

# **STECF EXPERT WORKING GROUP EWG15-03 AND 15-07**

## ***2015 Annual Economic Report (AER) of the EU Fleets***

4-8 May 2015, JRC Ispra (EWG 15-03)  
8-12 June 2015, Gothenburg (EWG 15-07)

**DG Mare focal person:** Angel Calvo Santos (A3)

**Chair:** Anton Paulrud

### **ToR 2015**

#### **1. Background**

Following the 2015 DCF call for economic data on the EU fishing fleet (Ref. Ares(2015)421690), EWG 15-03 and EWG 15-07 are requested to analyse and comment on the economic performance of the EU and national fishing fleets between 2008 and 2013; and 2014 where relevant.

The two main objectives for the 2015 Annual Economic Report (AER) are to increase qualitative interpretation of all data analyses and bring the report more "up to date".

- Quality of data remains essential. Data quality checks and data validation tools will be applied by the JRC. Experts will receive the data tables for the national and regional analyses, already validated where possible, on the first day of the meeting. Past experience suggests that some quality issues will remain (errors that can only be identified by those with specific knowledge of the data) and therefore experts are requested to check for further errors and report on these whilst carrying out the various tasks.
- Time saved as a result of not having to carry out specific quality checks on MS DCF data submissions will enable experts to focus more on the qualitative interpretation of the economic data analysed in the report. It is important to note that time should not be allocated to fixing specific MS data issues during the meeting. This implies that the data submitted should be final by the start of the first meeting and any outstanding data issues encountered during the course of the meeting will be addressed according to points 4 and 5 of the Data-handling procedure for STECF Expert Working Groups (Ref. Ares(2015)498884 - 06/02/2015).
- The 2015 AER will follow a more analytical approach and contain qualitative information on the drivers and trends in fleet economic performance and other aspects of policy relevance. For this, questions on the major drivers and issues affecting fleet performance, such as market prices, capacity imbalance (indicators for over-

establishment and over-capitalisation), fleet structure, employment, profit, etc., should be asked consistently at all levels of analysis, i.e. fleet segment level, national level, regional level, and overall EU level.

In addition, questions on other major drivers and issues affecting fleet economic performance, such as decommissioning, discards/high-grading, poor stock recruitment/stock recovery situations, ITQs systems, certification, MPAs, etc., should be brought into the analysis through expert knowledge and other sources were possible.

- Trends will be based on longer data series: generally 6-7 years of DCF data, while also including DCR data for the years 2002-2007, prepared previously by the JRC, where applicable.
- Increased qualitative interpretation of the data outputs requires sufficient attendance of experts knowledgeable in Member State specific fleet economic performance issues, while a more 'up-to-date' report requires that MS provide the data necessary to successfully undertake the calculations.
- The regional analysis will be further improved, particularly in terms of the level of disaggregation. In some instances it may be necessary to make assumptions about the allocation of costs and earnings for fleet segments operating in two or more sea basin areas; the allocation of costs and earnings for fleet segments by region will take a more effort-based approach than in previous years analyses.
- Another improvement will be bringing the report more 'up-to-date' by providing, where possible, forecast figures for 2014 and robust estimates on 2015 economic performance based on the latest available data (2015 agreed quota and effort restrictions).

## **2. OUTLINE OF THE 2015 AER**

STECF is requested to provide the Annual Economic Report on EU fishing fleets for 2015 including, the following sections:

- STECF OBSERVATIONS
- EXPERT WORKING GROUP REPORT
- EXECUTIVE SUMMARY
- EU FLEET OVERVIEW
  - EU fleet structure
  - EU fleet fishing activity and output
  - EU fleet employment and average salaries
  - EU fleet economic performance
    - Section on resource efficiency examining aspects such as energy use and labour productivity (key indicators)
    - Section on EU small-scale fleet segments (key socio-economic indicators)
    - Section on EU long distant water fleets (key socio-economic indicators)
  - Assessment for 2014 and 2015 (msy)

- REGIONAL ANALYSES
  - Baltic Sea
  - Mediterranean and Black Sea
  - North Atlantic
  - North Sea and Eastern Arctic area
  - Other Regions
- NATIONAL CHAPTERS
  - Section on small-scale fleet segments in each national fleet
  - Section on EU long distant water fleets (key socio-economic indicators)
- ANNEX (METHODOLOGIES, GLOSSARY, ETC)

### 3. ANNEX

#### Relevant documents

- The Economic Performance of the EU Fishing Fleet (AER)  
[2014-11 STECF 14-16 - AER Fleet economics 2014 JRC92507.pdf](#)  
[2013-09 STECF 13-15 - AER EU Fleet 2013 JRC84745.pdf](#)
- Summary of the 2013 Annual Economic Report on the EU Fishing Fleet  
[2013-09 STECF 13-18 - AER Summary JRC84741.pdf](#)
- Assessment of balance indicators for key fleet segments and review of national reports on Member States efforts to achieve balance between fleet capacity and fishing opportunities (EWG 13-11)  
[2013-11 STECF 13-28 - Balance capacity JRC86350.pdf](#)
- Member States Annual Report on the National Data Collection Programmes for 2013  
<http://datacollection.jrc.ec.europa.eu/ars/2014>
- Data-handling procedure for STECF Expert Working Groups  
<http://datacollection.jrc.ec.europa.eu/index.html>