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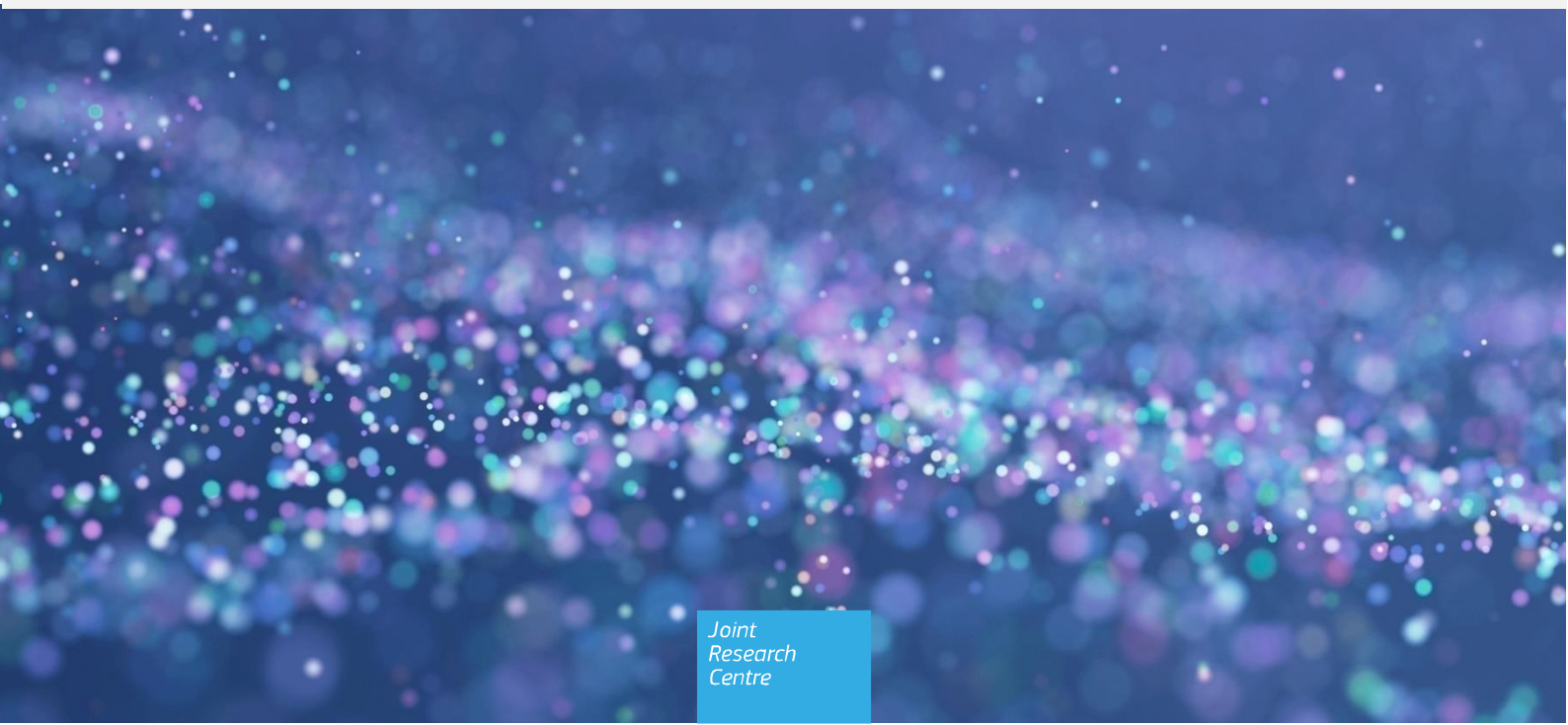
Assessment of balance indicators for key fleet segments and review of national reports on Member States efforts to achieve balance between fleet capacity and fishing opportunities (STECF-24-13)

Casey, J., Gras, M., Virtanen, J. (eds)

2025



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Contents

Abstract 3

Authors 4

SCIENTIFIC, TECHNICAL AND ECONOMIC COMMITTEE FOR FISHERIES (STECF) - 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 (STECF-24-13) 2

STECF comments 2

STECF conclusions 17

Contact details of STECF members 18

Expert Working GROUP EWG-24-13 report 22

1 Introduction 23

2 General Considerations Regarding the Assessment of 'Balance' 26

2.1 Data availability and the sustainable harvest indicator (SHI) and stocks at risk (SAR 26

2.2 A cautionary note concerning the Stocks At Risk indicator. 26

2.3 Issues concerning clustering and future needs 27

3 Task 1 - Assessment of Balance Indicators 29

3.1 Background 29

3.2 Provision of Indicator Values 29

3.2.1 Indicator Calculation Process 29

3.2.2 Data Source and Coverage 32

3.2.3 Fleet Segment Coverage 37

3.2.4 Biological Indicator Visualisation Tool 39

3.2.5 Overview of data and information to compute biological indicators (SHI and SAR) 39

3.3 Indicator Findings – Regional Overviews 40

3.3.1 NAO – North Atlantic (area 27) 41

3.3.2 MBS - Mediterranean and Black Sea (area 37) 43

3.3.3 OFR - Other Fishing Regions and French Outermost Regions 45

3.3.4 Overview of indicators and trends for each region 47

3.4 Task 2 - Indicator Findings – National Sections 48

3.4.1 Belgium (BEL) 49

3.4.2 Bulgaria (BGR) 54

3.4.3 Croatia (HRV) 60

3.4.4 Cyprus (CYP) 68
3.4.5 Denmark (DNK) 74
3.4.6 Estonia (EST) 81
3.4.7 Finland (FIN) 86
3.4.8 France (FRA) 91
3.4.9 Germany (DEU) 105
3.4.10 Greece (GRC) 112
3.4.11 Ireland (IRL) 118
3.4.12 Italy (ITA) 123
3.4.13 Latvia (LVA) 130
3.4.14 Lithuania (LTU) 135
3.4.15 Malta (MLT) 143
3.4.16 Netherlands (NLD) 148
3.4.17 Poland (POL) 154
3.4.18 Portugal (PRT) 160
3.4.19 Romania (ROU) 170
3.4.20 Slovenia (SVN) 175
3.4.21 Spain (ESP) 180
3.4.22 Sweden (SWE) 190
3.5 Overview of Action Plans 196
4 Task 4 -Stocks on which fleet segments are reliant – All regions 200
5 Contact details of EWG-24-13 participants 201
6 List of Annexes 204
7 List of Background Documents SOME HYPERLINKS TO ADD - JRC 204
8 Annex I - Methods of calculating indicators and trends 206
A1.1 Sustainable Harvest Indicator (SHI) 206
A1.2 Stocks at Risk Indicator (SAR) 208
A1.3. Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA) 212
A1.4. Ratio Current Revenue and Break-Even Revenue (CR/BER) 213
A1.5.The Inactive Fleet Indicator 214
A1.6.The Vessel Use Indicator 215
A1.7. Net profit margin 216
9 Annex IV - Species identified as SAR for 2022 according to COM (2014) 545 Final) and for which the cumulative annual catch since 2008 has exceeded 100 t. 218

Abstract

Commission Decision of 25 February 2016 setting up a Scientific, Technical and Economic Committee for Fisheries, C(2016) 1084, OJ C 74, 26.2.2016, p. 4–10. The Commission may consult the group on any matter relating to marine and fisheries biology, fishing gear technology, fisheries economics, fisheries governance, ecosystem effects of fisheries, aquaculture or similar disciplines. This report is the latest in a series of annual reports requested by the European Commission to analyse the balance between fleet capacity and fishing opportunities using a standard approach across all EU fleet segments, based on DCF information and in line with the Commission Guidelines (COM (2014) 545 final. Communication from the Commission to the European Parliament and the Council. Guidelines for the analysis of the balance between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/201 3 of the European Parliament and the Council on the Common Fisheries Policy).

Authors

STECF advice:

Bastardie, Francois; Borges, Lisa; Casey, John; Daskalov, Georgi; Döring, Ralf; Drouineau, Hilaire; Goti Aralucea, Leyre; Grati, Fabio; Hamon, Katell; Ibaibarriaga, Leire; Jardim, Ernesto; Jung, Armelle; Ligas, Alessandro; Mannini, Alessandro; Martin, Paloma; Moore, Claire; Motova, Arina; Nielsen, Rasmus; Nimmegeers, Sofie; Nord, Jenny; Pinto, Cecilia; Prellezo, Raúl; Raid, Tiit; Sabatella, Evelina Carmen; Sampedro, Paz; Somarakis, Stylianos; Stransky, Christoph; Ulrich, Clara; Uriarte, Andres; Valentinsson, Daniel; van Hoof, Luc; Velasco Guevara, Francisco; Vrgoc, Nedo.

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Avdic Mravlje, E., Bernreuther, M., Cano, S., Casey, J. (Chair), Curtin, R., Davidjuka, I., Ferreira, R., Gras, M., Grati, F., Guitton, J., Ioannou, M., Jakovleva, I., Jung, A., Le Grand, C., Malamidou, A., Perez Gil, J.L., Minguez Velasco, A., O' Hea, B., Ramos do Ó, J., Rodgers, P., Sys, K., Tsitsika, E., Valiente Viana, M., Vanhee, W., Velinova, M., Vermard, Y., Vukov, I., Virtanen, J.

SCIENTIFIC, TECHNICAL AND ECONOMIC COMMITTEE FOR FISHERIES (STECF) - 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 (STECF-24-13)

Request to the STECF

STECF is requested to evaluate the findings of the STECF Expert Working Group meeting and make any appropriate comments and recommendations.

STECF comments

General comments

The EWG report essentially follows the structure of previous Balance/Capacity reports but because a separate stand-alone report on balance/capacity for the Outermost regions (ORs) has already been completed (EWG 24-17), the national chapters in the EWG 24-13 report do not contain any details on the OR fleet segments. However, information on the OR fleet segments is still included in Annexes I, III, IV and V of the EWG 24-13 Report.

STECF notes that moving the assessment of balance between fleet capacity and fishing opportunities of the OR segments to a separate working group created more room for the experts to discuss in more depth the interpretation of the indicators and the way they are computed. As a result of this discussion as well as of the outcome of previous balance/capacity EWGs (EWG 23-13, 22-15, 21-16 etc.), a cautionary note concerning the Stocks At Risk (SAR) indicator has been included as section 2.2 of the EWG 24-13 report together with a comment on clustering in section 2.3 and what additional information from Member States would be useful to help identify reasons for missing information (see details in specific comments of task 1, below).

STECF notes that, the terms “in balance” and “out of balance” (imbalance) and analogous terms, are used strictly in relation to the criteria given in the Commission guidelines (COM (2014) 545 Final). Such terms are used to indicate a favourable (in balance) or unfavourable (out of balance) situation based on the values computed for specific indicators in relation to the threshold specified for such indicators. Trends in indicator values are expressed over different time periods, which vary by indicator and Member States. Comparisons between indicator values as computed by the EWG and those in the National fleet reports submitted by Member States by 31 May 2024 are based on the reference year 2022 unless specifically mentioned in the report.

STECF highlights the fact that the change in the EWG timeline and the addition of the separated EWG for the OR created some constraints in the calendar to prepare the data and relevant tables especially between the preparatory meeting (3-5 September) and the EWG for the OR (11-13 September):

- Preparatory meeting (EWG 24-13), 3-5 September 2024
- Balance/capacity OR (EWG 24-17), 11-13 September
- Mini Plenary meeting (PLEN 24-17) to review the EWG 24-17 report, 18 September 2024,
- Main Balance/capacity meeting (EWG 24-13), 7-11 October.

Consequently, the data preparation work had to be done more rapidly than is desirable, putting pressure on a small number of key people preparing the data and it gave rise to a

number of inconsistencies in the data the EWGs had to work with, which inevitably delayed the preparation of the EWG reports.

Comments on specific ToRs

STECF reviewed the report of the EWG 24-13 and notes that all the ToRs were addressed. A summary of the work undertaken in relation to each of the tasks specified in the request to the EWG is listed below:

EWG task 1: Compute values for the technical, economic and biological indicators specified in the European Commission Guidelines

Values for the following indicators as specified in the Commission guidelines (COM(2014) 545) are presented for the period 2013-2023:

Biological indicators

- Sustainable harvest indicator (SHI). SHI values are not considered meaningful if the landing values that are included in the SHI / total landings value ratio is too low (according to the guidelines less than 40%). Only meaningful values of SHI are used to indicate whether a fleet segment may be in or out of balance with fishing opportunities.
- Stocks at risk indicator (SAR).

Economic indicators

- Return on investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA).
- Ratio between current revenue and break-even revenue (CR/BER).

Technical indicators

- The inactive vessel indicator (IV). If more than 20% of the vessels in a length class have been inactive the whole year, the indicator is considered out of balance for the length class.
- The vessel use indicator (VUR). Average Days at Sea / Maximum Days at Sea.

STECF notes that the calculation of the inactive vessel indicator (Tables 3.2.2.1-3.2.2.3 of the EWG report) has been revised by the EWG following discussions on the interpretation of the guidelines (COM(2014) 545). STECF notes that the inactive vessel indicator was computed by the EWG as a proportion of the length-class specific fleet instead of the total fleet as was the case in previous Balance/Capacity reports. The indicator for the total national fleet as given in the traffic light tables in the individual National chapters of the report was calculated as the total inactive fleet related to the total national fleet. Whether a vessel length class is found to be in or out of balance according to the guidelines is determined by comparing the indicator to a threshold. The way the indicator is computed (relative to the total number of vessels for the Member State or the total number of vessels in the length class category) is crucial, as a threshold will be reached more often if the calculation is done relative to the number of vessels in the length class category.

STECF also notes that the EWG report currently only shows the IV indicator with respect to number of vessels by length group and Member State (Tables 3.2.2.1-3.2.2.3) while the guidelines also states that it should be provided for gross tonnage (GT) and engine power (kW). In addition, the number of inactive vessels expressed as a proportion of the total vessels in the fleet of each Member State is given in the traffic light tables in each national chapter of the report. STECF notes that the number of vessels alone is not a meaningful indicator as the fishing capacity of a vessel can vary greatly depending on its size (GT) and engine power (kW).

Regarding the SAR indicator, STECF notes that as mentioned in section 2.2 of the EWG report and as defined in the 2014 commission guidelines, there are several criteria to determine whether stocks are at risk. These include quantitative (B<Blim) or qualitative data (regulation, prohibition, CITES/IUCN listing). Based on these criteria, stocks at risk are selected for a given fleet segment if either: i) a dependency of the fleet is higher than 10% of the fleet's landings to the stock at risk or ii) a contribution of the fleet is at least 10% of the total landings of the stock. In the calculation of condition (ii) the total landings included are the EU landings of the stocks. For fleet segments fishing on shared stocks with third countries or highly distributed stocks, this means that the SAR indicator will be overestimated (i.e the total EU landings will be lower that the real total landings from the stock which makes the contribution of the fleet to the total landings artificially higher). Currently, it is unclear what the sensitivity of the SAR indicator is to that computation choice, and which fleets can have their assessment of balance affected by it. In contrast, underestimation could occur for segments for which the SAR values are calculated by condition i) in areas where a low number of stocks are assessed (eg. MBS, OMR) as values of B/Blim are not available. In addition, and as highlighted during EWG 24-06, this underestimation of the SAR indicator can also occur if a high number of stocks are harvested that may never reach the 10% threshold related to the total landings.

STECF also notes that the clustering of fleet segments may have an impact on the activation of the dependency or contribution rules (as explained in the previous paragraph) in defining the number of stocks at risk of a fleet segment. On one hand, aggregating segments to form a cluster may show a lower dependency of the cluster on a stock at risk (compared to individual fleets) and therefore underestimate the number of SAR. On the other hand, the contribution of the landings to the total landings of a stock at risk of a cluster may be higher than of individual fleet segments forming that cluster, thus overestimating the SAR for the cluster.

STECF notes that all required indicators for which relevant input data were available were computed by the EWG. Only the IV indicator in terms of GT and kW was not computed.

Overview of the European fleet and by region

Table 5.3.1 presents the number of segments in each supra region (North Atlantic Ocean, Mediterranean and Black Seas and Other Fishing Regions) and for each indicator, the number of segments for which an indicator value could be computed for the year 2021. It also includes the numbers of segments that according to the criteria in the Commission guidelines (CG), are indicated to be in balance or out of balance, together with an assessment of the trend of the indicators, as reported by EWG 24-13.

For the EU as a whole, out of 619 active fleet segments in 2022, 84% had landings by weight and value available (523 and 519 fleet segments, respectively). Of these 619 active fleet segments, a meaningful value for the SHI could be computed for 45% of them (276 fleets segments), and a value for the SAR could be computed for 73%. Economic indicator values (CR/BER and RoFTA) were available for 61% of the total active fleet segments, while, for RoI, this percentage was only 13% (an improvement from the 9% of last year).

For segments with a meaningful SHI value, the majority were indicated to be in balance (68%) and for the SAR, the majority were indicated to be out of balance (54%). With regard to each of the economic indicators, a majority of the segments were indicated to be in balance according to CR/BER and RoFTA (66%, 60%, respectively) and for the 13% of the fleet segments with a ROI only 49% were in balance. Finally, for the segments for which the technical indicator VUR could be computed, 58% were indicated to be in balance and 42%

out of balance. The total EU fleet comprised 18,156 vessels representing approximately 26% of the total vessels.

The main results by region are as follows:

North Atlantic Ocean (NAO)

- A meaningful SHI value could be estimated for 40% of the 355 active fleet segments, with 80% of them in balance.
- The SAR was estimated for 72% of the total segments in the region, 49% of which were indicated to be in balance and 51% out of balance.
- Economic indicators values (CR/BER and RoFTA) were available for 61% of the total active fleet segments in this area, while for RoI this percentage was 16%.
- The majority of the fleet segments considering CR/BER and RoFTA were indicated to be in balance (72% and 61%, respectively), however, RoI indicator indicates that 47% are out of balance.
- For the VUR technical indicator (available for 82% of the fleet segments of this area), 46% of the segments were indicated to be in balance and 54%, out of balance.
- The EU inactive fleets in the North Atlantic (NAO) represented 35% of the total vessels registered in the area.

Regarding the trends in indicator values:

- No clear trend could be observed in the SHI for 45% of the fleet segments in the NAO.
- 29% of the fleet segments had an improving trend, 5% a deteriorating trend, 1% were considered to have a flat trend and for 20% of the segments no trend could be calculated.
- The three economic indicators show contrasting trends, for CB/BER 35% of the fleet segments are improving while 27% are deteriorating, for RoFTA 31% are improving and 44% are deteriorating and for ROI only 12% are improving while 44% are deteriorating.
- No clear overall picture could be depicted by the technical indicators as for the majority of the segments (64%), there was no clear trend and a further 27% where no trend could be calculated.

Mediterranean and Black Seas (MBS)

A meaningful value for the SHI could be computed for 47% of the 201 active fleet segments in this region, 55% of which were indicated to be out of balance and 45% in balance.

- The SAR was estimated for 76% of the total segments in this region, 42% of which were indicated to be in balance and 58% out of balance.
- Economic indicator values (CR/BER and RoFTA) were available for 66% of the total active fleet segments in this area, while values for RoI could be computed for only 9%.
- According to the economic indicator values, 57% of fleet segments were indicated to be in balance for CR/BER and RoFTA and 47% for.
- According to the VUR technical indicator, 52% of the segments were indicated to be in balance and 48% out of balance.
- The EU inactive fleets in the Mediterranean and Black Seas (MBS) represented 19% of the total vessels registered in the area.

Regarding the trends of the indicators above:

- For the SHI, the trend was improving for 49% of the fleet segments in the MBS, 4% had a deteriorating trend, 4% a flat trend, no clear trend for 23% of the fleet segments and for the rest (19%), the trend could not be calculated.
- For the three economic indicators, an improving trend was observed for 32%, 31% and 37% of the fleet segments, considering the CR/BER, RoFTA and RoI, respectively, while it was deteriorating for 46%, 56% and 53%, respectively.
- For the majority of the remaining segments there was no clear trend, or no trend could be calculated.
- No clear overall picture could be depicted by the technical indicators, as for the majority of segments there was no clear trend (49%), or the trend could not be calculated (17%).

Other Fishing Regions (OFR)

- A meaningful SHI value could be computed for 62% of the 63 fleet segments from this area, with 85% of them indicated to be in balance and 15% out of balance.
- The SAR was estimated for 74% of the total number of segments, 44% of which were indicated to be in balance and 56% out of balance.
- Economic indicators values (CR/BER and RoFTA) were available for 49% of the total active fleet segments in this area, while for RoI this percentage was 5%.
- The majority of the fleet segments considering these three economic indicators were in balance (68%, 65% and 100% for CR/BER, RoFTA and RoI, respectively).
- For the VUR technical indicator (with a coverage of 94% of the fleet segments of this area), 97% of the segments were in balance and 3% out of balance.
- The EU inactive fleets in the Other Fisheries regions (OFR) represented 24% of the total vessels registered in the area.

Regarding the trends of the indicators above:

- For SHI no clear trend was observed, or it was not possible to obtain a clear trend for 67% of the fleet segments in the OFR, 5% had an improving trend, 5% had a deteriorating trend and for 21% of the segments the trend could not be calculated.
- For the three economic indicators, the majority of the segments had an improving trend (39%, 52% and 67% for CR/BER, RoFTA and RoI, respectively). A deteriorating trend was assessed for 32%, 39% and 33% of the fleet segments (for CR/BER, RoFTA and RoI, respectively).
- No trend in the VUR could be calculated for 14% of the fleet segments and no clear trend could be detected for 53% of them.

Table 1. Summary table of balance indicator values for 2022 and trends over the period 2018-2022 at regional level (NAO, MBS and OFR). The number of fleet segments in balance, out of balance with improved, worsened and no trends are shown.

Area			Nº active segments	Indicators						
				Biological		Economic			Technical	
			Total	SHI[1]	SAR	Cr/BER	RoFTA	RoI	VUR	IV[2]
EU	Coverage	Total	619	**276**	**454**	**380**	**380**	**79**	**544**	**26%**
	Balance	In balance		189	209	252	227	39	291	
		Out of Balance		87	245	128	153	40	253	
NAO	Coverage	Total	355	**143**	**254**	**217**	**217**	**57**	**291**	**35%**
	Balance	In balance		114	124	156	132	27	134	
		Out of Balance		29	130	61	85	30	157	
	Trend	Trend deteriorating		7		59	95	25	4	
		Trend improving		41		76	67	7	13	
		No clear trend		65		28	1	0	186	
		Flat trend		1		0	0	0	10	
		Could not be calculated		29		54	54	25	78	
MBS	Coverage	Total	201	**94**	**152**	**132**	**132**	**19**	**194**	**19%**
	Balance	In balance		42	64	75	75	9	100	
		Out of Balance		52	88	57	57	10	94	
	Trend	Trend deteriorating		4		61	74	10	14	
		Trend improving		46		42	41	7	39	
		No clear trend		22		13	0	0	95	
		Flat trend		4		0	1	0	13	
		Could not be calculated		18		16	16	2	33	
OFR	Coverage	Total	63	**39**	**48**	**31**	**31**	**3**	**59**	**24%**
	Balance	In balance		33	21	21	20	3	57	
		Out of Balance		6	27	10	11	0	2	
	Trend	Trend deteriorating		2		10	12	1	6	
		Trend improving		2		12	16	2	14	
		No clear trend		26		7	1	0	31	
		Flat trend		1		0	0	0	0	
		Could not be calculated		8		2	2	0	8	

[1] Data relate only to fleet segments for which meaningful values for the SHI could be computed i.e., the value of landings from stocks that are fished at rates greater than FMSY account for more than 40% of the total value of the landings by fleet segment.
[2] IV expressed as the % of vessels inactive in the area
Source: EWG-24-13 and own elaborations.

EWG Task 2: Based on such indicators, provide country chapters

EWG 24-13 considered that 14 of the 22 fleet reports submitted by Member States were prepared fully in line with the Commission guidelines (Table 2). The other eight Member States followed the guidelines to varying degrees (reported in Table 5.3.2 as a "No" in accordance with the "in line CG column"). The extent to which these Member States followed the guidelines, as extracted from the EWG 24-13 report, are listed in Table 2 below. The specific reasons vary by Member State but can be summarised as follows:

- Use of fleet segmentation deviating from the fleet segmentation in the DCF. The use of DCF segmentation is specified in the Commission guidelines.
- Omission of segments (not even capacity data is reported by some Member States).
- Calculation of an indicator(s) with data from the year prior to the year the fleet report is submitted (e.g., stock status from the previous year in the case of the SHI).
- Indicators not reported.

Table 2. Summary of the assessment made by the EWG 24-13 of whether annual national fleet reports follow the Commission Guidelines (CG).

Member State	In line with the CGs	STECF Comments based on the EWG assessment
Belgium	Yes	-
Bulgaria	Yes	-
Croatia	No	SAR provided for 2023 instead of 2022
Cyprus	No	Not all the indicators are provided for all fleets
Denmark	Yes	-
Estonia	No	The segmentation of the fleet segments under 12m differs from the DCF segmentation
Finland	No	Almost all the indicators missing.
France	No	Not all indicators are provided according to the guidelines
Germany	Yes	-
Greece	No	Not all the indicators are provided, some provided for different segmentation
Ireland	No	Not all the indicators are provided, some for different years, some calculated differently
Italy	No	Not all the indicators are provided, some for a different segmentation, some for different years

Latvia	No	One indicator is missing
Lithuania	Yes	-
Malta	No	Biological indicators not provided
Netherlands	Yes	-
Poland	No	Not all indicators are provided according to the guidelines
Portugal	No	Not all indicators are provided according to the guidelines
Romania	Yes	-
Slovenia	No	Not all the indicators are provided for the correct year
Spain	Yes	-
Sweden	Yes	-

Source: own elaborations.

Comparison of indicator values

For each fleet segment, the biological, economic and technical indicator values as computed under task 1 were compared with the equivalent values and trends in the fleet reports submitted by the Member State under Article 22.2 and 22.3 of Regulation (EU) 1380/2013. Discrepancies between such values were highlighted and where possible the reasons for such discrepancies were identified.

A summary of the differences found by Member States and indicators used was prepared by STECF and is presented in Table 3. The categorisation of the differences in the indicator values between Member States' fleet reports and those calculated by the EWG is based on the following criteria decided by STECF in the PLEN 22-03 report:

- Equal (Equal): If the indicator values calculated by the EWG and those provided by the Member State are the same.
- Similar (Sim). If the indicator values calculated by the EWG and those provided by the Member States differ, they indicate the same balance/imbalance assessment.
- Discrepancies (Discr). If the indicator value calculated by the EWG and those provided by the Member States differ and they indicate a different balance/imbalance assessment.
- Not Provided (NP): If the indicator value is not provided in the Member State's fleet report.
- Not Comparable (NC): If the fleet segmentation used by the Member State differs from the one used by the EWG; and/or if the indicator provided is not that computed by the EWG.

- Not Undertaken (NU): There were issues relating to data concerning inactive vessels and especially regarding the calculation of inactive GT and kW, which meant that comparisons between the EWG estimates and those provided by Member States in their fleet reports could not be undertaken.

Table 3. Summary of differences in indicator values between those calculated by EWG 24-13 and the Member States' fleet reports for 2022.

	Biological		**Economic**			**Technical**		**Comments from the EWG**
MS	**SHI**	**SAR**	**CR/BER**	**RoI**	**RoFTA**	**VUR**	**IV**	
Belgium	Sim	Sim	Discr	NP	Discr	Sim	NU	Discrepancies in CR/BER and RoFTA in one segment.
Bulgaria	Discr	Equal	Discr	NP	Sim	Sim	NU	SHI discrepancies for 2 segments probably due to difference in stocks used. Discrepancies for 5 segments for CR/BER possibly due to different clustering
Croatia	Discr	NC	Discr	NP	Equal	Sim	NU	SHI discrepancies for 2 segments probably due to difference in stocks used. SAR provided for 2023 instead of 2022. CR/BER discrepancy for 3 segments
Cyprus	Discr	Discr	Discr	NP	Discr	NC	NU	SHI and SAR discrepancy for one segment, CR/BER and RoFTA not calculated for 2 segments by MS and discrepancy for one segment. The maximum number od seadays used to calculate the VUR was not provided.
Denmark	Discr	Discr	Discr	Discr	NP	NC	NU	Discrepancies SHI: one segment; SAR: 5 segments; CR/BER: 6 segments; ROI: 2 segments. Different fleet segmentation for VUR.
Estonia	Sim	Equal	Sim	NP	Sim	NC	NU	SHI only comparable for 2 of the 6 segments

Finland	NC	NP	NP	NP	NP	NP	NU	The fleet report has calculated SHI on a stock basis rather than a fleet basis, therefore we are not able to make any comparisons. No values for the rest of the indicators.
France	Sim	Discr	Equal	NP	Equal	NC	NU	SAR discrepancy due to difference in stocks used. VUR provided is in many cases higher than 1, which is non sensical
Germany	Discr	Discr	Equal	NP	Equal	Discr	NU	SHI discrepancy for one segment, SAR in two segments and VUR for most segments
Greece	NC	NP	NP	NP	Sim	Discr	NU	SHI and VUR provided is for different fleets
Ireland	NC	NC	Discr	NP	Discr	NP	NU	SHI and SAR provided for 2021 not 2022. CR/BER and RoFTA show large discrepancy
Italy	NC	NP	NP	NP	NP	NC	NU	SHI and VUR provided by GSA so not comparable. CR/BER and ROI/RoFTA not provided for 2022.
Latvia	Sim	NP	Sim	Sim	NP	Sim	NU	SHI for different number of segments. SAR not provided.
Lithuania	Discr	Discr	Discr	Equal	Equal	Discr	NU	SHI and SAR discrepancy for 1 segment, CR/BR discrepancy for 3 segments. VUR discrepancies for most segments
Malta	NP	NP	Sim	Sim	NP	Discr	NU	SHI and SAR not provided, VUR provided per cluster
Netherlands	Sim	Discr	Equal	Equal	Equal	Equal	NU	Discrepancies for SAR for 5 segments.
Poland	Sim	Discr	Sim	Sim	NP	NC	NU	Discrepancies for SAR for 2 segments. the

								max seadays used to calculated VUR was not provided
Portugal	Sim	Discr	Sim	NP	Discr	Discr	NU	SAR discrepancies on many segments due to the number of stocks included in the calculations. Minor RoFTA discrepancy for 1 segment. VUR discrepancies for 9 segments due to the use of a different max seadays
Romania	Discr	NP	Discr	Equal	NP	Discr	NU	SHI discrepancies for 6 segments. SAR not provided because Romanian catches below 10% of stock at risk. CR/BER Discrepancy for 1 segment. VUR discrepancies for 3 segments
Slovenia	Equal	Discr	NC	NP	NC	Discr	NU	SAR discrepancies for 2 segments. Economic indicators provided for 2021 instead of 2022. VUR discrepancies because EWG calculated by cluster
Spain	Discr	Discr	Discr	NP	Discr	Discr	NU	Discrepancies in SHI for 2 segments, SAR for many segments, CR/BER for 2 segments, RoFTA for 1 segment, VUR for 2 segments.
Sweden	Discr	Sim	Equal	NP	Equal	NC	NU	SHI discrepancy for 2 segments. VUR discrepancy for 2 segments.

Source: EWG-24-13 and own elaborations.

STECF notes that often indicator trends were not provided in the fleet reports which prevented the EWG to make comparison between the trends calculated by the EWG and the provided trends.

STECF notes that as for past years, for many fleet segments discrepancies between the SHI values computed by the EWG 24-13 for a given year (in this report the year 2022) and those provided by Member States in their fleet reports for the same year, are likely to occur. Such occurrences arise because the values for F/FMSY used in computing the SHI will in most cases, be derived from the results of stock assessments undertaken at different times. For example, a Member State preparing its fleet report for 2023, which it will submit by 31 May 2024, is likely to base it on F/FMSY values for 2022 and stock assessments carried out in 2023. However, the EWG 24-13 derives its F/FMSY values for 2022 from stock assessments carried out in 2024, which is likely to deliver an updated and often different value for F/FMSY for 2022 than in the previous year's assessment.

STECF further notes that the Commission guidelines specify that Member States may provide the Vessel utilisation indicator (VUR) based on the maximum number of days at sea for a fleet segment or an alternative provided by the Member States. If the "maximum" number of days provided for a fleet is lower than the average effective number of days at sea for a fleet, the VUR indicator can reach values higher than 1 and can not be interpreted as the rest of the VUR.

Overview of action plans

The EWG was asked to provide their opinion as to the effectiveness of the proposed measures provided in new or revised action plans submitted by each Member State with the most recent fleet reports in addressing the imbalance in the fleet segments concerned.

In 2024, new Action Plans (APs) were presented by Lithuania and Malta. In addition, an update of existing APs was provided by Bulgaria, Cyprus, Denmark, France, Germany, Italy, Poland, Portugal, Romania and Spain. Croatia continued its Action Plan. The remaining Member States did not submit any new or updated APs.

STECF notes that the EWG 24-13 has produced a table summarising the main elements of the APs, for the years 2023 and 2024 which is reproduced below (Table 4). In particular, the new or revised APs were assessed by the EWG based on the (1) timeframe presented, (2) the precise measures to be implemented (tools described) and (3) their objectives and targets, for reducing the perceived imbalance in the fleet segments concerned, as requested by the Commission guidelines (appropriately targeted).

In 2024, for the Member States presenting a new or updated AP, the APs from Cyprus, Croatia, Germany, Lithuania, Poland, Portugal and Spain were considered by the EWG as sufficiently detailed regarding these three requirements. For the other APs submitted by Member States, the information provided was not sufficient for the EWG to quantitatively assess whether such measures would be sufficient to address any perceived imbalance or whether the stated objectives are likely to be met in the defined time frame. A summary of the Action Plans including the assessment of the EWG regarding the effectiveness of the measures proposed by the Member States is presented in Table 4.

Belgium, Estonia, Finland and Sweden did not present any AP because these Member States considered all fleet segments to be in balance.

Table 4. Summary of action plans submitted in 2023 and 2024 as reported by the EWG.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Belgium	2023	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Belgium	2024	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Bulgaria	2023	yes	unclear	No	No	No	The provided action plan is not based on the MS's overall assessment in fleet report and comparison of technical, economic and biological indicators for 2019-2021. The explanation provided about the planned measures is general and does not give enough information about specific MS actions to balance fleet capacity.
Bulgaria	2024	yes	update	No	Yes	No	The updated action plan is partly targeted because there is no information about the share of capacity that will be reduced. The measures were added to the AP related to the EMFF activities and does not have a link to the segments considered out of balance in the MS Fleet report. However, it is still not clear how the proposed measures will improve the balance of the fleet.
Cyprus	2023	yes	Update	yes	yes	yes	A renewed action plan has been proposed for the fleet segment DTS VL2440. The proposed measure is the permanent cessation of fishing activities for two trawlers from a segment total of 4 trawlers operating in the territorial waters of Cyprus should the vessel owners volunteer to decommission their vessels. A time frame of 2 years (until 2023) was given for reaching the target for permanent cessation. In case of no volunteers on permanent cessation, certain fisheries areas will be closed and gear selectivity improvement applies since 2024
Cyprus	2024	yes	Update	yes	yes	yes	Updated from 2023. Nevertheless, the time frame target for permanent cessation has been shifted from 2023 to 2024, due to delays in the preparation of the methodology to be used for compensating the owners for the permanent cessation. The related time frames for replacing the diamond meshed trawl net at the cod end, and for closing an area for trawling, have been moved from 2024 to 2025. The MS identified the concern regarding one fleet segment.
Croatia	2023	yes	Updated and Strengthened	Yes	Yes	Yes	MS presented an updated action plan concerning the imbalance fleet segments, based on temporary and permanent cessations and completed with supplementary measures. The timeframe is defined and was extended for the permanent cessations The targets are also defined, but not always quantifiable. An adjustment of the expected result has been established.
Croatia	2024	yes	Continuation	yes	yes	yes	MS will continue to implement the actions prescribed in the 2023 action plan concerning the imbalance fleet segments. The actions are based on temporary and permanent cessations and completed with supplementary measures. The timeframe and targets are also defined for main actions.
Denmark	2023	yes	update	yes	yes	yes	The action plan proposed the previous year is still ongoing and ends at the end of 2023.
Denmark	2024	yes	update	no	no	no	No new action plan with with a clear timeframe or targeted to specific imbalanced fleet segments was proposed. Only very general measures are included.
Estonia	2023	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Estonia	2024	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Finland	2023	no	/	/	/	/	No action plan proposed by MS. The MS considers its fishing fleet to be in balance with fishing opportunities, with no identified structural overcapacity.
Finland	2024	no	/	/	/	/	No action plan proposed by MS. The MS considers its fishing fleet to be in balance with fishing opportunities, with no identified structural overcapacity.
France	2023	yes	update	yes	yes	yes	The AP was updated with new segments in Outermost regions. The actions for these segments do not relate to fleet capacity reduction. The new actions added for the vessel's segments (operating in Mediterranean and Atlantic) provided in previous AP. Time frame was extended to 2024.
France	2024	yes	update	yes	No	yes	The new AP was updated with the 4 new segments (Area 27, Area 37 and Other regions). The plan contains a wide range of general as well as more-specific measures for imbalanced fleet segments. Objectives are clearly described.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Germany	2023	yes	Update	yes	yes	yes	Updated from 2022. The AP proposes specific measures for some fleet segments and clearly indicate baseline for targets and measures to be set for the fleet segments concerned.
Germany	2024	yes	Update	yes	yes	yes	Updated from 2023. The AP includes a range of general measures (i.e., shifting relevant fishing opportunities to coastal fisheries, marketing support, suspension of fishing to protect cod stocks in the western Baltic Sea, suspension of fishing to protect herring stocks in the western Baltic Sea, and permanent cessation of fishing activities targeting cod and herring in the western Baltic), applicable to seven fleet segments for which problems have been identified.
Greece	2023	no	/	/	/	/	No action plan prposed by the MS, justifications are provided in the fleet report
Greece	2024	no	/	/	/	/	MS considers that certain fleet segments are not in balance with their fishing opportunities. An Action plan is in preparation but was not submitted with the annual fleet report. It is proposed to complete the action plan by the end of 2024
Ireland	2023	No	/	/	/	/	Based on the fleet reports of 2021-2024, it is the view of the Irish that structural imbalance is not present in any of the Irish fleet segments and no action plans have been proposed. It is the Irish view that any imbalance identified in some fleets in the fleet report is due to the difference in the rate of interest used in calculating the indicators.
Ireland	2024	No	/	/	/	/	Based on the available information, Ireland considers that structural imabalance does not exist in any of its fleet segments and no action plans are proposed.
Italy	2023	Yes	Update	No fleet segments mentioned	Partly	Partly	Updated from at least 2017. Objectives are not specifically targeted at the fleet segments that are out of balance, but rather refer to GSAs. The action plan describes several measures to be taken to reduce fishing mortality. Of these, only temporary closure periods are explicitly described and percentage targets for a reduction of fishing capacity for specific GSAs were issued. The other measures are mostly unfinalized and/or have not been implemented yet.
Italy	2024	Yes	Update with some new actions added	Fleet segments provided by GSAs	Mostly	Mostly	The action plan (AP) presented in this year´s fleet report is a revised version of last year´s action plan. Specific tools for a reduction in fishing pressure have been adjusted, the MS presents a table with the scrapping targets per GSA by segment (period 2021-2027). The measures in the action plan presented by the MS are mostly GSA-specific. In the scrapping plan, the minimum tonnage to be withdrawn is provided by fleet segment per GSA, however, the number of vessels affected cannot be determined
Latvia	2023	Yes	New	Yes	Yes	Yes	Timeframe: 31.12.2023. The target is the Baltic fleet segment of trawlers TM VL2440 through permanent withdrawal from fishing activity of 9 vessels involved in sprat and herring fishery. The EWG could not assess if the actions proposed will influence the balance.
Latvia	2024	No	/	/	/	/	MS stated that the measures to balance the fleet segment VL2440, included in Annex VII of the Annual Report on the Latvian Fishing Fleet 2022, are in the implementation phase and the effect of the reduction of the segment should be evaluated in the following years.
Lithuania	2023	No	/	/	/	/	Ongoing AP provided with 2020 fleet report. Timeframe: 2021-2023. Two types of measures targeting fleet segments NAO DFN 1012 and NAO DTS 2440 operating in the Baltic Sea - a system of transferable fishing concessions and a scrapping scheme with public compensation for permanent cessation of fishing for reducing overcapacity. No action plan for the distant water fleet segment (OFR TM 40XX).
Lithuania	2024	Yes	New	Yes	Yes	Yes	The AP foreseen 4 vessels of the NAO DTS VL2440 fleet segment would be withdrawn in 2024 with public compensation for permanent cessation, resulting in a 40% reduction in the fleet segment's total tonnage and a 42% decrease in power. The Lithuania Programme for the European Maritime Fisheries and Aquaculture Fund 2021–2027 aims, by the end of 2029, to withdraw vessel capacity expressed in gross tonnage (GT) of 468.00 and kW of 884.00 in terms of power.
Malta	2023	yes	new	no	yes	no	The proposed action plan is largely a statement of intent to improve monitoring activities.
Malta	2024	yes	new	no	yes	yes	The proposed action plan is largely a statement of intent to improve monitoring activities. Some measures have been specified such as equipping vessels with a tablet (to transmit catches electronically), a sampling plan for lampara), obliging all vessels to be equipped with VMS or GPRS tracking devices, prohibition of fishing in certain bays from middle of february to middle of july, etc.).

