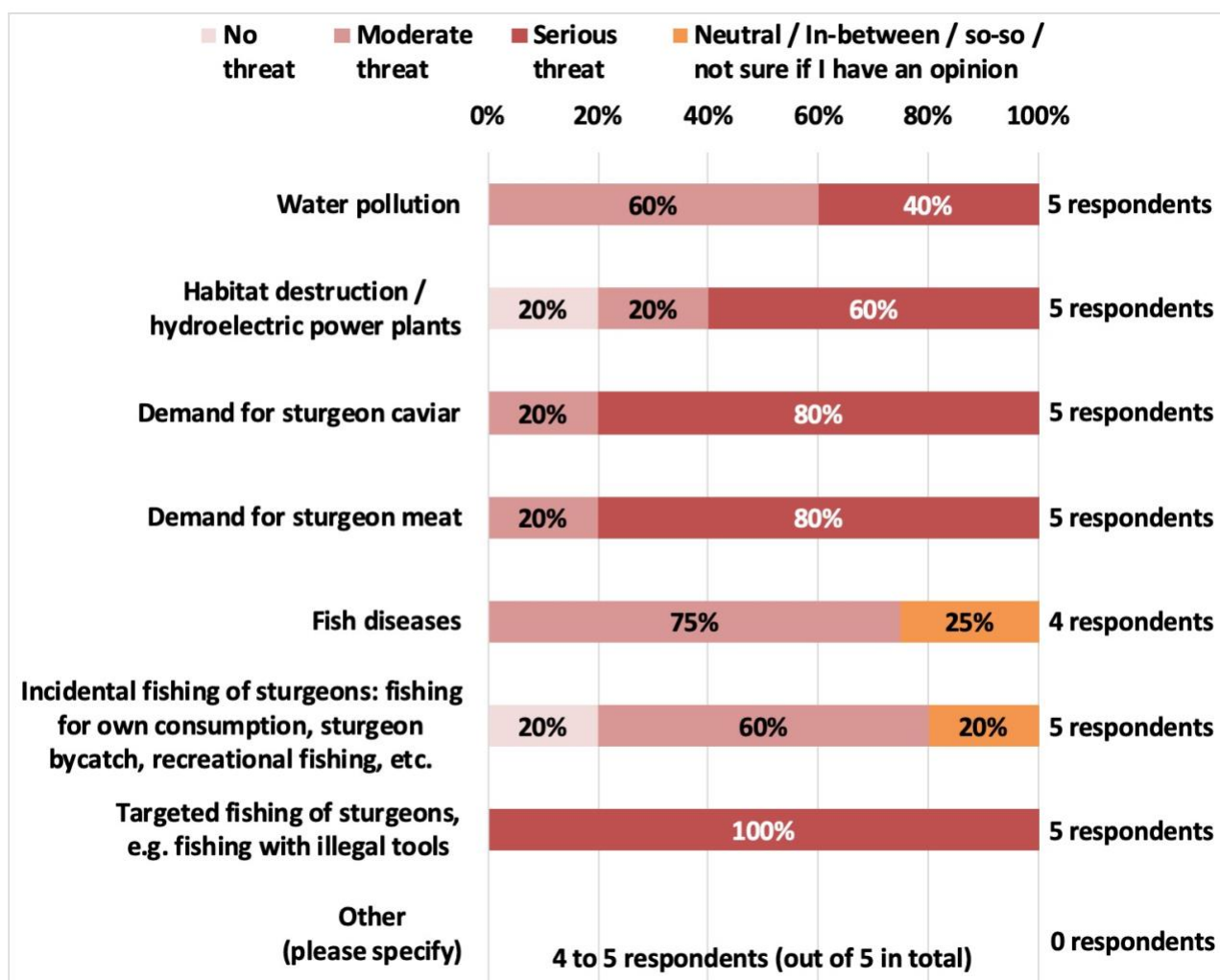
3.3 Question about sturgeons

All five survey participants (100%) expressed their opinion to the open ended question, about **the current state of wild sturgeon stocks in Romania (question no. 16)**:

- *"According to the EU reports the last sturgeon populations are only in Romania and Bulgaria, being threatened by extinction due to poaching and caviar trafficking. Law enforcement and sanctioning of poaching should be tightened in order to avoid sturgeon extinction."*
- *"Due to excessive fishing in the past, sturgeons are now on the brink of extinction."*
- *"Sturgeons are fished in an abusive way, that pushes the species to the brink of extinction."*
- *"There is no information about sturgeons available publicly."*
- *"I don't have an opinion about sturgeons. I heard they are a protected species."*

The following graph shows the respondents' thoughts on what makes sturgeons endangered species:

Graph 9 – Reasons why sturgeons are endangered species (question no. 17)



Four to five respondents (out of a total of five) provided an answer to this question. They identified different threats or different variations in the impact of the same threat.

The biggest threat identified was “targeted fishing of sturgeons”. In fact, it was considered to be a serious threat by all five respondents. Other presumed major threats were the “demand for sturgeon caviar” and the “demand for sturgeon meat” (80% of the respondents considered both these factors a major threat).

The majority of respondents (60%) considered “water pollution” as a moderate threat, while the others (40%) viewed this factor as a serious threat. The majority of respondents considered “fish diseases” (75%) and “incidental fishing of sturgeons (e.g. fishing for own consumption, sturgeon bycatch, recreational fishing)” (60%) as a moderate threat.

The strongest variability in opinions was expressed in regard to “habitat destruction / hydroelectric power plants”: it is not considered a threat by one respondent (20%), it is considered a moderate threat by one respondent (20%), and a serious threat by three respondents (60%).

All five survey participants (100%) knew of a ban when asked whether **commercial fishing of sturgeons is allowed in Romania (question no. 18)**. It was an open ended question where only two participants added more details about the prohibition:

- *“Commercial fishing of sturgeon is prohibited from 2006 until the second half of 2021.”*
- *“Commercial fishing is prohibited until the first half of 2021.”*

The other participants stated only “no” as an answer to this question and did not comment the exact end of the current ban.

