

COMMISSION STAFF WORKING DOCUMENT

# A Diagnosis of the EU fisheries sector

This Commission Staff Working Document was prepared to back up and clarify the Green Paper on the Reform of the Common Fisheries Policy (COM(2009) 163 final of 22.04.2009).

Sector development and CFP instruments

**DRAFT**

*This paper has been compiled by the Commission services and is intended to back up and clarify the Green Paper — Reform of the Common Fisheries Policy (COM(2009) 163 final of 22.04.2009). Its contents thus cannot be construed as reflecting or pre-empting the European Commission's definitive views or positions on the subject matters in issue. The European Commission cannot be held responsible for any use which might be made of the information contained therein.*



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## ACRONYMS AND ABBREVIATIONS

ABNJ	Areas Beyond National Jurisdiction
ACFA	Advisory Committee on Fisheries and Aquaculture
ACP	African, Caribbean and Pacific States
AER	Annual Economic Report (Economic Performance of the EU Fishing Fleet)
AGDC	Advisory Group for Data Communication
AIPCE	Association des Industries du Poisson de l'UE (EU Fish Processors Association)
APEC	Asia-Pacific Economic Cooperation
ASCM	WTO Agreement on Subsidies and Countervailing Measures
ASEAN	Association of South East Asian Nations
BEP	Break even point
BFT	BlueFin Tuna
BS RAC	Baltic Sea Regional Advisory Council
CBD	Convention on Biological Diversity
CCAMLR	Convention on the Conservation of Antarctic Marine Living Resources
CCSBT	Commission for the Conservation of Southern Bluefin Tuna
CECAF	Committee for the Eastern Central Atlantic Fisheries
CEM	Conservation and Enforcement Group
CFCA	Community Fisheries Control Agency
CFP	Common Fisheries Policy
CN code	Customs Combined Nomenclature
COFI	FAO Committee on Fisheries
COI	Commission de l'océan Indien
COMEXT	Commerce Extérieur
CPMR	Conference of Peripheral Maritime Regions
CR	Current Revenue (Economic overcapacity indicator)
CRONT	Catch Reporting ON the Net
CTE	Committee on Trade and Environment
DCR	Data Collection Regulation
DSB	Disputes Settlement Body
EAGGF / FEOGA	European Agricultural Guidance and Guarantee Fund / Fonds européen d'orientation et de garantie agricole
EC	European Community
ECU	European Currency Unit
EEA	European Economic Area
EESC	European Economic and Social Committee
EFF / FEP	European Fisheries Fund / Fonds européen pour la pêche
EFTA	European Free Trade Association
EMODNET	European Marine Observation and Data Network
EMSA	European Maritime Safety Agency
EP	European Parliament
ERDF	European Regional Development Fund
ERS	Electronic Reporting System
ESF	European Social Fund
ETF	European Transport Workers' Federation
EU	European Union
EU COGECA	General Committee for Agricultural Cooperation in the EU
EUROSTAT	Statistical Office of the European Communities
F	Fishing mortality rate
FAO	Food and Agriculture Organisation of the United Nations
FAONT	Fishing Authorization ON the Net
FAS	Fleet Adaptation Schemes
FEONT	Fishing Effort ON the Net
FIFG	Financial Instrument for Fisheries Guidance (the structural fund instrument prior to the EFF)
FP	Framework Programme (6 <sup>th</sup> FP6, 7 <sup>th</sup> FP)
FPAs	Fisheries Partnership Agreements
FR	Fleet Register
FRONT	Fleet Register ON the Net
FRONTEX	Agency for the Management of Operational Cooperation at the External Borders of