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Netherlands	2023	No	/	/	/	/	No rationale for not presenting AP is elaborated in the fleet report.
Netherlands	2024	No	/	/	/	/	The rationale given not to include any action plan is given as follows: "The consequences of the North Sea sole stock benchmark and the ongoing negotiations between the Coastal States on the pelagic stock management."
Poland	2023	yes	Update	yes	yes	yes	Some updates were performed in the action plan which were added to the 2023 MS report. An action plan applies to the vessels operating within the Baltic Sea region. The DTS VL1824 segment was withdrawn from the action plan due to it being definitively wound down in 2022. A timeframe is for three to five years without specific dates. However, a 5 year period was indicated for 2023 to 2027. The remedial measure for seven segments set out in the action plan will be implemented under the European Marine, Fisheries and Aquaculture Fund.
Poland	2024	yes	Update	yes	yes	yes	Updated from 2023. The AP clearly specifies the targets and tools. However, no specific implementation date was indicated, only that the plan is to be implemented over the 3-5 year period 2023-2027 . The MS identified the concern regarding seven fleet segments operating in the Baltic Sea. The EWG 24-13 is unable to assess the extent to which the measures in the action plan are likely to redress the imbalance in the fleet segments concerned.
Portugal	2023	yes	Update	yes	yes	yes	Action Plan from 2022 and extended to the end of 2025 which provides permanent cessation of activity of 16 vessels from the fleet HOK >12m. The AP is strengthened by temporary cessation measure in 2023 for 40 vessels from the same fleet. The AP is clear, targeted and limited in time. In 2023, 26 applications meeting the scheme's eligibility requirements were submitted and an Order prohibited swordfish fishing for a total of 45 days affecting 28 vessels.
Portugal	2024	yes	Update	yes	yes	yes	Action Plan from 2022 and extended to the end of 2025 which provides permanent cessation of activity of 16 vessels from the fleet HOK >12m. The AP is strengthened by temporary cessation measure in 2023 for 40 vessels from the same fleet. The AP is clear, targeted and limited in time.
Romania	2023	yes	update	no	yes	yes	The action plan proposed the previous year is still ongoing and ends in 2027. The action plan does not specifically target any fleet segments for indicators that appear out of balance.
Romania	2024	yes	update	no	no	no	The action plan is largely a statement of intent to imprive monitoring activities. The action plan proposed the previous year is still ongoing and ends in 2027. The action plan does not specifically target any fleet segments for indicators that appear out of balance.
Slovenia	2023	No	/	/	/	/	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving a a sustainable balance between fishing capacity and fishing opportunities. MS considers that all segments of Slovenian fleet are in balance and did not present an action plan.
Slovenia	2024	No	/	/	/	/	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving a a sustainable balance between fishing capacity and fishing opportunities. MS considers that all segments of Slovenian fleet are in balance and did not present an action plan.
Spain	2023	Yes	New	Yes	Yes	Yes	New AP. The objectives are clearly defined and the measures to achieve them are described. The objectives are appropriately targeted to the fleet segments which are out of balance.
Spain	2024	Yes	Update	Yes	Yes	Yes	Updated from 2023, with some new measures, targets and tools for some segments. The objectives are clearly defined and the measures to achieve them are described.
Sweden	2023	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Sweden	2024	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.

* Year relates to the year of the MS & apos's fleet report that included the AP
**Appropriately targeted? - Are the measures in the AP specifically aimed at redressing the imbalance in the fleet segments concerned?
Source: own elaborations.

EWG Task 3

Fleet segments assessed to be out of balance according to the SAR or the SHI were listed together with the fish stocks on which they rely and the area to which they are attributed. The list is available as Annex III of the EWG 24-13 report.

STECF conclusions

STECF concludes that all terms of reference were successfully addressed by EWG 24-13.

Conclusions on the indicators by supra-region

Based on the findings of the EWG 24-13 and according to the criteria in the Commission Guidelines (COM(2014) 545), STECF concludes the following:

A meaningful value for the SHI could be calculated for a higher proportion of fleets in all regions compared to the results of EWG 23-13, from 36% in 2021 to 40% in 2022 of the fleet segments in the North Atlantic Ocean (NAO); from 31% in 2021 to 47% in 2022 in the Mediterranean and Black Seas (MBS) and from 33% in 2021 to 62% in 2022 in the Other Fishing regions (OFR).

For the North Atlantic Ocean (NAO) and the Other Fishing regions (OFR), most (80% and 85%, respectively) of the meaningful SHI indicated fleet segments were assessed to be in balance with fishing opportunities. For the Mediterranean and Black Seas (MBS), less than half (45%) of the meaningful SHI indicated fleet segments were assessed to be in balance with fishing opportunities although the trend in SHI is improving in 49% of the segments. Most of the trends in SHI were either not clear or could not be calculated (66% in NAO, 46% in MBS and 90% in OFR).

Economic indicators are showing most fleet segments to be in balance across regions. Trends in economic indicators show contrasting trajectories for different segments and different indicators in the NAO, with an indication of slight deterioration in the MBS and improvement in the OFR. This in a context of increasing energy prices in 2022.

The technical indicator Vessel Utilisation Ratio (VUR) indicates that about half of the segments would be in balance in the NAO and MBS. In the OFR, almost all fleet segments appear in balance according to the VUR. For the VUR, no clear trends can be detected for any of the supra-region’s NAO, MBS and OFR.

Conclusions on the process

STECF concludes that it is not clear how the inactive vessel indicator (IV) should be calculated. In order to facilitate the comparison work of the balance group in 2025, it should be clarified by the Commission prior to the writing of the national fleet reports whether the indicator is to be calculated relative to the fleet per length class or the total fleet. STECF also concludes that to aid interpretation, the IV indicator should keep its three components; number of vessels, gross tonnage and engine power.

STECF concludes that the choice of the total landings used (EU or total) to calculate the fleet segments contribution to the mortality of a stock at risk likely impacts the SAR indicator for fleet segments fishing on shared stocks and highly distributed stocks. To evaluate the effect of the choice of total landings, STECF concludes that an ad hoc contract assessing the actual sensitivity of the SAR indicator to that impact would be useful. The results of the contract would ideally be available for the spring plenary 2025 in order to inform Member States before they submit their fleet report in case changes in the calculation are required and would cover all fleet segments, including outermost regions. STECF considers that such a contract should cover:

- Identifying which criteria and conditions triggered the inclusion of stocks at risk in previous year (data already partly available),
- When the contribution condition (ii) was the trigger, identifying the total landings used for the different stocks (e.g. how has the BREXIT changed the total landings used for stocks evaluated by ICES?),
- Assessing whether data are available to estimate the total landings for all stocks (using existing databases such as RFMOs or for some stocks FAO data base)
- Assessing the effect of the use of the total EU landings or the total landings on the SAR indicator results,
- Investigate further analysis that the expert may judge relevant to better express the SAR indicator in regards to criteria, condition and geographical area.

STECF concludes that the clustering of fleet segments might impact the SAR indicator and that justification should be provided by the Member States as to why the transversal data are not provided by fleet segment (i.e. if it is due to a lack of data or confidentiality).

Contact details of STECF members

[1] - Information on STECF members' affiliations is displayed for information only. In any case, Members of the STECF shall act independently. In the context of the STECF work, the committee members do not represent the institutions/bodies they are affiliated to in their daily jobs. STECF members also declare at each meeting of the STECF and of its Expert Working Groups any specific interest which might be considered prejudicial to their independence in relation to specific items on the agenda. These declarations are displayed on the public meeting's website if experts explicitly authorized the JRC to do so in accordance with EU legislation on the protection of personnel data. For more information: http://stecf.jrc.ec.europa.eu/adm-declarations

Name	**Affiliation[1]**	Email
Bastardie, Francois	Technical University of Denmark, National Institute of Aquatic Resources (DTU-AQUA), Kemitorvet, 2800 Kgs. Lyngby, Denmark	fba@aqua.dtu.dk
Borges, Lisa	FishFix, Lisbon, Portugal	info@fishfix.eu
Casey, John	Independent consultant	blindlemoncasey@gmail.com
Coll Monton, Marta	Consejo Superior de Investigaciones Cientificas, CSIC, Spain	mcoll@icm.csic.es
Daskalov, Georgi	Laboratory of Marine Ecology, Institute of Biodiversity and Ecosystem Research, Bulgarian Academy of Sciences	Georgi.m.daskalov@gmail.com

Name	Affiliation[1]	Email
Döring, Ralf	Thünen Institute [TI-SF] Federal Research Institute for Rural Areas, Forestry and Fisheries, Institute of Sea Fisheries, Economic analyses Herwigstrasse 31, D-27572 Bremerhaven, Germany	ralf.doering@thuenen.de
Drouineau, Hilaire	Inrae, France	hilaire.drouineau@inrae.fr
Goti Aralucea, Leyre	Thünen Institute of Sea Fisheries - Research Unit Fisheries Economics, Herwigstrasse 31, D-27572 Bremerhaven, Germany	leyre.goti@thuenen.de
Grati, Fabio	National Research Council (CNR) – Institute for Biological Resources and Marine Biotechnologies (IRBIM), L.go Fiera della Pesca, 2, 60125, Ancona, Italy	fabio.grati@cnr.it
Hamon, Katell	Wageningen Economic Research, The Netherlands	katell.hamon@wur.nl
Ibaibarriaga, Leire	AZTI. Marine Research Unit. Txatxarramendi Ugartea z/g. E-48395 Sukarrieta, Bizkaia. Spain.	libaibarriaga@azti.es
Jardim, Ernesto	Independent expert	ernesto.jardim@gmai.com
Jung, Armelle	DRDH, Techonopôle Brest-Iroise, BLP 15 rue Dumont d'Urville, Plouzane, France	armelle.jung@desrequinsetdeshommes.org
Ligas, Alessandro	CIBM Consorzio per il Centro Interuniversitario di Biologia Marina ed Ecologia Applicata "G. Bacci", Viale N. Sauro 4, 57128 Livorno, Italy	ligas@cibm.it; ale.ligas76@gmail.com
Mannini, Alessandro	CNR IRBIM Ancona, Largo Fiera della Pesca, 260125 Ancona ITALY	alessandro.mannini@irbim.cnr.it

Name	**Affiliation**[1]	Email
Martin, Paloma	CSIC Instituto de Ciencias del Mar Passeig Marítim, 37-49, 08003 Barcelona, Spain	paloma@icm.csic.es
Motova -Surmava, Arina	Sea Fish Industry Authority, 18 Logie Mill, Logie Green Road, Edinburgh EH7 4HS, U.K	arina.motova@seafish.co.uk
Moore, Claire	Marine Institute, Ireland	claire.moore@marine.ie
Nielsen, Rasmus	University of Copenhagen, Section for Environment and Natural Resources, Rolighedsvej 23, 1958 Frederiksberg C, Denmark	rn@ifro.ku.dk
Nimmegeers, Sofie	Flanders research institute for agriculture, fisheries and food, Belgium	Sofie.Nimmegeers@ilvo.vlaanderen.be
Nord, Jenny	Independent consultant	nordjenny@hotmail.com
Pinto, Cecilia (vice-chair)	Università di Genova, DISTAV - Dipartimento di Scienze della Terra, dell'Ambiente e della Vita, Corso Europa 26, 16132 Genova, Italy	cecilia.pinto@edu.unige.it
Prellezo, Raúl (vice-chair)	AZTI -Unidad de Investigación Marina, Txatxarramendi Ugartea z/g 48395 Sukarrieta (Bizkaia), Spain	rprellezo@azti.es
Raid, Tiit	Estonian Marine Institute, University of Tartu, Mäealuse 14, Tallin, EE-126, Estonia	Tiit.raid@gmail.com
Rihan, Dominic (chair)	BIM, Ireland	rihan@bim.ie
Sabatella, Evelina Carmen	National Research Council (CNR) – Institute for Research on Population and Social Policies (IRPPS), Corso S. Vincenzo Ferreri, 12, 84084 Fisciano, Salerno, Italy	evelina.sabatella@cnr.it

Name	**Affiliation**[1]	Email
Sampedro, Paz	Spanish Institute of Oceanography, Center of A Coruña, Paseo Alcalde Francisco Vázquez, 10, 15001 A Coruña, Spain	paz.sampedro@ieo.csic.es
Somarakis, Stylianos	Institute of Marine Biological Resources and Inland Waters (IMBRIW), Hellenic Centre of Marine Research (HCMR), Thalassocosmos Gournes, P.O. Box 2214, Heraklion 71003, Crete, Greece	somarak@hcmr.gr
Stransky, Christoph	Thünen Institute [TI-SF] Federal Research Institute for Rural Areas, Forestry and Fisheries, Institute of Sea Fisheries, Herwigstrasse 31, D-27572 Bremerhaven, Germany	christoph.stransky@thuenen.de
Ulrich, Clara	IFREMER, France	Clara.Ulrich@ifremer.fr
Uriarte, Andres	Independent expert	auriartes@hotmail.com
Valentinsson, Daniel	Swedish University of Agricultural Sciences (SLU), Department of Aquatic Resources, Turistgatan 5, SE-45330, Lysekil, Sweden	daniel.valentinsson@slu.se
van Hoof, Luc	Wageningen Marine Research Haringkade 1, Ijmuiden, The Netherlands	Luc.vanhoof@wur.nl
Velasco Guevara, Francisco	Spanish Insitute of Oceanography - National Research Council, Spain	francisco.velasco@ieo.csic.es
Vrgoc, Nedo	Institute of Oceanography and Fisheries, Split, Setaliste Ivana Mestrovica 63, 21000 Split, Croatia	vrgoc@izor.hr

REPORT TO THE STECF

EXPERT WORKING GROUP ON

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-24-13)

JRC Ispra, Italy and online
07-11 October 2024

This report does not necessarily reflect the view of the STECF and the European Commission and in no way anticipates the Commission's future policy in this area

Assessment of balance indicators for fleet segments and review of national reports on Member States' efforts to achieve balance between their fleet capacity and the available fishing opportunities.

1 INTRODUCTION

The Commission requests that an analysis of balance between fleet capacity and fishing opportunity be made using a standard approach across all EU fleet segments, based on DCF information and in line with the Commission Guidelines COM(2014) 545 final[1] and COM(2024) 223 final[2]. Where possible, evaluation should use data reference years 2011 to 2023. The assessment of balance indicators for the fleet segments in the outermost regions will be done by a dedicated expert working group.

An Expert group of the STECF (Chair, Dr John Casey), EWG 24-13, will be convened from 7 to 11 October 2024 to undertake the following tasks and report to the STECF.

A separate Expert Group meeting (EWG 24-17) to undertake an analysis of balance between fleet capacity and fishing opportunity for fleet segments operating in the outermost regions of France, Portugal and Spain (OMRs), was convened from 11-13 September 2024. The report of the Expert group is published as a stand-alone report (STECF 24-17) and is available at:

https://stecf.ec.europa.eu/reports/balance-between-capacity-and-fishing-opportunities_en

Request to the EWG 24-13

The STECF EWG 24-13 is requested to:

1. Based on the data submitted by Member States under the 2024 DCF Economic data call and the most recent assessments and advice from relevant scientific bodies on stock status and their exploitation rates, **compute values for the technical, economic and biological indicators specified in the European Commission Guidelines.**

   JRC will provide tabulated values (in the same format as the Member State indicator tables in the STECF 16-09 data table for all indicators as detailed in items i) to vi) below, covering all Member State fleet segments wherever the necessary data are available.

   Values for the following indicators to be provided as specified in the 2014 and 2024 Balance Indicator Guidelines:

[1] COM (2014) 545 final. Communication from the Commission to the European Parliament and the Council. Guidelines for the analysis of the balance between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy.

[2] COM(2024) 223 final. Communication from the Commission to the European Parliament and the Council. Guidelines for the analysis of the balance between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy.

(i) Sustainable harvest indicator (SHI)

(ii) Stocks at risk indicator (SAR)

(iii) Return on investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA)

(iv) Ratio between current revenue and break-even revenue (CR/BER)

(v) The inactive fleet indicators

(vi) The vessel use indicator

For fleet segments for which the indicator values can be calculated, the Expert group is requested to present the trend over the last 5/6-year period.

2. **Provide country chapters containing the following information for each Member State**, **in order to allow the STECF to issue an informed advice both as regard the balance situation of the fleet segments and concerning the quality of the assessment provided by the Member States in their national fleet reports and, where relevant, action plans**:

a) Based on the biological, economic or technical indicator values and their recent trends as computed under task 1, provide an overview of whether, according to the Commission Guidelines (COM (2014) 545) fleet segments can be considered in or out of balance with their fishing opportunities.

b) For each fleet segment, compare the biological, economic or technical indicator values as computed under task 1 with the equivalent values and trends in the fleet reports submitted by the Member State under Article 22.2 and 22.3 of Regulation (EU) 1380/2013. Highlight any discrepancies between the Member State's assessment of balance between capacity and fishing opportunities and the Expert group's assessment based on the indicator values computed under task 1. Where possible, identify the reasons for such discrepancies.

c) Assess whether the analysis of balance between fleet capacity and fishing opportunities in the fleet report submitted by the Member State by 31 May 2024 under Article 22.2 and 22.3 of Regulation (EU) 1380/2013 is based on DCF information in accordance with the Commission's Guidelines COM(2014) 545 final and COM(2024) 223 final.

d) Evaluate whether any discrepancies between the STECF assessment of the balance between capacity and fishing opportunities relating to the Member States's previous fleet report have been appropriately addressed in the fleet report submitted by 31 May 2024.

e) Advise as to whether the report identifies structural overcapacity and estimates the long-term profitability by fleet segment.

f) Advise on whether the new or revised action plans submitted with the fleet reports by 31 May 2024 set out the adjustment targets and tools to achieve a balance and a clear timeframe for its implementation.

g) Identify the number of vessels targeted by each action plan.

h) Provide a summary overview of the action plans (AP) currently implemented by each Member State. The overview should include the year each AP was launched, if it is a renewal or a new one and identify the changes between the current AP and its previous version. The number of fleet segments and their respective vessels concerned should be identified.

3. **For each Member State, the Expert group is requested to list in the Annex to its report those fleet segments that according to the most updated set of data (2017 or later if available) for either i) the SHI or ii) the SAR, as computed by the STECF, were indicated to be out of balance with their fishing opportunities together with the fish stocks on which such segments rely and the fishing area to which such segments are attributed**. Separate lists should be provided for each indicator. The fish stocks on which a fleet segment is reliant shall be determined by ranking the landings from all stocks caught by that fleet segment in descending order in terms of landings value and listing those stocks that account for at least 75% of the total value of the landings by that fleet segment. The area to which a fleet segment is attributed shall be given as FAO area 27, FAO area 37 and for other fishing regions (OFR).

2 GENERAL CONSIDERATIONS REGARDING THE ASSESSMENT OF 'BALANCE'

In previous reports, the Expert Group has discussed at length and provided a detailed critique of the application and utility of the indicators and criteria specified in the 2014 Commission guidelines (COM (2014) 545 FINAL) for assessing the balance between capacity and fishing opportunities3. Furthermore, numerous suggestions for modification and improvement have also been provided in previous reports.

All such criticisms and suggestions have been endorsed by the STECF and remain valid.

In this report, the terms "in balance" and "out of balance" and analogous terms, are used strictly in relation to the criteria given in the Commission guidelines (COM (2014) 545 Final). Such terms are used to describe a favourable (in balance) or unfavourable (out of balance) situation based on the value computed for specific indicators in relation to the threshold specified for such indicators. The term "imbalanced" is also used and is synonymous with "out of balance".

2.1 Data availability and the sustainable harvest indicator (SHI) and stocks at risk (SAR

The Expert group notes that in reporting indicator values for the SHI and SAR in their annual fleet reports, some Member States use the indicator values computed by the STECF in the year prior to the year the fleet report is submitted. In a number of cases, the fleet report submitted by 31 May 2024, presents the SHI and SAR indicator values computed by Expert Working Group 22-15, which may or may not be based on data up to and including 2022.

For many stocks, especially those in area 27, the most recent estimates for F available in January to May 2023, will be from assessments carried out in 2022 and in most cases the most recent estimate of F will be up to and including the years 2021. Hence, the SHI values in the fleet report submitted in 2024 ought to be computed using such estimates. In principle Member states ought to be able to provide such estimates since they have both the economic and stock assessment data to do so.

If the SHI estimates presented in the 2024 Member States' fleet reports are not based on the most recent data on the value of landings and scientific estimates for F/FMSY, the Expert group notes that the Member State's analysis of the balance between fleet capacity and fishing opportunities is not strictly in line with the Commission guidelines.

Furthermore, when the indicator values presented in the fleet report are derived from the report of the STECF EWG 23-13, no comparison between the values in the fleet report and those computed by the STECF EWG 23-13 was carried out.

2.2 A cautionary note concerning the Stocks At Risk indicator.

Criteria to produce a SAR indicator value

In order to flag a stock at risk for a fleet segment, one of the following 2 criteria needs to be fulfilled:

[3] STECF report 15-02; sections 2.7, 2.8, 2.9; STECF report 15-15; 3.5.1, 3.6.1, 3.8, 3.9, 3.10, 3.11. STECF report 16-09; 4.2, 4.3, 4.4, 4.5.; STECF report 17-08; 3.4 and ANNEX I; STECF report 18-14; 3.4 and ANNEX I; STECF report 19-13; 3.4 and ANNEX I.

1. The landings from a stock at risk by the fleet segment account for more than 10% of the total landings by the fleet.
2. The landings from a stock at risk by the fleet segment account for more than 10% of the total catches from the stock at risk. The 10% threshold is increased to 20% for segments from the OMR that comprise vessels less than 12 m in length.

For the second criterion above (ii) and particularly with regard to the Outermost regions the resulting SAR value may be misleading. Some fleets exploit highly distributed or shared stocks that are considered at risk, although the catches from such stocks are relatively small compared to the total international catches. The 10% threshold in (ii) above is a proxy for the amount of fishing mortality exerted by a fleet on a stock at risk relative to the total fishing mortality on the stock at risk. Hence to derive the appropriate value for the SAR indicator we require the landings by the fleet and the total international landings from the stock.

However, the EWG only has access to the total landings by the EU fleet and the fleet segment-specific landings. Hence, allocating a stock at risk to the SAR indicator value using the landings by fleet segment as a proportion of the total EU fleet landings, means that the proxy for the amount of fishing mortality on the stock at risk inflated by an unknown amount leading to stocks at risk being erroneously selected to contribute to the SAR indicator value. Such a situation becomes increasingly acute as the total EU landings expressed as a proportion of the total international landings from a stock at risk declines.

Hence cases where criterion (ii) is used to select a stock for inclusion in the SAR indicator require close scrutiny on a case-by-case basis.

2.3 Issues concerning clustering and future needs

In the National chapters, so-called “traffic-light” tables summarise whether according to the Commission Guidelines the indicator status according to a colour coded key e.g. green = “in balance”, red = “out of balance” etc. However, in many cases, Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster. Ideally for clusters, the biological and technical indicators will be available for the individual segments that make up the cluster, but only if the Member State has reported the relevant data at the segment level. Where biological and technical information is reported only for the cluster as a whole, the indicator status (colour shading red, green etc) is applied to the entire cluster. In such cases, the status may not reflect that for the individual fleet segments in the cluster.

To provide segment-specific values for the SAR indicator and the SHI, data on landings (weight and value) are required at the DCF segment level (i.e. country + supra region + fishing technique + vessel length + geoindicator + activity) for each fleet segment in the cluster.

In some cases, Member States may provide data on landings at the cluster level because of confidentiality issues. In such cases it is highly desirable that such cases are identified in the data submission so that the EWG can identify cases where the relevant landings’ data are not available for separate fleet segments.

The additional information needed is as follows:

1- Regarding confidentiality issues

country/supra region /fishing tech /vessel length /geo indicator /activity / year /data provided (True or False)

2- Regarding clustering

country/supra region /fishing tech /vessel_length /geo indicator /activity / year / fs_name

3 TASK 1 - ASSESSMENT OF BALANCE INDICATORS

3.1 Background

All indicator values computed by the STECF EWG 24-13 were calculated in accordance with the 2014 Commission guidelines (COM (2014) 545 final). The 2014 Commission guidelines seek to provide a common approach for estimating the balance over time between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy.

3.2 Provision of Indicator Values

All indicator values used by the EWG 24-13 are available in ANNEX V of this report

3.2.1 Indicator Calculation Process

Economic and technical indicators for the period 2013-2022 were prepared by the STECF EWG 24-07 (2024 Annual Economic Report on the EU Fishing Fleet (AER 2024)). The SAR list and corresponding data base were prepared under contract by Armelle Jung. SHI and SAR values by fleet segment were computed by Jerome Guitton.

All indicator values were reviewed at a preparatory expert group held from 3-5 September 2024 (WG 24-13). The values used for this report were those finalised and agreed following the preparatory expert group on the 12 of September 2024. Indicators, data sources and other relevant information regarding their computation are listed in Table 3.2.1.1.

A table containing all the balance indicators by Member State (MS) and fleet segment (supra-region + fishing technology + vessel length) was compiled by the JRC and provided to EWG 24-13. Indicator values were computed for each year over the period 2013-2022 specific details on computing indicator values are given in Annex I to this report.

Table 3.2.1.1. Indicators provided to experts at EWG 24-13.

Indicator		**Calculated by**	**Comments**
Biological indicators	**SHI** Sustainable Harvest Indicator	Jerome Guitton	1. Calculated by landings value for 2008-2021* for every EU fleet segment for which data were available (2021 data are provisional and may be subject to change): • Data sources for stock assessment parameters included the ICES and ICCAT for fleet segments operating in Area 27. • For fleet segments operating in Area 37 the data sources for stock assessment parameters included: a. A database of STECF stock assessment results compiled by the JRC. Updated information on stock assessments carried out at FAO/GFCM working groups was collected during preparatory meeting. b. Tuna fisheries stock assessment

			• For fleet segments operating in Outermost regions the data sources for stock a. CECAF Working group b. South Pacific Regional Fishery Management Organization c. Tuna commissions 2. Coverage ratio was also provided to give the part of the landing values that are included in the SHI. This is a quality indicator and the higher the ratio is, the higher the validity of SHI. Values are not taken into consideration if the ratio is less than 40%. 3. EDI, NOS, NSR have been provided. 4. ToR 4: the output was described in the term of reference. For each Member State, those fleet segments that according to the 2020 values for either i) the SHI as computed by the STECF, were indicated to be out of balance with their fishing opportunities together with the fish stocks on which such segments rely and the fishing area to which such segments are attributed were listed. Separate lists were provided for each indicator. The fish stocks on which a fleet segment is reliant were determined by ranking the landings from all stocks caught by that fleet segment in descending order in terms of landings value and listing those stocks that account for 75% of the total value of the landings by that fleet segment. The area to which a fleet segment is attributed was given as FAO area 27 (=NAO), FAO area 37 (=MBS) or other fishing region (OFR).
	SAR Stocks at Risk Indicator	Armelle Jung Jerome Guitton	1. Calculated for 2009-2023* for all fleet segments for which data were available. 2. Selection of the stocks at risk was prepare by Armelle Jung then complemented, checked and endorsed by the preparatory EWG 24-13 : • For fleet segments operating in Area 27, the most recent ICES Advice on fishing opportunities was accessed through the ICES website (up to the cut-off date 09/09/2023). • For fleet segments operating in Area 37, the most recent GFCM/SAC and STECF stock assessment reports were taken into account. • For fleet segments operating in other areas (OFR), STECF stock assessment reports and RFMO's reports were considered. • Additional information was taken from Council Regulations fixing annual fishing opportunities; as well as from GFCM, ICCAT, CECAF, IOTOC, SEAFO, NAFO or SPRFMO scientific assessments reports, advices or recommendations;

			• Extraction done in 2024 from CR (Critically Endangered), EN (Endangered) and VU (Vulnerable) marine organisms used as human food *(Fishes, Mollusks and Echinoderms)* from the IUCN list was updated for 2023. . . • After mapping species landings and catches to rebuild stocks catches, SAR indicator values were provided by fleet segment using a SQL script developed by Jerome Guitton. The complete list of species identified as at risk for the year 2023 is given in Annex IV.
Economic indicators	**ROI or RoFTA** The Return on Investment (ROI) or Return on Fixed Tangible Assets (RoFTA)	JRC	1. Calculated using the same principle as STECF EWG 23-07; 2. The target reference value to which the indicator value is compared is the 5-year average (2017-2021) risk-free interest rate. 3. Calculated for years 2013-2021, the most recent year for which DCF economic data are available. Values are in real terms, i.e., nominal values adjusted for inflation (base=2022)
	CR/BER Current revenue as proportion of break-even revenue	JRC	1. Calculated for years 2013-2021, the most recent year for which DCF economic data are available. 2. The long-term viability analysis of CR/BER approach was taken. Values are in real terms, i.e., nominal values adjusted for inflation (base=2022)
	Net profit margin Net profit to Revenue	JRC	1. Calculated using the same principle as STECF EWG 24-07; 2. Calculated for years 2013-2022, the most recent year for which DCF economic data are available. Values are in real terms, i.e., nominal values adjusted for inflation (base=2022)
	NVA/FTE Net Value Added per Full Time Equivalent	JRC	1. Calculated using the same principle as STECF EWG 24-07; 2. Calculated for years 2013-2022, the most recent year for which DCF economic data are available. 1. Values are in real terms, i.e., nominal values adjusted for inflation (base=2022)

Technical/inactivity indicators	**VUR** Fleet segment utilisation indicator Average Days at Sea / Maximum Days at Sea	JRC	2. Calculated for years 2013-2021. 3. Calculated when MS provided either maximum observed days at sea (DAS) for each fleet segment or maximum theoretical DAS. 1. The EWG also used the value of 220 maximum theoretical days at sea (VUR_{220}) per fleet segment, as stipulated in the 2014 Commission guidelines, to accommodate cases where the relevant information was not provided by MS.
	Inactive vessels per length category	JRC	1. Number of inactive vessels and proportion of inactive vessels in number, GT and kW.
Data sources: 2024 DCF Fleet Economic Data Call; ICES online stock assessment database; JRC STECF stock assessment database; GFCM stock assessment database; Stock assessment results from all relevant Regional Fisheries Organisations where EU fleets have an interest; IFREMER (French national assessments) for stocks in the French Outermost regions; CITES species list; IUCN Red List. NOTE however, that as for the EWG 22-15 and 23-13 reports, the results of stock assessments carried out by a Russian-Norwegian WG were not taken into account in computing the SHI and SAR indicators in this report (EWG 24-13). **based on provisional data*			

3.2.2 Data Source and Coverage

The data used by the STECF EWG 24-13 to compute the various indicators were collected under the Data Collection Framework (DCF), Council Regulation (European Commission (EC) No 199/2008 of 25th February 2008), amended by the multiannual Union programme for the collection, management and use of data in the fisheries and aquaculture sectors for the period 2017-2019 (EU-MAP) (see the Commission Implementing Decision (EU) 2016/1251 of 12 July 2016 and the Council Regulation (EC) No 199/2008 on a framework for the collection of data in the fisheries sector). Technical and economic balance indicators were calculated using data submitted under the call for fleet economic scientific data concerning 2008-2022/23 issued by DG MARE in 2024. The two biological indicators (SHI and SAR indicator) were calculated based on transversal (landings) data submitted under the same data call. Additional information needed to calculate the biological indicators was obtained from other sources (see Table 3.2.1.1).

The 2023 fleet economic data call requested transversal and economic data covering years from 2008 to 2022/2023. Capacity data (GT, kW, no. of vessels) was requested up to and including 2023, while employment and economic parameters were requested up to and including 2022. Most effort and all landings data were requested up to and including 2023, albeit on a voluntary basis, to allow for economic performance nowcasts to be estimated for 2023 and projections for 2024 Landings and effort data for fleet segments operating in the Mediterranean & Black Sea region (i.e. Area 37 or MBS) were requested at the GCFM-GSA level. This level of aggregation was requested to correctly allocate landings to the relevant stocks when calculating the biological balance indicators (see STECF 15-02 / 15-15 reports).

In terms of the completeness of the Member States data submissions, most countries submitted most of the parameters requested under the fleet economic data call. Overall, there has been an improvement in the data quality and coverage over time. In many cases

missing data relates to fleet segments with low vessel numbers, for which data are hard to obtain or for confidentiality reasons.

Regarding confidentiality, Member States may aggregate fleet segments into clusters to provide sensitive economic data. However, in several cases, clustering may not be enough to guarantee confidentiality, and hence, parts of MS fleets may not be completely covered. These generally relate to distant-water fleet segments and include MS such as Estonia, Italy and Poland.

Specific data issues at MS level, which can affect the quality and coverage of the balance indicators are summarised in the AER 2024.

Data on the inactive fleet

Total numbers of vessels and total numbers of inactive fishing vessels by Member State, length class and region are given in Tables 3.2.2.1 and 3.2.2.2 respectively. The proportions of inactive vessels expressed as a percentage of the total number of vessels are given in Table 3.2.2.3.

During the EWG, the Commission requested that the proportion of the fleet that is inactive in terms of GT and kW be also provided. However, due to unresolved issues relating to the variables for inactive GT and kW in the database, the EWG was unable to compute reliable estimates of the proportions (% in GT or kW) of Member States' fleets that were inactive in 2022.

Table 3.2.2.1. Total number of vessels by length group and supra-region for each Member State in 2022.

	Supra region																							Total all regions
Member State	MBS							NAO									OFR							
	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	Total	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	Total	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total	
BEL							**0**						28	36		**64**							**0**	**64**
BGR	732	1051	65	18			**1866**									**0**							**0**	**1866**
CYP	401	401	39		5		**846**									**0**							**0**	**846**
DEU							**0**	723	41	167	7	120	82	22	12	**1174**							**0**	**1174**
DNK							**0**	265	1215	90	71	217	65	36	30	**1989**							**0**	**1989**
ESP	165	1216	393	385	156		**2315**		4679		416	619	250	301		**6265**			2	6	122	90	**220**	**8800**
EST							**0**	1696		288			6			**1990**							**0**	**1990**
FIN							**0**	2579		646		30	8	15	3	**3281**							**0**	**3281**
FRA	319	919	24	32	47		**1341**		1501		678	392	191	117	12	**2891**	1775	127		22		21	**1945**	**6177**
GRC	3522	7225	370	206	164		**11487**									**0**							**0**	**11487**
HRV	4355	2789	330	101	105		**7680**									**0**							**0**	**7680**
IRL							**0**		1524		229	89	73	97	24	**2036**							**0**	**2036**
ITA	2332	6119	2338	716	284	13	**11802**									**0**					1	4	**5**	**11807**
LTU							**0**	89		17		1	3	17		**127**							**0**	**127**
LVA							**0**	195		55				31	5	**286**							**0**	**286**
MLT	414	381	21	35	8		**859**									**0**							**0**	**859**
NLD							**0**		306		36	34	185	76	77	**714**							**0**	**714**
POL							**0**	329		332		53	63	46		**823**							**0**	**823**
PRT							**0**		6611		308	383	156	149	13	**7620**							**0**	**7620**
ROU	14	131	21				**166**									**0**							**0**	**166**
SVN	59	61	16	1			**137**									**0**							**0**	**137**
SWE							**0**	369	266	99	75	76				**885**							**0**	**885**
(vide)							**0**									**0**							**0**	
Total	**12313**	**20293**	**3617**	**1494**	**769**	**13**	**38499**	**6245**	**16143**	**1694**	**1820**	**2014**	**1110**	**943**	**176**	**30145**	**1775**	**127**	**2**	**28**	**123**	**115**	**2170**	**70814**

Source: MS data submissions under the 2024 Fleet Economic data call (MARE/A3/ACS(2024)).

Table 3.2.2.2. Number of inactive vessels by length group and supra-region for each Member State in 2022.

	Supra region																						Total all regions
Member State	MBS							NAO									OFR							
	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	Total	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	Total	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	Total	
BEL							**0**						4	1		**5**							**0**	**5**
BGR	284	375	11	3			**673**									**0**							**0**	**673**
CYP	33	24	4		1		**62**									**0**							**0**	**62**
DEU							**0**	226	32	33	4	11	5	4	1	**316**							**0**	**316**
DNK							**0**	5	702	1	20	25	6	1	3	**763**							**0**	**763**
ESP	67	228	50	16	6		**367**		682		36	50	9	14		**791**			2	3	12	4	**21**	**1179**
EST							**0**	648		117			1			**766**							**0**	**766**
FIN							**0**	1673		427		14	2	2	1	**2119**							**0**	**2119**
FRA	58	158	2	5	3		**226**		163		47	14	13	6	1	**244**	462	32		10		1	**505**	**975**
GRC	713	1044	99	10	7		**1873**									**0**							**0**	**1873**
HRV	638	683	104	32	36		**1493**									**0**							**0**	**1493**
IRL							**0**		622		57	17	3	16	3	**718**							**0**	**718**
ITA	616	1170	315	31	21	3	**2156**									**0**					1	1	**2**	**2158**
LTU							**0**	37		13		1	1	8		**60**							**0**	**60**
LVA							**0**	79		18				5	2	**104**							**0**	**104**
MLT	114	104	4	11	2		**235**									**0**							**0**	**235**
NLD							**0**		132		12	15	20	15	8	**202**							**0**	**202**
POL							**0**	3		7		4	8	2		**24**							**0**	**24**
PRT							**0**		3893		83	126	35	27	3	**4167**							**0**	**4167**
ROU	2	26	2				**30**									**0**							**0**	**30**
SVN	34	20	6	1			**61**									**0**							**0**	**61**
SWE							**0**	110	37	17	3	6				**173**							**0**	**173**
Total	2559	3832	597	109	76	3	**7176**	2781	6263	633	262	283	107	101	22	**10452**	462	32	2	13	13	6	**528**	**18156**

Source: MS data submissions under the 2024 Fleet Economic data call (MARE/A3/ACS(2024)).

Table 3.2.2.3. Proportion (%) of inactive vessels by length group and supra-region for each Member State in 2022.

	Supra-region																			
Member State	MBS						NAO								OFR						% For all region
	VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	
BEL												14	3								8
BGR	39	36	17	17																	36
CYP	8	6	10		20																7
DEU							31	78	20	57	9	6	18	8							27
DNK							2	58	1	28	12	9	3	10							38
ESP	41	19	13	4	4			15		9	8	4	5				100	50	10	4	13
EST							38		41			17									38
FIN							65		66		47	25	13	33							65
FRA	18	17	8	16	6			11		7	4	7	5	8	26	25		45		5	16
GRC	20	14	27	5	4																16
HRV	15	24	32	32	34																19
IRL								41		25	19	4	16	13							35
ITA	26	19	13	4	7	23													100	25	18
LTU							42		76		100	33	47								47
LVA							41		33				16	40							36
MLT	28	27	19	31	25																27
NLD								43		33	44	11	20	10							28
POL							1		2		8	13	4								3
PRT								59		27	33	22	18	23							55
ROU	14	20	10																		18
SVN	58	33	38	100																	45
SWE							30	14	17	4	8										20

Source: MS data submissions under the 2024 Fleet Economic data call (MARE/A3/ACS(2024)).

3.2.3 Fleet Segment Coverage

As reported above, the estimation of the balance indicators requires multiple data coming from different sources. As data are not available for all fleet segments, the balance indicators are calculated for a proportion of the EU fleet. This proportion depends on the specific indicator and its data needs. For instance, the VUR indicator needs data on the maximum days-at-sea, which are provided by MS on a voluntary basis. When these data are not provided, the indicator cannot be calculated. On the other hand, the calculation of the SHI>=40% indicator depends on the availability of stock assessment information. When estimates for F and F_{MSY} for stocks in an area are not available, the indicator cannot be calculated for the fleet segments exploiting that area.

To provide a measure per MS of the proportion of fleet segments for which an indicator is calculated, the landings value of these fleet segments is divided by the total landings value of the MS fleet. The use of the landing's values instead of the number of fleet segments to calculate these percentages is aimed to consider the importance of the fleet segments concerned in terms of their contribution to the catches at MS level.

Table 3.2.3.1 shows the coverage (%) of each balance indicator in terms of landed value submitted by MS for the reference year 2022. Assuming that data on landings value are available for all fleet segments, a value of 100% means that the indicator is calculated for all fleet segments or, equivalently, for a number of fleet segments covering 100% of the MS landings value. Alternatively, in such a case the data required to calculate that indicator are available for all fleet segments.

Values for the SHI indicator are reported in Table 3.2.3.1 for

(i) SHI values that were calculated for all stocks with assessment data, even if the proportion of landings value of the assessed stocks made up less than 40% of the total landings value of the fleet segment (in such cases, the indicator is considered as unrepresentative/unreliable), and

(ii) (ii) SHI values calculated only for those fleet segments for which the proportion of landings value of the assessed stocks made up more than 40% of the total landings value of the fleet segment.

(iii) For the SAR indicator, all fleet segments with corresponding landings data were screened for stocks falling under the definition of stocks at risk; all of the landings (in weight) data provided by MS were thus considered in the SAR analysis.

It is important to note that full coverage in Table 3.2.3.1 does not necessarily mean that the entire MS fleet was covered. For confidentiality reasons, some MS may not provide landings data for specific fleet segments in cases where the data are considered sensitive and clustering of fleet segments may be insufficient to overcome breaching confidentiality rules. In some cases, only landings in weight are provided without the corresponding landed values for all active fleet segments reported by a MS. Indicator coverage is thus only relative to the data provided (value of landing), and should be considered together with the number of fleet segments and/or vessels.

In other cases, fleet segments are omitted entirely, i.e. not even capacity data are reported by MS.

Table 3.2.3.1. Coverage of each balance indicator in terms of landed value submitted by MS for the reference year 2022. SHI>40% = coverage of fleet segments for which SHI could be calculated and considered as meaningful (coverage of fleet segments where proportion of landings value of the assessed stocks made up more than 40% of the total landings value of the fleet segment).