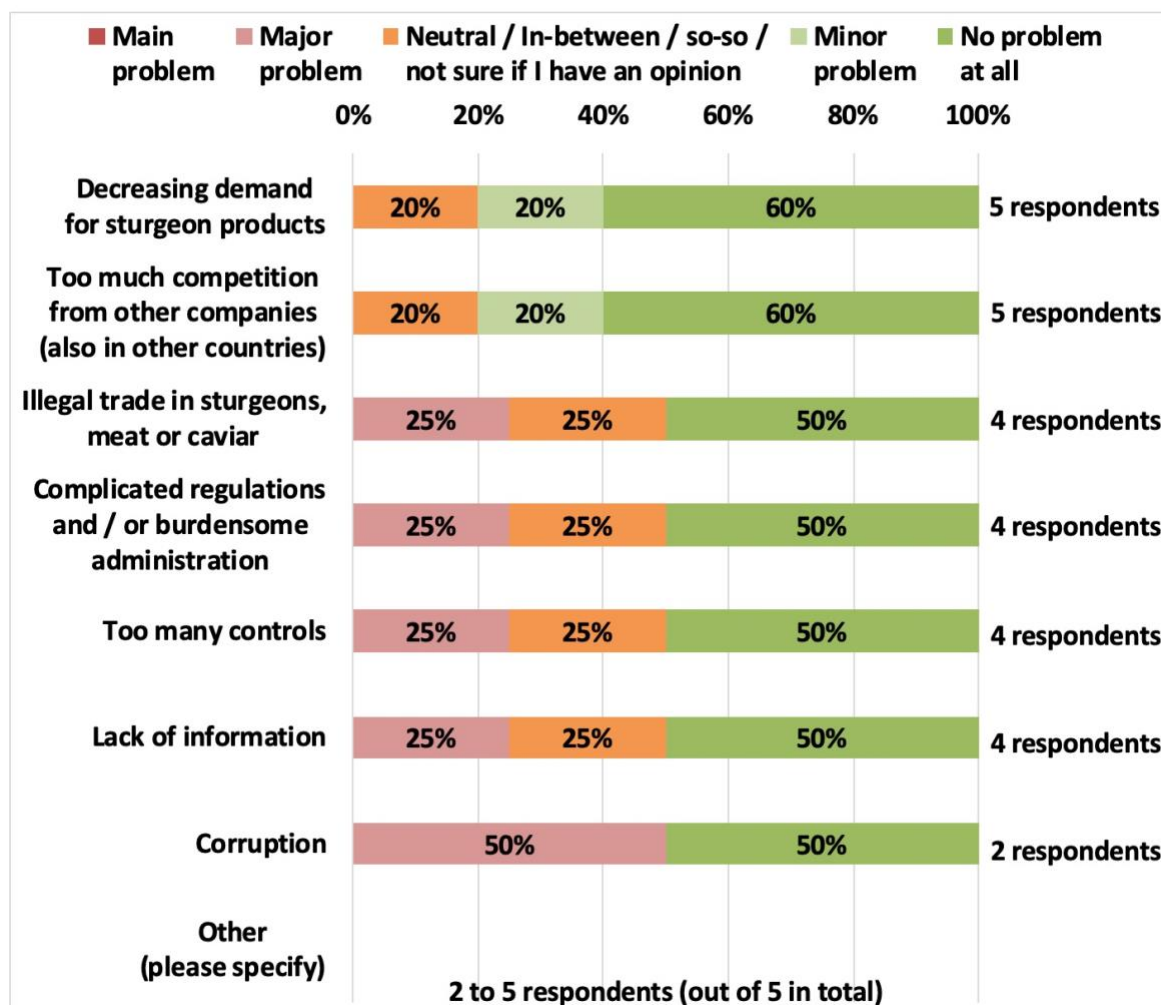
All five companies’ representatives (100%) were positive towards the protection of sturgeon stocks and the enforcement of a fishing ban when asked to express an opinion about the **prohibition of fishing sturgeons (question no. 19)**, which was an open ended question:

- *“The ban is efficient, if it is sustained by laws and complementary measures. For instance, implementation of monitoring, conservation and restocking programs of threatened species, and preservation of natural habitats.”*
- *“The prohibition helps preventing excessive fishing and protection of endangered species.”*
- *“If the ban is respected, it would be benefiting for sturgeons.”*
- *“The ban is a good measure if it would be respected by the neighbors (= neighboring countries).”*
- *“As the sturgeon is an endangered species, it's obvious that the prohibition is a good measure.”*

3.4 Question regarding sturgeons / caviar – business related

The following graph shows the major difficulties that respondents face in their daily business activities related to sturgeon trade:

Graph 10 – Major difficulties that respondents face in their daily business activities related to sturgeons (question no. 20)



Two to five respondents (out of a total of five) answered each one of the additional queries included in this question.

Only two respondents expressed their opinion about “corruption”. One of them (50%) pointed at corruption as a major problem for his / her company, yet for the other respondent (50%) it is no problem at all.

The least problematic seems to be the “decreasing demand for sturgeon products” and the “too much competition from other companies”. Both of these difficulties were no problem at all for three companies (60%) and only a minor problem for one company (20%). There was one respondent (20%) having a neutral opinion.

The remaining difficulties (“illegal trade in sturgeons, meat or caviar”, “complicated regulations and / or burdensome administration”, “too many controls”, and “lack of information”) were rated the same way: no problem at all for two companies (50%), a major problem for one company (25%) and one respondent (25%) did not have an opinion.