	the Member States of the European Union
FTA	Free Trade Association
FTE	Full-time Equivalent
GATT	General Agreement on Tariffs and Trade
GFCM	General Fisheries Commission for the Mediterranean
GFL	General Food Labelling
GFTs	Governmental Financial Transfers
GSP	Generalized System of Preferences
GT	Gross Tonnage
GTxdays	Gross tonnage time days
GVA	Gross Value Added
HELCOM	The Helsinki Commission – the Baltic Marine Environment Protection Commission
IATTC	Inter-American Tropical Tuna Commission
IBTS	International Bottom Trawl Survey
ICCAT	International Commission for the Conservation of Atlantic Tunas
ICES	International Council for the Exploration of the Sea
ICMZ	Integrated Coastal Zone Management
IE	Individual Non-transferable Effort Quota
ILO	International Labour Organisation
IMR	Institute of Marine Research
IOC	Indian Ocean Commission or International Oceanographic Commission
IOTC / CTOI	Indian Ocean Tuna Commission / Commission des Thons de l'océan Indien
IPCC	Intergovernmental Panel on Climate Change
IPOA	International Plan of Actions
IPPC	International Panel for Climate Change
IQ	Individual Non-transferable Catch Quota
ISBA	International SeaBed Authority
ITE	Individual Transferable Effort Allocation
ITQ	Individual Transferable Quota
IUU/INN	Illegal, Unreported and Unregulated / Illégale, non déclarée et non réglementée
JRC	Joint Research Centre
LDC	Less Developed Countries
LDRAC	Long Distance Fleet Regional Advisory Council
LL	Limited Licence
LSF	Large Scale Fleet
LTL	Limited Transferable Licence
MAGP	Multi-Annual Guidance Programme
MECU	Million of European Currency Units
MERCOSUR	Mercado Común del Sur
MLS	Minimum Landing Sizes
MPA	Marine Protected Area
MS	Member State
MSC	Marine Stewardship Council
MSP	Maritime Spatial Planning
MSY	Maximum Sustainable Yield
NACE	Nomenclature des Activités économiques dans la Communauté Européenne
NAFO	Northwest Atlantic Fisheries Organization
NEAFC	North East Atlantic Fisheries Commission
NSRAC	North Sea Regional Advisory Council
NSP	National Strategic Plan
NUTS	Nomenclature des Unités Territoriales Statistiques
NWW RAC	North Western Waters Regional Advisory Council
OCM	Organisation Commune de Marché
OECD	Organisation for Economic Cooperation and Development
OFIMER	Office National Interprofessionnel des Produits de la Mer et de l'Aquaculture
PECCOE	Permanent Committee of Control and Enforcement
PELRAC	Pelagic Regional Advisory Council
PFA	Pelagic Freezer Trawler Association
PGI/IGP	Protected Geographical Indication/Indication Géographique Protégée
PO	Producers Organisation
RAC	Regional Advisory Council

RBM	Right Based Management
RFMO/ORGP	Regional Fisheries Management Organisations/Organisations Régionales de Gestion des Pêches
ROI	Return on Investment
RTD	Research and Technological Development
QAP	Quality Assurance Plan
SEAFO	South-East Atlantic Fisheries Organisation
SIOFA	South Indian Ocean Fisheries Agreement
SPRFMO	South Pacific Regional Fisheries Management Organisation
SSB	Spawning stock biomass
SSCF	Small Scale Fleet
SSDC	Sectoral, Social Dialogue Committee for Sea fisheries
STACTIC	Standing Committee on International Control (in relation to NAFO)
STCW-F	Standards of Training, Certification and Watch keeping for Fishing vessel personnel
STECF	Scientific, Technical and Economic Committee for Fisheries
STECF WG	Scientific, Technical and Economical Committee for Fisheries Working Group
STONT	Structural funds ON the Net
SWWRAC	South Western Waters Regional Advisory Council
TAC	Total Allowable Catch
TEN	Trans European Networks
UNCLOS	United Nations Convention on the Law of the Sea
UNFSA	United Nations Fish Stocks Agreement
UNGA	United Nations General Assembly
VDS	Vessel Detection System
VME	Vulnerable Marine Ecosystems
VMS	Vessel Monitoring System
VQS	Vessel Quota System
WCPFC	Western and Central Pacific Ocean Fisheries Commission
WSSD	World Summit on Sustainable-Development, Johannesburg 2002
WTO	World Trade Organisation
WWF	World Wide Fund for Nature

## INTRODUCTION

At the meeting of the College of Commissioners on 17 September 2008 Commissioner Borg presented a paper outlining the status of CFP achievements, an overall diagnosis of the problems in the present CFP, options for addressing these problems and a proposal for a time schedule towards a reform by 2012. The College supported the analysis and the proposed time schedule.

On this basis a Commission Working Paper on the CFP reform was developed and presented by Commissioner Borg to the informal Council meeting on 29 September 2008. The Council agreed to the time plan proposed and task the Commission to start the process.

The first major milestone in this process is the launching of a public debate and publication of a Green Paper on 22 April 2009.

The preparatory work leading up to the Commission Green Paper has been the setting up of an internal working group which was tasked to analyze and diagnose both the status of EU fisheries and the performance of the various policy instruments in the CFP. This Commission Staff Working Paper is the product of the work of this internal working group.

This diagnosis will be made available to the public by publication on the Commission website, so as to ensure availability of information, data and background to the Green Paper and for the use of the participants in the consultation and public debate on the Green Paper. The diagnosis is intended only to back up and clarify the Green Paper. It should be considered as a technical annex which can serve as a reference.

The data and tables referred to in this diagnosis have been extracted from different sources and may be subject to some variability. However, this does not change the global analysis of trends and the overall diagnosis.