MS	SAR	SHI	SHI>40%	CR/BER	RoFTA	RoI*	VUR (MaxSeaDays)
BEL	100%	100%	89%	100%	100%	0%	100%
BGR	100%	100%	56%	96%	96%	0%	100%
CYP	100%	100%	43%	88%	88%	0%	0%
DEU	100%	100%	74%	100%	100%	0%	100%
DNK	100%	100%	56%	100%	100%	100%	0%
ESP	98%	97%	71%	96%	96%	35%	100%
EST	100%	100%	82%	85%	85%	85%	0%
FIN	100%	100%	66%	100%	100%	100%	100%
FRA	100%	100%	69%	92%	92%	0%	95%
GRC	100%	100%	73%	100%	100%	0%	100%
HRV	100%	100%	81%	99%	99%	0%	100%
IRL	100%	100%	75%	95%	95%	0%	93%
ITA	100%	99%	64%	96%	96%	48%	100%
LTU	100%	100%	100%	76%	76%	76%	100%
LVA	100%	100%	94%	100%	100%	0%	100%
MLT	100%	100%	90%	100%	100%	86%	100%
NLD	100%	100%	61%	100%	100%	100%	100%
POL	100%	100%	78%	100%	100%	0%	0%
PRT	100%	98%	46%	100%	100%	0%	100%
ROU	100%	100%	93%	56%	56%	60%	100%
SVN	100%	100%	0%	100%	100%	0%	100%
SWE	100%	100%	94%	43%	43%	0%	43%

* When value of fishing rights available.

Source: MS data submissions under the 2024 Fleet Economic data call (MARE/A3/ACS(2024)).

3.2.4 Biological Indicator Visualisation Tool

The expert responsible for the calculation of the SHI values (J. Guitton), has developed an interactive tool which allows users to visualise the input data as well as the results of the biological indicator calculations. The tool is available at:

Link: https://sirs.agrocampus-ouest.fr/stecf_balance_2024/

The input data and balance indicator calculation results can be viewed thematically at fleet segment, country and supra-region level.

To be in line with the 2024 guidelines for vessels less than 12m in length in the Outermost regions, specific factsheets were developed under the label “Outermost region” of the dashboard.

The dashboard menu "Outermost region" displays two sets of indicators: one taking into account the 2024 guidelines for vessels less than 12m, and a second where they are not taken into account.

For stocks assessments conducted at the national level, a specific entry 'Stock non rfmos' has also been included.

For example, input data such as landings data can be visualised by weight or value; graphs showing the list of stocks used in calculations and the corresponding time-series of F/F_{MSY} used for each stock can be displayed; indicator results can be viewed individually or as a combination of a number of indicators displayed on the same graph. The online tool includes updated values of (i) biological indicators specified in the 2014 Commission guidelines, and (ii) the alternative indicators suggested in STECF reports 15-02 and 15-15.

The country label entries in the dashboard of the online tool, now exclude information for fleet segments that are included under the OMR label.

The visualisation tool deals mainly with data provided under the annual fleet economic data call (AER data), SHI (+ ratio), EDI, and SAR indicator values.

All the data are downloadable using the link in the interactive tool.

The expert group considers that the tool provides a useful and informative synthesis of the available indicator values and makes the inputs and calculation process transparent. It could also aid Member States to identify and select those fleet segments that require targeted management measures to address the issue of balance/capacity.

3.2.5 Overview of data and information to compute biological indicators (SHI and SAR)

The EWG 24-13 was able to produce a variety of data and information which is likely to prove useful to researchers and Member States to undertake additional analyses and research on the balance between fishing capacity and fishing opportunities. Such data and information are presented in a single excel workbook with filename “Annex IA Annex IB Annex IC and Annex III.xlsx”. The workbook contains 6 separate worksheets including a metadata

worksheet describing the data presented in each of the other worksheets. An overview of the different annexes is given below.

Annex IA : Stock reference list for biological indicators including splitting values.

Sheet Annex IA provides the distribution of the species per area enabling to species-specific landings to be allocated to stocks.

- When two or more stocks both occur in the same area, a splitting value is used to allocate the proportion of catches from the area to each stock.

- When a species overlaps different areas and is not separated into different stocks, the geographical area of distribution of the species as described in the scientific literature, defines the species as a single stock.

Annex IB : SAR Decision Table

Sheet Annex IB provides the input data used to determine whether a particular stock can be considered a stock at risk (SAR). The data given as follows:

- the stock code,

- the species 3 alfa code

- the decision status as a stock at risk for each year of the time series 2009-2021 (ALL = stock listed at risk / 0= stock not listed at risk)

The data presented allow a value for SAR to be computed/reproduced for each stock.

Annex IC : SAR Calculation detailed

Sheet Annex IC provides the value of the SAR indicator by country, geo indicator, fleet segment, and year (-1= no SAR, 0= no SAR calculated, >1 = the number of SAR reaching the definition).

It presents the related stock name, the related criteria (a/b/c/d) and the threshold rule for selection (10% of the FS landings, 10% of the stock landings, or both).

The data can be filtered for the above criteria to identify the SAR for subsets of the data.

Annex III Area 27 : Stocks on which fleet segments out of balance (SAR or SHI) are reliant - North Atlantic (Area 27)

Annex III Area 37 : Stocks on which fleet segments out of balance (SHI or SAR) are reliant - Mediterranean and Black Seas (Area 37)

Annex III OFR : Stocks on which fleet segments out of balance (SHO or SAR) are reliant - OFR

3.3 Indicator Findings – Regional Overviews

Out of 619 active fleet segments in 2022 (52,820 vessels), landings in weight were available for 523 fleet segments or aggregate fleet segments, while value of landings were available for 519 segments. SHI indicator values were available for 487 segments, of which 276 were considered meaningful to assess balance or imbalance (SHI≥40%). Economic indicator values (CR/BER and RoFTA) were available for 380 fleet segments or aggregate fleet segments. RoI values (with value of fishing quota) were available for 79 fleet segments or aggregate fleet segments from 9 Member States.

The SAR indicator was available for 454 fleet segments in 2022. According to the criteria in the 2014 Commission guidelines, EWG 24-13 notes that the SAR results indicate that there were 209 segments that may have been in balance with their fishing opportunities (SAR=0) and 245 segments that may have not been in balance with their fishing opportunities, as follows:

- 1 segments with 8 stocks-at-risk,
- 5 segments with 6 stocks-at-risk,
- 8 segments with 5 stocks-at-risk,
- 8 segments with 4 stocks-at-risk,
- 17 segments with 3 stocks-at-risk,
- 52 segments with 2 stocks-at-risk,
- 154 segments with 1 stock-at-risk.

For each region (NAO, MBS and OFR) the number of fleet segments x number of stocks at risk are given in Table 3.3.1.

Table 3.3.1. Summary table for SAR values for 2022, showing the number of fleet segments at regional level (NAO, MBS and OFR) per number of SAR found.

Supra region	Number of SAR							
	0	**1**	**2**	**3**	**4**	**5**	**6**	**8**
NAO	124	83	22	9	6	6	3	1
MBS	64	57	21	6	2	1	1	
OFR	21	14	9	2		1	1	
EU total	**209**	**154**	**52**	**17**	**8**	**8**	**5**	**1**

Source: own elaborations.

3.3.1 NAO – North Atlantic (area 27)

Out of 355 active fleet segments in 2022, landings in weight were provided for 290 fleet segments or aggregate fleet segments, while value of landings were provided for 287 segments, i.e., not provided for 3 segments.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 273 segments, of which 130 could be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 143 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 66% of the total value of the landings in 2022 provided by MS, and were as follows:

- 80% (114 segments) may be in balance with their fishing opportunities;
- 20% (29 segments) may not be in balance with their fishing opportunities.

For 42 (29%) segments, an improving trend was assessed for SHI while a deteriorating trend was observed for 7 (5%) segments. A further 65 (45%) segments had no clear trend, 1 segment had a null/flat trend and no trend could be calculated for the remaining 29 segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 254 fleet segments, of which 124 segments may not have been in balance with their fishing opportunities in 2022. According to the criteria in the 2014 Commission guidelines, EWG 24-13 notes that the SAR results indicate that:

- 1 segment with 8 stocks-at-risk,
- 3 segments with 6 stocks-at-risk,
- 6 segments with 5 stocks-at-risk,
- 6 segments with 4 stocks-at-risk,
- 9 segments with 3 stocks-at-risk,
- 22 segments with 2 stocks-at-risk,
- 83 segments with 1 stock-at-risk.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The number of fleet segments or aggregate fleet segments for which *RoI* is available for 2022 in the North Atlantic region (NAO) is 57 and the number of segments for which trends are calculated is 32.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoI indicator values for the 57 fleet segments indicate that:

- 47% (27 segments) may be in balance with their fishing opportunities.
- 53% (30 segments) may not be in balance with their fishing opportunities;

For 7 (12%) segments, an increasing trend was assessed for RoI while a decreasing trend was observed for 25 (44%) segments. No trend could be calculated for the remaining 25 segments.

RoFTA is available for 217 fleet segments. According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoFTA indicator values for the 200 fleet segments indicate that:

- 61% (132 segments) may be in balance with their fishing opportunities.
- 39% (85 segments) may not be in balance with their fishing opportunities.

For 67 (31%) segments, an increasing trend was assessed for RoFTA while a decreasing trend was observed for 95 (44%) segments. No trend could be calculated for the remaining 55 segments.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The number of fleet segments for which the *CR/BER* indicator is available is 217 in 2022 for the North Atlantic region (NAO).

According to the criteria in the 2014 Commission guidelines the Expert group notes that the CR/BER indicator values for the 202 fleet segments for which balance/out of balance was calculated indicate that:

- 72% (156 segments) may be in balance with their fishing opportunities.
- 28% (61 segments) may not be in balance with their fishing opportunities;

An increasing trend for *CR/BER* was assessed for 76 (35%) fleet segments while a decreasing trend was observed for 59 (27%) segments. A further 28 (13%) fleet segments had no clear trend and no trend could be calculated for the remaining 54 segments.

The Vessel Use Indicator (or Vessel Utilisation ratio)

The Vessel Use Indicator (VUR) was available for 291 fleet segments[4] in NAO in 2022. According to the criteria in the 2014 Commission Guidelines, the expert group notes the VUR indicator values indicate that:

- 46% (134 segments) may be in balance with their fishing opportunities;
- 54% (157 segments) may not be in balance with their fishing opportunities.

An improving trend for the Vessel Use Indicator was assessed for 13 (4%) fleet segments while a deteriorating trend was observed for 4 (1%) segments. No clear trend was found for 186 (64%) segments, a null/flat trend was found for 10 (3%) segments and no trend could be calculated for the remaining 78 (27%) segments.

The Inactive Fleet Indicators

The EU inactive fleets in the North Atlantic (NAO) comprised 10,452 vessels representing approximately 26% of the total vessels registered in the area.

3.3.2 MBS - Mediterranean and Black Sea (area 37)

Out of 201 active fleet segments in 2022, landings in weight and value were provided for 175 fleet segments or aggregate fleet segments.

Sustainable Harvest Indicator (SHI)

SHI indicator values were available for 163 segments, of which 69 could not be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 94 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 85% of the total value of the landings in 2022 provided by MS, and were as follows:

- 45% (47 segment) may be in balance with their fishing opportunities;
- 55% (52 segments) may not be in balance with their fishing opportunities.

For 4 segment, an increasing (deteriorating) trend was assessed for SHI while a decreasing (improving) trend was observed for 46 segments. A further 22 segments had no clear trend, 4 segment showed a flat trend and no trend could be calculated for the remaining 18 segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 152 fleet segments, of which 88 segments may not have been in balance with their fishing opportunities in 2022. According to the criteria in the 2014 Commission guidelines, EWG 24-13 notes that the SAR results indicate that there were:

- 1 segments with 6 stocks-at-risk,
- 1 segments with 5 stocks-at-risk,

[4] The VUR value calculated for an aggregate segment (cluster) is applied to all the fleet segments in the cluster.

• 2 segments with 4 stocks-at-risk,
• 6 segments with 3 stocks-at-risk,
• 21 segments with 2 stocks-at-risk,
• 57 segments with 1 stock-at-risk.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The number of fleet segments or aggregate fleet segments for which RoI (with value of fishing quota) is available for 2022 in the Mediterranean and Black Sea (MBS) is 19.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoI indicator values for the 19 fleet segments indicate that:

- 47% (9 segments) may be in balance with their fishing opportunities.
- 53% (10 segments) may not be in balance with their fishing opportunities.

For 7 (37%) segments, an increasing trend was assessed for RoI while a decreasing trend was observed for 10 (53%) segments. Remaining segments showed no trend.

RoFTA is available for 132 fleet segments. According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoFTA indicator values for the 132 fleet segments indicate that:

- 57% (75 segments) may be in balance with their fishing opportunities.
- 43% (57 segments) may not be in balance with their fishing opportunities.

For 41 (31%) segments, an increasing trend was assessed for RoFTA while a decreasing trend was observed for 74 (56%) segments. For the remaining 17 segments trend could not be calculated.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The number of fleet segments for which the *CR/BER* indicator is available is 132.

According to the criteria in the 2014 Commission guidelines EWG notes that the CR/BER indicator values for the 132 fleet segments for which balance/out of balance was calculated indicate that:

- 57% (75 segments) may be in balance with their fishing opportunities.
- 43% (57 segments) may not be in balance with their fishing opportunities;

An increasing trend for *CR/BER* was assessed for 42 (32%) fleet segments while a decreasing trend was observed for 61 (46%) segments. A further 13 (10%) segments had no clear trend and the remaining 16 segments no trend could be calculated.

The Vessel Use Indicator (or Vessel Utilization ratio)

The Vessel Use Indicator (VUR) was available for 194 fleet segments in MBS in 2022. According to the criteria in the 2014 Commission guidelines EWG notes that the VUR indicator values indicate that:

- 52% (100 segments) may be in balance with their fishing opportunities;
- 48% (94 segments) may not be in balance with their fishing opportunities.

An improving trend for the Vessel Use Indicator was assessed for 39 (20%) fleet segments while a deteriorating trend was observed for 14 (%) segments. No clear trend was found for 95 (48%) segments, 13 (7%) segments showed a flat trend and no trend could be calculated for the remaining 33 segments.

The Inactive Fleet Indicators

The EU inactive fleets in the MBS comprised 7176 vessels in 2022 representing almost 16% of the vessels registered in the area.

3.3.3 OFR - Other Fishing Regions and French Outermost Regions

Out of 63 active fleet segments in 2022, landings in weight and value were provided for 57 fleet segments or aggregate fleet segments.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 51 segments, of which 12 could be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 39 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 77% of the total value of the landings in 2022 provided by MS, and were as follows:

- 85% (33 segments) may be in balance with their fishing opportunities;
- 15% (6 segments) may not be in balance with their fishing opportunities.

Overall, 2 (5%) segments showed a improving trend, and 2 (5%) segments showed deteriorating trend. 1 segment showed flat trend a 56 segments did not show clear trend. No trend could be calculated for the remaining 8 segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 48 fleet segments, of which 27 segments may not have been in balance with their fishing opportunities in 2022. According to the criteria in the 2024 Commission guidelines, EWG 24-13 notes that the SAR results indicate that there were:

- 1 segments with 6 stocks-at-risk,
- 1 segments with 5 stocks-at-risk,
- 2 segments with 3 stocks-at-risk,
- 9 segments with 2 stocks-at-risk,
- 14 segments with 1 stock-at-risk.

Return on Investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA)

The number of fleet segments or aggregate fleet segments for which *RoI* (with value of fishing quota) is available for 2022 in OFR is 3.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoI indicator values for all 3 segments indicate that they may be in balance with their fishing opportunities. 2 segments showed an increasing trend while a decreasing trend was observed for 1 segment.

RoFTA is available for 31 fleet segments (or clustered fleet segment). According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoFTA indicator values for the 31 segments indicate that:

- 65% (20 segments) may be in balance with their fishing opportunities.
- 35% (11 segments) may not be in balance with their fishing opportunities.

For 16 (52%) segments, an increasing trend was assessed for RoFTA while a decreasing trend was observed for 12 (39%) segments. No trend was found for the remaining 3 segment.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The number of fleet segments for which the *CR/BER* indicator is available is 31.

According to the criteria in the 2014 Commission guidelines EWG notes that the CR/BER indicator values for the 25 segments for which balance/out of balance was calculated indicate that:

- 68% (21 segments) may be in balance with their fishing opportunities.
- 32% (10 segments) may not be in balance with their fishing opportunities;

An increasing trend for *CR/BER* was assessed for 12 (39%) segments while a decreasing trend was observed for 10 (32%) segments. A further 7 (23%) segments had no clear trend and no trend could be calculated for the remaining 2 segment.

The Vessel Use Indicator (or Vessel Utilisation ratio)

The Vessel Use Indicator (VUR) was available for 59 fleet segments in OFR in 2022. According to the criteria in the 2014 Commission guidelines EWG notes that the VUR indicator values indicate that:

- 97% (57 segments) may be in balance with their fishing opportunities;
- 3% (2 segments) may not be in balance with their fishing opportunities.

An increasing trend was observed for 14 (24%) segments and a decreasing trend was observed for 6 segments. No clear trend was found for 31 segments and no trend could be calculated for the remaining 8 segments.

The Inactive Fleet Indicators

The EU inactive fleets in the OFR comprised 2170 vessels in 2022 representing almost 11% of the vessels registered in the area.

3.3.4 Overview of indicators and trends for each region

Table 3.3.2 provides a summary of balance indicators and trends by fishing region.

Table 3.3.2. Summary table of balance indicator values for 2022 and trends over the period 2018-2022 at regional level (NAO, MBS and OFR). The number of fleet segments *in balance*, *out of balance* or *insufficiently profitable* with improved, worsened and no trends are shown. For SHI and inactivity indicators, decreasing trends indicate improvement; for economic indicators and VUR, increasing trends indicate improvement.

Supra region	Status	SHI		SAR	CR/BER		RoFTA		RoI		VUR	
	Trend	in balance	out of balance	SAR	in balance	out of balance	in balance	out of balance	in balance	out of balance	in balance	out of balance
NAO	Improving	29	12		70	6	61	6	7	0	4	9
	Deteriorati	2	5		37	22	48	47	12	13	4	0
	Flat/null	1	0		0	0	0	0	0	0	10	0
	No clear tr	54	11		22	6	1	0	0	0	95	91
	No trend c	28	1		27	27	22	32	8	17	21	57
NAO TOTAL		**114**	**29**	**130**	**156**	**61**	**132**	**85**	**27**	**30**	**134**	**157**
MBS	Improving	18	28		32	10	31	10	5	2	25	14
	Deteriorati	1	3		25	36	33	41	3	7	11	3
	Flat/null	4	0		0	0	0	0	0	0	13	0
	No clear tr	12	10		8	5	0	1	0	0	27	68
	No trend c	7	11		10	6	11	5	1	1	24	9
MBS TOTAL		**42**	**52**	**88**	**75**	**57**	**75**	**57**	**9**	**10**	**100**	**94**
OFR	Improving	2	0		10	2	12	4	2	0	13	1
	Deteriorati	1	1		6	4	6	6	1	0	6	0
	Flat/null	1	0		0	0	0	0	0	0	0	0
	No clear tr	21	5		3	4	0	1	0	0	30	1
	No trend c	8	0		2	0	2	0	0	0	8	0
OFR TOTAL		**33**	**6**	**27**	**21**	**10**	**20**	**11**	**3**	**0**	**57**	**2**
Balance result - EU flee		189	87		252	128	227	153	39	40	291	253
dicator coverage EU fle		**276**		**245**	**380**		**380**		**79**		**544**	

Source: own elaborations.

North Atlantic Ocean (NAO)

Out of 143 fleet segments in the NAO for which the SHI could be estimated and meaningfully to assessed, 29 segments were *out of balance* and 114 *in balance* with fishing opportunities in 2022. For segments for which a trend in SHI could be detected the situation was improving for 41 segments, and worsening for 7. Null or no clear trend could be observed for 95 segments.

According to each of the economic indicators, the majority of fleet segments in the NAO were *in balance* with their fishing opportunities in 2022 but overall, the situation appeared to be deteriorating.

No clear overall picture could be depicted by the technical indicators as for the majority of segments, there was no clear trend.

Mediterranean and Black Seas (MBS)

Out of 94 fleet segments in the MBS for which the SHI could be estimated and meaningfully to assessed, 52 segments were *out of balance* and 42 *in balance* with their fishing opportunities in 2022. For segments for which a trend in SHI could be detected the situation was improving for 46 segments, and worsening for 4. Null or no clear trend could be observed for the rest 44 segments.

According to each of the economic indicators, the majority of fleet segments in the MBS were *in balance* with their fishing opportunities in 2022 and overall, the situation appeared to be deteriorating.

No clear overall picture could be depicted by the technical indicators as for the majority of segments, there was no clear trend.

Other fishing regions (OFR)

Values for all indicators could be computed only for a small number of fleet segments. Out of 39 fleet segments for which the SHI could be estimated and meaningfully to assessed, 33 segments were *in balance* and 6 segments *out of balance* with fishing opportunities in 2022. For segments for which a trend in SHI could be detected the situation appeared to be improving for 2 segments, and worsening for 2. Null or no clear trend was observed for the remaining segments.

For the limited number of segments for which economic indicators could be computed, majority were found to be *in balance* with their fishing opportunities in 2022. The sparse data indicate that the economic situation appeared to be improving.

The technical indicators imply that the vast majority of fleet segments were *in balance* with their fishing opportunities in 2022.

3.4 Task 2 - Indicator Findings – National Sections

Introduction

In this section, the following information is presented for each Member State in response to Task 2 of the terms of reference. Unless specifically mentioned, indicator values are for the reference year 2022 and for the year 2023 for capacity indicators

Task 2a. *Overview of indicator findings:* An overview of indicator values by fleet segment is presented and whether according to the guidelines (COM (2014) 545 Final) and separately for each indicator, such fleet segments are indicated to be “in balance” or “out of balance” with fishing opportunities. Indicator values referred to, are those computed by the EWG 24-13 based on data submitted by Member States under the 2024 fleet economic data call and the most recent assessments and advice for relevant scientific bodies on stock status and exploitation rates. Where applicable, trends in indicator values are also summarised as increasing, decreasing or no clear trend. Since an increasing or decreasing trend indicates an improving or worsening situation depending on the indicator, the trend descriptors increasing and decreasing in the text are written in green (improving situation) or red (worsening situation) font. No clear trend is written in blue font.

A synthesis of indicator values and trends for each Member State is given at the end of each national section.

In addition to the indicators in the Commission guidelines, the Expert group 24-13 has routinely computed values for the EDI and the NOS indicator, following the approach proposed in EWG 18-14 and further proposed in STECF 20-11.

Task 2b. *Comparison of indicator values*. For each fleet segment, the biological, economic and technical indicator values as computed under task 1 were compared with the equivalent values and trends in the fleet reports submitted by the Member State under Article 22.2 and 22.3 of Regulation (EU) 1380/2013. Discrepancies between such values were highlighted and where possible the reasons for such discrepancies were identified.

Tasks 2c. *Assessment of fleet report*. This section comments on whether the report submitted by 31 May 2024 by the Member State under Article 22.2 and 22.3 of Regulation (EU) 1380/2013 is based on DCF information and is in accordance with the Commission's Guidelines COM(2014) 545.

Task 2d. *Discrepancies in previous fleet reports*. This section notes whether any discrepancies between the STECF assessment of the balance between capacity and fishing opportunities relating to the Member States's previous fleet report, have been appropriately addressed in the fleet report submitted by 31 May 2024.

Task 2e. *Structural overcapacity and profitability*. This section assesses whether the report identifies structural overcapacity and estimates the long-term profitability by fleet segment.

Task 2h. *Overview of action plans*. This section provides a summary overview of the action plans (AP) currently implemented by each Member State and includes the year each AP was launched, if it is a renewal or a new one and identifies the changes between the current AP and its previous version.

Task 2f. *Adjustment targets and tools*. This section assesses whether the new or revised action plans submitted with the fleet reports by 31 May 2024 set out the adjustment targets and tools to achieve a balance and a clear timeframe for its implementation.

Task 2g. *Number of vessels*. This section identifies the number of vessels targeted by each action plan.

3.4.1 Belgium (BEL)

Overview of indicator findings

Area 27

There were 11 fleet segments in the Belgian fleet in 2022, of which 7 were active. Of the 7 active fleet segments, landings and economic data were provided aggregated in 3 fleet segments. The Belgian fishing fleet in 2022 consisted of 65 vessels. Of these, 60 vessels (92%) were active, while 5 vessels (8%) were inactive.

Sustainable Harvest Indicator (SHI)

Out of 7 active fleet segments in 2022, SHI indicator values were available for 3 fleet segments.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator value for 1 fleet segment cannot be used meaningfully to assess the balance or imbalance because the indicator value is based on stocks that comprise less than 40% of the total value of landings by this fleet segment.

The 2 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 88.72% of the total value of the landings in 2022 provided by MS, and were as follows:

• 2 segments may *be in balance* with their fishing opportunities,
• 0 segment may *not be in balance* with its fishing opportunities.

Trends were available for the 2 fleet segments:

• 2 segments displayed no clear trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all the 3 active fleet segments in 2022. EWG 24-13 notes that the 2022 SAR indicator values indicate:

• 1 fleet segment may be *in balance* with its fishing opportunities,
• 1 fleet segment with 2 stocks-at-risk,
• 1 fleet segment with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments		3		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	1		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 3 segments:

- 1 segment was *in balance* with their fishing opportunities,
- 2 segments were *out of balance* with their fishing opportunities.

Trends were calculated for 3 segments:

- All 3 segments displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 3 segments:

- 2 segments were *in balance* with their fishing opportunities.
- 1 segment was *out of balance* with their fishing opportunities.

Trends were calculated for 3 segments:

- 1 segment displayed an increasing trend,
- 1 segment displayed a decreasing trend,
- 1 segment displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for 5 segments:

- all segments were *in balance* with their fishing opportunities.

Trends were calculated for 5 segments:

- all segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2017-2022 and according to the criteria in the Commission guidelines, the majority of the fleet segments appear to be out of balance with fishing opportunities. In terms of economic indicators, the exception is BEL NAO TBB1824 NGI * for which all values indicate that the segment is in balance, while according to the biological indicator SAR this segment is “out of balance”. In contrast, BEL NAO DTS2440 NGI is “in balance” according to the biological indicators, while the economic indicators do not give a clear signal (CR/BER = “in balance”, RoFTA = “out of balance”). The most important segment by numbers of vessels and landings (BEL NAO TBB2440 NGI) appears to be out of balance according to majority of indicators, whereas the SHI indicator suggests that this segment is in balance. The biological indicators generally show no clear trend, while the economic indicators are deteriorating for all of the segments.

These observations are not completely in line with the assessment of balance in the Member States’ fleet report submitted in 2024, where the two most important fleet segments BEL NAO TBB1824 NGI and BEL NAO TBB2440 NGI are assessed as being in balance with their fishing opportunities. No action plan was proposed by the Member State for imbalanced segments.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.1.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
bordeline
insuffiently profitable
insufficient data

improving
deteriorating
null/flat trend
no clear trend
insufficient data
no data

		Status 2022					Trends 2018-2022				
		Economic					Economic				
Fleet segment/ clustered segment	No. vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	CR/BER	RoFTA	ROI	NP margin	NVA/FTE
BEL NAO DTS2440 NGI *	15										
BEL NAO TBB1824 NGI *	17										
BEL NAO TBB2440 NGI	28										
Total active	60										
Total inactive	5										
% of inactive in total	7.7										

		Status 2022				Trends 2018-2022		
		Biological			Technical	Biological		Technical
Fleet segment	No. vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
BEL NAO DTS1824 NGI	8							
BEL NAO DTS2440 NGI	7							
BEL NAO TBB1218 NGI	1							
BEL NAO TBB1824 NGI	16	1						
BEL NAO TBB2440 NGI	28	2						

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are compared in Annex II to this report.

Sustainable Harvest Indicator (SHI)

In the MS report, the SHI values were presented for 2014 to 2023. However, the comparison between SHI values reported in the Belgian annual fleet report and those estimated in the framework of EWG 24-13 was only conducted for 2022 and revealed similar outputs for 1 out of 2 fleets where the SHI may be considered as meaningful to assess balance or imbalance (BEL NAO DTS2440 NGI *). The EWG notes that the value of the SHI in the Belgian fleet report was not identical to the one estimated in the framework of EWG 24-13, but that the resulting assessment of the status of the segment was the same. The SHI for the other fleet segment (BEL NAO TBB2440 NGI) is also similar (SHI MS: 1.02, SHI EWG24-13: 0.94). Despite the SHI being above 1, the perception of the balance of this segment is the same as the EWG24-13 perception (“in balance”)

Indicator trends were not provided in the fleet report. No comparison was possible.

Stocks at Risk Indicator (SAR)

In the MS report, SAR values were presented for 2014 to 2023. As for the SHI, the comparison between SAR values reported in the Belgian annual fleet report and those estimated in the framework of EWG 24-13 was only conducted for 2022 and revealed similar outputs for the 3 fleets (BEL NAO DTS2440 NGI*, BEL NAO TBB1824 NGI* and BEL NAO TBB2440 NGI). In BEL NAO DTS2440 NGI* no SAR was identified, while for BEL NAO TBB1824 NGI* one SAR was identified and for BEL NAO TBB2440 NGI two SAR.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed different values of indicator but similar outputs for most of the values: BEL NAO DTS2440 NGI * was “out of balance” in 2022 according to MS fleet report and ‘‘in balance’’ according to EWG estimations. BEL NAO PMP1824 NGI* segment is in balance according the Belgian fleet report, while in EWG 24-13 estimation this segment was not presented.

Indicator trends were not provided in the fleet report. No comparison was possible.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The comparison between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed different values of indicator but similar outputs for all of the values. BEL NAO PMP1824 NGI* segment is in balance according the Belgian fleet report, while in EWG 24-13 estimation this segment was not presented.

Indicator trends were not provided in the fleet report. No comparison was possible.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The comparison between VUR reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed similar outputs for all segments except for the segment BEL NAO PMP1824 NGI* where the segment is in balance according the Belgian fleet report, while the EWG 24-13 was unable to compute a value for VUR for this segment.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted by Belgium provides indicator values separately by fleet segment, based on DCF information and for all the indicators specified in the Commission guidelines COM(2014)545. All fleet segments identified in the report were assessed by the Member State to be “in balance” with their fishing opportunities.

The current Belgian management system is considered by the MS to be well functioning in order to secure a balance between fishing opportunities and capacity. The main fleet segments were assessed to be in balance and no action plan is proposed by the Member State. In cases where negative indicators (indicating “out of balance”) were calculated by the MS for some segments (e.g. SAR for BEL NAO TBB2440 NGI), explanations and justifications are given as to why these segments are considered to be "in balance".

Discrepancies in previous fleet report

The EWG 23-13 did not highlight any discrepancies between the assessment of balance in its report and the previous Belgian fleet report. Hence, there were no specific issues for the MS to address.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

No structural overcapacity was identified by the MS in the fleet report.

Long-term profitability in the fleet report is identified separately by fleet segment based on the economic indicators specified in the guidelines.

Overview of action plan

No new or revised action plan was proposed.

Adjustment of targets and tools

No new or revised action plan was proposed.

Number of vessels

No new or revised action plan was proposed.

3.4.2 Bulgaria (BGR)

Overview of indicator findings

Area 37

There were 27 fleet segments in the Bulgarian fleet in 2022, of which 23 were active. Of the 23 active fleet segments, landing data were provided for 23 segments while economic data were available to calculate the indicators for 16 aggregated fleet segments. The Bulgarian fishing fleet consisted of 1877 vessels, of which 1204 (64.15%) where active and 673 (35.85%) were inactive.

Sustainable Harvest Indicator (SHI)

Out of 23 fleet segments active in 2022, SHI indicator values were available for 21 fleet segments.

SHI indicator values for 10 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 11 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 55.56% of the total value of the reported landings in 2022. SHI values indicated that

- 7 fleet segments were *out of balance* with fishing opportunities,
- 4 fleet segments were *in balance* with fishing opportunities.

Trends could be calculated for 6 segments:

- 6 segments displayed an *increasing* trend.

Stocks-at-Risk Indicator (SAR)

The SAR indicator was available for 23 fleet segments in 2022. For 5 fleet segments, one or more stocks-at-risk were detected:

- 18 fleet segments were *in balance* with its fishing opportunities,
- 5 fleet segments were *out of balance* with its fishing opportunities,
    - 5 segments with 1 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		5	10	6

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	13	4	1	3

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 16 segments:

- 6 segments were *in balance* with their fishing opportunities,
- 10 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 12 segments:

- 4 segments displayed an increasing trend,
- 7 segments displayed a decreasing trend,
- 1 segment displayed no clear trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 16 segments:

- 13 segments were *in balance* with their fishing opportunities,
- 3 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 12 segments:

- 4 segments displayed an increasing trend,
- 8 segments displayed a decreasing trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR220 is not analysed here.

VUR was calculated for all 23 segments*:

- 16 segments were *in balance* with their fishing opportunities,
- 7 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 17 segments:

- 2 segments displayed an increasing trend,

- 1 segment displayed a decreasing trend,
- 14 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

The status of 27 fleet segments and trends for the Bulgarian fleet in the Black Sea Region is shown below. Based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, all fleet segments show an imbalance for at least one of the indicators (CR/BER, RoFTA, SAR, SHI, VUR).

Regarding the biological indicators, 5 and 7 fleet segments showed an imbalance regarding the Stock-at-Risks (SAR) and Sustainable Harvest Indicator (SHI) indicator, respectively. One segment, BGR MBS PMP1218 NGI, showed an imbalance for both indicators. Where trends could be calculated, an improving trend for SHI was noted.

Seven fleet segments showed a technical imbalance due to VUR, for all those segments, VUR showed no clear trend.

The economic indicators CR/BER and RoFTA were analysed for the 16 clustered segments. For the 9 out of 16 clustered segments in 2022 the CR/BER and RoFTA indicators show a profitable fishery with the decreasing trend for the 5 clustered segments over 2018 to 2022. The EWG 24-13 estimates show 7 clustered segments consisted of 929 vessels out of balance for both economic indicators in 2022. These segments represent 77% of the total number of active vessels in the fleet in 2022.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.2.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
		Economic					Economic							Biological			Technical	Biological		Technical
Fleet segment / clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
BGR MBS DFN0006 NGI	362											BGR MBS DFN0006 NGI	362							
BGR MBS DFN0612 NGI	505											BGR MBS DFN0612 NGI	505							
BGR MBS DFN1218 NGI *	17											**BGR MBS DFN1218 NGI**	14	1						
												BGR MBS DFN1824 NGI	3	1						
BGR MBS FPO0612 NGI *	1											BGR MBS FPO0006 NGI	1							
BGR MBS FPO0612 NGI *	31											BGR MBS FPO0612 NGI	31							
BGR MBS HOK0006 NGI	17											BGR MBS HOK0006 NGI	17							
BGR MBS HOK0612 NGI *	12											BGR MBS HOK0612 NGI	12	1						
BGR MBS PGP0006 NGI	6											BGR MBS PGP0006 NGI	6							
BGR MBS PGP0612 NGI *	7											BGR MBS PGP0612 NGI	7	1						
BGR MBS PMP0006 NGI	54											BGR MBS PMP0006 NGI	54							
BGR MBS PMP0612 NGI	110											BGR MBS PMP0612 NGI	110							
BGR MBS PMP1218 NGI *	18											**BGR MBS PMP1218 NGI**	16	1						
												BGR MBS PMP1824 NGI	2							
BGR MBS PS 0006 NGI *	10											**BGR MBS PS0006 NGI**	8							
												BGR MBS PS0612 NGI	2							
BGR MBS TBB1218 NGI *	10											BGR MBS TBB0612 NGI	2							
												BGR MBS TBB1218 NGI	6							
												BGR MBS TBB1824 NGI	2							
BGR MBS TM 0612 NGI	7											BGR MBS TM0612 NGI	7							
BGR MBS TM 1218 NGI	18											BGR MBS TM1218 NGI	18							
BGR MBS TM 1824 NGI	8											BGR MBS TM1824 NGI	8							
BGR MBS TM 2440 NGI	11											BGR MBS TM2440 NGI	11							
Total active	1204																			
Total inactive	673																			
% of inactive in total	35,85																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

A comparison of the indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are given in Annex II to this report. Points of note for each indicator are listed below.

Sustainable Harvest Indicator (SHI)

All SHI values reported in the MS fleet report could be compared with the values calculated by the EWG. Overall, there is a good agreement, with many values matching exactly. In two cases, the discrepancies tend to be larger leading to a different interpretation of the indicator. The EWG assesses the BGR MBS TM 0612 NGI fleet segment as imbalanced, while the fleet segment appears to be balanced based on the SHI value presented in the fleet report of

the Member State. For the BGR MBS TM 1218 NGI fleet segment, the coverage of the SHI indicator is below 40% according to the MS fleet report, while the EWG could assess the segment meaningfully and considers it as balanced with respect to the SHI indicator. Differences can potentially be explained by the stock assessments used. The MS considers 4 species stocks (TUR, RPW, DGS, MUT) in the calculation of SHI while the EWG uses a more extensive list of stocks.

Stocks at Risk Indicator (SAR)

All SAR indicator values provided in the fleet report matched exactly with the values computed by the EWG.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The CR/BER indicator for the 17 segments is provided in the fleet report. The EWG 24-13 notes that a direct comparison for the CR/BER trends reported in the MS fleet report and those estimated by the EWG is not feasible due to differences between the time series. The indicators estimated for EWG reported for the period 2018-2022 and Bulgarian fleet report include results calculated for 2019-2022. However, when comparing data for 2022 the CR/BER indicators values computed by EWG 24-13 are negative for 5 clustered segments: FPO VL0612, PMP VL0006, PMP VL0612, TBB VL1218 and TM VL1218. The CR/BER indicator values presented in MS fleet report show positive CR/BER for those segments. The EWG 24-13 notes that the reason for the differences may be due to different clustering of segments between the data submitted by the Member State in response to the 2024 fleet economic data call and that used for the fleet report.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The value of the RoFTA indicator for 18 segments in the fleet report were presented. The comparison of RoFTA indicators between trends in the fleet report and EWG calculations is not feasible due to differences in time frames for the trends (2018-2022 for EWG estimations and 2019 -2022 in the fleet report). When comparing data for 2022 the RoFTA indicators values computed by EWG 24-13 are similar.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The EWG 24-13 note the MS annual fleet report provide values for VUR calculated according to the guidelines. The comparison of indicator values for 2022 show similar values for most segments. The slight difference is detected for the segments: DFN VL1218 and HOK VL0612. The reason for such differences may be due to rounding of values.

The Inactive Fleet Indicators

The comparison between Inactive fleet indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted by Bulgaria provides an analysis of balance between fleet capacity and fishing opportunity of all fleet segments with respect to the economic, biological and technical indicators for the period 2019-2022. The applied methodology to calculate balance indicators and fleet segmentation are according to the guidelines and DCF framework, respectively.

To assess whether a segment is balanced or imbalanced, the MS categorizes fleet segments in 3 different levels using the following criteria:

- Level 1 = Balanced
    - Fleet segments with maximum one indicator showing an imbalance
- Level 2 = Imbalanced in the short term
    - Fleet segments with one indicator showing imbalance, and one or more indicators in “yellow”.
- Level 3 = Imbalanced with excess capacity
    - Two or more indicators showing an imbalance

The yellow category is used when VUR and RoFTA are in the range of 0.7-0.9 and 0 – TRP, respectively. With TRP being the 5-year average of the risk-free long-term interest rate.

According to these criteria, the MS considers the following eight fleet segments as imbalanced in the long term:

- HOK VL0006, DFN VL0006, DFN VL0612, HOKVL0612, PGP VL0612, DFN VL1218, PMP VL1218 and TM VL1218;

and eight segments as imbalanced in the short term, but assumed to be balanced in the long term:

- PS VL0006, PMP VL0006, PGP VL0006, FPO VL0612, PMP VL0612, TBB VL1218, TM VL1824 and TM VL2440.

Discrepancies in previous fleet reports

In contrast to the previous years, the fleet report presents an overall assessment of balance and capacity for each fleet segment based on the different indicators. The VUR indicator presented in MS fleet report was calculated according to the Guidelines. This now allows the EWG to compare the values for VUR in the MS fleet report with those computed by the EWG.

Overview of action plan

The MS considers that the action plan is prepared in accordance with Article 22 of the Regulation (EU) 1380/2013.

The Action Plan consists of 3 major sections. First, a review of the capacity reductions in terms of number of vessels in specific fleet segments with respect to measures implemented in 2022 is presented. Second, an overview of the balance between fishing capacity and fishing opportunities for the different fleet segments is presented based on the indicators given in the MS fleet report. Finally, the Action Plan includes measures and actions planned for 2024.

The proposed action plan is largely a statement of intent to improve fishery sector activities in 2024 and the measures are those previously implemented under the EMFF. The explanation provided about the planned measures is general and does not give enough information about specific MS actions to balance fleet capacity with fishing opportunities for specific fleet segments. Furthermore, the information on how the actions are to be implemented and the expected effect from such measures on overcapacity in the fleet is not described or assessed.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS makes a distinction between long- and short-term overcapacity based on the number of imbalanced indicators and the value of VUR and RoFTA. According to these criteria, the MS has identified 8 fleet segments as imbalanced in the long term in 2022.

Long-term profitability in the fleet report is expressed only through the values for the economic indicators.

Adjustment targets and tools

The EWG notes that no targets and tools are provided in the Action plan. The implementation of the proposed measures according to the Bulgarian action plan appears to be scheduled until the end of 2024.

Number of vessels

No information is provided in the fleet report or action plan to identify how many vessels are targeted by the action plan.

3.4.3 Croatia (HRV)

Overview of indicator findings

Area 37

There were 35 fleet segments in the Croatian fleet in 2022, of which 30 were active. Of the 30 active segments, landings data were provided for 29 segments while economic data were provided aggregated by 23 fleet segments. The Croatian fishing fleet in 2022 consisted of 7860 vessels. Of these, 6187 vessels (81%) were active, while 1493 (19%) were inactive.