There were two respondents (out of five in total) who could correctly name some **national or international regulations aimed at controlling the sturgeon business in Romania as well as the institutions which are responsible for their enforcement (question no. 21):**

- *“At national level, the regulation is the Government Emergency Ordinance (GEO) no. 23/2008. The enforcement is assured by National Agency for Fishing and Aquaculture (NAFA), Romanian Police, Border Police, Gendarmerie, Romsilva, and Danube Delta Biosphere Reserve Authority (DDBRA). For the CITES permits the responsible authority is the central authority for environmental protection.”*
- *“The regulations are: MADR Order no. 545/715/2016, and GEO no. 23/2008. The responsible institutions are NAFA, Environmental Guard, DDBRA, and Gendarmerie.”*

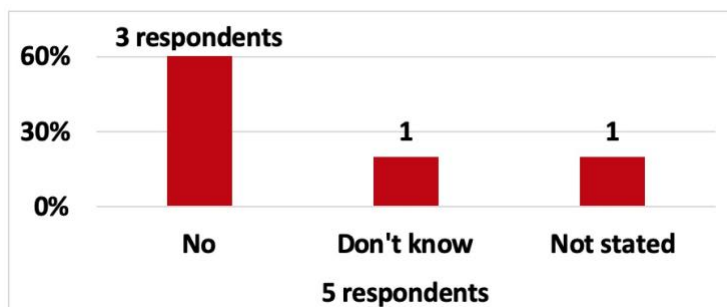
One respondent admitted that *“I don’t know”* while the remaining two skipped the question.

All five respondents (100%) were aware of the **ban on trade with wild sturgeon meat or caviar from national rivers or seas in Romania (question no. 22)**. One of them provided a more complex answer: *“According to our knowledge and according to the national legislation, it is an offence to sell sturgeons captured in natural habitat in Romania as well as any other sturgeon products, without respecting the legal requirements (except those sturgeons from aquaculture for which the origin must be proved through documents and legal marks). It is our understanding that the commerce with sturgeons and sturgeon caviar is allowed only if they come from aquaculture and if the seller has the legal documents to prove the origin. According to our knowledge, there is a ban order which prohibits fishing of different species at different times of the year. Sturgeon fishing was prohibited first time in 2006 for 10 years. The ban was prolonged for another five years.”*

There was one respondent (20%) who **had been offered to trade sturgeon, caviar or sturgeon meat that did not meet the legal requirements before and even after the ban came into force (question no. 23)**, but there were no details stated (e.g. approximate time of the offer). The other four respondents (80%) stated that they have not gotten such an offer.

Asked about whether the respondents had heard of other companies that had got and / or accepted such offers, the answers are shown in following graph:

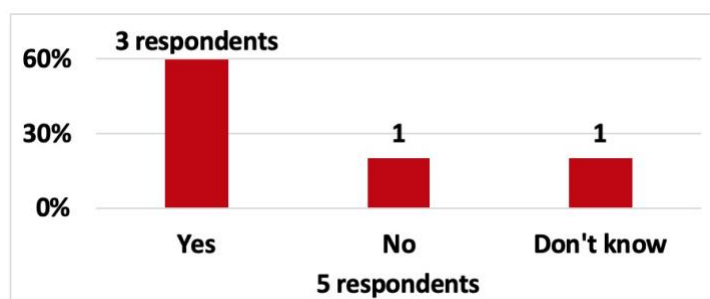
Graph 11 – Have respondents heard of other companies that had got and / or accepted such offers (question no. 24)



Although none of the respondents provided a “yes” answer to the previous questions, two of them answered the follow-up question regarding the country of origin of hypothetical illegal samples (**question no. 25 - which country(ies) it might be coming from**). One respondent stated “Russia”, while the other one stated two project countries: “Romania and Ukraine”. There were two respondents who skipped this questions and one who admitted that “I don’t know”.

The opinions about the responsibility of companies towards sturgeon protection varied as shown in graph no. 13.

