

FISHERIES



CFP REFORM State of play



**European
Commission**
Maritime Affairs
and Fisheries

DG MARE F2

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1. Results of the stakeholders' consultation

117	Stakeholders (including ACFA and 6 RACs)
16	Research Group
63	NGOs
29	Member States Administrations
35	Member States Regions
8	Other Institutions
11	Third Countries
113	General Public
+ 1329 = mailing list	

- **392 contributions received**
Available on:
http://ec.europa.eu/fisheries/reform/consultation/received/index_en.htmReport
- **Commission Communication - Synthesis of the Consultation on the Reform of the Common Fisheries Policy**
SEC(2010)428 final, 16.4.2010
[http://ec.europa.eu/fisheries/reform/sec\(2010\)0428_en.pdf](http://ec.europa.eu/fisheries/reform/sec(2010)0428_en.pdf)



Governance

Chain of responsibilities

Almost unanimous support for clearer chain of responsibilities

Large minority (some MS and NGO's): Increased power of the Commission (delegation/implementing powers) – but no free license, Regulatory Committee, other stakeholders involved.

Some opposition from MS considering that technical decision are also political.



Governance

Regionalization

Overwhelming support for some kind of regionalization

Great variety in the understanding of what should be regionalization:

- **Subsidiarity**
- **MS jointly undertake actions**
- **Regional body**
 - Some: Body to implement EU policy
 - Most: Advisory body – dialogue, consultation, proposals to EU arena

Composition?



Governance

RAC's

- **Many reactions: Success**
- **Clarify role, strengthen, more support, more weight**
- **Review composition**
- **More weight RAC advice, more influence on research agenda**
- **Transform into regional advisory bodies?**

- **RAC's on their own future role**
In favor of regionalization, with diverse understanding (leading role for the RACs, more self-regulation, development of fisheries plans...)



Giving the industry responsibility

- At first sight, very divergent views: accountability versus flexibility
 - 1) Environmental NGOs: result based management, reversal burden of the proof, against self-management (mistrust) – prefer co-management.
 - 2) Industry: cautious towards self-management, move away from micromanagement.
 - 3) MS ready to delegate more responsibility to POs
- However, convergent views on what are the preconditions for increased responsibility:
 - Increased horizontal and vertical integration – POs!
 - Better involvement stakeholders decision making
 - New deal on cost sharing fisheries management
 - Safeguards



2. Impact assessment -Methodology

- / comparison on different scenarios (incl. status quo)
- **Combination of quantitative (2 bio-economic models), trend and qualitative analysis;**
- **Scope: 80+% of EU landings and 75+% of employment on board, all fleet segments and MS covered; Processing and aquaculture included;**
- **30 indicators mostly on environmental, economic and social dimension. Comparisons for 2012, 2017 and 2022;**
- **Managed by a team in DG MARE and an external contractor**



List of indicators used for the assessment

- 6 environmental indicators (stock at MSY, LTPM, Fish size, fleet evolution, evolution of fishing mortality, protected areas)
- 6 economic indicators (Gross Value Added, profit margin, return on investment, ratio of current revenue-break even revenue, fish prices and level of subsidies)
- 6 social indicators (employment and wages, sectorial and regional dependency, gross value added per employee and safety)
- 7 governance indicators (management costs, departure from scientific advice, RBM, compliance MS/obligations, % utilisation of quotas, level of swaps and time to reach a decision)
- 1 on external dimension
- 1 on coherence with WTO and EU policies in general
- 1 on administrative burden and 1 on simplification
- 1 on development of aquaculture