Sustainable Harvest Indicator (SHI)

Out of 30 fleet segments active in 2022, SHI indicator values were available for 28.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 14 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 14 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 81.22% of the total value of the landings in 2022 provided by MS, and were as follows:

• 12 fleet segments were *out of balance* with their fishing opportunities;

• 2 fleet segments were in balance with their fishing opportunities.

Trends could be calculated for 11 fleet segments:

• 6 segments displayed a decreasing trend,

• 4 segments displayed a flat or no trend,

• 1 segment displayed an increasing (deteriorating) trend.

Stocks at Risk Indicator (SAR)

SAR indicator was evaluated for the 29 fleet segments that reported landings in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

• 9 fleet segments were in balance with their fishing opportunities,

• 20 fleet segments were out of balance with their fishing opportunities.

- 1 fleet segment with 3 stocks-at-risk,
- 6 fleet segments with 2 stocks-at-risk,
- 13 fleet segments with 1 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	3	15	6	1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	18	6	1	3

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

There were 30 active fleet segments in the Croatian fleet in 2022. After clustering 23 segments were available for economic analysis.

RoI and RoFTA were calculated for 23 segments:

- 9 segments were *in balance* with their fishing opportunities,

- 14 segments were *out of balance* with their fishing opportunities,

Trends could be calculated for 20 segments:

- 6 segments displayed an increasing trend,
- 14 segments displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 23 segments:

- 12 segments were *in balance* with their fishing opportunities,
- 11 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 20 segments:

- 8 segments displayed an increasing trend,
- 11 segments displayed a decreasing trend,
- 1 segment displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for all the 30 active segments:

- 12 segments were *in balance* with their fishing opportunities,
- 18 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 26 segments:

- 6 segments displayed a flat trend,
- 20 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, most fleet segments appear to be out of balance with fishing opportunities. The biological indicators suggest that, excluding FPO, all segments for which a meaningful SHI is available may also be out of balance, although for the trawl segments, the trends indicate an improving situation (decreasing trend in SHI). Additionally, some segments are in balance according to the SAR (e.g. DFN0006, DTS0006, MGO and PMP), whereas for these segments, the SHI is not considered meaningful because the indicator values are based on stocks that together comprise less than 40% of the total value of landings by those fleet segments in 2022.

Some segments are out of balance according to the economic indicators (CR/BER and RoFTA), and the trends are showing deterioration. However, according to the MS report, some of these segments (PGP) are mainly composed of small scale coastal fisheries (SSCF) vessels that have a high share of their income from other sources, which is not included in the estimation of economic indicators, so these indicators are not reliable for assessing balance. According to the economic indicators, the trawler sectors show the greatest imbalance.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.3.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
bordeline
insuffiently profitable
insufficient data

improving
deteriorating
null/flat trend
no clear trend
insufficient data

		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
		Economics					Economics							Biological			Technical	Biological		Technical
Fleet segment/ clustered segment	**Nb of vessels**	**CR/ BER**	RoFTA	**ROI**	NP margin	NVA/ FTE	**CR/ BER**	**ROI**	RoFTA	NP margin	NVA/ FTE	**Fleet segment**	**Nb of vessels**	**SAR**	**SHI**	EDI	**VUR**	**SHI**	EDI	**VUR**
HRVMBSDFN0006 NGI	346											HRVMBSDFN0006 NGI	346							
HRVMBSDFN0612 NGI	698											HRVMBSDFN0612 NGI	698	2						
HRVMBSDFN1218 NGI	13											HRVMBSDFN1218 NGI	13	2						
HRVMBSDRB0612 NGI	9											HRVMBSDRB0612 NGI	9	2						
HRVMBSDRB1218 NGI	13											HRVMBSDRB1218 NGI	13	2						
HRVMBSDTS0612 NGI *	128											HRVMBSDTS0006 NGI	1							
												HRVMBSDTS0612 NGI	127	1						
HRVMBSDTS1218 NGI	154											HRVMBSDTS1218 NGI	154	2						
HRVMBSDTS1824 NGI	30											HRVMBSDTS1824 NGI	30	1						
HRVMBSDTS2440 NGI	8											HRVMBSDTS2440 NGI	8	1						
HRVMBSFPO0006 NGI	47											HRVMBSFPO0006 NGI	47							
HRVMBSFPO0612 NGI	125											HRVMBSFPO0612 NGI	125							
HRVMBSHOK0006 NGI	88											HRVMBSHOK0006 NGI	88	1						
HRVMBSHOK0612 NGI *	252											**HRVMBSHOK0612 NGI**	245	2						
												HRVMBSHOK1218 NGI	7	3				4	4	
HRVMBSMGO0006 NGI	281											HRVMBSMGO0006 NGI	281							
HRVMBSMGO0612 NGI *	42											**HRVMBSMGO0612 NGI**	40							
												HRVMBSMGO1218 NGI	2							
HRVMBSPGP0006 NGI	2923											HRVMBSPGP0006 NGI	2923	1						
HRVMBSPGP0612 NGI *	812											**HRVMBSPGP0612 NGI**	811	1						
												HRVMBSPGP1218 NGI	1							
HRVMBSPMP0006 NGI *	30											HRVMBSPGO0006 NGI	4	1						
												HRVMBSPMP0006 NGI	26							
HRVMBSPMP0612 NGI *	27											HRVMBSPGO0612 NGI	1	1						
												HRVMBSPMP0612 NGI	26							
HRVMBSPS0612 NGI *	25											HRVMBSPS0006 NGI	1	1						
												HRVMBSPS0612 NGI	24	1						
HRVMBSPS1218 NGI	36											HRVMBSPS1218 NGI	36	1						
HRVMBSPS1824 NGI	39											HRVMBSPS1824 NGI	39	1						
HRVMBSPS2440 NGI	61											HRVMBSPS2440 NGI	61	1						
Nº active vessels	6187																			
Nº of inactive vessels	1493																			
%of inactive vessels	19%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster.

Source: own elaborations.

Comparison of indicator values

Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are compared in Annex II. Points of note for each indicator are listed below.

Area 37

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI has been provided for the period 2018-2023 and has, therefore, been made available for the reference year 2022.

The comparison between biological indicators reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 shows some discrepancies. MS indicated the dredge and trawl segments, and the small purse seiners (VL0006) as balanced, while the EWG 24-13 values indicate out of balance for those segments. The reasons for differences may be due to the different list of stocks considered to compute the SHI and the F/F_{MSY} reference values used by the MS (GFCM SAC25 report and the GFCM SRC-AS). In addition, in the MS annual fleet report, no SHI values are given (MS considered that share of stocks taken into account for calculation is not relevant therefore SHI is not meaningful), whereas the EWG 24-13 values indicate that the longline segments are out of balance.

In addition to the available and meaningful SHI values per fleet segment for the period 2018-2023, MS has also presented the trends of this indicator. The fleet report notes an increasing (deteriorating) trend in the small purse seiner segment. No trend was found for the other segments. However, the EWG 24-13 values indicate a decreasing (improving) trend in trawl segments less than 24 metres in length and in trap and hook segments between 6 and 12 metres. An increasing trend was identified only for the larger longliner segments. The difference in trends is also affected by the different time scale used to assess trends in biological indicators (Fleet report = 2018-23, EWG = 2018-22).

Stocks at Risk Indicator (SAR)

In the MS annual fleet report SAR has not been provided for the reference year 2022, but for the year 2023. For that reason, a comparison with the values found by the EWG 24-13 for this indicator is not possible.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between the SAR indicator values reported in the MS annual fleet report and those computed by the EWG 24-13 indicates the same balance status except for the segments DFN1218, FPO0612 and PS1824 for which unlike the fleet report, the EWG values indicate imbalance.

In the MS annual fleet report, the trend for CR/BER was assessed for all segments for the period 2018-2022. Compared to the EWG 24-13 estimates, there are differences in the trends of the DFN0006, FPO0612, PGP0612 and PMP0612 segments which the MS indicates improving trends whereas the EWG trends are deteriorating. On the other hand, the MS indicates a worsening trend for the PS1824 segment, while the EWG trend indicates improvement.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In MS fleet report RoFTA is indicated for all the 23 clustered segments. The comparison between RoFTA reported in the MS annual fleet report and those estimated by the EWG 24-13 revealed the same outputs for values and status for all fleet segments.

An increasing trend for RoFTA in the MS annual fleet report is observed for 14 fleet segments while a decreasing trend was registered for 9 segments. The EWG 24-13 observed trends in 20 fleet segments. Comparing the MS's assessment of trends with that of the EWG,

there is a disparity in the DFN0006, DFN0612, FPO0612, MGO006, PGP and PMP0612 segments, which the MS considers to be in an improved situation.

The Vessel Use Indicator (VUR)

The comparison between VUR reported in the MS annual fleet report and those estimated by the EWG 24-13 revealed similar outputs. It is important to note that while EWG 24-13 estimated the indicator for each of the 30 fishing segments, MS presented values for 16 fleet segments and 7 aggregated segments (clusters).

Of the 23 active clustered fleet segments, MS considered 8 to be in balance and 15 to be out of balance.

Regarding the trends (from 2018 to 2023) for the MS fleet report outputs were as follows:

- none displayed an increasing trend;
- 1 displayed a declining trend;
- 13 displayed no significant trend:
- 9 displayed flat/null trend.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted in 2024 *provides* indicator values separately by individual or aggregated segments when they are clustered, based on DCF information and for all the indicators specified in the Commission guidelines (COM (2014) 545).

The SAR indicator was not provided for 2022, but for 2023 and the SHI indicator was provided only for clustered segments.

Fleet segments that are assessed by the Member State to be out of balance with their fishing opportunities are clearly identified in the fleet report.

The national assessment of overall balance status per fleet segment provided in MS annual fleet report was made taking into consideration firstly the available biological indicators (SHI and SAR) estimated for 2023.and previous years. Assessments. For fleet segments for which SHI or SAR was not available or relevant, technical, economic and social indicators were used for the assessment, together with additional information on fleet behaviour.

The fleet report mentions an action plan established for the segments of the fleet that the Member State assessed as out of balance. This action plan also relates to specific groups of vessels that are out of balance (i.e. ‘red coral fishing vessels’, ‘land seiners’, ‘small seiners’), even though the segment to which they belong is in balance.

***Discrepancies in previous fleet reports*.**

EWG 23-13 pointed out discrepancies between the Member States’ assessments and the EWG’ assessment regarding the SAR indicator. The discrepancies seemed to be related to the difference in the stocks taken into account in computing SAR values. No values have been provided for this indicator for 2022.

***Structural overcapacity and profitability*.**

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

MS considers that there are some imbalances in its fleet, primarily when compared to the status of the stocks.

MS has assessed the over 12m Purse seine segment and all demersal trawl segments to be out of balance with their fishing opportunities. In addition, irrespective of the fleet segment, specific groups of vessels are considered as out of balance (i.e. ‘red coral vessels’, ‘shore seiners’, ‘small-purse seiners’).

Regarding the DTS segments, MS states that biological indicators (SHI and SAR) showed an improving situation. However, there are still some signs of overcapacity but with inconclusive economic results, fluctuating over time.

Concerning the PS segments, estimates of the long-term profitability by fleet segment are provided in the Fleet Report, and indicates that, although being out of balance with their fishing opportunities in 2022, the PS 1218 and PS 2440 seem to be profitable in the long-term based on the trends in the economic indicators.

Croatia is aware that in terms of economic and technical indicators an imbalance exists in some segments (PGP) that have low dependency on overfished stocks. However, because these segments are considered highly local and operating in very restricted areas with limited impact on resources, MS will continue to closely monitor these fleet segments and their impact on stocks.

MS points out that a small number of vessels that are included in the MGO and HOK segments and are authorised to fish red coral (‘red coral fleet’) should be singled out and considered to be out of balance, due to the conservation status of red coral. Such vessels are subject to specific regulations but due to the segmentation used, they cannot be analysed separately to other vessels making up the MGO and HOK segments. As a result, the MS assesses that the MGO and HOK segments as a whole, to be in balance.

Overview of action plans

MS is continuing to implement the actions prescribed in 2023. The progress of its implementation was presented in the Fleet report submitted in 2024.

Regarding the PS segments, the action plan aims to balance the fleet capacity with the availability of resources. It includes a permanent cessation scheme to address overcapacity, temporary cessation to further decrease the catches (closure seasons) and area restrictions to protect the juveniles (keeping fleets outside the areas identified as nurseries or important for protection of early age classes of sardine and anchovy).

For the DTS segments, the action plan intends to reduce capacity through permanent cessation. It also considers temporary cessation of fishing activities during key periods for recruitment of target species and spatio-temporal measures.

Regarding the DRB segments, capacity control measures for limiting the active capacity (through authorisation process) is planned as a first step. However, the results of balance analysis in the Fleet report submitted in 2024 show there is no immediate need to address DRB.

A buy-off scheme for withdrawal of authorisations for fishing with shore seines (SB), small purse seines (PS) and hatchet for red coral is planned in parallel while effort and spatio-temporal restrictions in all unbalanced fleet segments shall continue under the multiannual management frameworks.

Adjustment targets and tools.

No new or revised action plans have been submitted by the Member State in 2024.

The EWG notes that the information presented in the Italian fleet report is insufficient to quantitatively assess whether the proposed measures in the action plan will result in a reduction in fishing mortality of relevant targeted species or the extent to which any potential imbalance between capacity and fishing opportunities for the fleet segments will be affected.

Number of vessels

In the action plan submitted by the MS, it is possible to assess the number of vessels target by the permanent session and buy-off of gears. As the fleet segmentation presented for the Buy-off measure is not the same as the DCF, it is not possible to know what percentage of the fleet segments is expected to be targeted. Expected outcomes are presented in the tables below. The number of vessels targeted with the temporary session or with the supplementary measures is not stated.

Permanent cession

Implementation of permanent cessation of fishing activities in 2024.

Fleet Segment	Target as number of vessels to be removed from the fleet		Number of applicants	Expected achievement
	number of vessels	% of the fleet segment		
DRB VL0612	5	71%	Not initiated	
DRB VL1218	6	50%		
DTS VL0612	15	13%	7	47%
DTS VL1218	32	23%	13	41%
DTS VL1824	12	41%	8	67%
DTS VL2440	4	57%	4	100%
PS VL0612	5	28%	1	20%
PS VL1218	7	20%	4	57%
PS VL1824	15	41%	13	87%
PS VL2440	15	25%	8	53%
TOTAL	**116**	25%	**58**	**50%**

Buy-off of gears

Expected outcome of the implementation of the buy-off scheme

Fleet Segment		**Number of vessels**	**Number of applicants**	**Expected achievement**
PS igličara	PS ciplarica	35	20	57%
	PS igličara	4	2	50%
	PS oližnica	12	12	100%
	PS palamidara	30	6	20%
Shore seines (SB)	SB girarica	11	7	64%
	SB migavica	52	48	92%
	SB oližnica	5	4	80%
	SB šabakun	16	15	94%
Hatchet for red coral (‘red coral vessels’)		10	9	90%
TOTAL		**175**	**123**	**70%**

3.4.4 Cyprus (CYP)

Overview of indicator findings

Area 37

There were 11 fleet segments in the Cypriot fleet in 2022, of which 7 were active. Of the 7 active segments, landing data were provided for 7 segments and economic data were provided for 6 segments. MS presented all indicators for 2022. Indicator values referred to, are those computed by the EWG 24-13 based on data submitted by Member States under the 2024 fleet economic data call and the most recent assessments and advice for relevant scientific bodies on stock status and exploitation rates. The Cyprus fishing fleet in 2022 consisted of 847 vessels. Of these, 785 vessels (92.7%) were active, while 62 vessels (7.3%) were inactive.

Sustainable Harvest Indicator (SHI)

Out of 7 fleet segments active in 2022, landings in value have been provided aggregated in 7 fleet segments and SHI indicator values were available for 7.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 5 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 2 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 42.93% of the total value of the landings in 2022 provided by MS, and were as follows:

•1 fleet segment was *out of balance* with fishing opportunities;

• 1 fleet segment was *in balance* with fishing opportunities.

The time series of SHI values for the fleet segments indicated above displayed a null/flat trend for one fleet segment and no trend for another fleet segment.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 7 active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 17-08 notes that the 2022 SAR indicator values indicate:

• 3 fleet segments were *in balance* with their fishing opportunities;

• 4 fleet segments with 1 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		3	1	2

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	5	2		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 6 segments:

- 2 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends were calculated for the 6 segments:

- 2 segments displayed an improving trend,
- 4 segments displayed a deteriorating trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 6 segments:

- 2 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends were calculated for the 6 segments:

- 1 segment displayed an improving trend,
- 3 segments displayed a deteriorating trend,
- 2 segments displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were not provided by the MS. VUR_{220} is analysed here.

VUR_{220} was calculated for 7 segments:

- 7 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 7 segments:

- 1 segments displayed an improving trend,
- 6 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and according to the criteria in the Commission guidelines, half of the fleet segments appear to be out of balance with fishing opportunities for biological indicators, while for economic indicators about 70% of fleet segments appear to be out of balance. Based on EWG calculations the PG VL0006, PGO VL0006, PGO VL0612 and PGP VL1218 fleet segments for CR/BER and RoFTA values are indicated to be out of balance. The SAR indicator shows that DTS VL2440, PG VL0612, PGP VL1218 and PS VL1824 fleet segments may not be in balance with their fishing opportunities. The available trends in CR/BER half of the fleet segments shows a deteriorating situation, although 2 segments have no trend and 1 segment shows an improving trend. The trends in RoFTA show as improving for 2 segments and deteriorating for 4 different fleet segments.

The SHI indicators shows that PGP VL1218 may not be in balance with its fishing opportunities.

The above observations are not always in line with the 2022 balance indicator values provided in the Member State's Fleet Report for 2023. The estimates in the fleet report are based on three most recent years 2020-2022 for biological indicators, two years 2021-2022 for economic indicators and five years 2018-2022 for Vessel Utilisation indicators. The economic indicators for fleet segments PGO VL0006 and PGO VL0612 with limited fishing activities were not calculated by the Member State.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.4.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
insuffiently profitable
bordeline
insufficient data

improving
deteriorating
no clear trend
null/flat trend
insufficient data
no data

		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
		Economic					Economic							Biological			Technical	Biological		Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
CYP MBS DTS 2440 NGI	4											CYP MBS DTS 2440 NGI	4	1						
CYP MBS PG 0006 NGI	27											CYP MBS PG 0006 NGI	27							
CYP MBS PG 0612 NGI	290											CYP MBS PG 0612 NGI	290	1						
CYP MBS PGO0006 NGI	341											CYP MBS PGO0006 NGI	341							
CYP MBS PGO0612 NGI	87											CYP MBS PGO0612 NGI	87							
CYP MBS PGP1218 NGI	35											CYP MBS PGP1218 NGI	35	1						
CYP MBS PS 1824 NGI	1											CYP MBS PS 1824 NGI	1	1						
Total active	785																			
Total inactive	62																			
% of inactive in total	7.3																			

*Note1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster. In such cases, indicator status for the cluster is shown against the main fleet segment in the cluster.*

Note2: Vessel Utilization indicators (VUR) were not computed by the EWG although they were provided in the National Fleet Report (see explanation below in section "Comparison of indicator values; The vessel utilization indicator").

Note3: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 24-13 and those in the fleet report submitted in May 2024 are given in Annex II. Points of note for each indicator are listed below.

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI has been provided for the reference year 2022.

The comparison between biological indicators reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed one discrepancy. For one fleet segment (DTS VL2440), the MS annual report provided the SHI values (out of balance), while the EWG 24-13 estimates are not considered meaningful because of the <40% landing value threshold. The EWG is unable to identify the reasons for such discrepancies.

Indicator trends were provided only for the period 2020-2022 in the fleet report.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report a table with five species which are defined as SAR (*Prionace glauca*, *Sciaena umbra*, *Umbrina cirrosa*, *Dentex dentex*, and *Epinephelus marginatus*) are reported for the year 2022. This table also reports the fleet segments landing those species with the relative amount of landings. Three fleet segments are reported out of balance from both the MS annual report and the EWG 24-13 (DTS VL2440, PG VL0612, and PGP VL1218). For PS VL1824 the EWG 24-13 calculated 1 stock at risk, while the MS annual

report did not report any stock at risk. The reason was that they do not consider the bluefin tuna a stock at risk based on the ICCAT stock assessment in the East Atlantic and Mediterranean Sea.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the EWG 24-13 report values for CR/BER are available for six fleet segments whereas in the Cyprus fleet report, there are only four. The MS considers that the indicator is not relevant for the PGO VL0006 and PGO VL0612 segments because fishing effort for those segments was limited.

Comparison between CR/BER indicator values reported in the MS annual fleet report and those estimated by the EWG 24-13 could be made for 4 segments only.

Both the PGO VL0006 and PGO VL VL0612 segments appear out of balance according to the EWG 24-13 estimates but as there were no separate estimates provided by the MS, no comparison was possible for these segments.

Of the four segments that could be compared, there are differences in the indicator value for PG VL0006 segment where segment in balance in the Cyprus fleet report.

No trends analysis could be undertaken as in the fleet report data are available for 2 years only.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the EWG 24-13 report values for RoFTA are available for six fleet segments whereas in the Cyprus fleet report there are only four.

The comparison between RoFTA reported in the MS annual fleet report and those estimated by the EWG 24-13 could be made for 4 segments only. The MS considers that the indicator is not relevant for the PGO VL0006 and PGO VL0612 segments because fishing effort for those segments was limited.

Both the PGO VL0006 and PGO VL0612 segments appear out of balance in the calculation by EWG 24-13 but as there were no separate estimates provided by the MS, no comparison was possible for these segments.

Of the four that could be compared, there were differences in the indicator value for PG VL0006 segment where segment is assessed as in balance in the fleet report but out of balance according to the EWG value for RoFTA.

No trends analysis could be undertaken as in the fleet report data are available for 2 years only.

Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR_{220})

In the MS annual fleet report the VUR Indicator was calculated as the ratio between days at sea and maximum days at sea for each length group in kW for active and in GT for passive gear.

The maximum number of days at sea was not submitted by MS in response to the 2024 fleet economic data call. Hence a comparison of VUR indicator values could not be undertaken as the EWG was unable to compute values for VUR.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for the majority of the indicators specified in the Commission guidelines (COM (2014) 545).

Fleet segments that are assessed by the Member State to be “out of balance” with their fishing opportunities are clearly identified in the fleet report.

An action plan for fleet segments assessed by the Member State to be “out of balance” has been included in the fleet report since 2020. The fleet report provides a revised action plan relating to one segment (DTS VL2440) only. No action plan is proposed for other fleet segments which according to the indicator values for 2022 computed by EWG 24-13 are out of balance. The MS reports that all indicators of the PGP VL1218 fleet segment indicate out of balance. However, the MS states in its fleet report that real economic performance is not negative as shown by the economic indicators and concludes that this segment is in balance.

Discrepancies in previous fleet reports

The assessment of balance in the Member States’ fleet report submitted in 2024 is similar to previous fleet report submitted in 2023. In both reports, the trends calculation is based on two years which cannot be compared with trends reported by the EWG. In the report submitted in 2024, there are still no indicator calculations for the PGO VL0006 and PGO VL0612 segments.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS has indicated when it considers that structural overcapacity exists in the fleet. In the fleet report submitted by 31 May 2024 the DTS VL2440 segment, which is included in the action plan, economic indicators show that this segment is in balance in 2022. The PGP VL1218 segment economic indicators show that this segment is out of balance in 2021 and 2022, but has not been included in the action plan. In the fleet report, no estimates of the long-term profitability (RoI) were given.

***Overview of action plans*.**

An action plan has been proposed for the fleet segment DTS VL2440 since the fleet report of the year 2020. The proposed measure is the permanent cessation of fishing activities for two trawlers from a segment total of 4 trawlers operating in the territorial waters of Cyprus should the vessel owners volunteer to decommission their vessels. A time frame of 2 years (until 2023) was given for reaching the target for permanent cessation. If the vessel owners do not voluntarily decommission their vessels, the plan proposes to introduce a mesh size change by replacing the current 50mm diamond mesh codend by a 40 mm square mesh codend in the north-west part of Cyprus. An additional measure that is currently under consideration is a closed area for trawling in the north-west part of Cyprus. Both measures were planned to be applied during 2024.

However, it is noted that the time frame target for permanent cessation has been shifted to 2024, due to delays in the preparation of the methodology to be used for compensating the owners for the permanent cessation. The related time frames for replacing the diamond

meshed trawl net at the codend, and for closing an area for trawling, have been moved to 2025.

However, with the data and information provided in the fleet report submitted by Cyprus and the action plan, the EWG 24-13 is unable to determine whether the measures proposed will have any influence on the balance between capacity and fishing opportunities.

Adjustment targets and tools

The revised action plan was submitted with the fleet report by 31 May 2024. If 2 vessels do not volunteer to be decommissioned, the additional measure consist in increasing the codend mesh size and a closed area to trawling which will come into force in 2025.

Number of vessels

Two vessels are targeted by the action plan.

3.4.5 Denmark (DNK)

Overview of indicator findings

Area 27

There were 43 fleet segments in the Danish fleet in 2022, of which 35 were active. Of the 35 active segments, landings data were provided for 25 fleet segments and economic data were available for 25 aggregated fleet segments.

Sustainable Harvest Indicator (SHI)

Out of 25 active fleet segments in 2022, SHI indicator values were available for 25.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 18 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 7 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 56.5% of the total value of the landings in 2022 provided by MS, and were as follows:

- 3 fleet segments were out of balance with their fishing opportunities;
- 4 fleet segments were in balance with their fishing opportunities.

Trends were calculated for 2 fleet segments:

- 1 fleet segment displayed a decreasing (improving) trend,
- 1 fleet segment displayed no clear trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 25 fleet segments in 2022.

- 7 fleet segments were in balance with their fishing opportunities,
- 18 fleet segments were out of balance with their fishing opportunities:
    - 1 segment with 6 stocks-at-risk,

- 1 segment with 5 stocks-at-risk,
- 1 segment with 4 stocks-at-risk,
- 1 segment with 2 stocks-at-risk,
- 14 segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	19	4		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	21	2	2	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was calculated for 25 segments:

- 7 segments were in balance with their fishing opportunities,
- 18 segments were out of balance with their fishing opportunities.

Trends were calculated for 6 segments:

- 6 segments displayed a decreasing trend.

RoFTA was calculated for 25 segments:

- 8 segments were in balance with their fishing opportunities,
- 17 segments were out of balance with their fishing opportunities.

Trends were calculated for 6 segments:

- 6 segments displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 25 segments:

- 12 segments were in balance with their fishing opportunities,
- 13 segments were out of balance with their fishing opportunities.

Trends were calculated for 6 segments:

- 3 segments displayed an increasing trend,

- 1 segments displayed a decreasing trend,
- 2 segment displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) could not be provided by EWG 24-13 even if MS provided data, because of different fleet segmentation.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

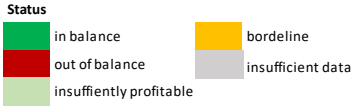
Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, an overview of the indicators implies that the majority of fleet segments appear to be out of balance for available economic indicators and trends over the period 2018-2022 shows a worsening situation.

The SHI indicator in 2022 appears in balance for most segments and the trend over the period 2018-2022 is improving for one fleet segment.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.5.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).



		Economic indicators											Biological and technical indicators						
		Status 2022					Trends 2018-2022						Status 2022				Trends 2018-2022		
Fleet segment / clustered segment	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment	N vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
DNK NAO DFN0008 NGI *	137											DNK NAO DFN0008 NGI	136							
												DNK NAO DTS0008 NGI	1							
DNK NAO DFN0010 NGI	405											DNK NAO DFN0010 NGI	405	1						
DNK NAO DFN0812 NGI	60											DNK NAO DFN0812 NGI	60	1						
DNK NAO DFN1012 NGI	23											DNK NAO DFN1012 NGI	23	1						
DNK NAO DFN1218 NGI	22											DNK NAO DFN1218 NGI	22	1						
DNK NAO DFN1824 NGI	7											DNK NAO DFN1824 NGI	7	1						
DNK NAO DRB0010 NGI *	11											**DNK NAO DRB0010 NGI**	**9**							
												DNK NAO DRB1012 NGI	2							
DNK NAO DRB1218 NGI *	31											**DNK NAO DRB1218 NGI**	**30**							
												DNK NAO DRB40XX NGI	1							
DNK NAO DTS0010 NGI	36											DNK NAO DTS0010 NGI	36	2						
DNK NAO DTS0812 NGI	9											DNK NAO DTS0812 NGI	9							
DNK NAO DTS1012 NGI	24											DNK NAO DTS1012 NGI	24	1						
DNK NAO DTS1218 NGI	122											DNK NAO DTS1218 NGI	122	5						
DNK NAO DTS1824 NGI	37											DNK NAO DTS1824 NGI	37	6						
DNK NAO DTS2440 NGI	31											DNK NAO DTS2440 NGI	31	4						
DNK NAO DTS40XX NGI *	6											**DNK NAO DTS40XX NGI**	**5**	1						
												DNK NAO TBB40XX NGI	1							
DNK NAO FPO0008 NGI *	121											DNK NAO FPO0008 NGI	121	1						
DNK NAO FPO0010 NGI	56											DNK NAO FPO0010 NGI	56							
DNK NAO FPO0812 NGI	20											DNK NAO FPO0812 NGI	20	1						
DNK NAO FPO1218 NGI	3											DNK NAO FPO1218 NGI	3							
DNK NAO PGP0008 NGI *	2											DNK NAO PGP0008 NGI	2							
DNK NAO PGP0010 NGI *	8											DNK NAO PGP0010 NGI	2	1						
												DNK NAO HOK0010 NGI	**5**							
												DNK NAO HOK1012 NGI	1							
DNK NAO TBB1218 NGI *	11											**DNK NAO TBB1218 NGI**	**10**	1						
												DNK NAO TBB1012 NGI	1							
DNK NAO TBB1824 NGI *	15											**DNK NAO TBB1824 NGI**	**14**							
												DNK NAO TBB2440 NGI	1							
DNK NAO TM 1218 NGI	5											DNK NAO TM1218 NGI	5	1						
DNK NAO TM 2440 NGI *	4											**DNK NAO TM2440 NGI**	**3**	1						
												DNK NAO TM1824 NGI	1							
DNK NAO TM 40XX NGI	20											DNK NAO TM40XX NGI	20	1						
Total Active	1226																			
Total Inactive	763																			
%of inactive in total	38%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stock at risk.

Source: own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are given in Annex II. The observations of the EWG are not exactly in line with the balance assessment in the Member States' fleet report submitted in 2024. Points of note for each indicator are given below.

Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are compared in Annex II.

Comparison was not possible for all segments because the segmentation used in the MS report differs from the segmentation available in the EWG data.

Sustainable Harvest Indicator (SHI)

In the Denmark annual fleet report, SHI values have been calculated for 11 fleet segments and trends were available for 6 of them. The comparison between SHI indicator reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 was possible for only 6 fleet segments, and the values were different for all of them. These discrepancies affected the perception of balance for one segment: DTS2440, estimated to be in balance in the Member State report but out of balance for the EWG. For PGP0010, the MS report did not provide the status of the fishing opportunities because the criterium of 40% of catch value being an assessed species is not met, whereas the EWG did provide these values (and found it to be out of balance). Indicator trends were comparable for 2 segment fleets (DTS2440 and TM40XX) and the results were identical.

Stocks at Risk Indicator (SAR)

In the Denmark annual fleet report, SAR values have been calculated for 24 fleet segments. The comparison between SAR indicator reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 was possible for 17 fleet segments, the value of the indicator was different for almost all segments and affected the perception of balance for 5 fleet segments.

These differences are explained by the stock perimeter and the total reference quantity used for the calculation. For example, the sandeel landings data provided in the MS report are specific to the sandeel management areas and follow the EU sandeel management approach (and not all sandeels caught in the North Sea). Moreover, for other stocks the MS report states that the SAR criteria of a minimum of 10% landings from a stock is calculated in the MS report using fleet landings and the total international landings reported to ICES. EWG 24-13 use the sum of international fleet landings reported to STECF by member states, which may be lower than the (total international) ICES landings. This means that EWG has more fleets fulfilling the 10 % criterion and potentially more SAR species for a fleet segment.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed different outputs for several fleet segments, resulting in a different outcome (balance or imbalance) for six fleet segments. For DFN1824, DTS1012, DTS1218, DTS1824. DTS2440 andTM40XX, the EWG values indicate the segments to be *in balance,* where the fleet report finds them to be *out of balance*.

Although the data to calculate trends is provided, the MS fleet report does not provide trends over the period 2018-2022, so these could not be compared to the findings of the EWG.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The comparison between ROI reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed similar outputs for all but two values: For DTS1824, the MS annual fleet report finds fishing opportunities to be *in balance*, whereas the EWG finds fishing opportunities to be *out of balance*. The same stands for the TM2440 where EWG value indicate the segment to be *out of balance* but the fleet report finds it to be *in balance.*

Although the data to calculate trends for ROI is provided, the MS annual fleet report does not provide trends for the period 2018-2022, so these could not be compared to the findings of the EWG.

The MS annual fleet report does not provide values for the RoFTA indicator. In previous years, the MS fleet report did provide this value.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The values of VUR could not be estimated by EWG 24-13 although they were provided in the Fleet report because of different fleet segmentation (economical clusters).

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for the indicators specified in the Commission guidelines (COM (2014) 545).

The conclusions regarding the analysis of balance between fleet capacity and fishing opportunity for fleet segments are based mainly on the status and trends of the different balance indicators.

The current Danish management system is considered by the MS to be well functioning in order to secure a balance between fishing opportunities and capacity. However, no action plan was proposed for the imbalance fleet segments. According to the economic sustainability indicators, most of the fleet segments did not perform well in either of the two economic indicators. Actually, 13 fleet segments out of 25 assessed by EWG 24-13 were out of balance for both RoFTA and CR/BER another 4 fleet segments were out of balance only for the RoFTA indicator. Also, the assessment shows biological unsustainability since there are 18 fleet segments out of balance with many stocks at risk.

The Expert group notes that the current fleet report is based on DCF data and is largely in line with the Commission's Guidelines, although some indicator values and trends are missing.

Discrepancies in previous fleet reports

Some comments of EWG 23-13 have been considered in the current fleet report. Specifically, the inactive vessels were reported for 2023 in the MS report and the data for 2022 and before are now presented in an annexe.

However, some issues identified in EWG 23-13 remain unresolved. The both VUR and VUR_{220} values are given in the fleet report, but the values are not processed by the EWG 24-13 because the maximum days at sea values were not provided to the call for economic data

and the number of days at sea does not appear to be provided at segment level in the call for economic data.

Compared with previous reports, in this report the fleet was segmented with more detail on gear, and vessels classified before PGP or PMP are now assigned to more specialised segments: DFN, FPO, HOK.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS annual fleet report identifies overcapacity in 2022, based on the estimated indicators. The fleet report explains this is due to the fact that a large portion of vessels < 12 m are non-commercial vessels, and it states that it would be more informative to estimate VUR/VUR_{220} values for commercial vessels only.

The MS annual fleet report addresses the profitability of each fleet segment based on ROI and CR/BER values. For fleet segments < 24 m with unfavourable ROI and CR/BER values, the MS fleet report explains this by the fact that the realistic income of fishers working in the small-scale fishery is often lower than the standard salary, and that capital costs are often zero.

Overview of action plans

The fleet report does not include an s action plan with a clear timeframe targeted to specific imbalanced fleet segments. The fleet report discusses some measures to improve the balance of the small-scale fleet, through investments and improved facilities in ports and landing places supporting small-scale fisheries. Such measures were also present in the fleet report submitted in 2022 and 2023 but have not been specified further.

The fleet report describes two scrapping schemes, one for the Baltic Sea fleet and one for vessels affected by Brexit that have already been implemented by the end of 2023.

Adjustment targets and tools

The proposed measures (for small-scale fisheries), do not provide clear adjustment targets and tools, and do not provide a clear timeframe.

Number of vessels

There are no specific action plans. The other plans do not provide numbers of vessels targeted, and the report does not explicitly address the specific (out of balance) fleet segments targeted in the plans.

3.4.6 Estonia (EST)

Overview of indicator findings

Area 27

There were 9 fleet segments in the Estonian fleet in 2022, of which 6 were active. Of the 6 active segments, landings data were provided for 4 segments and economic data were provided aggregated in 3 fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet 6 segments active in 2022, landings in value have been provided aggregated in 4 fleet segments and SHI indicator values were available for 4.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 1 fleet segment cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 81.77% of the total value of the landings in 2022 provided by MS, and were as follows:

- 2 fleet segments may be *out of balance* with their fishing opportunities;
- 1 segment may be *in balance* with their fishing opportunities.

Trends could be calculated for 2 fleet segments:

- 2 fleet segments displayed an *improving* trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 4 active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

- 1 fleet segment may be *in balance* with their fishing opportunities;
- 3 fleet segments may be *out of balance* with their fishing opportunities;
    - 3 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		2	2	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1	1		2

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI and RoFTA were calculated for 3 segments:

- 2 segments were *in balance* with their fishing opportunities;
- 1 segment was *out of balance* with its fishing opportunities.

Trends were calculated for 1 segment:

- 1 segment displayed a *deteriorating* trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 3 segments:

- 2 segments were *in balance* with their fishing opportunities;
- 1 segment was *out of balance* with its fishing opportunities.

Trends were calculated for 1 segment:

- 1 segment displayed a *deteriorating* trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were not provided by the MS and thus, VUR_{220} is analysed here.

VUR_{220} was calculated for 3 segments:

- All 3 segments were *out of balance* with their fishing opportunities,

Trends were calculated for 1 segment:

- 1 segment displayed *no clear* trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, the majority of fleet segments appear to be out of balance in at least one indicator (biological, economic or technical).

The technical indicator VUR_{220} is unfavorable for all segments, but the MS report underlines that the technical indicator (calculated on a theoretical level of activity) is not relevant to

assess imbalances and calculates a different indicator based on ratio in kW/days and GT/days.

The most important segment by numbers of vessels (PG VL0008 NGI with 1 048 vessels) appears to be out of balance according to the economic indicators, except for NVA/FTE. The SAR indicator suggests that this segment is out of balance, with 1 stock-at-risk. No SHI data was provided for this segment.

For the PG VL0812 NGI, the second segment with the highest number of vessels, the economic indicators, except for NP margin (insufficiently profitable), appeared to be in balance. SHI appeared to be in balance, but SAR indicates 1 stock-at-risk. No trends analysis could be undertaken for the PG VL0812 NGI as new segmentation has only occurred since 2022.

The TM VL2440 NGI segment appeared to be in balance for economic variables, (except for NP Margin which is insufficiently profitable), although the trend shows a deterioration in all economic indicators in the period 2018-2022.

No data was available for DTS VL2440 IWE and DTS VL40XX IWE segments.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.6.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

	in balance
	out of balance
	bordeline
	insuffientlyprofitable
	insufficient data

	improving
	deteriorating
	null/flat trend
	no clear trend
	insufficient data

		Status 2022					Trends 2018-2022				
		Economic					Economic				
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE
ESTNAO DTS2440 IWE	1										
ESTNAO DTS40XX IWE	5										
ESTNAO PG0008 NGI	1048										
ESTNAO PG0812 NGI	171										
ESTNAO TM2440 NGI *	24										
Total active	1249										
Total inactive	766										
%of inactive in total	38.0										

		Status 2022				Trends 2018-2022		
		Biological			Technical	Biological		Technical
Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
ESTNAO DTS2440 IWE	1							
ESTNAO DTS40XX IWE	5							
ESTNAO PG0008 NGI	1048	1						
ESTNAO PG0812 NGI	171	1						
ESTNAO TM1824 NGI *	5							
ESTNAO TM 2440 NGI *	**19**	1						

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: The data submitted by the MS under the DCF guidelines did not provide information on the maximum observed days at sea per fleet segment, so the EWG-24 cannot estimate de VUR indicator.

Source: own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 24-13 and those in the fleet report are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

Estonia presented SHI values for 2018-2022 period, but with a different segmentation for vessels under 12 meters for 2022, so the comparison with SHI values calculated by EWG 24-

13 was not possible, except for TM VL1824 NGI and TM VL2440 NGI. The comparison between SHI values reported in the Estonia annual fleet report and those estimated by the EWG revealed similar output (out of balance). No trends were presented by the MS.

Stocks at Risk Indicator (SAR)

For the segments where it was possible to calculate and compare SAR values, it was noted that there are no differences between the EWG 24-13 and MS report. It should be noted that the member state used the values from last EWG report (23-13).

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed a similar status (in balance) for TM 2440 NGI segment, although the values for the indicator were slightly different. The discrepancies are due to the way the indicator is calculated. In the MS fleet report, opportunity costs of capital are excluded from the calculation of the CR/BER whereas the EWG includes the opportunity Costs of capital. Whether to include opportunity costs of capital in the calculation is optional in the guidelines.

In the MS annual fleet report, trends were presented in a chart format and were available for three segments: PG0010, PG1012, and TM1840. The EWG presented a different segmentation for vessel under 12 meters (VL008 and VL0812), so the comparison was not possible for these vessels.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA information was not provided in the MS report.

For the only segment where the comparison is possible (TM VL2440 NGI), RoI calculated by MS at the annual report and the EWG calculations are similar.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

A different approach has been observed for the calculation of VUR between the MS annual fleet report and the ones estimated in the framework of the EWG 24-13.

In the MS annual fleet report the VUR Indicator was presented for 2019-2023 period but based on ratio in kW/days and GT/days. The MS provided context and justification for calculating the VUR based on GT and KW, which relates to decreased Baltic Sea fishing quotas, high dependency on weather conditions and ice coverage etc.).

EWG 24-13 was only able to calculate VUR_{220}, since the data submitted by the MS under the DCF guidelines did not provide information on the maximum observed days at sea per fleet segment. For this reason, EWG 24-13 used the theoretical maximum number of 220 days for the calculation.