Graph 12 – Are the companies dealing with sturgeons / caviar as well responsible for the protection of sturgeons (question no. 26)



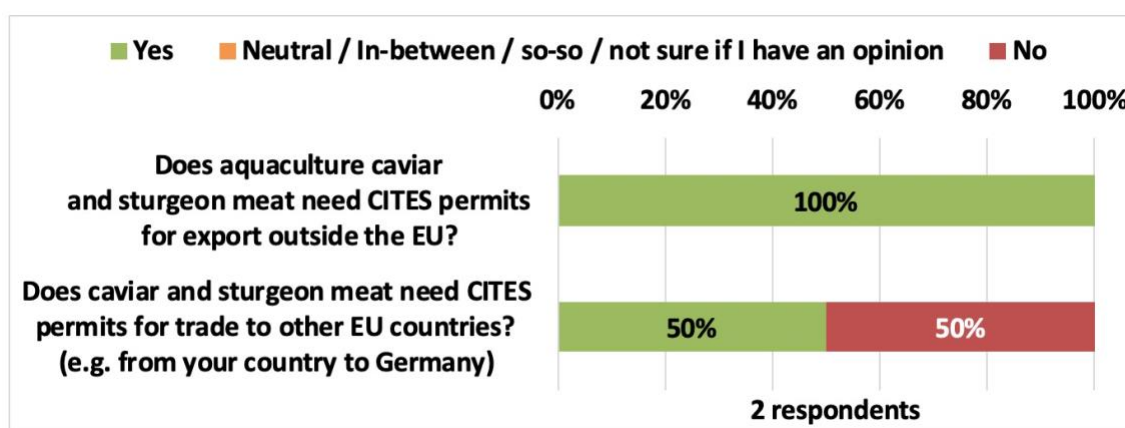
There was one respondent who added to his “yes” answer that: “We believe that the companies that sell caviar / sturgeons are responsible for sturgeon protection. They can ask the suppliers for details concerning products’ traceability.”

When asked what the actions taken by the **respondent's company to protect sturgeons (question no. 27)** are, these were the replies:

- *"We are not selling in excess this type of products. We had three types of such products which weren't part of the permanent stocks. In these cases we ensured that they come from aquaculture, some of them bearing 'Friend of the Sea' certification."*
- *"We ensure sustainable commerce with caviar by making sure that we are selling only those products that are following the legal regulation."*
- *"We are selling only sturgeons from aquaculture."*
- *"Selling of sturgeons from aquaculture only."*
- *"We don't sell sturgeons from poachers."*

The question about CITES permits and caviar labeling system was to be answered only by companies that trade internationally. Although to question no. 12, no company representative declared an activity of international trade in caviar, two people provided an answer to the questions below.

Graph 13 – CITES permit and caviar labeling system (question no. 28)



One respondent (50%) incorrectly assumed that caviar and sturgeon meat require CITES permits for trade to other EU countries. Shipments of sturgeon caviar produced within the EU do not require CITES permits or certificates as the EU is a common market and trade is therefore considered as domestic.

The last three questions from this chapter were to be answered only by those companies dealing with caviar. Although at previous questions (no. 12 and no. 15), three respondents declared an activity of national trade with caviar (either buying or selling), and that caviar is somehow important for their income, only two respondents provided an answer to the following question no. 29.

Both respondents were able to **explain the CITES labeling requirements (question no. 29):**

- *“According to our knowledge, the universal labelling requirement means the application of the non-reusable label on every primary tin that has caviar from Acipenseriformes species, regardless of their size or (re)packaging by a processing / packaging / repackaging plant, without avoiding the actual legislation regarding the labelling of animal origin products nor sanitary-veterinary regulation concerning the marking of products from fishing activities (article no. 9 of Government Decision – GD 1191/2010).”*
- *“It contains the following: species standard code / source code / country / harvesting or repacking year / processing plant official code / lot number.”*