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Areas	Indicators
Environmental	1) Stock situation in terms of fishing mortality in relation to MSY 2) Percentage of stocks and/or catches covered by LTMP 3) Average size (length and weight) of fish 4) Fleet evolution 6) Area covered by protection regimes (Natura 2000) or special measures EU EEZ.
Economic	7) Gross valued added 8) Economic sustainability: Ratio current revenue-Break even revenue point 9) Net profit margin 10) Economic performance: Return on investment 11) Fish prices, market orientation 12) Level of subsidies
Social	13) Employment 14) Status of fisheries dependent communities/regions/ MS/EU 15) Value added dependency levels 16) Social sustainability: Gross value added per employee 17) Attractiveness of the sector: Distribution of incomes 28) Safety
Governance	18) Departure from quotas by Council (scientific advices in decision making) 19) Management costs for the sector 20) Regions and MS having adopting RBM system 21) Data provided by MS 22) Rate of utilization of allocations (quotas) 23) Level of quotas exchanges 29) Time taken to reach a decision
Coherence	24) Level of coherence with WTO and other EC policy
Administrative burden	25) Impact for the private sector
Simplification	26) Level of implementation simplification process by MS and industry
External*	27) Governance of EC fishing activities in external waters
Aquaculture	29) Development of Aquaculture



Status Quo scenario

- CFP until 2022 includes Regulations enacted since 2002, including the LTMPs (existing and in the pipeline), the Control Regulation and the IUU Regulation. Lisbon Treaty also taken into account. Continuation of EFF and CMO. No EU policy on ITRs. No changes to external dimension.
- Main results: Slow improvements, mainly associated with the signs of recovery of some fish stocks, but ...
... environmental, social and economic indicators remain far from sustainability.



Status Quo – more detailed results

Environmental Impacts: Slow and insufficient improvements - only 9% of stocks are likely to be at Fmsy by 2022 (3 in 2012, 8 in 2022). Progress mostly limited to Northern stocks.

Economic Impacts: Gradual and incremental improvement for some fleets; the financial/economic viability of others will remain under threat, Significant numbers of poorly performing, over-capacity fleets prevent improvement in overall financial performance of the EU fleet, Significant vulnerability to evolution of fuel prices and first sale fish prices.

Social Impacts: Total employment in the catching sector continues to decline,

Average wages slowly increase by 2022 but overall remain well below national average; increases mostly in LSF segment,

Many fishing dependent communities continue to decline.



Status Quo – more detailed results

- **Governance:** Departure from scientific advice is likely to continue. The continued inclusion of the 15% interannual TAC variation in LTMPs, may also lead to low consistency with scientific advice. Improvements in management costs (new technology, etc) and data reporting (compliance with regulations). The number of fleets with RBM systems will continue to rise slowly.



Four regional cases study

- **The general IA accompanied with additional analysis at more desegregated level: Scotland, Galicia, Brittany and Sicily (combined around 30% of EU sector).**
- **Same methodology but for additional local data (fleets/stocks) where available.**
- **Results of Status Quo analysis for each region in line with conclusions of general IA study: environmental, economic and social sustainability not achieved, neither short not long term.**
- **Regional differences: Scotland performs significantly better than general results. Brittany too because of increased environmental performance. Galicia worse in general (high dependency on EU stocks), but for employment. Sicily shows some improvement but not significant.**



3. Next steps

9-10 November 2010: Symposium organised by the Belgian Presidency in Ostend, « Improved Fisheries and Science Partnerships as Policy drivers »

More info: <http://www.eutrio.be/international-symposium-improved-fisheries-and-science-partnerships-policy-drivers>

16 November 2010: Commission's Conference in Bruxelles « Another future for Fisheries »

More info:

http://ec.europa.eu/fisheries/news_and_events/events/161110/index_en.htm

Registration on line



Indicative calendar

- **CFP reform package adopted by the Commission at the end of May – beginning of June 2011:**
 - **Communication on the CFP reform**
 - **Proposal of Framework regulation**
 - **Proposal of regulation on the CMO**
 - **Communication on the external fisheries policy**
 - **Proposal of financial regulation for fisheries in July 2011**
- => Negotiations with the Council and European Parliament**
- **Commission's aim: Package to be adopted before the end of 2012 and entry into force on 1st January 2013**



Thank for your attention