A comparison between VUR values for 2022 is not appropriate because the basis for the indicator calculations was different.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for all the indicators specified in the Commission guidelines (COM (2014) 545). The fleet segments under 12 meters are assessed by the Member State but with a different segmentation (PG VL0010 and PG VL1012) to that used by the EWG 24-13 (PG VL0008 and PG VL0812).

Fleet segments that are assessed by the MS to be “out of balance” with their fishing opportunities are clearly identified in the fleet report. No action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report.

The SAR indicator for 2022 was not calculated by the MS, the MS presented the values extracted from the STECF JRC web page for the EWG 23-13 report. In addition, the biological indicators (SHI and SAR) and economic indicators are not provided for the high seas fleet segment (DTS VL2440 and DTS VL40XX) due to lack of data or issues of confidentiality.

The values of SHI and the economic indicators were calculated by the MS are based on data for the period of 2018-2022. For technical indicators MS provided data for the period 2019-2023.

The EWG notes that effort variables should be provided by fleet segment instead of cluster segment so the EWG could calculate technical indicators at the segment level.

Discrepancies in previous fleet reports

As in previous reports, the data provided for SAR are extracted from the STECF JRC webpage as computed by the EWG 23-13 and are therefore not equivalent and hence not directly comparable with the calculations of EWG 24-13.

The segmentation for vessels under 12 meters presented in the MS report does not correspond to the EWG's segmentation, so it was not possible to compare the indicators.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS states in the fleet report that “based on the calculations and analysis of the balance indicators presented in the report that all fleet segments are structurally balanced”. They also state that even though “*the structural balance has been achieved there is some room left for adapting with the changes in stocks* “. Estonia states that their evaluation of balance indicators gives an overall positive assessment of the fleet.

Estonian fisheries management (based on individual transferrable quotas and individual transferrable efforts) is considered by the MS as an effective tool for keeping capacity in structural balance with fishing opportunities, due to economic self-regulation“ in the Baltic Sea trawling fishery.

Overview of action plan

No new or revised action plans were proposed.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State.

Number of vessels

No new or revised action plans have been submitted by the Member State.

3.4.7 Finland (FIN)

Overview of indicator findings

Area 27

There were 14 fleet segments in the Finnish fleet in 2022, of which 8 were active. Of the 8 active segments, landings, economic data and effort variables were provided aggregated in 5 fleet segments.

The EWP notes that effort variables and landings should be provided by fleet segment instead of cluster segment so the EWG could calculate biological and technical indicators at the proper level of disaggregation.

Sustainable harvest indicator (SHI)

Out of the 5 aggregated fleet segments active in 2022, SHI indicator values were available for 3.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 2 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 65.99% of the total value of the landings in 2022 provided by MS, and were as follows:

- 0 fleet segments were *out of balance* with their fishing opportunities.
- 3 fleet segments were *in balance* with their fishing opportunities.

Trends were calculated for the 3 segments:

- 3 fleet segments displayed a decreasing (improving) trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for all 5 aggregated fleet segments in 2022.

- 1 fleet segments were *in balance* with their fishing opportunities
- 4 segments were *out of balance*, with their fishing opportunities
  - 2 fleet segments with 2 stocks-at-risk
  - 2 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments		5		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	5			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was calculated for 5 aggregated segments:

- 1 segment was *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 3 segments:

- 3 segments displayed a decreasing trend

RoFTA was calculated for 5 aggregated segments:

- 1 segment was *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends were calculated for 3 segments:

- 1 segment displayed an increasing trend.
- 2 segments displayed a decreasing trend

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 5 aggregated segments:

- 1 segment was *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends were calculated for the 3 segments:

- 2 segments displayed a decreasing trend.
- 1 segment displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for 5 aggregated segments:

- 3 segments were *in balance* with their fishing opportunities,

- 2 segments were *out of balance* with their fishing opportunities.

Trends could not be calculated.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on the biological STECF indicator estimates, three Finnish segments (NAO TM1218, NAO TM1824 and NAO TM244O) may be in balance with their fishing opportunities, as the SHI-values are less than 1 (with an improving trend). For the , other two segments the SHI values are not meaningful.

When considering the economic indicators for 2022, the situation may be interpreted differently. The economic indicators CR/BER, RoI, and RoFTA are all assessed as being out of balance for four segments (PG0812, TM1218, TM 1824 and TM2440), while the segment PG0008 is in balance for CR/BER and ROI. Two fleet segments show a decreasing trend for all economic indicators while there is no clear trend for the other segments. This contrast to 2020 when four segments were in balance.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.7.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

Status	Trend
in balance	improving
out of balance	deteriorating
bordeline	null/flat trend
insuffiently profitable	no clear trend
insufficient data	insufficient data

		Status 2022					Trends 2018-2022						Status 2022				Trends 2018-2022		
		Economic					Economic						Biological			Tehcnical	Biological		Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	RoI	NP margin	NVA/ FTE	CR/ BER	RoFTA	RoI	NP margin	NVA /FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
FIN NAO PG 0008 NGI	906											FIN NAO PG 0008 NGI	906	2						
FIN NAO PG 0812 NGI *	215											FIN NAO PG 1218 NGI	3	2						
												FIN NAO PG 0812 NGI	**212**							
FIN NAO TM 1218 NGI *	20											**FIN NAO TM 1218 NG**	**13**	1						
												FIN NAO TM 0812 NGI	7							
FIN NAO TM 1824 NGI	6											FIN NAO TM 1824 NGI	6	1						
FIN NAO TM 2440 NGI *	15											**FIN NAO TM 2440 NGI**	**13**							
												FIN NAO TM 40XX NGI	2							
Total active	1.162																			
Total inactive	2.119																			
%of inactive in total	65%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).

Source: own elaborations.

Comparison of indicator values

The balance between the fleet and resources was examined by referring to the indicators defined in the Commission's guidelines COM(2014)545. The conclusion by the MS was that the Finnish fishing fleet and the fishing opportunities are in balance. However, the MS only provided SHI values for three pelagic stocks, rather than fleet segments, and they failed to provide any SAR, economic or technical indicator values. As a result, comparisons with the values computed by the EWG cannot be made.

Sustainable harvest indicator (SHI)

In the 2023 Finnish annual fleet report SHI values have been calculated for a number of pelagic fish stocks, rather than fleet segments. The fleet report notes that for three stocks, from biologically assessed fish stocks (where F and F_{MSY} are available), two stocks are said to be in a good state, while the third is in a poor state. According to EWG 24-13 estimations of SHI, two fleet segments cannot be assessed, and three fleet segments are assessed as being in balance. As the information provided in the fleet report has calculated SHI on a stock basis rather than a fleet segment basis, we are not able to make any comparisons.

The MS, in its fleet report, reiterates the comment made in the 2022 fleet report, that the biological indicator (SHI), calculated by EWG 23-13, "was not sufficiently accurate to reflect the situation or current status of the fleet segments concerned".

No trend was presented for this indicator in the fleet report.

Stocks at Risk Indicator (SAR)

In the Finnish annual fleet report no SAR has been provided for the reference year 2022 or any previous years.

According to the EWG 24-13 estimations of SAR, FS PG0008 and PG0812 segment indicate two stocks at risk (Salmon - sal.27.32, sal.27.22-31) and for TM1218 and TM 1824 segment indicate one stock at risk (her.27.25-2932).

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the Finnish annual fleet report no CR/BER-values have been provided for the reference year 2022 or any previous years.

Consequently, no trend was presented for this indicator.

According to the EWG 24-13 estimations of CR/BER, PG0812, TM1218, TM1824 and TM2440 appear to be out of balance.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the Finnish annual fleet report no ROI or RoFTA values have been provided for the reference year 2022 or any other previous years.

Consequently, no trends were presented for these indicators.

According to the EWG 24-13 estimations of RoFTA and RoI, PG0812, TM1218, TM1824 and TM2440 appear to be out of balance.

The MS in its fleet report points out that "the STECF indicators provide a poor description of the financial situation of vessels in the Finnish fishing fleet, in particular those with a length of less than 12 metres. For economic indicators, the net result in coastal fisheries is affected by the use by STECF of imputed depreciation (capital accumulation method) rather than depreciation in the financial statements."

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the Finnish annual fleet report no VUR or VUR_{220}-values have been provided for the reference year 2022 or any previous years.

Consequently, no trends were presented for these indicators.

According to the EWG 24-13 estimations of VUR, PG0008 and PG0812 appear to be out of balance.

The MS in its fleet report points out that “there is a variety of vessels, intended for different seasons and specific work phases. Hence, they are also used only when needed, usually for a very short time during the whole period”.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Inactive vessels have not been reported in the Finnish fleet report.

Assessment of fleet report

The fleet report submitted by Finland provides an analysis of balance between fleet capacity and fishing opportunity. Its conclusions are based mainly on ongoing capacity reductions and compliance with quota regulations, and not on the status and trends of the different balance indicators.

The fleet report submitted by Finland provides some explanations about the segments that the EWG has previously considered to be out of balance. However, the information presented in the Finnish fleet report for 2022 is insufficient to judge the suitability of the Member State’s assessment of balance.

The Expert group concludes that while the Member State’s assessment of the balance between fleet capacity and fishing opportunities may be valid, the content of the Finnish fleet report is not in line with the Commission’s Guidelines. SHI values were only presented for three pelagic stocks rather than fleet segments. None of the economic or technical indicators requested were presented in the fleet report and no comparison with the indicator values computed by the EWG 24-13 could be made.

Discrepancies in previous fleet reports

EWG 24-13 notes that comments made in previous reports have not been addressed by the MS. The MS has, once again, provided SHI indicator values for three pelagic stocks, rather than for fleet segments. It has also failed to provide indicator values for SAR, or any of the economic or technical indicators.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS has not identified any structural overcapacity in the fleet. The Member State states that the fishing fleet has decreased continuously since 2014. They note that the profitability of

the fleet is moderate, however crises experienced between 2020 and 2022 have had a negative impact on this profitability.

The MS states that the national TFC, transferrable fishing concessions, system creates the conditions for improving the profitability of the fishing fleet and reduces unnecessary fishing capacity.

Overview of action plan

No new or revised action plans were proposed.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State.

Number of vessels

No new or revised action plans have been submitted by the Member State

3.4.8 France (FRA)

Overview of indicator findings

There were 95 uncluttered fleet segments in the French national fleet, excluding OMR fleet segments, in 2022, of which 84 were active fleet segments. Indicator results are presented below by Supra-region. The French fishing fleet consisted of 4261 vessels, of which 3791 (89%) where active and 470 (11%) were inactive.

Area 27

In the French North Atlantic fleet, there were 62 fleet segments in 2022, of which 56 were active. Of the 56 active segments, landings data were provided for 56 segments and economic data for 32 aggregated fleet segments. The French fishing fleet operating in the NAO consisted of 2891 vessels, of which 2647 (92%) where active and 244 (8%) were inactive.

Sustainable harvest indicator (SHI)

Out of 56 fleet segments active in 2022, SHI indicator values were available for 53.

SHI indicator values for 28 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 25 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 65.29% of the total value of the landings in 2022 provided by MS, and were as follows:

- 20 segments were *in balance* with their fishing opportunities;
- 5 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 23 fleet segments:

- 4 segments displayed a decreasing (improving) trend,

- 19 segments displayed no clear trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 56 active fleet segments in 2022 of which

- 36 fleet segments were *in balance* with their fishing opportunities;
- 32 fleet segments were *out of balance* with their fishing opportunities.
    - 1 segment with 6 stocks-at-risk,
    - 2 segments with 5 stocks-at-risk,
    - 1 segment with 4 stocks-at-risk,
    - 3 segments with 3 stock-at-risk,
    - 5 segments with 2 stocks-at-risk,
    - 12 segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	9	42	1	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	47	4	1	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 32 segments:

- 24 segments were *in balance* with their fishing opportunities,
- 8 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 32 segments:

- 16 segments displayed an increasing trend,
- 16 segments displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 32 segments:

- 28 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 32 segments:

- 11 segments displayed an increasing trend,
- 10 segments displayed a decreasing trend,
- 11 segments displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

Technical indicator values for VUR and VUR90 were not computed by the EWG (see section Comparison of indicator values below: The vessel utilisation index)

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends (Area 27 NAO)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below for Area 27.

Table 3.4.8.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
insuffiently profitable
bordeline
insufficient data

improving
deteriorating
no clear trend
null/flat trend
insufficient data
no data

		Status 2022					Trends 2018-2022						Status 2022				Trends 2018-2022		
		Economic					Economic						Biological			Technical	Biological		Technical
Fleet segment / clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
FRA NAO DFN0010 NGI	285											FRA NAO DFN0010 NGI	285	3						
FRA NAO DFN1012 NGI	132											FRA NAO DFN1012 NGI	132	5						
FRA NAO DFN1218 NGI *	59											**FRA NAO DFN1218 NGI**	56	2						
												FRA NAO PGO1218 NGI	1	1						
												FRA NAO PGP1218 NGI	2							
FRA NAO DFN1824 NGI	30											FRA NAO DFN1824 NGI	30	1						
FRA NAO DFN2440 NGI *	30											**FRA NAO DFN2440 NGI**	26							
												FRA NAO PGP2440 NGI	2	2						
												FRA NAO PMP1824 NGI	1							
												FRA NAO PMP2440 NGI	1	1						
FRA NAO DRB0010 NGI	72											FRA NAO DRB0010 NGI	72							
FRA NAO DRB1012 NGI	96											FRA NAO DRB1012 NGI	96	1						
FRA NAO DRB1218 NGI *	108											**FRA NAO DRB1218 NGI**	99							
												FRA NAO DRB1824 NGI	8							
												FRA NAO DRB2440 NGI	1							
FRA NAO DTS0010 NGI *	70											FRA NAO DTS0010 NGI	70							
FRA NAO DTS1012 NGI *	129											**FRA NAO DTS1012 NGI**	125	2						
												FRA NAO PS0010 NGI	1							
												FRA NAO PS1012 NGI	3							
FRA NAO DTS1218 NGI	134											FRA NAO DTS1218 NGI	134	2						
FRA NAO DTS1824 NGI *	116											**FRA NAO DTS1824 NGI**	102	6						
												FRA NAO MGP1824 NGI	14							
FRA NAO DTS2440 NGI *	62											**FRA NAO DTS2440 NGI**	56	4						
												FRA NAO MGP2440 NGI	6							
FRA NAO DTS40XX NGI	8											FRA NAO DTS40XX NGI	8	5						
FRA NAO FPO0010 NGI	300											FRA NAO FPO0010 NGI	300	1						
FRA NAO FPO1012 NGI	76											FRA NAO FPO1012 NGI	76	1						
FRA NAO FPO1824 NGI *	16											FRA NAO FPO1218 NGI	7							
												FRA NAO FPO1824 NGI	8							
												FRA NAO FPO2440 NGI	1							
FRA NAO HOK0010 NGI	209											FRA NAO HOK0010 NGI	209							
FRA NAO HOK1012 NGI	49											FRA NAO HOK1012 NGI	49							
FRA NAO HOK2440 NGI *	18											FRA NAO HOK1824 NGI	2							
												FRA NAO HOK2440 NGI	16	3						
FRA NAO MGO0010 NGI *	196											**FRA NAO MGO0010 NGI**	189	1						
												FRA NAO MGO1012 NGI	7	1						
FRA NAO MGP0010 NGI	12											FRA NAO MGP0010 NGI	12							
FRA NAO MGP1012 NGI *	69											**FRA NAO MGP1012 NGI**	61	2						
												FRA NAO TBB1012 NGI	1							
												FRA NAO TM1012 NGI	7							
FRA NAO MGP1218 NGI *	42											**FRA NAO MGP1218 NGI**	40	1						
												FRA NAO TBB1218 NGI	1							
												FRA NAO TBB1824 NGI	1							
FRA NAO PGO0010 NGI *	97											**FRA NAO PGO0010 NGI**	91	1						
												FRA NAO PGO1012 NGI	6							
FRA NAO PGP0010 NGI	69											FRA NAO PGP0010 NGI	69	1						
FRA NAO PGP1012 NGI	15											FRA NAO PGP1012 NGI	15							
FRA NAO PMP0010 NGI	40											FRA NAO PMP0010 NGI	40							
FRA NAO PMP1012 NGI *	58											**FRA NAO PMP1012 NGI**	53							
												FRA NAO PMP1218 NGI	5							
FRA NAO PS 1218 NGI *	28											**FRA NAO PS1218 NGI**	26							
												FRA NAO PS1824 NGI	2							
FRA NAO TM 1824 NGI *	19											FRA NAO TM1218 NGI	7	3						
												FRA NAO TM1824 NGI	10	1						
												FRA NAO TM2440 NGI	2							
FRA NAO TM 40XX NGI	3											FRA NAO TM40XX NGI	3							
Total active	2647																			
Total inactive	244																			
% of inactive in total	8,43																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Vessel Utilization indicators (VUR and VUR90) were not computed by the EWG although they were provided in the National Fleet Report (see explanation below in section "Comparison of indicator values; The vessel utilization indicator").

Source: own elaborations.

Area 37

There were 31 fleet segments in the French Mediterranean fleet in 2022, of which 26 were active. Of the 26 active segments, landings data were available for 26 segments and economic data aggregated by 15 fleet segments. The French fishing fleet operating in the MBS consisted of 1349 vessels, of which 1123 (83%) where active and 226 (17%) were inactive.

Sustainable harvest indicator (SHI)

Out of 26 fleet segments active in 2022, SHI indicator values were available for 23.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for all 17 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 6 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 47.56% of the total value of the landings in 2022 provided by MS, and were as follows:

- 6 segments were *in balance* with their fishing opportunities;
- 0 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 2 fleet segments:

- 3 segment displayed no clear trend,
- 2 segment displayed a null/flat trend,
- 1 segment displayed deteriorating trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 26 fleet segments in 2022 of which

- 14 fleet segments were *in balance* with their fishing opportunities;
- 12 fleet segments were *out of balance* with their fishing opportunities.
    - 2 segments with 2 stocks-at-risk,
    - 10 segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	8	3	2	3

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	23			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 15 segments:

- 14 segments were *in balance* with their fishing opportunities,
- 1 segment were *out of balance* with their fishing opportunities.

Trends were calculated for the 15 segments:

- 2 segments displayed an increasing trend,
- 8 segments displayed a decreasing trend,
- 5 segments displayed no clear trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 15 segments:

- 14 segments were *in balance* with their fishing opportunities,
- 1 segment were *out of balance* with their fishing opportunities.

Trends for the 15 segments were as follows:

- 4 segments displayed an increasing trend,
- 11 segments displayed a decreasing trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

Technical indicator values for VUR and VUR90 were not computed by the EWG (see section Comparison of indicator values below: The vessel utilisation index)

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends (Area 37, MBS)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below for Area 37.

Table 3.4.8.2. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
insuffientlyprofitable
bordeline
insufficient data

improving
deteriorating
no trend
null/flat trend
insufficient data
no data

		Status 2022					Trends 2018-2022				
		Economic					Economic				
Fleet segment / clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE
FRA MBS DFN0006 NGI	132										
FRA MBS DFN0612 NGI	454										
FRA MBS DTS1824 NGI *	48										
FRA MBS DTS2440 NGI *	30										
FRA MBS FPO0006 NGI	76										
FRA MBS FPO0612 NGI	70										
FRA MBS HOK0006 NGI	14										
FRA MBS HOK0612 NGI	95										
FRA MBS PGO0006 NGI	20										
FRA MBS PGO0612 NGI	38										
FRA MBS PGP0006 NGI	19										
FRA MBS PGP0612 NGI	75										
FRA MBS PMP0612 NGI *	10										
FRA MBS PS 0612 NGI *	19										
FRA MBS PS 2440 NGI *	23										
Total active	1123										
Total inactive	226										
% of inactive in total	16,75										

		Status 2022				Trends 2018-2022		
		Biological			Technical	Biological		Technical
Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
FRA MBS DFN0006 NGI	132	2						
FRA MBS DFN0612 NGI	454	1						
FRA MBS DFN1218 NGI	4							
FRA MBS DTS1218 NGI	3							
FRA MBS DTS1824 NGI	26							
FRA MBS FPO1218 NGI	1							
FRA MBS HOK1218 NGI	12	1						
FRA MBS PGP1218 NGI	1	1						
FRA MBS PS1218 NGI	1							
FRA MBS DTS2440 NGI	29	1						
FRA MBS TM2440 NGI	1	1						
FRA MBS FPO0006 NGI	76	1						
FRA MBS FPO0612 NGI	70	1						
FRA MBS HOK0006 NGI	14							
FRA MBS HOK0612 NGI	95	2						
FRA MBS PGO0006 NGI	20							
FRA MBS PGO0612 NGI	38							
FRA MBS PGP0006 NGI	19							
FRA MBS PGP0612 NGI	75	1						
FRA MBS PMP0612 NGI	10							
FRA MBS DRB0612 NGI	8							
FRA MBS MGO0612 NGI	7							
FRA MBS PS0612 NGI	4							
FRA MBS PS1824 NGI	1							
FRA MBS PS2440 NGI	14	1						
FRA MBS PS40XX NGI	8	1						

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.
Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.
Note 3: Vessel Utilization indicators (VUR and VUR90) were not computed by the EWG although they were provided in the National Fleet Report (see explanation below in section "Comparison of indicator values; The vessel utilization indicator").
Source: own elaborations.

OFR

There were 2 segments operating in international waters exclusively (IWE) in 2022, of which 2 were active. Of the 2 active segments, landing data were available for 1 segment and economic data for 1 fleet segment. The French fishing fleet operating in the OFR, excluding the OMR fishing fleet, consisted of 21 vessels, of which 21 (100%) where active and 0 (0%) were inactive.

Sustainable harvest indicator (SHI)

Out of 2 fleet segments active in 2022, SHI indicator values were available for 1.

The fleet segment for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 100% of the total value of the landings in 2022 provided by MS, and were as follows:

- 1 segment was *in balance* with fishing opportunities.

Trends could be calculated for 1 fleet segment:

- 1 segment displayed a flat/null trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 1 fleet segments in 2022. The 2021 SAR indicator values indicate:

- 1 fleet segment was out of balance with their fishing opportunities;
- 1 segment with 2 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1			

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments		1		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 1 segment:

- 1 segment were *out of balance* with their fishing opportunities.

Trends could be calculated for 16 segments:

- 1 segment displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 1 segment:

- 1 segment were *out of balance* with their fishing opportunities.

Trends could be calculated for 1 segment:

- 1 segment displayed a decreasing trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

Technical indicator values for VUR and VUR90 were not computed by the EWG (see section Comparison of indicator values below: The vessel utilisation index)

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends (Other fishing regions; OFR)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below for the Other Regions.

Table 3.4.8.3. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
insuffiently profitable
bordeline
insufficient data

improving
deteriorating
no clear trend
null/flat trend
insufficient data
no data

		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
		Economic					Economic							Biological			Technical	Biological		Technical
Fleet segment / clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
FRA OFR PS 40XX IWE *	21											FRA OFR HOK2440 IWE	1	2						
												FRA OFR PS40XX IWE	20							
Total active	21																			
Total inactive	0																			
% of inactive in total	0																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.
Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.
Note 3: Vessel Utilization indicators (VUR and VUR90) were not computed by the EWG although they were provided in the National Fleet Report (see explanation below in section "Comparison of indicator values; The vessel utilization indicator").
Note 4: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).
Source: own elaborations.

Status and trends for the French fleet in ALL REGIONS

Fleet Report 2024 provides DCF segmentation and estimations according to the guidelines. However, additional alternative segmentation and indicators EDI, NOS and VUR90 are used by France to assess more detailed analysis for some fleet segments.

Based on the indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, 33 out of 56, 12 out of 36 and 2 out of 2 active fleet segments show imbalance in the NAO, MBS and OFR (IWE), respectively.

The majority of the fleet segments shows an imbalance due to the SAR indicator which indicates imbalance for approximately 50% of the fleet segments. The SHI could be calculated and meaningfully assessed for approximately 50% of the fleet segments in the NAO, and indicated an imbalance for 5 fleet segments. The ratio of fleet segments for which the SHI indicator could be assessed meaningfully in the MBS supra region is remarkably lower, and only available for 6 out of 28 active fleet segments. For each of these cases, the SHI value was below one. In most cases, the SHI shows no clear trend, or a flat trend. In the NAO, an improving trend in the SHI indicator was found for 4 fleet segments. In the MBS, one fleet segment showed a deteriorating trend.

Vessel Utilization indicators (VUR and VUR90) were not computed by the EWG although they were provided in the National Fleet Report (see explanation below in section “Comparison of indicator values; The vessel utilization indicator”).

According to the EWG 24-13 estimated values, the economic indicators CR/BER and RoFTA show that most of the French fleet clustered segments appear to be in balance with their fishing opportunities in Area 27 and Area 37, with often decreasing (worsening situation) trends.

For the Area 27 economic indicators CR/BER and RoFTA were analysed for the 32 clustered segments. For the 28 out of 32 clustered segments in 2022 the CR/BER and RoFTA indicators show profitable fishery with the decreasing trend for the 15 clustered segments from 2018 to 2022. The EWG 24-13 estimates show 4 clustered segments consisted of 100 vessels out of balance for both economic indicators in 2022. These segments represent 3,8% from the total number of active vessels in the fleet in 2022.

For the Area 37 economic indicators CR/BER and RoFTA were analysed for the 15 clustered segments. For the 14 out of 15 clustered segments in 2022 the CR/BER and RoFTA indicators show profitable fishery with the decreasing trend for the 8 clustered segments from 2018 to 2022. The EWG 24-13 estimates show one clustered segment consisted of 30 vessels out of balance for both economic indicators in 2022. This segment represents 2,7% from the total number of active vessels in the fleet in 2022.

For the Other fishing regions (OFR) there was only one clustered segment consisted of 21 vessels operated in International Waters Exclusively (IWE) in 2022 and it show insufficient profitability for both economic indicators CR/BER and RoFTA.

Comparison of indicator values

SHI indicator comparisons

A comparison between the indicator values submitted by the MS in Annex 1 of the fleet report and the SHI values computed by the EWG show good correspondence. Minor differences are present and are likely related to the use of different stock assessments used by the EWG.

In the NAO supra region, a vast majority of the values of the SHI indicator submitted by the MS are lower than the values computed by the EWG. This is likely related to the fact that the

MS uses the upper range of F_{MSY} in case it is defined, while the calculation of the EWG is restricted to F_{MSY}. In 4 cases, of which 2 cases (FRA NAO TM1012 NGI; FRA NAO HOK0010 NGI) have a coverage >40%, this leads to a different interpretation of the SHI indicator although both values are close to 1.0.

In general, the discrepancies appear to be larger in the MBS, and differ in one case with respect to the threshold of 1. However, as the coverage of the SHI for this fleet segment is below 40%, it does not affect the assessment of balance and capacity.

SAR indicator comparisons

There are major differences between the SAR indicator computed by EWG 24-13 and the SAR values reported by the MS. In general the EWG, reports many more fleet segments where the SAR indicates a potential imbalance. This is a consequence of the selection of SAR stocks used by the MS, which is restricted to 10 stocks. In Annex 6 of the fleet report submitted by France, it is stated that the SAR indicator is only partly calculated due to the lack of availability of an approved European list.

Economic indicator comparisons

The comparison between estimated values for EWG and information provided in ANNEX 1 of the French fleet report was carried out for economic indicators RoFTA and CR/BER. EWG notes that the CR/BER and RoFTA values reported in ANNEX 1 of the MS annual fleet report and those estimated in the framework of EWG 24-13 are the same.

The vessel utilization indicator

The VUR90 indicator provided by the MS cannot be calculated by the EWG 24-13 as the 90th percentile cannot be calculated from the data that the MS submitted through the data call. In addition, the EWG was unable to provide meaningful estimates of VUR because of unresolved data issues with the French data submission. The issues seem related to the fleet segment values for MAXSEADAYS. In many cases, fleet segment values for VUR are greater than 1.0, which is nonsensical. Consequently, the EWG was unable to provide meaningful estimates for the technical indicator to compare to the values given in the French fleet report.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The indicator values calculated by France are based on data for the years 2020 – 2022. The SHI, SAR, CR/BER, RoFTa have been computed in line with the Commission guidelines COM(2014)545, and an overview of the methods and input data sources is provided in Annex 1 to the fleet report.

All fleet segments in the North Atlantic, Mediterranean Sea and Outermost regions follow the segmentation of the DCF. Nevertheless, sub-segments were applied for fleets with an actual imbalance among the DCF segments for the Atlantic and for some of the Mediterranean segments (in particular for eel fishing segments in Atlantic and 'gangui' segments in the Mediterranean). The Fleet Report provides the detailed description of the additional segmentation method in a separate section. The MS argues that this segmentation aligns better with the characteristics of the different fleets.

According to the MS fleet report in 2022, the French fleet comprised 157 segments, of which 132 were active. In Mailand France and other regions (excluding the outermost regions) there were 96 fleet segments of which 11 were inactive in 2022. Of the 85 active fleet segments, 43 were considered balanced by the MS, 24 required partial or full monitoring and 21 were partially or fully imbalanced (8 were fully imbalanced). In the outermost regions, 47 segments were active, of which 44 were assessed, 27 of which have been classed as balanced and 17 as imbalanced.

-

A segment is assessed as imbalanced (in red in the Table 7, 8 and 9 of the fleet report) if:

- one of its indicators has been imbalanced during the last 3 years
- it is not considered to require monitoring

Imbalance cannot be identified:

- if there is only a technical imbalance according to the VUR in fleets comprising vessels of less than 12 m, this being an indicator which France considers unsuitable irrespective of the calculation method used,
- if there is only an economic imbalance, but this economic imbalance disappears if subsidies are taken into account,
- if the SHI cannot be calculated but the other biological indicators are balanced and offer a series of reassuring signals.

The EWG does not consider that the requirement for additional monitoring necessarily indicates that a segment is in balance with its fishing opportunities although such an assumption would imply that such segments would not require an action plan.

In Table 7, 8 and 9 of the fleet report, an overview of the assessment of balance and capacity by fleet segment is provided. Considering these tables, the EWG notes that the MS uses the criteria listed below for a more fine-tuned assessment. The MS states that such a more fine-tuned assessment overcomes the limitations of some of the indicators and segmentation that do not always accurately reflect the reality of the fleet segments.

- All fleet segments with an SHI >1 are assessed as imbalanced
- Although various Stocks-at-Risk are reported in the tables, it appears that the MS only considers the SAR for ELE (European eel) and MUT (Red mullet).
- EDI is considered for some fleet segments (FRA MBS PGO0006 NGI, FRA MBS MGO0612 NGI) as a criterium to assess imbalance, while not for others (FRA MBS DFN1218 NGI)
- In the case where only the technical indicator (VUR90) indicates an imbalance for fleet segments above 12m, the segment is subjected to monitoring
- When the economic indicators (CR/BER and RoFTA) are imbalanced, fleet segments require monitoring.

Although provided in the fleet report, the EWG notes that the economic and technical indicators were never considered by the MS in its assessment of balance between fishing capacity and fishing opportunities by fleet segment.

The EWG 24-13 notes that the MS' 2024 fleet report has successfully addressed previous concerns regarding fleet segmentation in the NAO. While the fleet segmentation provided in the fleet report is based on what the Member State considers a more appropriate segmentation than the DCF segmentation, the segmentation used can be explicitly mapped to the DCF segmentation in accordance with the Commission guidelines.

Discrepancies in previous fleet reports

In response to previous findings regarding discrepancies in the segmentation of the French fishing fleet, the MS has aligned the segmentation with the DCF segmentation for the fleet segments operating in the NAO. This allows to compare the assessment on balance and capacity of the EWG and the MS. However, the MS relies on a spatially disaggregated fleet segmentation for some segments operating in the NAO for the assessment of balance and capacity. A comparison of indicator values for such segments could not be undertaken by the EWG.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The EWG 24-13 notes MS fleet report identifies structural overcapacity based only on biological indicators.

The EWG notes that the long-term fleet profitability is not considered by the MS when identifying imbalanced fleet segments.

Overview of action plan

The activities from the previous year's Action plans are summarised and presented in the Annex 4 of the fleet report. The new Action plan provided in the Annex 5 of the Fleet report 2024 is an update and continuation from the 2016, 2018, 2019, 2020, 2021 and 2022 action plans. It includes a single segment in the OFR, 14 DCF fleet segments operating in the Mediterranean, 2 DCF and one segment grouped based on additional segmentation for the Atlantic areas (provided as 11 rows in the action plan) that were assessed by the MS to be out of balance, of which four segments are new in Action plan 2024.

The plan contains a wide range of general as well as more-specific measures for such fleet segments.

For the one new fleet segment operating in other regions a capacity freeze is planned by banning new vessels entering the segment without first removing at least the equivalent capacity. The three additional segments operating in Mediterranean were added to the previously proposed actions aimed at reducing capacity by a ban of a new vessels entering the fleet segment and effort reduction measures.

Adjustment targets and tools

The proposed measures in the action plan describe clear targets as well as actions to be taken to restore the imbalance of fleet segments operating in the North Atlantic and Mediterranean Sea without clear timeframe.

Fleet Segments from previous Action Plans	Additional fleet segments included in the Action plan in 2024 Report	Number of vessels in the segment concerned in 2022
FRA MBS DTS1824 NGI FRA MBS DTS2440 NGI	FRA MBS DTS1218 NGI	58
	FRA MBS DFN0006 NGI FRA MBS DFN0612 NGI	68
	FRA OFR PS_40XX IWE	20

The plans to restore a sustainable balance between fishing capacity and fishing opportunities in the imbalanced segments will primarily comprise the following measures:

- capacity ceilings for imbalanced segments;

- improving data collection to determine whether imbalances are due to a lack of exhaustive economic and/or biological information regarding the segments;

- where necessary steering the renewal and redeployment of the fleet towards balanced segments, with support for temporary cessation of activity where appropriate;

- optimising the regulatory, technical and administrative measures in force so as to balance fishing capacity with fishing opportunities;

- implementation of assisted management measures intended to reduce fishing effort in imbalanced segments;

- increasing selectivity of fishing gear, where appropriate by funding research, to rebalance the stock(s) concerned more quickly.

Number of vessels

The action plan submitted by the MS concerns a total of 771 vessels.

Description of fleet segment	Number of vessels in 2022
FRA MBS DTS1218 NGI FRA MBS DTS1824 NGI FRA MBS DTS2440 NGI	58
FRA MBS DFN0006 NGI FRA MBS DFN0612 NGI	68
FRA MBS FPO0006 NGI FRA MBS FPO0612 NGI	92
FRA MBS HOK0006 NGI FRA MBS HOK0612 NGI	8
FRA MBS PGO0006 NGI FRA MBS PGO0612 NGI	23

FRA MBS PGP0006 NGI	13
FRA MBS DRB0612 NGI	1
FRA MBS MGO0612 NGI	7
FRA OFR PS_40XX IWE	20
FRA NAO PS_1012 NGI FRA NAO PS_1218 NGI	29
Ad hoc segment AT ELE anguille VL0024 [includes part of the following segments in particular: FRA NAO DFN0010 NGI FRA NAO FPO0010 NGI FRA NAO HOK0010 NGI FRA NAO MGO0010 NGI FRA NAO MGO1012 NGI]	452

3.4.9 Germany (DEU)

Overview of indicator findings

Area 27

There were 32 fleet segments in 2022, of which 24 were active. Of the 24 active segments, landing data were provided for 15 fleet segments and economic data for 15 fleet segments. The German fishing fleet in 2022 consisted of 1174 vessels. Of these, 858 vessels (73.1%) were active, while 316 vessels (26.9%) were inactive.

Sustainable harvest indicator (SHI)

Out of 24 fleet segments active in 2022, landings in value have been provided aggregated in 15 fleet segments and SHI indicator values were available for 14.
According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 4 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.
The EWG notes that for the 10 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 74.04% of the total value of the landings in 2022 provided by MS, and were as follows:

- 3 fleet segments were out of balance with their fishing opportunities;
- 7 fleet segments were in balance with their fishing opportunities.

The time series of SHI values for the fleet segments indicated above displayed:

- 5 fleet segments displayed a decreasing (improving) trend,
- 2 fleet segments displayed no clear trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 15 active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

- 11 fleet segments were in balance with their fishing opportunities;
- 1 fleet segment with 8 stocks-at-risk.
- 3 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	9	3	1	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	12		1	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 15 segments:

- 2 segments were *in balance* with their fishing opportunities,
- 13 segments were *out of balance* with their fishing opportunities.

Trends were calculated for 9 segments:

- 2 segments displayed an improving trend,
- 7 segments displayed a deteriorating trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 15 segments:

- 4 segments were *in balance* with their fishing opportunities,
- 11 segments were *out of balance* with their fishing opportunities.

Trends were calculated for 9 segments:

- 2 segments displayed an improving trend,
- 5 segments displayed a deteriorating trend,
- 2 segments displayed a no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for the 24 segments*:

- 11 segments were *in balance* with their fishing opportunities,
- 13 segments were *out of balance* with their fishing opportunities.

Trends for the 13 segments were as follows:

- 3 segments displayed a decreasing trend,
- 10 segments displayed no clear trends.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on biological indicator values (SHI and SAR) for 2022 and trends over the period 2018 to 2022 and in accordance with the criteria in the Commission guidelines, less than half fleet segments appear to be out of balance with fishing opportunities and where trends in SHI can be computed, 5 of them indicate an improving situation and 2 segments displayed no clear trends.

By the EWG calculation, DTS VL1824 and TBB VL1012 segments for CR/BER values are indicated as in balance, while TBB VL1218 and TBB VL1824 segments for CR/BER and RoFTA values are indicated as in balance. The available trends in CR/BER mostly show a deteriorating situation, although TBB VL1012 and TBB VL1824 segments have no trend, while TBB1824 and DFN2440 segments show an improving trend. The trends in RoFTA are deteriorating for 7 fleet segments and are improving for 2 segments. Thirteen segments were out of balance according to the technical indicator (VUR).

Due to changes in segmentation of small-scale fisheries (new segments VL0008 and VL0812) which applied for the Baltic Sea region since 2021, the trends are not available.

The status of each indicator as computed by EWG with respect to the criteria given in the Commission Guidelines (COM (214)545) is illustrated in the table below.

Table 3.4.9.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
		Economic					Economic							Biological			Technical	Biological		Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
												DEUNAO DFN 1218 NGI	5							
												DEUNAO DFN 1824 NGI	1							
												DEUNAO DFN 2440 NGI	2							
												DEUNAO FPO 1824 NGI	2							
DEUNAO DFN 2440 NGI *	12											DEUNAO FPO 2440 NGI	1							
												DEUNAO HOK 1218 NGI	1							
DEUNAO DTS 0812 NGI *	7											**DEUNAO DTS 0812 NGI**	7							
DEUNAO DTS 1218 NGI	14											DEUNAO DTS 1218 NGI	14							
DEUNAO DTS 1824 NGI	9											DEUNAO DTS 1824 NGI	9							
DEUNAO DTS 2440 NGI	11											DEUNAO DTS 2440 NGI	11	1						
DEUNAO DTS 40XX NGI	4											DEUNAO DTS 40XX NGI	4	8						
												DEUNAO PG 0010 NGI	1							
DEUNAO PG 0008 NGI A*	66											**DEUNAO PG 0008 NGI**	65							
												DEUNAO PG 0010 NGI	3							
DEUNAO PG 0008 NGI L*	435											**DEUNAO PG 0008 NGI**	432							
DEUNAO PG 0812 NGI A*	49											**DEUNAO PG 0812 NGI**	49	1						
DEUNAO PG 0812 NGI L*	78											**DEUNAO PG 0812 NGI**	78	1						
												DEUNAO TBB 0010 NGI	5							
DEUNAO TBB 1012 NGI *	8											**DEUNAO TBB 1012 NGI**	3							
DEUNAO TBB 1218 NGI	89											DEUNAO TBB 1218 NGI	89							
DEUNAO TBB 1824 NGI	65											DEUNAO TBB 1824 NGI	65							
												DEUNAO TBB 2440 NGI	4							
DEUNAO TBB 2440 NGI *	6											DEUNAO TBB 40XX NGI	2							
DEUNAO TM 40XX NGI *	5											**DEUNAO TM 40XX NGI**	5							
Total active	858																			
Total inactive	316																			
% of inactive in total	26.9																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster.(See section 2.3 of this report).

Source: own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the MS annual fleet report, the SHI has been provided for the reference year 2022.

The comparison between SHI reports in the MS annual fleet report and those estimated by the EWG revealed similar outputs for seven fleet segments (PG VL0812A, DTS VL0812, DTS VL1218, DTS VL1824, TM VL40XX, TBB VL2440 and DTS VL40XX). An exception is DTS 2440 which is indicate as “in balance” in the MS fleet report whereas the EWG 24-13 value indicate out of balance. A further discrepancy was observed for DFN 2440 and PG 0812 that were calculated as "in balance” by the EWG 24-13, while in the MS report the SHI

values were not considered because the indicator values are based on stocks that comprise less than 40% of the total value of landings.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has been provided for the reference year 2022.

The comparison between SAR reported in the MS annual fleet report and those estimated by the EWG 23-13 revealed similar outputs for 14 fleet segments. An exception is DFN VL1218, for which EWG 24-13 did not compute an estimate for SAR, while in the MS annual report it was indicated as “out of balance”.

For TBB VL2440, EWG 24-13 estimated the SAR as “in balance”, while in the MS annual report it was indicated “out of balance”.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparisons between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed similar outputs for all values.

No trends analysis could be undertaken for the PG VL0008A, PG VL0812A, PG VL0008L and PG VL0812L segments, as new segmentation has only occurred since 2021 in the fleet report. Other trends are similar to those computed by the EWG 24-13.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

As for the Return on Fixed Tangible Assets (RoFTA) indicator, the comparisons between values reported in the MS annual fleet report and those estimated by the EWG 24-13 revealed similar outputs for all values.