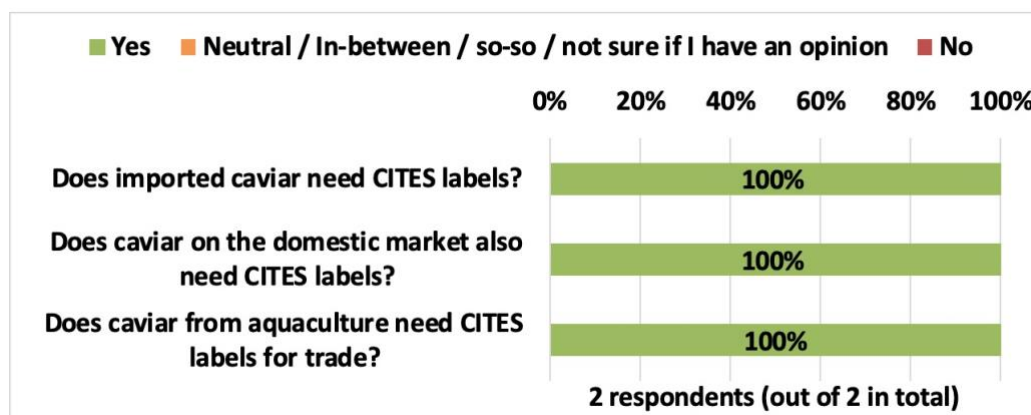
Both respondents explained correctly the **CITES code on a CITES label (question no. 30):**

- *“HUS – standard species code – Huso Huso here); C – source code (captive breed here); BG – standard code of the country (Bulgaria here); 2011 – year of harvesting or repackaging; DE-R05 – plant identification code; 6616 – lot number.”*
- *“Beluga/captive/Bulgaria/2011/Germany/lot number.”*

An example provided was “HUS/C/BG/2011/DE-R05/6616” which should be read as: species code (in this case, *Huso huso*), code of origin of the caviar which can be W/C/F (in this case “Captive bred”), country of origin code, year of harvest or repacking (in this case repacking), registration code of the processing organization (in this case Germany) and lot identification number.

Questions about the CITES permit and caviar labelling system are correctly answered in Graph 15 by both respondents.

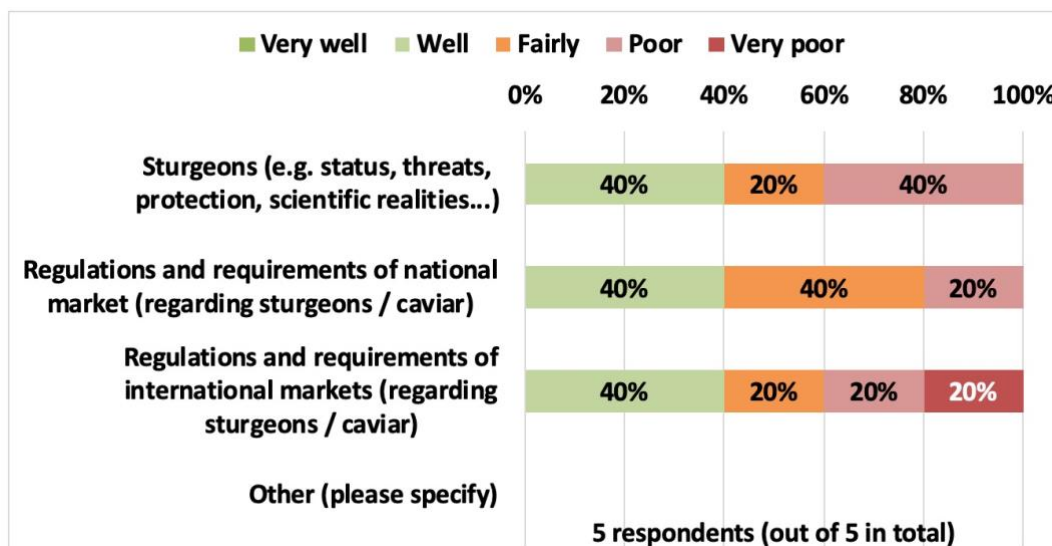
Graph 14 – CITES permit and caviar labeling system (question no. 31)