No trends analysis could be undertaken for the PG VL0008A, PG VL0812A, PG VL0008L and PG VL0812L segments, as this segmentation has only been used in the fleet report since 2021. Other trends are similar to those computed by the EWG 24-13.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the MS annual fleet report, the VUR Indicator was provided. Hence VUR_{220} is not referred to here.

A discrepancy has been observed in the calculation of VUR between the MS annual fleet report and that of the estimation in the framework of the EWG 24-13. The status in the EWG 24-13 estimation was “in balance” for DTS VL0812, DTS VL1218, DTS VL1824, TBB VL2440 and TBB VL1012 segments for which the MS annual report indicated “out of balance”. Also, DFN VL2440 Germany indicated as “in balance” when the status in the EWG 24-13 estimation was “out of balance”. No calculation of the VUR Indicator for PG VL0008A and PG VL0008L segments was presented in fleet report.

No trend analysis could be undertaken due to the application of different calculation periods used by the MS and the EWG 24-13.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted by Germany provides an updated analysis of the balance between fleet capacity and fishing opportunities for all fleet segments based on DCF data in line with the Commission guidelines COM(2014)545. The indicator values in the fleet report are generally in line with those computed by the EWG 24-13.

The Member State concludes that overall, fishing capacity and fishing opportunities are well balanced in those fleet segments accounting for the biggest share of catches. The Member State also considers that their conclusion is also corroborated by the fact that fishing opportunities allocated to German fisheries under EU law are generally not exceeded. With regard to Baltic Sea fisheries, it is reported that unprecedented reductions in fishing opportunities for herring and cod will continue to affect fleet management. ICES estimates that these stocks will continue to develop slowly, with a falling trend compared to previous years. Therefore, it is concluded that fishing capacity in the affected segments will need to be adjusted in the coming years.

Fleet segments that are assessed by the Member State to be “out of balance” with their fishing opportunities are clearly identified in the fleet report and an action plan for these fleet segments is included in the report.

The Fleet Report also provides information about several management measures carried out by Germany to reduce the number of imbalanced fleets segments.

Discrepancies in previous fleet reports

No major discrepancies between the findings in the fleet report submitted in 2023 and those of the EWG were reported in the EWG 23-13 report. Hence, the Member State had no such discrepancies to address in its report submitted in 2024.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

Germany identified structural overcapacity of 7 segments for vessels operated in the Baltic Sea region.

In the fleet report, no estimates of the long-term profitability were given. The Germany CR/BER and RoFTA estimation by segments shows out of balance for all Baltic Sea region fleet segments.

Overview of action plans

The report on the balance between the fishing capacity and fishing opportunities of the German fleet draws attention to the significant decline in cod stocks across the Baltic Sea and in herring stocks in the western Baltic, which are the most important stocks for German fishers.

To protect and restore the cod and herring stocks in the Baltic Sea, it was again necessary to adopt emergency measures in 2023. Closure periods were put in place, in three 10-day blocks for cod (periods from 1 to 14 January 2023, 1 April to 14 May 2023 and 1 November to 31 December 2023) and in three 10-day blocks for herring (periods from 16 August to 31 October 2023 and 1 October to 31 December 2023).

An action plan is presented which proposes specific measures for the fleet segments indicated to be out of balance (see the table below).

Fleet segments included in action plan

Fleet segment	**Explanation**	**Stocks fished***
PG VL0008A and PG VL0008L (formerly covered by PG VL0010)	Passive gear, vessels <8m	Baltic Sea stocks
PG VL0812A and PG VL0812L (formerly covered by PG VL0010 and PG VL1012)	Passive gear, vessels 8-12 m	Baltic Sea stocks
DFN VL1218	Static net vessels, 12-18m	Western Baltic herring
DTS VL0812 (formerly DTS VL0010 and DTS VL1012)	Demersal trawlers, 8-12m	Baltic Sea stocks
DTS VL1218	Demersal trawlers, 12-18m	Baltic Sea and Kattegat stocks
DTS VL1824	Demersal trawlers, 18-24m (only Baltic Sea vessels according to MAF-BMEL)	Baltic and North Sea stocks
DTS VL2440	Demersal trawlers, 24-40 m (only Baltic Sea vessels according to MAF-BMEL)	Baltic and North Sea stocks

The action plan includes a range of general measures, applicable to all fleet segments for which problems have been identified. Measures includes:

- Shifting relevant fishing opportunities to coastal fisheries.
- Marketing support - Appropriate measures are being taken under the EMFF/EMFAF to strengthen direct marketing by fishers and producer organisations in order to improve income levels.
- Suspension of fishing to protect cod stocks in the western Baltic Sea.
- Suspension of fishing to protect herring stocks in the western Baltic Sea.
- Permanent cessation of fishing activities targeting cod and herring in the western Baltic.

Adjustment targets and tools

The revised action plan was submitted with the fleet report by 31 May 2024. The targets and tools are defined clearly and are the same as those described in the report submitted in 2023. The timeframe for implementation (starting and ending years) is described by fleet segment and measure.

Number of vessels

The total number of vessels which are targeted by the action plan is 992. However, the number of vessels for which the permanent cessation is foreseen was not reported.

3.4.10 Greece (GRC)

Overview of indicator findings

Area 37

There were 25 fleet segments in 2022, of which 21 were active. Of the 20 active segments, landings data were provided aggregated for 14 fleet segments and economic data were provided aggregated for 14 fleet segments.

Sustainable harvest indicator (SHI)

Out of 14 fleet segments active in 2022, SHI indicator values were available for 13.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 7 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the **6** fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for **73.01%** of the total value of the landings in 2022 provided by MS, and were as follows

- 5 fleet segments were *out of balance* with their fishing opportunities
- 1 fleet segment were *in balance* with their fishing opportunities

Trends were calculated for 1 segment:

- 1 fleet segment displayed an improving trend

Stocks at Risk Indicator (SAR)

SAR indicator values was available for 14 active fleet segments in 2022.

- 9 fleet segments were *in balance* with their fishing opportunities.
- 5 fleet segments were *out of balance*, with their fishing opportunities
    - 1 fleet segment with 3 stocks-at-risk
    - 1 fleet segment with 2 stocks-at-risk
    - 3 fleet segments with 1 stock-at-risk

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		5	8	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	12	1		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 14 segments:

- 9 segments were *in balance* with their fishing opportunities,
- 5 segments were *out of balance* with their fishing opportunities,

Trends could be calculated for 10 segments:

- 3 segments displayed an improving trend.
- 7 segments displayed a deteriorating trend

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 14 segments:

- 9 segments were *in balance* with their fishing opportunities,
- 5 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 10 segments:

- 3 segments displayed an improving trend.
- 7 segments displayed a deteriorating trend

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for the 14 segments*:

- 10 segments were *in balance* with their fishing opportunities,

- 4 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 12 segments:

- 4 segments displayed an increasing trend,
- 2 segment displayed a decreasing trend
- 4 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator estimations for 2022 and trends over 2018-2022, a mixed picture emerges regarding the segments that appear in or out of balance with fishing opportunities.

The three purse seine segments score well on most indicators. SHI data is available this year, with the PS2440 segment being in balance, while the other two segments are out of balance. Economic and technical indicators for PS1824 and PS2440, while assessed in balance, show a deteriorating trend.

The two larger demersal segments DTS1824 and DTS 2440 may be in balance based on all economic and technical indicators, while DTS 2440 shows a deteriorating trend for economic indicators, but no trend for technical indicators. SAR and SHI indicators for both segments appear to be out of balance.

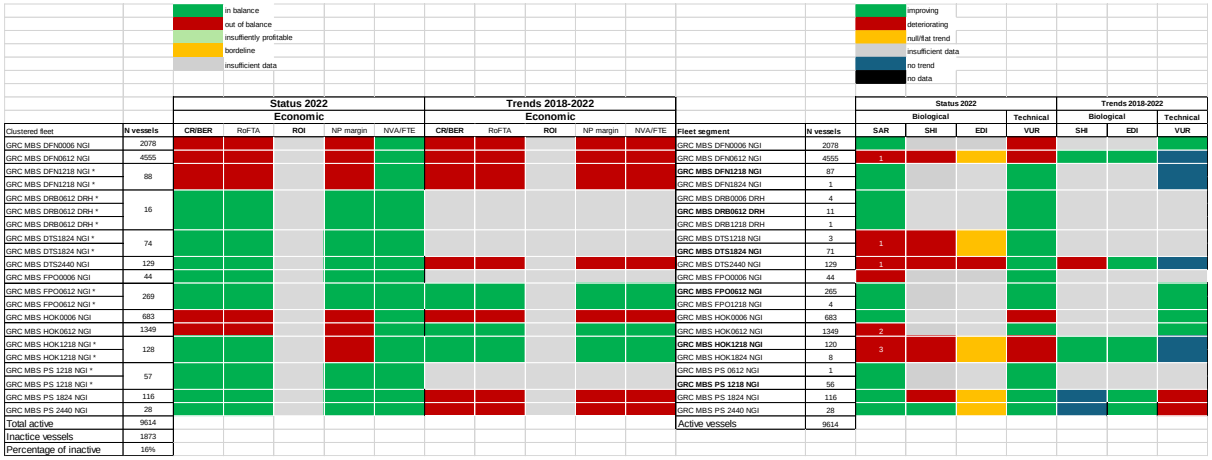
The two smallest hook segments seem to be out of balance based on the economic and technical indicators, while HOK1218 appears to be in balance. HOK0006 indicates a deteriorating trend while the other two segments show an improving trend across economic indicators and technical indicators. SAR values for the smallest hook segment appears to be in balance, with a deteriorating trend, while the other two segments appear to be out of balance, but with improving trends. SHI values for all three segments are out of balance.

The pots and/or traps segments appear to be in balance on the economic and technical indicators, and they show an improving trend. The segments are in balance for SAR, but are out of balance, with improving trends, for SHI.

The three drift/fixed netters segments appear to be out of balance for both economic and technical indicators. All three also show a deteriorating trend. Two segments are in balance for SAR, while DFN0612 are out of balance. All three segments are out of balance for SHI, with improving trends.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.10.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).



		Status 2022 Economic					Trends 2018-2022 Economic				
Clustered fleet	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	CR/BER	RoFTA	ROI	NP margin	NVA/FTE
GRC MBS DFN0006 NGI	2078										
GRC MBS DFN0612 NGI	4555										
GRC MBS DFN1218 NGI *	88										
GRC MBS DFN1218 NGI *											
GRC MBS DRB0612 DRH *	16										
GRC MBS DRB0612 DRH *											
GRC MBS DRB0612 DRH *											
GRC MBS DTS1824 NGI *	74										
GRC MBS DTS1824 NGI *											
GRC MBS DTS2440 NGI	129										
GRC MBS FPO0006 NGI	44										
GRC MBS FPO0612 NGI *	269										
GRC MBS FPO0612 NGI *											
GRC MBS HOK0006 NGI	683										
GRC MBS HOK0612 NGI	1349										
GRC MBS HOK1218 NGI *	128										
GRC MBS HOK1218 NGI *											
GRC MBS PS 1218 NGI *	57										
GRC MBS PS 1218 NGI *											
GRC MBS PS 1824 NGI	116										
GRC MBS PS 2440 NGI	28										
Total active	9614										
Inactice vessels	1873										
Percentage of inactive	16%										

		Status 2022				Trends 2018-2022		
		Biological			Technical	Biological		Technical
Fleet segment	N vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
GRC MBS DFN0006 NGI	2078							
GRC MBS DFN0612 NGI	4555	1						
GRC MBS DFN1218 NGI	87							
GRC MBS DFN1824 NGI	1							
GRC MBS DRB0006 DRH	4							
GRC MBS DRB0612 DRH	11							
GRC MBS DRB1218 DRH	1							
GRC MBS DTS1218 NGI	3	1						
GRC MBS DTS1824 NGI	71							
GRC MBS DTS2440 NGI	129	1						
GRC MBS FPO0006 NGI	44							
GRC MBS FPO0612 NGI	265							
GRC MBS FPO1218 NGI	4							
GRC MBS HOK0006 NGI	683							
GRC MBS HOK0612 NGI	1349	2						
GRC MBS HOK1218 NGI	120	3						
GRC MBS HOK1824 NGI	8							
GRC MBS PS 0612 NGI	1							
GRC MBS PS 1218 NGI	56							
GRC MBS PS 1824 NGI	116							
GRC MBS PS 2440 NGI	28							
Active vessels	9614							

*Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster and is indicated in the table with a *. For such clusters, the status of the economic indicators (RoI/RoFTA and CR/BER) are reported for the entire cluster and not for the individual fleet segments that make up the cluster.*

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).

Source: own elaborations.

Comparison of indicator values

A comparison of Indicator values computed by the EWG 24-13 and those in the fleet report are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the MS annual fleet report the SHI has been provided for a number of fleet segments for reference year 2023, however they have been split by GSAs and gear groups (PS, OTB and SSF). EWG 24-13 calculated SHI values for thirteen fleet segments for 2022, therefore comparison of SHI values was not possible.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has not been provided while EWG 24-13 provided SAR for 14 fleet segments. Therefore, a comparison of values is not possible.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the MS annual fleet report the CR/BER has not been provided. Therefore, a comparison with values from EWG 24-13 is not possible.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI information was not provided in the MS report.

The comparison between RoFTA reported in the report and those estimated by EWG 24-13 revealed similar indicators for all segments. The balance indication is the same for available segments between the MS and EWG assessment, however the calculated values are different.

The MS annual fleet report provided indicator data for three years, without calculating a trend value. However, it was possible to compare these data with the values calculated by EWG 24-13. In general, the indicators showed similar indications for the three years.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The MS annual fleet report provides VUR data for nine segments in three gear groups – OTB, PS and 'coastal', each divided into three vessel length categories. Four of the segments are comparable, and have similar values, with those calculated by EWG 24-13. The other five segments are not comparable with values from EWG 24-13 as they refer to clustered fleet segments.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for many of the indicators specified in the Commission guidelines (COM (2014) 545). Fleet segments that are assessed by the Member State to be "out of balance" with their fishing opportunities are clearly identified in the fleet report. No action plan for fleet segments assessed by the Member State to be "out of balance" is included in the fleet report, although the Member State is proposing to develop one.

According to the information given in the fleet report the MS notes that the Greek management system has improved significantly in recent years. A number of weaknesses in the management system still remain, relating to the large number of vessels in the fleet which are multi species fishing with a large variety of fishing gears, and the very long coastline. The geomorphology of Greece makes the work of control authorities at sea difficult. The MS plans to make a number of improvements to the system in the near future, including the upgrading and expanding of the fisheries control system, although no final dates have been provided. The Member State's fleet report did not explicitly assess the fleet segments in terms of 'in balance' or 'out of balance' in accordance with the Commission guidelines.

The Greek fleet report submitted in 2024 does not provide an assessment of balance between fleet capacity and fishing opportunities for all fleet segments in accordance with the Commission guidelines.

Discrepancies in previous fleet reports

The fleet report submitted in 2024 has provided indicator values for SHI, VUR, RoFTA and inactive vessels, for a number of fleet segments, but many are still missing. No values have been provided for SAR or CR/BER. SHI values have been provided for some fleet segments by fishing area and species.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS has not indicated whether structural overcapacity exists in the fleet. While providing information on the economic indicators the MS doesn't state whether it considers the various fleet segments to be profitable or not.

The MS identified areas of concern regarding certain fleets, in particular, fleet segments fishing for hake. In recent years the reference thresholds for SHI for these sectors have been exceeded. The MS has decided to submit an action plan to address these issues before the end of 2024.

Overview of action plan

In the fleet report, the Member State noted that it had been asked by DG-MARE to provide an action plan to cover four fleet segments; DRB0612, DTS0612, DTS1218 and HOK0006.

Regarding DRB0612 the Member State notes that this segment covers dredges pulled by hand or manual winch. The MS said this segment was previously erroneously included as DRB, they have now reclassified it as DRH. They state they no longer have a DRB0612 segment and therefore there is no need to draw up an action plan.

Regarding DTS0612 and DTS1218 the Member State says that it has not been clearly demonstrated that fishing capacity is not effectively balanced with fishing opportunities, given that boat seines using winch trawl (SB), the main gear for these segments, have not been actively fishing since 1 April 2020. As a result, MS considers that it is not necessary to draw up or implement an action plan for these segments.

Regarding HOK0006 the Member State notes that" the imbalance recorded is due to assessments of balance indicators calculated on the basis of data which may not take into account collateral or social factors". Further analysis will be carried out and if considered necessary an action plan will be drawn up.

The Member State notes that management plans are currently in place for the DTS 1824 and 2440, and PS fleet segments. The MS states that there are no grounds to take additional measures for the PS fleet segments to protect the main sardine and anchovy stocks, as the indicators show a positive trend.

The management plan for the DTS fleet segments need to be revised. The upper reference levels for SHI for Hake have been exceeded. As a result, it has been decided to draft an action plan for these fleet segments to protect the stock. GFCM have also recommended that the HOK1218 fleet segment should be added to the proposed action plan, as this segment's fishing pressure on the hake stock is considerable.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State, however they are preparing an action plan to submit by the end of 2024 at the latest.

Number of vessels

No new or revised action plans have been submitted by the Member State, however they are preparing an action plan to submit by the end of 2024 at the latest.

3.4.11 Ireland (IRL)

Overview of indicator findings

Area 27

There were 37 fleet segments identifiable in 2022, of which 31 were active. Of the active segments, landings data and economic data were available for 21 segments (including 6 clustered segments) to calculate the indicators.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 11 fleet segments active in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for fleet segments cannot be used meaningfully to assess the balance or imbalance unless the indicator values are based on stocks that comprise more than 40% of the total value of landings by those fleet segments. All 11 segments satisfied this criterion:

• 4 fleet segments were *out of balance* with their fishing opportunities;

• 7 fleet segments were *in balance* with their fishing opportunities.

Trends could be calculated for 10 fleet segments:

• 1 segment displayed a decreasing (improving) trend,

• 6 segments displayed an increasing (deteriorating) trend,

• 3 segments displayed no clear trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 21 active fleet segments in 2022.

According to criteria in the 2014 Balance Indicator Guidelines:

• 12 fleet segments were *in balance* with their fishing opportunities,

• 9 segments were out *of balance* with their fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion on NOS	0-<25%	25-<50%	50%-<75%	75-100%
No of fleet segments	4	15	2	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	12	4	3	2

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA).

RoI was not calculated.

RoFTA was calculated for 17 segments:

• 8 segments were *in balance* with their fishing opportunities,

• 9 segments were *out of balance* with their fishing opportunities,

The trend could be calculated for only 3 segments:

• 2 segments displayed a decreasing (deteriorating) trend,

• 1 segment displayed an increasing (improving) trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 17 segments:

• 10 segments were *in balance* with their fishing opportunities,

• 7 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for only 3 segments:

• 1 segment displayed a decreasing (deteriorating) trend.

• 1 segment displayed an increasing (improving) trend.

• 1 segment displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for 28 segments:

• 2 segments were *in balance* with their fishing opportunities,

• 26 segments were *out of balance* with their fishing opportunities.

No VUR trend could be calculated for any segment.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

One or more indicator values could be computed for all but 2 of the 21 active fleet segments and for the majority of segments values for at least two of the indicators could be computed.

An overview of the indicators for 2022 continues the mixed picture of 2021. SHI values were computed for 11 segments, 7 of which appear now to be in balance. In terms of trends in the SHI, the situation appears to either be improving or there are no clear trends. The situation regarding economic indicators is also mixed but for most segments for which an economic indicator could be computed, the situation in 2022 continues to improve.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.11.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
bordeline
insuffientlyprofitable
insufficient data

improving
deteriorating
null/flat trend
no clear trend
insufficient data

		Economic Indicators												Biological and technical indicators									
		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2023					
		Economic					Economic							Biological			Technical	Biological		Technical			
Fleet segment/ clustered segment	Nb of vessels	CRBER	RoFTA	ROI	NP margin	NVA/FTE	CRBER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR			
IRL NAO DFN0010	168											IRL NAO DFN0010	168	1									
IRL NAO DFN1012	15											IRL NAO DFN1012	15										
												IRL NAO DFN1218	9										
IRL NAO DFN1824 *	17											**IRL NAO DFN1824 ***	7	1									
												IRL NAO DFN2440	1										
IRL NAO DRB0010	122											IRL NAO DRB0010	122										
IRL NAO DRB1012 *	49											IRL NAO DRB1012 *	44										
												IRL NAO DRB1218	5										
IRL NAO DRB2440 *	9											IRL NAO DRB1824	3										
												IRL NAO DRB2440 *	6										
IRL NAO DTS0010	34											IRL NAO DTS0010	34	1									
IRL NAO DTS1012	9											IRL NAO DTS1012	9										
IRL NAO DTS1218	24											IRL NAO DTS1218	24										
IRL NAO DTS1824	52											IRL NAO DTS1824	52	2									
IRL NAO DTS2440	49											IRL NAO DTS2440	49	5									
IRL NAO FPO0010	531											IRL NAO FPO0010	531										
IRL NAO FPO1012	94											IRL NAO FPO1012	94										
IRL NAO FPO1218 *	32											**IRL NAO FPO1218 ***	29										
												IRL NAO FPO1824	1										
												IRL NAO FPO2440	2										
IRL NAO HOK0010	45											IRL NAO HOK0010	45										
IRL NAO HOK1012 *	5											**IRL NAO HOK1012 ***	4										
												IRL NAO HOK1218	1										
IRL NAO TBB2440 *	14											IRL NAO TBB1824	5	2									
												IRL NAO TBB2440 *	9										
IRL NAO TM 0010 *	8											**IRL NAO TM 0010 ***	2	2									
												IRL NAO TM 1012 *	6										
IRL NAO TM 1218 *	6											**IRL NAO TM 1218 ***	4	2									
												IRL NAO TM 1824	2										
IRL NAO TM2440	14											IRL NAO TM2440	14	2									
IRL NAO TM40XX	21											IRL NAO TM40XX	21										
Total Active	1318																						
Total Inactive	718																						
% Inactive Vessels	35%																						

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).

Source: own elaborations.

Comparison of indicator values

A comparison of indicator values computed by EWG 24-13 and those in the fleet report submitted by 31 May 2024 is given in Annex II. The Irish Fleet Report noted the difficulty in applying the current technical indicators to its fleet segments as they demonstrate considerable internal diversity, natural variation, geographical spread of activity and products

(species) targeted. Neither do they recognise effort restrictions on certain specified areas or seasonal and monthly fishing patterns. Nevertheless, a consideration of the technical indicators is provided subject to the caveat that an accurate picture of the technical indicators cannot be provided until such time as the natural variations can be taken into account within the assessment. Values for the biological indicators of SHI and SAR are provided in the MS fleet report for the year 2021. Values for 2022 are not provided however mention is made of the trends over time improving and suggesting that in 2022 the indicator (SHI) would indicate balance.

Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

The Irish Fleet Report presented SHI values calculated by the STECF EWG 23-13 and extracts from the JRC website on 29th April 2024, where 2021 values were reported for 15 fleet segments.

According to the fleet report, values for SHI for 10 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

SHI values for 2022 are provided in the fleet report.

- 9 segments were considered to be in balance and
- 6 segments out of balance with fishing opportunities.

Trends were reported for 14 fleet segments,

- 10 fleet segments displayed a decreasing (improving) trend,
- 1 fleet segment displayed an increasing (deteriorating) trend, and
- 3 fleet segments showed no clear trend.

The overall trend for all fleet segments as analysed over the full time series and showed a clear decreasing (improving) trend.

Stocks at Risk Indicator (SAR)

The Irish Fleet Report concludes the trend of balance between capacity and resource has improved. As regards fleets that are out of balance – there are 7 - Irish fleets take minor catches of the vulnerable stocks, and the report suggests that there is insufficient information to assess whether fleets take more than 10% of the landings of the vulnerable stocks.

Values for the period 2009-2022 are provided in the fleet report. No comparison was made with the EWG 23-13 indicator values.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

According to the Ireland fleet report, the results of CR/BER improved for the 2022 performance compared to a poor performance the previous year with the overall result becoming positive. Results are shown for 18 fleet segments.

- 5 fleet segments are out of balance,
- 13 fleet segments are in balance.

EWG 24-13 identified seven segments continuing to be out of balance.

The comparison between CR/BER reported in the MS fleet report and those estimated in the framework of EWG 24-13 revealed different outputs for most of the values. The discrepancies are due to the data used to calculate the indicator. Furthermore, the MS

calculates and reports indicator values for fleet segments even when essential variables (e.g., fuel costs, consumption of fixed capital, etc.) are missing for these.

Return on Fixed Tangible Assets (RoFTA)

In the Irish Fleet Report, RoFTA was calculated for 18 segments, 5 of which were indicated to be out of balance. One of the five demersal trawl and seine fleet segments (DTSVL1012) appeared out of balance.

Nevertheless, the number of fleet segments out of balance fell from 11 in 2021 to 5 in 2022. EWG 24-13 also identified 5 segments out of balance; DFN0010, DTS0010, DTS1824, FPO0010, and FPO1218*.

The Vessel Use Indicator (VUR)

The MS annual fleet report did not provide information for VUR or VUR_{220}. Indicator trends were not provided in the fleet report. No comparison was possible.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The EWG 24-13 notes the following:

The fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information for 2021 and for the majority the indicators specified in the Commission guidelines (COM (2014) 545).

Fleet segments assessed by the Member State to be “out of balance” with their fishing opportunities are clearly identified in the fleet report.

In preparing the report the guidelines have been broadly followed. However, where the methodology deviates from that advocated by the guidelines a clear explanation of the reasoning has been provided. The fleet report noted that the Annual Economic Report (AER), DG Fisheries and Maritime Affairs and EWG 23-13 each used separate and distinct definitions of the economic indicators. A principal source of these discrepancies is the different definitions of the opportunity cost of capital used.

Given that some indicators imply imbalance EWG 24-13 notes that such an assessment is not in line with the Commission Guidelines.

Discrepancies in previous fleet report

The assessment of balance in the Irish Fleet Report submitted in 2024 is similar to last year´s report. The Fleet Report did not address any comments made by EWG 23-13. Table 5 (see page 27) gives the Synthesis of indicators and trends for Ireland in Supra Region Area 27, for all gears and all vessel lengths. The discussion material is based on these tables and the comments for Ireland from the 2023 STECF report – 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 (STECF-23-18).

Structural overcapacity and profitability

Based on the available information, the Irish Fleet Report considers that structural imbalance does not exist in any of its fleet segments and no action plans are proposed but there are plans for fleet adjustment currently in progress to cope with the new environment post-Brexit.

Adjustment targets and tools

No action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report and no new or revised action plans were proposed.

Number of vessels

No new or revised action plan was proposed.

3.4.12 Italy (ITA)

Overview of indicator findings

There were 35 fleet segments in 2022, of which 30 were active. Of the 30 active segments, landings were provided for 30 fleet segments and economic data were provided aggregated for 20 fleet segments. The Italian fishing fleet in 2022 consisted of 11807 vessels. Of these, 9649 vessels (82%) were active, while 2158 vessels (18%) were inactive.

Area 37

Sustainable harvest indicator (SHI)

Out of 30 fleet segments active in 2022, SHI indicator values were available for 26.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 7 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings in 2022 by those fleet segments.

The EWG notes that for the 19 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 65.97% of the total value of the landings in 2022 provided by MS, and were as follows:

- 11 fleet segments were *out of balance* with their fishing opportunities;
- 8 fleet segments were *in balance* with their fishing opportunities.

Trends could be calculated for 18 fleet segments:

- 10 fleet segments displayed a decreasing trend,
- 8 fleet segments displayed no clear trend,

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all the 28 active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

- 9 fleet segments were *in balance* with their fishing opportunities,

- 19 fleet segments were *out of balance* with their fishing opportunities.
    - 1 fleet segment with 5 stocks-at-risk,
    - 1 fleet segment with 4 stocks-at-risk,
    - 3 fleet segments with 3 stocks-at-risk,
    - 5 fleet segments with 2 stocks-at-risk,
    - 9 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	3	12	9	1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	16	7		3

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

There were 35 fleet segments in the Italian fleet in 2022. After clustering 21 segments were available for analysis.

RoFTA was calculated for 21 segments:

- 12 segments were *in balance* with their fishing opportunities,
- 9 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 20 segments:

- 8 segments displayed an increasing trend,
- 12 segments displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 21 segments:

- 15 segments were *in balance* with their fishing opportunities,
- 6 segments were *out of balance*.

Trends could be calculated for 20 segments:

- 8 segments displayed an increasing trend,
- 7 segments displayed a decreasing trend,
- 5 segments displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analyzed here.

VUR was calculated for 30 segments*:

- 7 segments were *in balance* with their fishing opportunities,
- 23 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 27 segments:

- 2 segments displayed an increasing trend,
- 10 segments displayed a decreasing trend,
- 13 segments displayed no clear trend and
- 2 segments displayed null or flat trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

OFR

Sustainable harvest indicator (SHI)

Out of the 2 active fleet segments in 2022, SHI indicator value was available for 1 segment.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator value for 1 fleet segment cannot be used meaningfully to assess the balance or imbalance because the indicator value is based on stocks that comprise less than 40% of the total value of landings by this fleet segment.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for the 2 active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

- 2 fleet segments were *in balance* with their fishing opportunities.

Number of Overharvested Stocks (NOS)

No data available.

Economic Dependency Indicator (EDI)

Fleet segments' distribution over EDI classes is shown in the table below. The Fleet segment reported is the one for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

No data available.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

No data available.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analyzed here.

VUR was calculated for 2 segments*:

- 2segments were *in balance* with their fishing opportunities,

Trends could be calculated for 1 segment:

- 1segment displayed no clear trend

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2017-2023 and according to the criteria in the Commission guidelines, for biological variables most fleet segments appear to be out of balance with their fishing opportunities, with at least one indicator (SHI and/or SAR) indicating “out of balance”. The exceptions are ITA MBS PS1824 NGI and ITA MBS PS2440 NGI, which are the only two segments where both SHI and SAR indicate “in balance”. Additionally, some segments are “in balance” according to SAR (e.g. ITA MBS PS0612 NGI, ITA MBS PS1218, ITA MBS DRB1218 NGI*), but for these segments the SHI is not considered as meaningful for an assessment of balance (the indicator values are based on stocks that comprise less than 40% of the total value of landings in 2022 by those fleet segments) so this assessment is solely based on one biological indicator

Although most segments are still in balance regarding economic indicators (CR/BER and RoFTA), the situation has significantly worsened compared to the previous year. Furthermore, more than half of segments show a deteriorating trend or no clear trend for economic indicators. According to the Italian fleet report, the industry saw a deterioration in economic performance mainly for trawling segments and ‘rapido’ trawling across almost all GSAs and length classes. The increased cost of diesel in 2022 led to reduced profitability for the most energy-intensive fishing segments.

23% by number of active segments appear to be in balance according to VUR variables. While most segments show a worsening trend (37%) in VUR, 48% of active segments show no clear trend.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.12.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Status 2022					Trends 2018-2022				
		Economic					Economic				
Fleet segment/ clustered segment	No. vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	CR/BER	RoFTA	ROI	NP margin	NVA/FTE
ITA MBS DRB1218 NGI *	635										
ITA MBS DTS0612 NGI	115										
ITA MBS DTS1218 NGI	1003										
ITA MBS DTS1824 NGI	524										
ITA MBS DTS2440 NGI	166										
ITA MBS HOK1218 NGI	136										
ITA MBS HOK1824 NGI *	35										
ITA MBS PGP0006 NGI	1716										
ITA MBS PGP0612 NGI	4591										
ITA MBS PGP1218 NGI *	237										
ITA MBS PS 0612 NGI	147										
ITA MBS PS 1218 NGI	85										
ITA MBS PS 1824 NGI	36										
ITA MBS PS 2440 NGI	31										
ITA MBS PS 40XX NGI	10										
ITA MBS TBB1218 NGI *	11										
ITA MBS TBB1824 NGI	30										
ITA MBS TBB2440 NGI	23										
ITA MBS TM 1218 NGI *	33										
ITA MBS TM 1824 NGI	42										
ITA MBS TM 2440 NGI	40										
ITA OFR DTS40XX IWE	2										
ITA OFR PS 40XX IWE	1										
Total active	9649										
Total inactive	2158										
% of inactive in total	18,3										

		Status 2022				Trends 2018-2022		
		Biological			Technical	Biological		Technical
Fleet segment	No. vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
ITA MBS DRB0612 NGI	90							
ITA MBS DRB1218 NGI	544							
ITA MBS DRB1824 NGI	1							
ITA MBS DTS0612 NGI	115							
ITA MBS DTS1218 NGI	1003	3						
ITA MBS DTS1824 NGI	524	4						
ITA MBS DTS2440 NGI	166	2						
ITA MBS HOK1218 NGI	136	5						
ITA MBS HOK1824 NGI	33	2						
ITA MBS HOK2440 NGI	2	1						
ITA MBS PGP0006 NGI	1716	1						
ITA MBS PGP0612 NGI	4591	3						
ITA MBS PGP1218 NGI	217	3						
ITA MBS PGP1824 NGI	19	2						
ITA MBS PGP2440 NGI	1							
ITA MBS PS 0612 NGI	147							
ITA MBS PS 1218 NGI	85							
ITA MBS PS 1824 NGI	36							
ITA MBS PS 2440 NGI	31							
ITA MBS PS 40XX NGI	10	1						
ITA MBS TBB0612 NGI	3	1						
ITA MBS TBB1218 NGI	8	2						
ITA MBS TBB1824 NGI	30	2						
ITA MBS TBB2440 NGI	23	1						
ITA MBS TM 0612 NGI	3	1						
ITA MBS TM 1218 NGI	30	1						
ITA MBS TM 1824 NGI	42	1						
ITA MBS TM 2440 NGI	40	1						
ITA OFR DTS40XX IWE	2							
ITA OFR PS 40XX IWE	1							

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators are reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicator values

A comparison of Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 is given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

The SHI values provided by the Italian fleet report are based on a fleet segmentation by GSA, which is different to that used by EWG 24-13. Therefore, a comparison between indicator values computed by the Expert group with those prepared by the MS cannot be made.

Stocks at Risk Indicator (SAR)

No SAR values were provided by the Italian fleet report, so a comparison was not possible.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

Italy in their annual fleet report did not provide the relevant data for 2022, making a comparison impossible.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

Italy in their annual fleet report did not provide the relevant data for 2022, making a comparison impossible.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The VUR values provided by the Italian fleet report are based on a fleet segmentation by GSA, which is different to that used by EWG 24-13. Therefore, a comparison between indicator values computed by the Expert group with those prepared by the MS cannot be made.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.***Assessment of fleet report***

The fleet segment submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for the majority of indicators specified in the Commission guidelines (COM (2014) 545). While the segmentation used for the Italian fleet report uses the standard fleet segmentation adopted under the DCF for economic indicators, some indicator values (SHI, VUR) for the Mediterranean and Black Sea (area 37) are reported separately by segment and GSA. Because stock assessments and management are GSA-based, the EWG 24-13 considers that providing indicator values in such a way, may lead to a more informative indication of potential overcapacity than providing indicator values by segment for the entire area 37. On the contrary, if a particular fleet segment fishes several different GSAs, the indicator values will be based on more stocks than those for a single GSA.

Such an approach differs from that adopted by most other Member States, the present EWG and by the STECF and it could be argued that it is partly not in line with the Commission Guidelines, which aim to provide a common methodology for the assessment of the balance over time between fleet capacity and fishing opportunities at fleet segment level. It also prevents a comparison between the SHI and VUR indicator values estimated by the EWG 24-13.

It should be noted that the SAR indicator has not been provided in the Italian fleet report.

Fleet segments were assessed by the Member State to be “out of balance” with their fishing opportunities according to each indicator presented.

An action plan for fleet segments assessed by the Member State to be “out of balance” (the exact segments were not explicitly mentioned) is included in the report. The aim is to significantly reduce fishing mortality through a series of measures, which partly have already been implemented but are further developed annually.

Discrepancies in previous fleet reports

The information on SHI and VUR was provided by GSA in last year´s report in order to capture geographical differences in economic and social performance and the state of the fisheries, as reflected by the overall condition of the targeted stocks. This was commented by EWG 22-15 and EWG 23-13 and was assessed as being partly not in line with the Commission Guidelines, which aim to provide a common methodology for the assessment of the balance over time between fleet capacity and fishing opportunities at fleet segment level. This also prevented a comparison between the SHI and VUR indicator values estimated by the EWG 24-13.

Additionally, the SAR indicator was not presented.

In this year´s report, the information on SHI and VUR was continued to be provided by GSA and no SAR indicator estimates were presented.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

Fleet segments assessed as out of balance with fishing opportunities are identified in the Fleet report and an action plan is provided for such fleet segments .

No estimates of long-term profitability based on 2022 economic indicators are given in the Fleet report.

Overview of action plan

The Italian action plan aims to significantly reduce the fishing mortality through the combined effect of different measures. The main goal of the plan is to reduce the fishing effort in several fishing segments by a reduction in trawling activity and fleet reduction. The EWG notes that the plan partly includes a continuation of measures already established prior to and including 2023.

These measures include:

- In GSAs 8 to 11, trawling is prohibited from 1 to 30 October, twin trawling is prohibited, trawling is prohibited at depths greater than 800 m, specific areas are permanently closed to fishing.
- From 1 July to 31 October 2024 fishing with towed nets is prohibited at a distance of less than 6 nmi from the shore or at a depth of less than 60 m in specific areas of the Adriatic and Ionian Seas.
- A permanent cessation plan (under the 2021-2027 EMFAF) has been developed with set targets (%) for the reduction of GT and kW by GSA and fishing technique, but no date has been set for the achievement of the objectives.
- Management measures for targeted fishing of demersal stocks have been applied. The listed and affected vessels participating in this fishery in different GSAs have to report catches also at low quantities of < 50 kg and the installation of a VMS tracking device has now become compulsory for vessels > 10 m operating in GSAs 12-16 and 19-21 and vessels > 12 m in GSAs 19-21.
- The first phase of a study collecting the necessary data for drawing up a specific management plan for small pelagics in the Campania Region (GSA 10) has now been

completed. The results of this and the subsequent study phase should lead to the preparation and approval of a specific management plan for small pelagics in the Campania Region within the next couple of years.

Adjustment targets and tools

The action plan (AP) presented in this year´s fleet report is a revised version of last year´s action plan. Specific tools for a reduction in fishing pressure have been adjusted, the MS presents a table with the scrapping targets per GSA by segment.

The EWG notes that the information presented in the Italian fleet report is insufficient to quantitatively assess whether the proposed measures in the action plan will result in a reduction in fishing mortality of relevant targeted species or the extent to which any potential imbalance between capacity and fishing opportunities for Italian fleet segments will be affected.

Number of vessels

The measures in the action plan presented by the MS are mostly GSA-specific. In the scrapping plan, the minimum tonnage to be withdrawn is provided by fleet segment per GSA, however, the number of vessels affected cannot be determined.

3.4.13 Latvia (LVA)

Overview of indicator findings

There were 10 fleet segments in the Latvian fleet in 2022, of which 6 were active. Of the 6 active segments, landings and economic data were provided for all segments except for the 2 high seas fleet segments TM VL40XX due to limited number of vessels (7 vessels in total of which 5 active and 2 inactive) and data confidentiality.

Area 27

Sustainable Harvest Indicator (SHI)

Out of fleet segments active in 2022, landings in value have been provided aggregated in 4 fleet segments and SHI indicator values were available for 4.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 2 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 2 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 94.22% of the total value of the landings in 2022 provided by MS, and were as follows:

- 2 fleet segments may *were out of balance* with their fishing opportunities.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 4 active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG notes that the 2022 SAR indicator values indicate:

• 4 fleet segments were *in balance* with their fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments		3		1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{msy} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments		2		2

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

ROI was calculated for 4 segments:

- 4 segments were *in balance* with its fishing opportunities.

No trends are available.

RoFTA was calculated for 4 segments:

- 4 segments were *in balance* with its fishing opportunities.

Trends could be calculated for 2 segments:

- 2 segments displayed an increasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 4 segments:

- 4 segments were *in balance* with their fishing opportunities.

Trends could be calculated for 2 segments:

- 1 segment displayed an increasing trend;
- 1 segment displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR_{220})

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR^{220} is not analysed here.

VUR was calculated for 4 segments:

- 1 segment was *in balance* with its fishing opportunities,
- 3 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 2 segments:

- 2 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, two of four fleet segments appear to be out of balance with fishing opportunities (TM VL1218 and TM VL2440) in terms of SHI with no clear trend but with long-term and short-term profitability according ROI, RoFTA and CR/BER. Two fleet segments (PGP VL0008 and PGP VL0812) indicate some potential imbalance in terms of VUR with no clear trend. The SAR, ROI, RoFTA and CR/BER indicators suggests that all fleet segments may be in balance with increasing (improving) trend for RoFTA for two segments (TM VL1218 and TM VL2440).

The above observations are in line with the assessment of balance in the Member States' fleet report submitted in 2024.

Discrepancies are observed for CR/BER values. However, the comparison reveals similar outputs for most indicators for the segments for which a comparison can be made.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.13.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance	improving
out of balance	deteriorating
bordeline	null/flat trend
insuffientlyprofitable	no clear trend
insufficient data	insufficient data
	no data

		Status 2022					Trends 2018-2022						Status 2022				Trends 2018-2022		
		Economic					Economic						Biological			Technical	Biological		Technical
Fleet segment/ clustered segment	**Nb of vessels**	**CR/ BER**	RoFTA	**ROI**	NP margin	NVA/ FTE	**CR/ BER**	RoFTA	**ROI**	NP margin	NVA/ FTE	**Fleet segment**	**Nb of vessels**	**SAR**	**SHI**	EDI	**VUR**	**SHI**	EDI	**VUR**
LVANAOTM40XXIWE	3											LVANAOTM40XXIWE	3							
LVANAOPGP0008NGI	116											LVANAOPGP0008NGI	116							
LVANAOPGP0812NGI	37											LVANAOPGP0812NGI	37							
LVANAOTM1218NGI	9											LVANAOTM1218NGI	9							
LVANAOTM2440NGI	26											LVANAOTM2440NGI	26							
LVAOFRTM40XXIWE	2											LVAOFRTM40XXIWE	2							
Total active vessels	193																			
Total inactive vessels	104																			
%of inactive in total	35%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Source: own elaborations.

Comparison of indicator values

A comparison of indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are given in Annex II.

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI has been provided for the reference year 2022 for two fleet segments (TM VL1218 and TM VL2440). Data were not provided in the Member State's report for the PGP VL0008 and PGP VL0812 segments, but it was computed by the EWG.

A comparison between indicator values in the MS Fleet report and the values for equivalent fleet segments as estimated by EWG 24-13 indicate that the status of 2 of the fleet segments for which a comparison can be made (TM VL1218 and TM VL2440) is the same, both of them are out of balance.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR was not provided and no comparison could be made.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

Discrepancies were found between the MS annual fleet report and those estimated by the EWG 24-13. For all fleet segments the indicator values from the MS annual fleet report are lower than the one calculated by the EWG. Three fleet segments (PGP VL0812, TM VL1218, and TM VL2440) reveal positive values for this indicator in agreement with the EWG 24-13 assessment. One fleet segment (PGP VL0008) reveals a value for CR/BER below 1, indicating signs of unprofitability with potential over-capitalisation while the EWG 24-13 this segment to be in balance.

No conclusion on trend assessment was presented by the MS.

Trends for CR/BER based on EWG 24-13 calculations are available for 2 segments as follows:

- 1 segment displayed an increasing (improving) trend (TM VL1218).
- 1 segment displayed no clear trend (TM VL2440).

Return on Investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA)

Discrepancies for ROI were found between the MS annual fleet report and those estimated in the framework of EWG 24-13 for all fleet segments with the exception of TM VL1218. For fleet segments PGP VL0008 and PGP VL0812 this might be because the Member State indicates that coastal vessels not engaged in commercial fishing and involved only in fishing for self-consumption are excluded from the analyses of the corresponding indicators in the MS fleet report.

Nonetheless, all fleet segments reveal positive values for this indicator in agreement with the EWG 24-13 assessment and the balance conclusion for the indicator revealed similar outputs suggesting all segments are in balance.

No conclusion on trend assessment was presented by the MS.

Only trends for RoFTA based on EWG 24-13 calculations for the 2 of all 4 segments are available as follows:

- 2 segments displayed an increasing trend (TM VL1218 and TM VL2440).

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the MS annual fleet report the VUR Indicator was calculated as the ratio between the average effort per vessel in a fleet segment and the observed maximum effort (based on average days at sea of 10 most active vessels) for each of the fleet segments.

The comparison between VUR reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed the same outputs for all values with the exception of PGP VL0812 where slight discrepancy was observed. Nevertheless, the outputs in terms of fleet segments status are the same and show that three fleet segments (PGP VL0008, PGP VL0810 and TM VL2440) appear to be out of balance and one fleet segment TM VL1218 appear to be in balance.

No conclusions on trend assessment were presented in the MS annual fleet report.

Based on EWG 24-13 calculations trends were calculated for two of the segments (TM VL1218, and TM VL2440) with no clear trend.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The fleet balance was assessed using all biological, economic and technical indicators (SHI, ROI, CR/BER, VUR and the inactive fleet indicator (IFI)) for 2018-2022 for all fleet segments, except IFI for fleet segments PGP VL0008 and PGP VL0812 and SAR for all 4 fleet segments. The following categories of fishing vessels were excluded from the MS analysis:

- vessels over 40 meters operating in the Atlantic (area 27 and 34) due to the limited number of vessels and data confidentiality;
- coastal vessels listed in the Fleet Register not engaged in commercial fishing and involved only in fishing for self-consumption.

A traffic light table based on the indicators outputs is included in the fleet report but trends are not presented, as well as an overall statement on the balance of the fleet segments. However, MS stated in its fleet report that the measures to balance fleet segment VL2440, included in the Action plan to the fleet report provided in 2023 are in the implementation phase and the effect of the reduction of the segment should be evaluated in the following years.

Although the fleet report submitted by Latvia does not present a calculation for the SAR indicator without any explanation, the report is generally in line with the Commission guidelines COM (2014)545.

Discrepancies in previous fleet reports.

The discrepancies between the STECF assessment of the balance between capacity and fishing opportunities relating to Latvia's fleet report submitted in 2023 have not been explicitly addressed in the fleet report submitted by 31 May 2024.

Structural overcapacity and profitability

MS fleet report identifies structural overcapacity for fleet segment TM VL2440 based on analysis of SHI, VUR and IFI indicators results. An action plan for segment VL2440 is applying. Analysis of economic indicators shows that all four fleet segments imply long-term and short-term profitability based on ROI and CR/BER.

Overview of action plans

Latvia has implemented:

- an action plan provided with the fleet report in 2019 to reduce fleet capacity for the VL2440 TM fleet segment through the permanent withdrawal from the fishing activity of 10 vessels (with a corresponding capacity of 1150 GT and 2881 kW), which were involved in the Baltic cod fishery. The timeframe for reducing fleet segment capacity was by the end of 2020.

-an action plan provided with the fleet report in 2023 to reduce fleet capacity for the VL2440 fleet segment through the permanent withdrawal from the fishing activity of 9 vessels (with a corresponding capacity of 1150 GT and 3500 kW), involved in sprat and herring fishery in the Baltic Sea. The timeframe for reducing fleet segment capacity was by the end of 2023.

Adjustment targets and tools

No new or revised action plan has been proposed with the fleet report submitted in 2024. The current action plan aims to achieve a 30% reduction of the vessels number in the fleet segment TM VL2440, up to 34% of the gross tonnage and up to 32% of the engine power by the end of 2023.

Number of vessels

No new or revised action plan has been proposed by the MS.

3.4.14 Lithuania (LTU)

Overview of indicator findings

There were 12 fleet segments in the Lithuanian national fleet in 2022, of which 7 were active (5 in NAO and 2 in OFR). Of the 7 active segments, landings data were provided aggregated for 5 fleet segments while economic data were provided aggregated by 4 fleet segments.

Sustainable Harvest Indicator (SHI)

Area 27

Out of 5 fleet segments active in 2022, landings in value and SHI indicator values have been provided aggregated for all fleet segments.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 2 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The three fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 88.67% of the total value of the landings in 2022 provided by MS, and were as follows:

- 2 fleet segments were *out of balance* with fishing opportunities,
- 1 fleet segment were *in balance* with fishing opportunities

Trends were available for three fleet segments:

- 3 fleet segment displayed a decreasing (improving) trend.

OFR

The two fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 100% of the total value of the landings in 2022 provided by MS, and were as follows:

- 2 fleet segments were *in balance* with their fishing opportunities.

Trends were available for the two fleet segments:

- 1 fleet segments a decreasing (improving) trend,
- 1 fleet segment displayed no clear trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 5 fleet segments in NAO and 2 in OFR:

Area 27

- 1 fleet segment were *in balance* with its fishing opportunities,
- 4 fleet segments were *out of balance* with their fishing opportunities with 1 stock-at-risk.

OFR

- 1 fleet segment was *in balance* with its fishing opportunities,
- 1 fleet segment was *out of balance* with its fishing opportunities with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)-Area27

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	2		

Number of Overharvested Stocks (NOS)-OFR

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments		2		

Economic Dependency Indicator (EDI)-Area 27

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{msy} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2		1	2

Economic Dependency Indicator (EDI)-OFR

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{msy} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

ROI and RoFTA indicators were available for 3 aggregated fleet segments in NAO and 1 in OFR:

Area 27

- 1 segment was *in balance* with its fishing opportunities,
- 2 segments were *out of balance* with their fishing opportunities.

Trends were available for 1 fleet segment:

- 1 segment displayed a decreasing trend.

OFR

- 1 segment was *in balance* with its fishing opportunities.

Trends were available for fleet segment:

- 1 segment displayed an increasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was available for 3 aggregated fleet segments in NAO and 1 in OFR.

Area 27

- 1 segment was *in balance* with its fishing opportunities,
- 2 segment was *out of balance* with their fishing opportunities.

Trends were available for 1 fleet segment:

- 1 segment displayed no clear trend.

OFR

- 1 segment was *in balance* with its fishing opportunities.

Trends were available for the aggregated fleet segment:

- 1 segment displayed an increasing trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR_{220})

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for 5 fleet segments in NAO and 2 in OFR.

Area 27

- 4 segments were *in balance* with its fishing opportunities,
- 1 segment was *out of balance* with their fishing opportunities.

Trends were available for 3 fleet segments:

- 1 segment displayed an increasing (improving) trend,
- 2 segments displayed no clear trend.

OFR

- 1 segment was *in balance* with its fishing opportunities.

Trends were available for one fleet segment:

- 1 segment displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on biological indicator values for 2022 and trends over 2018-2022, and according to the criteria in the Commission guidelines, six fleet segments appear not to be in balance with fishing opportunities. Two of the fleet segments are considered out of balance for SHI, and five are out of balance according to SAR. The SHI values in the MS fleet report are consistent with those computed by EWG 24-13, except for TM VL2440 NGI. The SAR values in the MS fleet report are consistent with those computed by EWG 24-13, except for TM VL40XX NEU. The economic indicators suggest that DFN VL0812 NGI, PG VL0008 NGI and TM VL2440 NGI fleet segments out of balance.

The above observations are largely in line with the indicator values in the MS fleet report submitted in 2024.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.14.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Status 2022					Trends 2018-2022				
		Economic					Economic				
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE
LTUNAODFN0812NGI	4										
LTUNAOPG0008NGI	52										
LTUNAOTM2440NGI*	2										
	9										
	2										
LTUOFRTM40XXNEU*	2										
	4										
Total active vessels	75										
Total inactive vessels	60										
%of inactive in total	44%										

		Status 2022				Trends 2018-2022		
		Biological			Technical	Biological		Technical
Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
LTUNAODFN0812NGI	4	1						
LTUNAOPG0008NGI	52	1						
LTUNAOTM1824NGI	2	1						
LTUNAOTM2440NGI	9	1						
LTUNAOTM40XXNGI	2							
LTUOFRDTS40XXNEU	2							
LTUOFRTM40XXNEU*	4	1						

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Comparison of indicators

A comparison of indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are given in Annex II.

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI has been provided for the reference year 2022.

Despite the fact that the Lithuanian Baltic Sea fleet in 2022 consisted of 5 NAO and 1 OFR fleet segments SHI was estimated for only 3 of these segments, NAO TM VL1824, NAO TM VL2440 and OFR TM VL40XX. Two of these fleet segments were out of balance (NAO TM VL1824 and NAO TM VL2440) and one fleet segment was in balance (OFR TM VL40XX).

A comparison between indicator values in the MS Fleet reports and the values for equivalent fleet segments as estimated by EWG 24-13 indicate that the status of 2 of the fleet segments for which a comparison can be made (NAO TM VL2440 and OFR TM VL40XX) remains the same. There are similar outputs for all values.

The SHI values for these 3 fleet segments (NAO TM VL1824, NAO TM VL2440 and OFR TM VL40XX) estimated for the period 2018-2022 show a decreasing trend.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has been provided for the reference year 2022 for 4 NAO fleet segments, and 1 OFR segment.

The comparison between SAR reported in the MS annual fleet report for NAO segments and those estimated by the EWG 24-13 revealed the same outputs for all fleet segments, all of them being out of balance.

For the OFR, the SAR values computed by the MS and EWG 24-13 for one segment (OFR TM VL40XX), revealed contrasting results, MS annual fleet report found it to be in balance while EWG 24-13 found it to be out of balance.

Ratio between Current Revenue and Break-Even Revenue (CR/BER) stocks

In the MS annual fleet report the CR/BER ratio has been provided for the reference years 2018-2022 for 4 aggregated fleet segments.

A comparison between indicator values in the MS Fleet report and the values for equivalent fleet segments as estimated by EWG 24-13 for 2022 show some discrepancies. The fleet segments NAO TM VL2440 was found to be profitable with potential under-capitalisation according EWG 24-13 assessment, while MS annual fleet report founds it unprofitable with potential over-capitalisation.

Segments NAO DFN VL0812 and NAO PG VL0008 were found to be out of balance, while OFR TM VL40XX was found to be in balance.

Graphs and relevant explanations are included in the MS Annual Fleet Report to outline the trends for the indicator.

Based on EWG 24-13 analysis the distant fleet segment OFR TM VL40XX shows a increasing trend for the period 2018-2022, whereas NAO TM VL2440 shows no clear trend.

Return on Investment (ROI) and/or Return on Fixed Tangible Assets (RoFTA)

In the MS annual fleet report ROI indicator is provided for the reference years 2018-2022 for 4 aggregated fleet segments. RoFTA is estimated for the same fleet segments as RoFTA.

The comparison between RoFTA and ROI for the 4 fleet segments reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed the same outputs for all values.

Fleet segments NAO DFN VL0812, NAO PG VL0008 and NAO TM VL2440 appears to be out of balance for RoFTA and ROI and with decreasing trend for NAO TM VL2440. Distant fleet OFR TM VL40XX is indicated as in balance with an increasing trend.

Graphs and relevant explanations are included in the MS Annual Fleet Report to outline the trends for the indicator.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR_{220})

In the MS annual fleet report the VUR Indicator was calculated as the ratio between the average effort per vessel in a fleet segment and the observed maximum effort actually expended by a vessel in the segment for each length group and gear type. The MS says that the theoretical maximum days at sea (220 days) cannot be used for the small-scale fleet segments due to part time/seasonal fishing activities and thus, it did not calculate the VUR_{220}.

A discrepancy has been observed in the values of VUR between the MS annual fleet report and the ones estimated from EWG 24-13. For some segments, this could be because the MS used a clustered fleet segmentation. The outputs in terms of fleet segment status are not the same. EWG 24-13 values indicate that the majority of the fleet segments are in balance

(except NAO PG VL0008) while MS fleet report found 3 fleet segments as borderline and 2 fleet segments (NAO PG VL0008 and NAO DFN VL0812) may be out of balance.

A comparison of the trends in VUR between the fleet report and EWG 24-13 values show similar observations for no clear trend for fleet segments for which trends are available (except for NAO TM VL2440 with an increasing (improving) trend according EWG 24-13 assessment EWG 24-13).

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The EWG 24-13 notes the following:

The fleet report submitted for 2022 provides indicator values separately by fleet segment based on DCF information and for all the indicators specified in the Commission guidelines (COM (2014) 545).

The comparison between indicator values in the MS Fleet reports and the values for equivalent fleet segments, as estimated by EWG 24-13, show that many of the indicators for all the segments for which a comparison can be made, are similar except for VUR, SHI for NAO TM 2440 NGI and SAR for OFR TM 40XX NEU fleet segment.

A traffic light table based on the indicators outputs is included in the fleet report. Fleet segments that are assessed by the Member State to be “out of balance” with their fishing opportunities are clearly identified in the fleet report (NAO TM VL2440).

Fleet segments NAO DFN VL0812 and NAO PG VL0008 reveals a potential imbalance for ROI, RoFTA, CR/BER and SAR but according MS fleet report in long-term (3 years period) the segments are not “negative”, so no action needed.

The Lithuanian fleet report appears generally in accordance with the Commission’s Guidelines COM(2014) 545. All the prescribed indicators are used for the MS’s analysis of the balance between capacity and fishing opportunities with accompanying explanations on its conclusions.

Discrepancies in previous fleet reports

There were no significant discrepancies between the STECF assessment of the balance between capacity and fishing opportunities relating to MS's previous fleet report. There were no significant issues raised by the previous EWG.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

MS fleet report submitted by 31 May 2024 found fleet segment NAO TM VL2440 economic inefficient in long term (5 years period) indicating the existence of an imbalance and an action plan is presented. For the large-scale trawlers in the segment, MS observed difficulties in generating positive profits due to a combination of factors such as reductions in TACs for Baltic herring and sprats, closure of Baltic cod fisheries and COVID-19 restrictions, which have led to declining trend in economic efficiency, viability and capital productivity for 2018-2022 period. The cconflict in Ukraine additionally influenced negatively on the economic performance of the fleet segment.

Analysis of economic indicator values in the fleet report and those in this EWG report indicate that the distant fleet segment may be considered long-term profitable.

According EWG 24-13 estimation, three of four fleet segment appears to be “out of balance”:

- NAO DFN VL0812 for CR/BER, ROI and RoFTA,
- NAO PG VL0008 for CR/BER, ROI and RoFTA and VUR,
- NAO TM VL2440 for ROI and RoFTA with deterioration (decreasing) trend for both indicators.

Overview of action plans

The action plan was provided with MS fleet report relating to the fleet segment NAO DTS VL2440 operating in Baltic Sea which are reliant on the small pelagic species (mainly sprat and herring). The plan envisages to reduce the overcapacity by implementing a scraping scheme with public compensation for the permanent cessation of fishing activities.

Adjustment targets and tools

In the action plan, a need for adjusting the capacity in fleet segment NAO DTS VL2440 is considered, the aim of implementing measures for the permanent cessation of activity is presented and a timeframe for the implementation and the completion of decommissioning (by the end 2024) are defined. The plan foreseen reducing in 2024 of the tonnage of Baltic Sea vessels by 40% and the power by 42%. This target would be achieved by scrapping of 4 vessels.

The action plan also envisages implementation of Lithuania- Programme for the European Maritime Fisheries and Aquaculture Fund 2021-2027, Priority 1 “Fostering sustainable fisheries and the restoration and conservation of aquatic biological resources,” with the specific objective "Promoting the adjustment of fishing capacity to fishing opportunities in cases of permanent cessation of fishing activities and contributing to a fair standard of living in cases of temporary cessation of fishing activities".

Number of vessels

The action plan submitted by the MS concerns 4 vessels to be withdrawn in 2024 from the NAO DTS VL2440 fleet segment reducing the tonnage of the vessels in the fleet segment by 40% and the power by 42%.

Under the Lithuania Programme for the European Maritime Fisheries and Aquaculture Fund 2021-2027 following measure are planned:

1. Target value (2029) for removed vessel capacity, expressed in gross tonnage (GT): 468.00,
2. Target value for removed vessel power, expressed in kilowatts (kW): 884.00.

3.4.15 Malta (MLT)

Overview of indicator findings

There were 24 fleet segments in 2022, of which 19 were active. Of the 19 active segments, landings data was provided for 10 aggregated fleet segments and economic data were provided aggregated in 10 fleet segments.

Sustainable harvest indicator (SHI)

Out of 19 active fleet segments in 2022, SHI indicator values were available for 10.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 3 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 7 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 89.76% of the total value of the landings in 2022 provided by MS, and were as follows

• 1 fleet segments were out of balance with their fishing opportunities;
• 6 fleet segments were in balance with their fishing opportunities.

SHI trends are available for 6 segments.

- 2 segments show an improving trend
- 4 segments show no clear trend

Stocks at Risk Indicator (SAR)

SAR indicator was available for 10 fleet segments in 2022

• 3 fleet segments were in balance with their fishing opportunities,

• 7 fleet segments were out of balance with their fishing opportunities.

• 3 fleet segments with 2 stock-at-risk.

• 4 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1	5	1	1

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	9		1	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was calculated for 9 clustered segments:

- 5 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 8 segments:

- 5 segments displayed an increasing trend,
- 3 segments displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 10 clustered segments:

- 6 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 9 segments:

- 5 segments displayed an increasing trend,
- 4 segments displayed a decreasing trend,

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for 19 segments*:

- 10 segments were *in balance* with their fishing opportunities,
- 9 segments were out *of balance* with their fishing opportunities.

Trends could be calculated for 15 segments:

- 2 segments displayed a decreasing trend,
- 10 segments displayed no clear trend
- 3 segments displayed a null/flat trend.

Inactive Fleet Indicator

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, less than half of the fleet segments appear to be out of balance with their fishing opportunities. While the economic indicators indicate balance for

the clustered fleet segments HOK1218 NGI, HOK1824 NGI*, MGO1824 NGI *, PGP0612 NGI*, PS1824 NGI* and DTS2440 NGI*, the biological indicators show an imbalance due to the presence of one or more stocks-at-risk in four of these six segments, or an imbalance with respect to the SHI indicator for the latter segment.

In terms of economic and technical indicators, DTS2440 NGI * may be in balance for CR/BER, RoFTA, ROI and VUR. This segment appears to be in balance with the biological indicator SAR but appears out of balance for the SHI indicator. Trends are however improving in SHI. This segment appears to be in balance overall.

The HOK1218 NGI and HOK1824 NGI * segments pass all economic indicators and all the biological indicators except for SAR. No clear trend is evident in SAR for these segments. One stock is at risk for both of these segments. Overall, these segments appear to be in balance.

The MGO1824 NGI * passes all indicators except VUR22 and so appears in balance.

The PGP0612 NGI * and PS1824 NGI * clustered segments pass all economic indicators and fail only the SAR. PGP0612 NGI * only has biological indicators assessed for 1 segment, failing the SAR which shows 2 stocks at risk while passing the SHI. PS1824 NGI * fails SAR with 1 stock at risk but passes the SHI indicator. Both pass the EDI indicator.

Four clustered segments fail most of the economic indicators, three of which fail the SAR biological indicator: PGP0006 NGI *, PMP0006 NGI * and PMP0612 NGI. These segments may be out of balance. The MGO0612 NGI * segment fails all economic indicators except for NVA/FTE while passing SAR and VUR. This segment may be out of balance.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.15.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
bordeline
insufficiently profitable
insufficient data

improving
deteriorating
null/flat trend
no clear trend
insufficient data

			Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
															Biological			Technical	Biological		Technical
SR	Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	RoI	NP margin	NVA/ FTE	CR/ BER	RoFTA	RoI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
MBS	MLT MBS DTS2440 NGI *	12											**MLT MBS DTS1824 NGI**	7							
MBS													MLT MBS DTS2440 NGI *	5							
MBS	MLT MBS HOK1218 NGI	14											**MLT MBS HOK1218 NGI**	14	1						
MBS	MLT MBS HOK1824 NGI *	13											**MLT MBS HOK1824 NGI ***	13	1						
MBS	MLT MBS MGO0612 NGI	9											**MLT MBS MGO0612 NGI**	9							
MBS	MLT MBS MGO1824 NGI *	3											**MLT MBS MGO1218 NGI ***	2							
MBS													**MLT MBS MGO1824 NGI ***	1							
MBS	MLT MBS PGP0006 NGI *	273											MLT MBS DFN0006 NGI *	3							
MBS													MLT MBS HOK0006 NGI *	3	1						
MBS													**MLT MBS PGP0006 NGI ***	267							
MBS	MLT MBS PGP0612 NGI *	148											MLT MBS DFN0612 NGI *	4							
MBS													MLT MBS DFN1824 NGI *	1	2						
MBS													MLT MBS HOK0612 NGI *	41							
MBS													**MLT MBS PGP0612 NGI ***	102							
MBS	MLT MBS PMP0006 NGI	27											MLT MBS PMP0006 NGI	27	2						
MBS	MLT MBS PMP0612 NGI	121											MLT MBS PMP0612 NGI	121	2						
MBS	MLT MBS PS 1824 NGI *	4											MLT MBS PS 1218 NGI *	1							
MBS													**MLT MBS PS 1824 NGI ***	2	1						
MBS													MLT MBS PS 2440 NGI *	1							
Total Active		624																			
Total Inactive		235																			
% Inactive		27%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).

Source: own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 24-13 and those in the fleet report submitted by September 2024 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

No SHI-values were presented in the MS fleet report for the reference year 2022. It is not clear why SHI indicators are not presented, although F/F_{MSY} values are reported for 2021 for hake and red mullet. However, in the summary table of the MSs' fleet report provided for Balance and Capacity, Malta provided results at the MS level. In this table, the SHI indicator is green for the years 2018-2021 and grey for 2022 and 2023, i.e. implying prior balance for this indicator. There is no information how these results are derived.

Stocks at Risk Indicator (SAR)

The MS annual fleet report did not provide information for SAR in the reference year 2022. A general statement is made that overall, the SAR indicator is not available for Malta for 2012-2023, since during this period, the Maltese fleet did not exploit any stocks at high biological risk as defined by the 2014 indicator guidelines (COM (2014) 545 Final), with the exception of one stock, swordfish in the Mediterranean. It is also stated that the landings threshold is likely to be overestimated as it does not account for landings from non-EU fleets. Likewise, in the summary table of the MS's fleet report, the SAR indicator is displayed as not applicable for the years 2017-2023.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated by the EWG 24-13 revealed similar outputs for most values.

The following segments were defined as out of balance in the annual fleet report: MGO0612 NGI, PGP0006 NGI*, PGP0612 NGI, PMP0006 NGI and PMP0612 NGI.

EWG 24-13 shows four fleet segments not passing the CR/BER indicator with PGP0612 NGI * noted as passing this indicator.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

The comparison between ROI reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed similar outputs for most values.

According to RoI, the following segments were out of balance in the fleet report: MGO0612 NGI, PGP0006 NGI*, PGP0612 NGI, PMP0006 NGI and PMP0612 NGI .

According to the EWG 24-13 values for RoI, four of these segments are out of balance whereas the cluster PGP0612 NGI is in balance.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The comparison between VUR reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 show discrepancies for some segments. Based on the results for the technical indicator the MS considers that the Maltese fleet is overall in balance. The estimations provided by EWG define 9 segments where the VUR indicator is out of balance. However, 7 of these 9 relate to 2 clusters. The fleet report provides results for 10 segments in total noting that 6 segments appear to be in balance according to the indicator guidelines. These 6 segments are identified as passing this indicator in EWG 24-13.

Inactive Fleet Indicator

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The EWG 24-13 notes that the fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for the economic indicators specified in the Commission guidelines (COM (2014) 545).

Nevertheless, it should be noted that the report does not include biological indicators at the segment level which is, according to the report, mainly related to data limitations. This is not in line with the observations of the EWG which could calculate biological indicators for more fleet segments in 2022. Instead, the MS reports the SHI indicators as calculated by the EWG 22-15, as well as F/F_{MSY} values for several stocks, but these are not used by the MS in their assessment of the balance between capacity and fishing opportunities. The fleet report does not provide inactive fleet indicator values for the years 2019-2021 (values for 2022 and 2023 are provided). Of interest, the fleet report makes specific mention of interpretation of the inactivity levels within the guidelines and mentioned in EWG 19-13 and which is also brought up here in EWG 24-13. An additional table is provided showing inactivity within each length class against the total within that length class (as recommended in EWG 19-13 and the current EWG 24-13).

Discrepancies in previous fleet reports

The Maltese fleet report has not been adjusted in accordance with previous EWG comments regarding the assessment of balance and capacity of fleet segments and the structure and content of the Action Plan.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The fleet report states that the main indicators of relevance to identify balance for the Maltese fleet are the economic indicators given the absence of reliable information on the biological situation of stocks. The fleet report states that some segments (the same five that EWG 24-13 suggested were out of balance for the economic indicators) which show imbalance over time may benefit from an Action Plan.

Overview of action plan

The new action plan is provided in Annex I of the fleet report for 2022 (submitted in 2024). The fleet report states that the segments which show a trend of being imbalanced over time may benefit from the application of an Action Plan. The proposed action plan is largely a statement of intent to improve monitoring activities through the adoption of new regulatory frameworks and the adoption of equipment to register fishing vessel activity and monitor catches, and includes, amongst others, the following actions:

- equip all commercial fishing vessels with VMS or a GPRS tracking device
- develop a regulatory framework to improve the economic data collection

- develop a regulation to obliges fishers to weigh landings at landing sites
- install tablets of fishing vessel for the transmission of catch data
- develop a policy framework for diversification of the fishing fleet
- develop and implement a Fisheries Information System

EWG 24-13 is unable to assess the likely effects of the proposed measures.

Adjustment targets and tools

The adjustment targets and tools are not specifically described and the timeframe for implementation is to continue until 2027.

Number of vessels

The Action plan does not specify the number of vessels targeted by the plan. Most measures relate to the entire Maltese fishing fleet although two actions (prohibition of fishing in designated days and weeks from 15th February to 15th July and lampara sampling plan to scientifically assess the catch composition of the lampara fishery to revise the reporting of the lampara catches) are aimed at purse seine, trammel and gillnet fleets.

3.4.16 Netherlands (NLD)

Overview of indicator findings

Area 27

There were 37 fleet segments in 2022, of which 31 were active. Of the 31 active segments, landings and economic data were provided aggregated for 11 fleet segments.

Sustainable harvest *indicator (SHI)*

Out of 31 fleet segments active in 2022, landings in value have been provided aggregated in 11 fleet segments and SHI indicator values were available for 11.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 5 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that the 6 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 61.24% of the total value of the landings in 2022 provided by MS. Of these:

- 1 fleet segment were *in balance* with its fishing opportunities;
- 5 fleet segments were *out of balance* with their fishing opportunities.

Trends were available for the six fleet segments:

- 3 fleet segments a decreasing (improving) trend;
- 3 fleet segment displayed no clear trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 11 active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG notes that the 2022 SAR indicator values indicate:

- 10 fleet segments were *in balance* with their fishing opportunities;
- 1 fleet segment were *out of balance* with their fishing opportunities with 1 stock-at-risk

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	9	2		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{msy} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	10		1	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

ROI was calculated for 11 segments:

- 7 segments were *in balance* with their fishing opportunities,
- 3 segments were *out of balance* with their fishing opportunities;
- 1 segment with insufficient data.

Trends could be calculated for 10 segments:

- 3 segments displayed an increasing trend,
- 7 segments displayed a decreasing trend.

RoFTA were calculated for 11 segments:

- 8 segments were *in balance* with their fishing opportunities,
- 3 segments were *out of balance* with their fishing opportunities.

Trends were calculated for 11 segments:

- 1 segment displayed an increasing trend,
- 10 segments displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 11 segments:

- 11 segments were *in balance* with their fishing opportunities.

Trends were calculated for 11 segments:

- 5 segments displayed an increasing trend,
- 4 segments displayed a decreasing trend,
- 2 segments displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR_{220})

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR^{220} is not analysed here.

VUR was calculated for 11 segments:

- 4 segments were *in balance* with their fishing opportunities,
- 7 segments were *out of balance* with their fishing opportunities.

Trends were calculated for 8 segments:

- 7 segments displayed no clear trend;
- 1 segment displayed a null/flat trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, the majority of fleet segments appeared to be in balance with fishing opportunities. However, SHI, ROI and RoFTA indicators suggest that segment TM VL40XX is not in balance with a worsening situation (decreasing trend) for ROI and RoFTA and no clear trend in CR/BER. As the SAR and VUR indicators suggest, fleet segment PG VL0010 representing a significant share of the total Dutch fleet (156 of 714 vessels), shows some imbalance with a decreasing trend for ROI and ROFTA but with an improving situation (increasing trend) for CR/BER and no clear trend for SHI.

Fleet segments DFN VL1824, DTS VL2440 and TBB VL0010 also indicate imbalance as follows:

- ROI and RoFTA values and decreasing trend for ROI, RoFTA and CR/BER for DFN VL1824;
- ROI values and decreasing trend for ROI, RoFTA and CR/BER for DTS VL2440;
- RoFTA and VUR values and decreasing trend for RoFTA but with an increasing trend for CR/BER for TBB VL0010.

A comparison between indicator values provided in the MS Fleet report and values for equivalent fleet segments, as estimated by EWG 24-13, reveals similar results for most indicators for the segments for which a comparison can be made. The majority of indicators show similar values and trends, except for the SAR indicator (for 5 of the 11 fleet segments for which SAR was provided by MS).

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.16.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
		Economic					Economic							Biological			Technical	Biological		Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
NLD NAO DFN 1824 NGI*	18											NLD NAO DFN VL1218 NGI	3							
												NLD NAO DFN VL1824 NGI	2							
												NLD NAO FPO VL1218 NGI	2							
												NLD NAO FPO VL1824 NGI	2							
												NLD NAO HOK VL1218 NGI	1							
												NLD NAO MGO VL1824 NGI	5							
												NLD NAO PGP VL1218 NGI	1							
												NLD NAO PMP VL1218 NGI	1							
												NLD NAO TM VL1824 NGI	1							
NLD NAO DTS 1824 NGI*	6											**NLD NAO DTS VL1824 NGI**	6							
NLD NAO DTS 2440 NGI*	29											**NLD NAO DTS VL2440 NGI**	29							
NLD NAO PG 0010 NGI*	156											**NLD NAO PG VL0010 NGI**	156	1						
NLD NAO PG 1012 NGI*	20											**NLD NAO PG VL1012 NGI**	20							
NLD NAO TBB 0010 NGI*	22											NLD NAO DRB VL0010 NGI	4							
												NLD NAO DRB VL1012 NGI	1							
												NLD NAO DTS VL0010 NGI	7							
												NLD NAO DTS VL1012 NGI	1							
												NLD NAO TBB VL0010 NGI	7							
												NLD NAO TBB VL1012 NGI	2							
NLD NAO TBB 1218 NGI*	30											NLD NAO DRB VL1218 NGI	1							
												NLD NAO DRB VL1824 NGI	5							
												NLD NAO DRB VL2440 NGI	8							
												NLD NAO DRB VL40XX NGI	4							
												NLD NAO DTS VL1218 NGI	1							
												NLD NAO MGP VL2440 NGI	2							
												NLD NAO TBB VL1218 NGI	8							
												NLD NAO TM VL1218 NGI	1							
NLD NAO TBB 1824 NGI*	144											**NLD NAO TBB VL1824 NGI**	144							
NLD NAO TBB 2440 NGI*	22											**NLD NAO TBB VL2440 NGI**	22							
NLD NAO TBB 40XX NGI*	57											**NLD NAO TBB VL40XX NGI**	57							
NLD NAO TM 40XX NGI*	8											**NLD NAO TM VL40XX NGI**	8							
Total active vessels	512																			
Total inactive vessels	202																			
% of inactive in total	28%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.
Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.
Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).
Source: own elaborations.

Comparison of indicator values

A comparison of indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are given in Annex II. Points of note for each indicator are listed below.

Sustainable Harvest Indicator (SHI)

In the MS annual fleet report the SHI indicator has been provided for the reference year 2022 for five fleet segments.

The comparison between SHI reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed the same outputs for all fleet segments. Four fleet segments (PG-VL0010-NGI, PG-VL1012-NGI, TBB-VL2440-NGI and TBB-VL40XX-NGI) show that are in balance with their fishing opportunities and fleet segment TM-VL40XX-NGI shows that is out of balance with its fishing opportunities. Trends are the same for both the MS annual fleet report and the EWG 24-13 showing a decreasing trend for PG-VL1012-NGI, TBB-VL2440-NGI and TBB-VL40XX-NGI) and no trend for PG-VL0010-NGI and TM-VL40XX-NGI. EWG 24-13 shows no trend for DTS-VL1824-NGI while no information was available in the MS report.

Data were not provided in the Member State's report for 6 fleet segments (DFN-VL1824-NGI, DTS-VL1824-NGI, DTS-VL2440-NGI, TBB-VL0010-NGI, TBB-VL1218-NGI and TBB-VL1824- NGI), but they were computed by the EWG.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR indicator has been provided for the reference year 2022 for eleven fleet segments.

Five fleet segments were found to be in balance in both MS annual fleet report and EWG 24-13. PG-VL0010-NGI was found to be in balance in the MS annual report but out of balance in the EWG 24-13. PG-VL1012-NGI, TBB-VL2440-NGI, TBB-VL40XX-NGI and TM-VL40XX-NGI fleet segments were found to be out of balance in the MS annual fleet report but in balance in the EWG 24-13. TBB-VL0010-NGI was found to be in balance in the MS annual report but no SAR was found in the EWG 24-13.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed the same outputs for all values. All fleet segments seem to be in balance for CR/BER.

CR/BER values are provided for the period 2017-2022 accompanied by trend indication (calculated over the last five years of data) for all segments. A decreasing trend is indicated for TM VL40XX and non-significant trend at 5% for the other 10 fleet segments. Therefore, no comparison on the trend was possible for them.

Trends based on EWG 24-13 calculations for the 11 segments were as follows:

- 5 segments displayed an increasing trend (DTS VL1824, PG VL0010, PG VL1012, TBB VL0010 and TBB VL1218),
- 4 segments displayed a decreasing trend (DFN VL1824, DTS VL2440, TBB VL2440 and TBB VL40XX),
- 2 segments displayed no clear trend (TBB VL1824 and TN VL40XX).

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the Dutch annual fleet report, both ROI and RoFTA were calculated. A comparison between indicator values in MS Fleet report and data estimated by EWG 24-13 revealed the same outputs for all values. Three fleet segments (DFN VL1824, TBB VL0010 and TM VL40XX) seems to be out of balance for RoFTA and eight segments are in balance (DTS VL1824, DTS VL2440, PG VL0010, PGVL 1012, TBB VL1218, TBB VL1824, TBB VL2440 and TBB VL40XX).

In in the Dutch annual fleet report ROI and RoFTA values for the period 2017-2022 are provided accompanied by trend (calculated over the last five years of data) indication for 1 segment (TBB VL40XX) with a decreasing trend. A non-significant trend at 5% is indicated for the other 10 segments.

Trends for ROI based on EWG 24-13 calculations for the 10 segments (no trend was available for segment TBB VL0010) were as follows:

- 3 segments displayed an increasing trend (DTS VL1824, TBB VL1218 and TBB VL1824),
- 7 segments displayed a decreasing trend (including DFN VL1218 and TM VL40XX).

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The comparison between VUR reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed the same outputs for all values.

Values for the period 2017-2023 are provided. In the MS annual fleet report the VUR Indicator was calculated as the ratio between days at sea and maximum observed days at

sea for each length group and gear type. A table reporting the maximum observed days at sea (based on average days at sea of 10 most active vessels) per fleet segment was included in the MS annual fleet report (Table on page 25 of the MS fleet report). A comparison between indicator values in MS Fleet report and data estimated by EWG 24-13 revealed the same outputs for all values.

VUR was calculated for 11 segments:

- 4 segments were in balance with their fishing opportunities,
- 7 segments were *out of balance* with their fishing opportunities.

Trend assessment (calculated over the last six years of data) for VUR was provided by the MS and indicated a non-significant trend at 5% with the exception of TM VL40XX no trend.

Trends based on EWG 24-13 calculations based on VUR for the 8 segments were as follows:

- 7 segments displayed no clear trend;
- 1 segment displayed no clear trend.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The EWG 24-13 notes the following:

The fleet report submitted in 2023 provides indicator values separately by fleet segment based on DCF information and for all the indicators specified in the Commission guidelines (COM (2014) 545).

A traffic light table based on the indicators outputs and trends is included in the fleet report. Fleet segments that are assessed by the Member State to be “out of balance” with their fishing opportunities are clearly identified in the fleet report (PG VL1012, TBB VL2440, TBB40XX and TM 40XX).

No action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report and the rationale behind the lack of an action plan is explained (the consequences of the North Sea sole stock benchmark and the ongoing negotiations between the Coastal States on the pelagic stock management).

In line with the conclusions of EWG 23-13, the Netherlands' fleet report includes details on the capacity outcomes of the decommissioning scheme implemented in 2022. However, point 9 of the Commission guidelines COM (2014) 545, which outlines additional information that should be included, is still not fully followed by the report.

Discrepancies in previous fleet reports.

There were no significant discrepancies for the biological and the economic indicators between the STECF assessment of the balance between capacity and fishing opportunities relating to MS's previous fleet report. The majority of indicators show similar values and trends for SHI and SAR, except for SAR in 5 fleet segments.

No action plan was provided for segments that were indicated to be the imbalanced, although an explanation was given regarding the lack of need for an action plan at the time.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The long-term and short-term profitability estimation on the fleet and by fleet segments is provided in the fleet report based on ROI, RoFTA and CR/BER values.

The assessment in the fleet report suggests long-term profitability on the Dutch fleet with a decreasing trend for both ROI and RoFTA.

The estimation by segments shows short-term profitability for all fleet segments according CR/BER with deterioration trend for four fleet segments (DFN VL1824, DTS VL2440, TBB VL2440 and TBB VL40XX).

One fleet segment (DFN VL1824) appears to be “out of balance” for ROI, RoFTA and VUR with a decreasing trend for both ROI and RoFTA, one fleet segment (TM VL40XX) to be “out of balance” for ROI and RoFTA with a decreasing trend for both indicators, one fleet segment (DTS VL2440) to be “out of balance” for ROI with a decreasing trend for ROI, RoFTA and CR/BER, one segment (TBB VL0010) “out of balance” for VUR and RoFTA suggesting unprofitability but profitable based on the CR/BER. The other assessed fleet segments are found to be profitable.

Adjustment targets and tools

No new or revised action plan was proposed.

Number of vessels

No new or revised action plan was proposed.

Overview of action plans

No new or revised action plan was proposed.

3.4.17 Poland (POL)

Overview of indicator findings

Area 27

There were 20 fleet segments in 2022, of which 15 were active. Of the 15 active segments, weight of landings was provided aggregated by 10 segments, value of landings and economic data were provided aggregated by 7 fleet segments. The Polish fishing fleet in 2022 consisted of 825 vessels. Of these, 801 vessels (97.1%) were active, while 24 vessels (2.9%) were inactive.

Sustainable harvest indicator (SHI)

Out of 15 fleet segments active in 2022, landings in value have been provided aggregated in 10 fleet segments and SHI indicator values were available for 7.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 2 fleet segments cannot be used meaningfully to assess the balance or imbalance because

the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 5 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 78.14% of the total value of the landings in 2022 provided by MS, and were as follows:

• 5 fleet segments were *in balance* with their fishing opportunities.

The time series of SHI values were available for 4 fleet segments and they were decreasing (improving).