3.5 Information level

Respondents were given the opportunity to self-assess their level of awareness about specific topics listed in following graph:

Graph 15 – How well do respondents feel informed about specific topics (question no. 32)

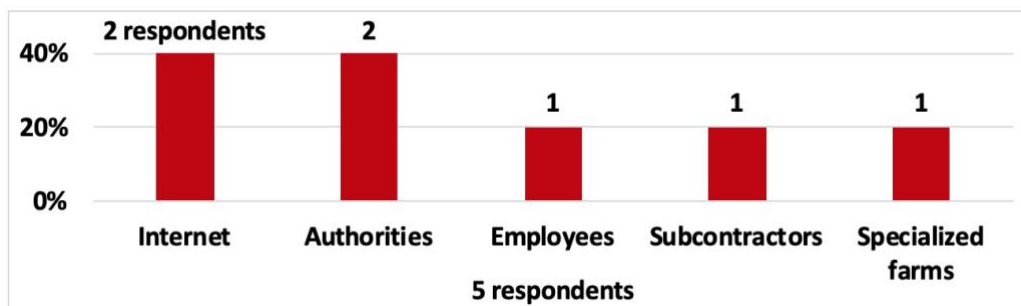


All five respondents provided an answer to this question and there were always two of them who felt well informed about all sturgeon related topics.

There were two respondents (40%) who had neutral opinion about their information level related to regulations and requirements of national market, while one respondent (20%) felt poorly informed.

In regard to regulations and requirements of international markets, the answers varied the most. Respondents expressed feeling either well (40%), neutral (20%), poorly (20%) or very poorly (20%) informed.

Graph 16 – Where / how can respondents get more information if needed (question no. 33)



One of the respondents was more specific: *"In case of unclarities, in a first stage, we research at internal level with employees or subcontractors. In a second stage we ask the relevant authorities for clarifications."*

Asked about **what kind of information would be useful for the company or the respondent personally and how the respondent would prefer to have it delivered (question no. 34)**, the responses of the five survey participants varied:

- *"Information about national interests and their effects on the commerce should be subject of some workshops or trainings organized by relevant authorities or other organizations."*
- *"The form of delivery should be videos and brochures."*
- *"Workshops would be useful."*
- *"Needed information is related to legal requirements and sources for getting legal breeds of sturgeons."*
- *"Any information which aims to help sturgeon sellers is useful."*

3.6 Interviewer notes

This part of the questionnaire was intended to provide space for the interviewer for his / her notes related e.g. to conditions, problems, etc. during the discussion with the respondent. It was used only during one interview:

- *"The respondent is the Fresh Products Acquisition Manager and he also represents the Fish Department of the company. Probably he is focused only on live fish, that's why he didn't mention caviar, even though his company sells caviar."*

ANNEXES

Annex 1 – Online questionnaire for Retailers

* attached as extra document

Annex 2 – List of reviewed documents

- Project documents
- Project logframe
- Previous project materials including evaluation
- Project webpage (<https://danube-sturgeons.org>)
- Convention on International Trade in Endangered Species of Wild Fauna and Flora – CITES (<https://www.cites.org/eng>)
- Webpages of six project partners
- EU Life program webpage (<http://ec.europa.eu/environment/life/>)
- Danube Sturgeons Task Force webpage (<http://www.dstf.eu>)
- Danube Region Strategy webpage (<http://www.danube-region.eu>)
- World Sturgeon Conservation Society webpage (<http://www.wscs.info>)
- International Association for Danube Research (<http://www.iad.gs>)
- International Commission for the Protection of the Danube River (<http://www.icpdr.org/main/>)

Annex 3 – ToR

* attached as extra document