Stocks at Risk Indicator (SAR)

SAR indicator was available for 10 active fleet segments in 2022.
According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

• 3 fleet segments were *in balance* with their fishing opportunities,
• 3 fleet segments with 2 stocks-at-risk,
• 4 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	4	3		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2	3	2	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 7 segments:

- 3 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 4 segments:

- 0 segments displayed an improving trend,
- 4 segment displayed a deteriorating trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 7 segments:

- 6 segments were *in balance* with their fishing opportunities,
- 1 segment was *out of balance* with their fishing opportunities.

Trends could be calculated for 4 segments:

- 0 segments displayed an improving trend,
- 4 segments displayed a deteriorating trend,

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were not provided by the MS and thus, VUR_{220} is analysed here.

VUR_{220} was calculated for 11 segments:

- 2 segments were *in balance* with their fishing opportunities,
- 9 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 6 segments:

- 3 segments displayed no clear trend,
- 2 segments displayed a deteriorating trend,
- 1 segment displayed an improving trend.

Area OFR

There was 1 fleet segment in 2022, which was active. The weight of landings was provided by 1 vessel. No economic data was provided.

Stocks at Risk Indicator (SAR)

The only Polish vessel operating in OFR was *in balance* with its fishing opportunities.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were not provided by the MS and thus, VUR_{220} is analysed here. The segment was *in balance* with its fishing opportunities. However, this segment contains only a single vessel. No trends calculated, as the vessel was not active in 2019 and 2020.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines, half of fleet segments appear to be out of balance with their fishing opportunities. More than half of segments are indicated to be out of balance according to the RoFTA values. Trends in CR/BER are improving while in RoFTA are deteriorating for all fleet segments.

The status of each indicator as computed by EWG with respect to the criteria given in the Commission Guidelines (COM (214)545) is illustrated in the table below.

Table 3.4.17.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
insuffiently profitable
bordeline
insufficient data

improving
deteriorating
no clear trend
null/flat trend
insufficient data
no data

		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
		Economic					Economic							Biological			Technical	Biological		Technical
Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
POL NAO DFN 1218 *	19											**POL NAO DFN 1218**	15							
												POL NAO DFN 1824	2							
												POL NAO HOK 1218	2	1						
POL NAO DTS 1218 *	33											**POL NAO DTS 1218**	22							
												POL NAO DTS 1824	3							
												POL NAO DTS 2440	1							
												POL NAO DTS 0812	7	2						
POL NAO FPO 1824	1											POL NAO FPO 1824	1							
POL NAO FPO 2440	1											POL NAO FPO 2440	1							
POL NAO PG 0008	326											POL NAO PG 0008	326	2						
POL NAO PG 0812	318											POL NAO PG 0812	318	2						
POL NAO TM 1218	10											POL NAO TM 1218	10	1						
POL NAO TM 1824	49											POL NAO TM 1824	49	1						
POL NAO TM 2440	42											POL NAO TM 2440	42	1						
POL NAO TM 40XX	1											POL NAO TM 40XX	1							
POL OFR TM 40XX	1											POL OFR TM 40XX	1							
Total active	801																			
Total inactive	24																			
% of inactive in total	2.9																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.
Note2: Vessel Utilization indicators (VUR) were not computed by the EWG although they were provided in the National Fleet Report (see explanation below in section "Comparison of indicator values; The vessel utilization indicator").
Note3: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.
Note4: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster. (REFET to…)
Source: own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the Fleet Report submitted by Poland SHI is presented for the period 2021–2023, therefore the trends cannot be compared.

SHI values reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 are similar (i.e., all the 5 fleet segments out of balance).

Stocks at Risk Indicator (SAR)

In the Fleet Report submitted by Poland SAR is presented for 2021–2023, therefore the trends cannot be compared.

The comparison between SAR values reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 was made for 2022 and reveals some discrepancies. In particular, DFN VL1218 and PG VL0008 were out of balance for EWG 24-13, while the fleet report reported these fleet segments as in balance for SAR. In addition, FPO VL1824, FPO VL2440 and TM VL40XX were in balance according to SAR values computed by EWG 24-13, while they were missing in the fleet report.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed similar outputs. There were some differences in indicator values for some fleet segments, their status with respect to being in or out of balance was the same for most segments. However, DFN VL1218, PG VL0008 and PG VL0812 segments in fleet report were indicated as out balance, while the EWG 24-13 calculation shows in balance.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the MS annual fleet report ROI was calculated where RoFTA was estimated by EWG 24-13.

The status in terms of balance for both indicators revealed similar outputs for 7 segments:

- 3 segments are in balance with its fishing opportunities,
- 4 segments are out of balance with their fishing opportunities.

In the absence of RoFTA calculations in the MS report, a comparison between trends is not possible. No comparison with trends estimated by the EWG 24-13 could be undertaken.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The maximum number of days at sea is again requested at the fleet segment level by supra region was not submitted by MS in data call. Comparison VUR indicator analysis could not be undertaken as values were not estimated by the EWG 24-13.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for the majority of the indicators specified in the Commission guidelines (COM (2014) 545).

Fleet segments that are assessed by the Member State to be “out of balance” with their fishing opportunities are clearly identified in the fleet report.

An action plan for fleet segments assessed by the Member State to “out of balance” is included in the fleet report.

The Fleet Report submitted by Poland states that there is imbalance between the fishing capacity of the Polish fleet operating in the Baltic and available fish stocks. In particular, it attributes the main causes of the imbalances to the following main factors: a) an excessive number of vessels in the fleet; b) catch imbalance; c) an imbalance in the exploitation of central Baltic herring; d) banning of cod-targeting fisheries.

The Fleet Report provides information about several management measures carried out by Poland to reduce the number of imbalanced fleets segments.

Discrepancies in previous fleet reports

Discrepancies for SHI which were found by EWG 23-13 have been addressed, while discrepancies found for SAR in several fleet segments have not been addressed in the fleet report 2024.

Also, estimated RoFTA by EWG and provided in fleet report ROI values were equal as in previous fleet report. 24-13

Both issues have not been properly addressed in 2024 MS report. The Member State should clarify which indicator is provided.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, EWG 24-13 has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The fleet report submitted by 31 May 2024 identifies overcapacity for 7 segments.

The MS has indicated when structural overcapacity exists in the fleet. The report presents the estimates of the long-term profitability by fleet segments based on ROI values. However, the ROI values seem to be not properly calculated. The CR/BER estimation by segments shows short-term profitability for 3 fleet segments. Three fleet segments were with improving trend.

The MS identified the concern regarding all fleet segments operating in the Baltic Sea.

***Overview of action plans*.**

In the fleet report, Poland has concluded that structural overcapacity exists in 7 of the fishing fleet segments when in the 2023 report was reported 8 segments. The DTS VL1218 segment was out of fleet in 2022. Accordingly, a revised action plan based on the action plan submitted with the report for 2022 is provided. The revised action plan specifies actions to be taken separately for specific fleet segments.

EWG 24-13 notes that the action plan clearly specifies the targets and tools. However, no specific implementation date was indicated, only that the plan is to be implemented over the 3-5 year period 2023-2027.

The action plan specifies three main measures:

I. reducing the number of vessels in permanently inefficient and imbalanced segments to a level which ensures an increase in efficiency in segments operating at a deficit and stabilises the financial condition of those segments;

II. developing a system for distributing Polish catch quotas in a way which is geared towards achieving biological balance;

III. improving data collection methods and tools, analyses and modelling of the Baltic fleet’s economic and biological performance. Over a period of 3-5 years, Poland is planning to

develop holistic balance assessment methods and a data collection system enabling better structuring and modelling of fleet scenarios.

The EWG 24-13 is unable to assess the extent to which the measures in the action plan are likely to redress the imbalance in the fleet segments concerned.

Adjustment targets and tools

The revised action plan was submitted with the fleet report by 31 May 2024. The updated numbers of vessels, which are foreseen for permanent cessation, was provided in the report. The targets and tools defined clearly and remain as in 2023 report.

Number of vessels

All 797 vessels are targeted by action plan whereas 260 vessels are foreseen for permanent cessation.

3.4.18 Portugal (PRT)

Overview of indicator findings

There were 72 fleet segments in the Portuguese fleet in 2022, of which 57 were active. Of the 57 active segments, landings data were provided for 54 fleet segments and economic data were available for 54 aggregated fleet segments. Results are presented by supra-region below.

Area 27

There were 43 fleet segments operating in Area 27 in 2022, of which 37 were active. Of the 37 active segments, landings data were provided for 35 fleet segments and economic data were available for 35 aggregated fleet segments

Sustainable harvest indicator (SHI)

Out of 35 active fleet segments in 2022, SHI indicator values were available for 32.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 22 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 10 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 40.7% of the total value of the landings in 2022 provided by MS, and were as follows:

- 0 fleet segment were *out of balance* with their fishing opportunities,
- 10 fleet segments were *in balance* with their fishing opportunities.

Trends could be calculated for 10 segments:

- 2 fleet segments displayed an increasing (deteriorating) trend,
- 8 fleet segments displayed no clear trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 35 fleet segments in 2022.

- 26 fleet segments were *in balance* with their fishing opportunities;
- 9 fleet segments were *out of balance* with their fishing opportunities:
  - 1 fleet segment with 6 stocks-at-risk,
  - 2 fleet segments with 4 stocks-at-risk,
  - 1 fleet segment with 3 stocks-at-risk,
  - 5 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	28		1	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI values	0-25%	25-50%	50-75%	75-100%
N of fleet segments	32			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 35 segments:

- 29 segments were *in balance* with their fishing opportunities,
- 6 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 35 segments:

- 20 segments displayed an increasing trend,
- 14 segments displayed a decreasing trend,
- 1 segment displayed no clear trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 35 segments:

- 30 segments were *in balance* with their fishing opportunities,
- 5 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 35 segments:

- 23 segments displayed an increasing trend,
- 9 segments displayed a decreasing trend,
- 3 segments displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for 37 segments:

- 24 segments were *in balance* with their fishing opportunities,
- 13 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 36 segments:

- 36 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends (Area 27)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.18.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Economic indicators											Biological and technical indicators						
		Status 2022					Trends 2018-2022						Status 2022				Trends 2018-2022		
Fleet segment / clustered segment	N vessels	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	CR/BER	RoFTA	ROI	NP margin	NVA/FTE	Fleet segment	N vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
PRT NAO DTS40XX IWE	10											PRT NAO DTS40XX IWE	10	6						
PRT NAO DFN0010 NGI	236											PRT NAO DFN0010 NGI	236	3						
PRT NAO DFN1012 NGI	15											PRT NAO DFN1012 NGI	15							
PRT NAO DFN1218 NGI	39											PRT NAO DFN1218 NGI	39	1						
PRT NAO DFN1824 NGI	22											PRT NAO DFN1824 NGI	22							
PRT NAO DRB0010 NGI	34											PRT NAO DRB0010 NGI	34							
PRT NAO DRB1012 NGI	19											PRT NAO DRB1012 NGI	19							
PRT NAO DRB1218 NGI	18											PRT NAO DRB1218 NGI	18							
PRT NAO DTS0010 NGI	3											PRT NAO DTS0010 NGI	3							
PRT NAO DTS1012 NGI	6											PRT NAO DTS1012 NGI	6							
PRT NAO DTS1218 NGI	8											PRT NAO DTS1218 NGI	8							
PRT NAO DTS1824 NGI	8											PRT NAO DTS1824 NGI	8	1						
PRT NAO DTS2440 NGI	55											PRT NAO DTS2440 NGI	55	4						
PRT NAO FPO0010 NGI	365											PRT NAO FPO0010 NGI	365							
PRT NAO FPO1012 NGI	51											PRT NAO FPO1012 NGI	51							
PRT NAO FPO1218 NGI *	61											**PRT NAO FPO1218 NGI**	**57**							
												PRT NAO FPO1824 NGI	4							
PRT NAO HOK0010 NGI	103											PRT NAO HOK0010 NGI	103							
PRT NAO HOK1012 NGI	3											PRT NAO HOK1012 NGI	3							
PRT NAO HOK1218 NGI	34											PRT NAO HOK1218 NGI	34							
PRT NAO HOK1824 NGI	21											PRT NAO HOK1824 NGI	21							
PRT NAO HOK2440 NGI	20											PRT NAO HOK2440 NGI	20	1						
PRT NAO MGO0010 NGI	25											PRT NAO MGO0010 NGI	25							
PRT NAO MGO1012 NGI	6											PRT NAO MGO1012 NGI	6							
PRT NAO PGP0010 NGI	1472											PRT NAO PGP0010 NGI	1472	4						
PRT NAO PGP1012 NGI	9											PRT NAO PGP1012 NGI	9							
PRT NAO PGP1218 NGI	17											PRT NAO PGP1218 NGI	17							
PRT NAO PGP1824 NGI	5											PRT NAO PGP1824 NGI	5							
PRT NAO PMP0010 NGI	33											PRT NAO PMP0010 NGI	33							
PRT NAO PS 0010 NGI	18											PRT NAO PS0010 NGI	18							
PRT NAO PS 1012 NGI	28											PRT NAO PS1012 NGI	28							
PRT NAO PS 1218 NGI	34											PRT NAO PS1218 NGI	34	1						
PRT NAO PS 1824 NGI	51											PRT NAO PS1824 NGI	51							
PRT NAO PS 2440 NGI	21											PRT NAO PS2440 NGI	21	1						
PRT NAO TBB0010 NGI	14											PRT NAO TBB0010 NGI	14							
PRT NAO TBB1012 NGI *	10											**PRT NAO TBB1012 NGI**	**9**							
												PRT NAO TBB1218 NGI	1							
Total Active	2874																			
Total Inactive	3640																			
%of inactive in total	56%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.
Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stock at risk.
Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report)
Source: own elaborations.

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MBS

There are 1 fleet segment operating in area 37 in 2022, made up of a single vessel. For confidentiality reasons, this segment will not be analysed.

Synthesis of indicators and trends (Area 37)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.18.2. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Economic indicators											Biological and technical indicators						
		Status 2022					Trends 2018-2022						Status 2022				Trends 2018-2022		
Fleet segment / clustered segment	N vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	N vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
PRT MBS FPO2440 NGI	1											PRT MBS FPO2440 NGI	1							
Total Active	1																			
Total Inactive	0																			
%of inactive in total	0%																			

Note 1: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stock at risk.

Source: own elaborations.

OFR

There were 2 fleet segments operating in OFR in 2022, of which both were active. Landings data and economic data were provided for 2 fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2022, landings in value have been provided aggregated in 2 fleet segments and SHI indicator values were available for both.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 2 fleet segments may be considered meaningful to assess balance or imbalance, accounted for 100% of the total value of the landings in 2022 provided by MS, and were as follows:

- 0 fleet segment were *out of balance* with their fishing opportunities,
- 2 fleet segments were in balance with their fishing opportunities.

Trends could be calculated for 0 fleet segment.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 2 fleet segments in 2022.

- 0 fleet segments were *in balance* with their fishing opportunities;
- 2 fleet segments were *out of balance* with their fishing opportunities:
  - 2 fleet segments with 2 stocks-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	1	1		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments		2		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 2 segments:

- 2 segments were *in balance* with their fishing opportunities.

Trends could not be calculated.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 2 segments:

- 2 segments were *in balance* with their fishing opportunities.

Trends could not be calculated.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

VUR was calculated for 2 segments:

- 2 segments were in balance with their fishing opportunities.

Trends couldn't be calculated.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends (OFR)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.18.3. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

		Economic indicators											Biological and technical indicators						
		Status 2022					Trends 2018-2022						Status 2022				Trends 2018-2022		
Fleet segment / clustered segment	N vessels	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Fleet segment	N vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
PRT OFR HOK2440 IWE	9											PRT OFR HOK2440 IWE	9	2						
PRT OFR HOK40XX IWE	3											PRT OFR HOK40XX IWE	3	2						
Total Active	12																			
Total Inactive	0																			
%of inactive in total	0%																			

Note 1: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stock at risk.

Source: own elaborations.

Status and trends for the Portugal fleet in ALL REGIONS

For the Portuguese NAO area fishery, based on indicator values for 2022 and trends over 2018-2022 and according to the criteria in the Commission guidelines. Based on the STECF indicator estimated for the economic indicators, most fleet segments in the Portuguese NAO area fishery were in balance. Considering biological indicators, the SHI was calculated for 10 fleet segments, representing 41% of the total landings. For these fleets, the SHI indicator appeared in balance. The SAR indicator appeared in balance for most fleet segments.

For the Portuguese OFR area fishery, an overview of the indicators presented the two OFR fleet segments in balance for available economic indicators and for the biological indicator SHI, while the biological indicators SAR was out of balance. Furthermore, trends were not available.

Portugal also has a fleet segment in the Mediterranean which is not mentioned in the MS fleet report. This segment is made up of only one vessel. Economic indicator values indicate imbalance and biological indicators imply “in balance”.

Comparison of indicators

Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2024 are compared in Annex II to this report.

The number of vessels were slightly different between the data used by the WG and the results presented in the MS report (2887 active vessels against 2880).

The fleet report is based on 2023 data, whereas the WG assessed 2022. However, the 2022 data was also presented in the report and the WG was able to compare the results.

Sustainable harvest indicator (SHI)

In the Portuguese annual fleet report, SHI-values have been presented for the DTS, PS, PGP and HOK (swordfish) Mainland segments, for 2022 and 2023.

Although there are discrepancies in the SHI values for the segments that could be compared, these differences have no effect on the balance assessment. However, one of the reasons for the discrepancies in the SHI calculation is the list of species included in the SHI calculation.

There is no trend over the last few years calculated in the fleet report.

Stocks at Risk Indicator (SAR)

In the Portuguese annual fleet report for the mainland fleet, only eel and undulate ray are considered as stock at risk and accounted for more than 10% of the total catch in value of the PGP VL0010 segment.

According to the WG, the SAR indicator was not favourable for 9 mainland fleet segments and 2 OFR fleet segments. SARs were identified in particular for DTS40XX-IWE, DTS2440-NGI, PGP0010-NGI, DFN0010-NGI, DFN1218-NGI, DTS1824-NGI, HOK2440-NGI, PS-1218-NGI and PS-2440-NGI.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the Portuguese annual fleet report, the CR/BER-values have been provided for the reference years 2018-2022 for 37 segments. There were 38 segments estimated by the EWG 24-13 (1 segment more than in the MS Fleet report: MBS FPO2440 NGI).

A comparison between indicator values in MS Fleet report and data estimated by EWG 24-13 showed small discrepancies in values, but these differences have no effect on the balance assessment.

The values were calculated for the years 2018-2022 but the trends were not interpreted in the MS fleet Report.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the Portuguese annual fleet report, the RoFTA -values have been provided for the reference years 2018-2022 for 37 segments. There were 38 segments listed in the data used by the EWG 24-13 (1 segment more than in the MS Fleet report: MBS FPO2440 NGI).

A comparison between indicator values in MS Fleet report and data estimated by EWG 24-13 showed important discrepancies in values in all segments: there is a scaling-factor of 100 difference between the values calculated by the MS and those of the EWG 24-13 (the values are in percentages in the calculation of the member state). To make the comparisons, the values have been divided by 100. In addition to the scale, there are a few differences in the calculations. These differences have an effect on the balance assessment for only one fleet segment HOK1824 (with a ROFTA value of -0.36 according to the EWG and 0.02 according to the MS report).

The values were calculated for the years 2018-2022 but the trends were not interpreted in the MS fleet Report.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the Portuguese annual fleet report the VUR values have been provided for 36 segments. The VUR was based on maximum observed days at sea in each fleet segment. Hence VUR220 is not considered here.

Discrepancies are detected for nearly all segments that could be compared between the EWG 24-13 and the MS Fleet Report and affected the perception of balance for 9 fleet segments. The maximum days at sea used in the MS fleet report were different to those used by the EWG.

The estimates for the EWG did not provide a clear trend for most fleets. In the MS fleet Report, the values were calculated for the years 2018-2023 but the trends were not interpreted.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for the majority of the indicators specified in the Commission guidelines (COM (2014) 545). Fleet segments that are assessed by the Member State to be "out of balance" with their fishing opportunities are clearly identified in the fleet report. An action plan for fleet segments assessed by the Member State to be "out of balance" is included in the fleet report. The MS fleet report focused on 2023.

The MS fleet report indicated that in 2023, 4 261 vessels (more than 50% of the vessels in the fleet) did not carry out any activity, this data concerned all the regions of Portugal, including OMR. A process of decommissioning vessels that have been inactive for a long period of time is ongoing.

The values of the vessel use indicator indicate imbalance for most fleet segments, but according to the MS fleet report, this indicator does not appear to be the most appropriate means of assessing the actual activity of the vessels. The variability between the average number and the maximum number of sea days is mostly due to the particularities of vessels in the segments concerned and has little to do with structural underactivity. The main factors contributing to these differences are the great variability in the weather and sea conditions of the different areas/regions of the mainland, the fact that a large number of vessels operate on a part-time basis (seasonal activity), and the requirement to observe specific closed seasons for certain areas or types of fishing gear.

In the fleet report, biological indicator values were calculated only for the main species fished by Portugal that are assessed by ICES. Consequently, SHI-values were given for the DTS, PS, PGP and HOK Mainland segments only. The resulting SHI values indicated that the segments were in balance with fishing opportunities.

According to the economic indicators, most fleet segments performed well. Five segments have presented low or negative returns in recent years and have not generated sufficient revenue to cover operating and capital costs.

Based on the combined analysis of the results of vessel use, biological sustainability and economic indicators, the MS concludes in the Fleet Report that the majority of the Portuguese fleet is more or less in balance with fishing opportunities. Only the HOK VL1824 and HOK VL2440 targeting swordfish are considered imbalanced and an action plan has been provided for these vessels since 2022.

Discrepancies in previous fleet reports

Unlike the fleet report for 2022 (submitted in 2023), the Portuguese report for 2023 (submitted in 2024) presented SAR for the mainland fleet based on undulate ray and eel catches only. The values of the SHI and SAR provided by the MS are different from those calculated by the EWG.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The economic indicator values for the fleet segments relate to the year 2023. Most fleet segments performed well and were indicated to be in balance.

However, as regards vessels of more than 18 meters operating HOK in mainland and in external waters, the estimated values for the economic indicators suggested that the fleet segments were out of balance and have not generated sufficient revenue to cover operating and capital costs.

Overview of action plans

The action plan presented is a continuation of the Action Plan set out in the 2021 and 2022 reports on the Portuguese fishing fleet, which aims for an adjustment (reduction in capacity) of the fishing fleet operating with hooks, particularly in the case of larger length-class vessels.

The action plan provides for the permanent cessation of activity, meaning scrapping vessels or decommissioning and retrofitting them for activities other than commercial fishing. The focus will be on older vessels, since these are generally the least energy-efficient, not only in terms of their engines but also their hydrodynamics.

In addition, the action plan provides for the implementation of a temporary cessation measure with regard to the licensed fleet with a quota to fish swordfish (northern stock) in 2023.

The EWG 24-13 is unable to assess the extent to which the measures in the action plan are likely to redress the perceived imbalance in the fleet segments concerned.

Adjustment targets and tools

The action plan seems targeted to vessels of the fleet segments HOK VL1824 and HOK VL2440 targeting swordfish and provide clear adjustment targets and tools.

In the action plan, a need for adjusting the fleet’s capacity is considered, the aim of implementing measures for the permanent cessation of activity is presented and a timetable defining the start of the implementation in the second half of 2023 and the completion of decommissioning by the end 2025 are defined. The plan targets the HOK segment over 12 meters and more particularly 9 vessels using bottom and/or deep-water longlines and 7 surface longliners targeting swordfish. The application period ran from 1 September to 31 October 2023, and 26 applications meeting the scheme’s eligibility requirements were

submitted (20 vessels are licensed to fish with bottom longlines and 6 vessels are licensed for surface-longline fishing).

The action plan also provides for the implementation of a temporary cessation measure which will halt vessel activity for a period of 45 days, starting in June and ending in September 2023. The plan relates to around 40 vessels which have a quota to fish swordfish (northern stock). In June 2023, the Order No 23/DG/2023 prohibited swordfish fishing for a total of 45 days affecting 28 vessels.

Number of vessels

The action plan submitted by the MS concerns a total of 54 vessels:

- permanent cessation: 26 vessels
- temporary cessation: 28 vessels complied with these requirements.

The fleet capacity will be adjusted by 26 vessels, which will result in a capacity reduction of around 1 615 GT in terms of gross tonnage and 5 336 kW in terms of propulsion power.

3.4.19 Romania (ROU)

Overview of indicator findings

Area 37

There were 10 fleet segments in 2022, of which 7 were active. Of the 7 active segments, landings data were provided for all 7 segments while economic data was provided for 5 fleet segments.

Sustainable harvest indicator (SHI)

The EWG notes that for the 5 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 93.00 % of the total value of the landings in 2022 provided by MS, and were as follows

- 3 fleet segments were *out of balance* with their fishing opportunities;
- 2 fleet segments were *in balance* with their fishing opportunities.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 2 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 7 active fleet segments in 2022

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 17-08 notes that the 2022 SAR indicator values indicate:

- 7 fleet segments were *in balance* with their fishing opportunities;

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments			3	3

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	4		3	

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was calculated for 3 segments:

- 2 segments were *in balance* with their fishing opportunities,
- 1 segment was *out of balance* with its fishing opportunities.

Trends were calculated for 2 segments:

- 2 segments displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 3 segments:

- 2 segments were *in balance* with their fishing opportunities,
- 1 segment was *out of balance* with its fishing opportunities.

Trends were calculated for 2 segments:

- 2 segments displayed a decreasing trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

VUR was calculated for 7 segments:

- 4 segments were *in balance* with their fishing opportunities,
- 3 segments were *out of balance* with their fishing opportunities.

Trends were calculated for 6 segments:

- 4 segments displayed an increasing trend,
- 2 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on economic indicator values for 2022 and according to criteria in the Commission guidelines, the majority of the fleet segments appear to be in balance with fishing opportunities although the trend over 2017-2021 shows a worsening situation. Based on the biological indicator values, most fleet segments appear to be out of balance with fishing opportunities in terms of SHI, with trends showing an improving situation, and all segments appear in balance in terms of SAR. Based on the technical indicators, the majority of fleet segments appear to be in balance with fishing opportunities. VUR values indicate an imbalance in fishing opportunities for 3 of 7 segments. The MS (which indicates the all segments are out of balance according to the VUR indicator) explains this is due to the unstable hydro-climatic conditions specific to the Black Sea, the Covid pandemic and the war in Ukraine.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.19.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
bordeline
insuffiently profitable
insufficient data

improving
deteriorating
nullflat trend
no clear trend
insufficient data

			Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
															Biological			Technical	Biological		Technical
SR	Fleet segment/ clustered segment	Nb of vessels	CR/ BER	RoFTA	RoI	NP margin	NVA/ FTE	CR/ BER	RoFTA	RoI	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
MBS	ROU MBS PG 0006 NGI *	7											ROU MBS PG 0006 NGI *	7							
MBS	ROU MBS PG 0612 NGI *	105											ROU MBS PG 0612 NGI *	79							
MBS													ROU MBS PMP 0612 NGI *	26							
MBS	ROU MBS PMP0006 NGI *	5											ROU MBS PMP0006 NGI *	5							
MBS	ROU MBS PMP1218 NGI *	22											ROU MBS PMP1218 NGI *	19							
MBS													ROU MBS PMP1824 NGI *	3							
MBS	ROU MBS PMP2440 NGI *	2											ROU MBS PMP2440 NGI *	2							
Total Active		141																			
Total Inactive		30																			
% Inactive		18%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Source: own elaborations.

Comparison of indicators

A comparison of Indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2023 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the MS annual fleet report all 6 segments assessed appear as imbalanced (PMP <6m, PG 6-12m, PMP 6-12m, PMP 12-18m, PMP 18-24m and PMP 24-40m). In the report a table was provided including SHI values for 5 of these segments. In EWG 24-13 only 5 fleet segments are assessed with 2 segments passing the SHI indicator and 3 segments failing it. PMP <6m and PMP 24-40m have no indicator value while PMP 6-12m, PMP 12-18m and PMP 18-24m all fail the indicator as reported in the MS annual report. PG <06m passes this indicator, in contrary to the report while PG 6-12m also passes however this segment is not assessed in the MS report.

Values for SHI were provided by fleet segment for the years 2014-2022 which show fluctuations throughout however no assessment of trends is made in the report.

No comparison of trends was possible.

Stocks at Risk Indicator (SAR)

SAR indicator values were not calculated for any of the segments because Romanian catches of stocks-at-risk are less than 10% of total catches or catches by the segments concerned. EWG 24-13 estimated SAR values for all fleet segments, where all were indicated to be in balance.

Values for SAR were provided by fleet segment for the years 2014-2022 showing no stocks at risk in all years, therefore no assessment of trends is made in the report.

No comparison of trends was possible.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

In the MS fleet report, the CR/BER ratio has been provided for 7 segments while EWG 24-13 has returned 7 segments grouped in 5 clusters. Indicator results are available for 3 of the five clusters in EWG 24-13. Two of these clusters do not have indicator results due to the lack of certain cost elements such as energy costs or capital costs. Because the fleet segments found by the EWG were clustered and the segments found by the MS were not, values for this indicator could only be compared for one segment, PMP2440 NGI *. This segment is indicated to be out of balance in both the MS annual report and in EWG 24-13.

The clusters PG0612 NGI * and PMP1218 NGI * in the EWG 24-13 data, are indicated to be in balance and their constituent segments listed in the fleet report (PG0612, PMP0612, PMP1218 and PMP1824) are also in balance. There is no contradiction between the fleet report and the EWG values.

EWG 24-13 did not calculate this indicator for PG0006 NGI * nor for PMP0006 NGI. The MS annual report indicates both segments are in balance.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

In the MS fleet report, the ROI has been provided for 7 segments while EWG 24-13 has returned 7 segments grouped in 5 clusters. In the MS fleet report, the RoI has been provided. Because the fleet segments found by the EWG were clustered and the segments found by the MS were not, values for this indicator could only be compared for one segment, PMP2440 NGI *. Both the MS annual report and in EWG 24-13 indicate it is out of balance.

The clusters PG0612 NGI * and PMP1218 NGI * in the EWG 24-13 data, are indicated to be in balance and their constituent segments listed in the fleet report (PG0612, PMP0612, PMP1218 and PMP1824) are also in balance.

EWG 24-13 does not calculate this indicator for PG0006 NGI * nor for PMP0006 NGI. The MS annual report indicates that segments PG0006 NGI * and for PMP0006 NGI are in balance whereas RoI is not computed bt the EWG.

Trends in RoI were provided in the annual report with four segments showing a negative trend while 2 segments showed a positive trend compared to the 2016-2021 average. In EWG 24-13 trends are only shown for the two clusters PG0612 NGI * and PMP1218 NGI *, woth both showing a negative trend. Comparing with the composite fleet segments, PG0612 and PMP0612 for the former and PMP1218 and PMP1824 for the latter, one segment is positive and the other three are negative. Overall, the trends seem to be in line between both sources.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the MS annual fleet report the VUR Indicator was calculated as the ratio between days at sea and maximum days at sea for each length group and gear type for the reference years 2016-2022. Major discrepancies have been observed in the calculation of VUR between the MS annual fleet report and the ones estimated by the EWG 24-13 for all segments. The MS annual report shows all segments below the 0.7 threshold for this indicator while the EWG 24-13 indicator values suggest that four fleet segments may be in balance while three may be out of balance.

The trends between the MS annual fleet report and EWG 24-13 for the period 2017-2021 were different. This could be because there are discrepancies in the calculation of the trend: in the fleet report, the trend was the comparison between the average value of the period 2016-2021 and the value for 2022.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted by Romania provides an analysis of balance between fleet capacity and fishing opportunity of all fleet segments for which indicator values were available and in line with the Commission guidelines (COM (2014)545).

Romania uses a different method to calculate trends, leading to differences in findings between the EWG and MS.

For the economic indicators, the data provided to EWG 24-13 clustered 7 fleet segments into 5 clusters, whereas the data in the fleet report was available for all 7 fleet segments individually. Due to this discrepancy, the economic indicators could not be compared directly for the majority of segments but the results in the report were broadly in line with the estimations in EWG 24-13.

Discrepancies in previous fleet reports

In the fleet report submitted in 2023, the EWG 23-13 noted that comparisons could not be carried out for the economic indicators due to the use of clusters in EWG-23-13 compared to fleet segments in the annual report. The use of clusters in EWG 24-13 can be justified for PMP1218 NGI * given that one fleet segment only has 3 vessels however for PG0612 NGI * the smaller segment has 26 vessels. Usually, segments are clustered when small fleet segments contain 5 or less vessels are merged with other fleet segments for confidentiality purposes. It is unclear why a fleet segment with many vessels was clustered in this case. Landings data was provided for both fleet segments however economic data was only available for the cluster. In the fleet report the landings and economic data is provided as are the results for the economic indicators. It is unclear whether this is an issue with the MS data submission or with the data provided in EWG 24-13.

Additionally, economic indicator values for two segments could not be computed by the EWG one of which (diving for Rapa whelks) appears to be highly profitable and uses no fuel, although such indicators are given in the fleet report.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

The MS fleet report identifies technical inefficiency in terms of VUR for all 6 segments ascribing this under-use to unstable hydro-climatic conditions specific to the Black Sea, the Covid pandemic and the war in Ukraine. Inactivity has been noted in the report to have fallen significantly over the last 2 years. The report notes that in terms of biological indicators the effect of the Romanian fleet is insignificant due to their low level of regional landings of these stocks.

The fleet report also identifies the profitability of each fleet segment in the short and long-term and finds that PMP2440 is not profitable based on the CR/BER and the ROI. The other assessed fleet segments are found to be profitable.

Overview of action plans

The Action plan submitted by Romania does not appear to be based on analysis of the economic and technical indicators and seems to be an update and continuation of the Action plan from 2023. Despite one fleet segment appearing to be out of balance with their fishing opportunities based on the economic indicators, no action plan specifically addressing economical imbalance in this segment is provided.

The current Action plan proposes economic and technical measures for the fisheries sector in general and does not indicate any measures specific to fleet segments found to be out of balance. These measures are broad-ranging, and their objectives and targets are unclear.

Adjustment targets and tools

The action plan is not targeted to specific out-of-balance fleets, so no adjustment targets and tools are set out.

The action plan submitted by the MS does not set out a timeframe for implementation.

***Number of vessels*.**

The action plans provided by the MS does not identify the number of vessels targeted by the action plan.

3.4.20 Slovenia (SVN)

Overview of indicator findings

Area 37

There were 16 fleet segments in 2021, of which 12 were active. Of the active segments, landings and economic data were provided aggregated for 3 clusters (aggregated fleet segments). There were 137 vessels in the fleet of which only 76 were active.

The EWG notes that effort variables and landings should be provided by fleet segment instead of cluster segment so the EWP could calculate biological and technical indicators at the proper level of disaggregation

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2022, landings in value have been provided aggregated in 3 fleet segments and SHI indicator values were unavailable for all

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 3 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

SHI and its trend could thus not be calculated for any fleet segment.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 3 active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 2-13 notes that the 2021 SAR indicator values indicate:

- 2 segments were *in balance* with their fishing opportunities,
- 1 segment was out of balance with their fishing opportunities.
-

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
No of fleet segments		2	1	

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. The fleet segment reported is that for which F/FMSY is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
No of fleet segments	3			

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 3 segments:

- All 3 segments were *in balance* with their fishing opportunities.

Trends were calculated for 3 segments:

- 2 segments displayed an increasing trend,
- 1 segment displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 3 segments:

- All 3 segments were in balance with their fishing opportunities.

Trends cannot be calculated

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

VUR was calculated for 3 aggregated fleet segments:

- All 3 VUR segments were in balance with their fishing opportunities.

Trends cannot be calculated

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over 2018-2022, according to the criteria in the Commission guidelines, EWG 24-13 found that the majority of fleet segments for which results are presented appear to be in balance with fishing opportunities for the economic indicators. Regarding biological indicators, there is one SAR being targeted by one clustered segment and SHI indicator values could not be used meaningfully to assess the balance. VUR values suggest that all segments are in balance.

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.20.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

in balance
out of balance
bordeline
insuffiently profitable
insufficient data
no data

improving
deteriorating
null/flat trend
no clear trend
insufficient data
no data

		Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
		Economic					Economic							Biological			Technical	Biological		Technical
Fleet segment/ clustered segment	**Nb of vessels**	**CR/ BER**	RoFTA	**RoI**	NP margin	NVA/ FTE	**CR/ BER**	RoFTA	**RoI**	NP margin	NVA/ FTE	**Fleet segment**	**Nb of vessels**	**SAR**	**SHI**	EDI	**VUR**	**SHI**	EDI	**VUR**
SVN MBS DFN0006 NGI *	25											**SVN MBS DFN0006 NGI***	17							
												SVN MBS FPO0006 NGI	4							
												SVN MBS HOK0006 NGI	3							
												SVN MBS PMP0006 NGI	1							
SVN MBS DFN0612 NGI *	40											**SVN MBS DFN0612 NGI ***	28	1						
												SVN MBS DFN1218 NGI	2							
												SVN MBS FPO0612 NGI	1							
												SVN MBS HOK0612 NGI	5							
												SVN MBS PMP0612 NGI	3							
												SVN MBS PMP1218 NGI	1							
SVN MBS DTS1218 NGI *	11											SVN MBS DTS0612 NGI	4							
												SVN MBS DTS1218 NGI *	7							
Total active	76																			
Total inactive	61																			
% of inactive	45%																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.
Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.
Note 3: Where biological and/or technical indicators are indicated at cluster level instead of fleet segment level, the status may not reflect that for the individual fleet segments in the cluster (See section 2.3 of this report).
Source: own elaborations.

Comparison of indicator values

A comparison Indicator values computed by the EWG 24-13 and those in the fleet report are given in Annex II. Points of note for each indicator are listed below. MS has calculated technical indicators for all segments, but biological and economic indicators are only provided for DFN and DTS segments.

MS provided effort and landings variables aggregated by cluster instead of by fleet segment, so the EWG was unable to estimate biological and technical indicator at the proper level of disaggregation.

Sustainable harvest indicator (SHI)

Slovenia presented data for all DFN and DTS segments but none of them reached the 40% of their landings value comprised stocks for which estimates of F/F_{MSY} needed to consider them meaningful. Also, EWG 24-13 could not compute a meaningful value for the SHI for any fleet segment.

The MS report includes a time series since 2016 of the percentage landing value of assessed stocks, but MS was unable to compute a meaningful estimate in any year of that time series. Likewise, EWG 24-13 could not compute any trend.

Stocks at Risk Indicator (SAR)

EWG 24-13 calculated SAR for 3 aggregated fleet segments. The MS annual fleet report provided SAR values for five fleet segments. SAR outputs for the 3 fleet segments are shown in EWG 24-13 as 2 in balance and 1 out of balance while the MS fleet report shows 4 in balance and one out of balance.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

MS presented this indicator with 2021 as the reference year, so no comparison could be made.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

MS presented this indicator with 2021 as the reference year, so no comparison could be made.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

MS reported VUR for 12 fleet segments, however EWG 24-13 could only estimate VUR for 3 aggregated fleet segments.

According to the EWG all the three aggregated segments are in balance, however according to the MS report all of the fleet is out of balance, excepting the one vessel segments.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted by Slovenia provides analysis of balance between fleet capacity and fishing opportunity of all significant fleet segments, providing useful time series of balance indicators.

The fleet report submitted in 2024 provides indicator values separately by fleet segment, but MS only reports biological and economic indicators for the segments that are the most important in terms of landings, arguing that these indicators “would show a distorted picture on the balance” of the less important ones. Furthermore, economic indicators are reported for 2021 and not 2022. Technical indicators are provided for all the 12 segments. In view of the above observations it is apparent that the fleet report submitted by Slovenia is not entirely in line with the DCF and the Commission guidelines COM(2014)545.

Fleet segments that are assessed by the Member State to be “out of balance” with fishing opportunities are clearly identified in the fleet report.

The fleet report provides a rationale behind the MS’s assessment that all fleet segments are in balance. According to the criteria in the guidelines, the fleet was mostly in balance.

No action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report as MS consider them all in balance.

The current Slovenian management system is considered by the MS to be effective in implementing a balance between fishing opportunities and capacity.

Slovenia reports serious reservations regarding the application and appropriateness of the indicators as defined in the guidelines owing to the characteristics of the Slovenian fishing sector, which have not been addressed or foreseen when preparing the indicators. The fleet report argues “These indicators do not take account of the past efforts carried out for the reduction of fishing effort… The size (number of vessels and active fishermen) of the whole fisheries sector and the size of individual fleet segments, which are very small (sometimes only 2 vessels), have not been regarded when deciding on these indicators.”

The annual fleet report, states that Slovenia is committed to achieving the objectives of the Common Fisheries Policy but, at the same time, suggests that consideration needs to be given to the extremely low level of landings by volume in the Slovenian fishery sector.

Discrepancies in previous fleet reports

EWG 24-13 notes that this year SAR has been computed according to the Commission guidelines COM(2014)545 for 2022.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

EWG 24-13 notes that the MS does not explicitly identify any structural overcapacity.

Overview of action plan

No new or revised action plans were proposed.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State.

Number of vessels

No new or revised action plans have been submitted by the Member State.

3.4.21 Spain (ESP)

Overview of indicator findings

There were 79 fleet segments in 2022, of which 72 were. Of the 72 active segments, landings data were provided for 72 fleet segments and economic data aggregated by 52 fleet segments. Results are presented by main supra-region below, except for the OMR, which was analysed at EWG 23-17 report.

Area 27

There were 39 fleet segments in 2022, of which 37 were active. Of the 37 active segments, landings data were provided for 37 fleet segments and economic data were available for 26 aggregated fleet segments.

Sustainable harvest indicator (SHI)

Out of 37 active fleet segments in 2022, SHI indicator values were available for 35.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 13 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 22 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 73.42% of the total value of the landings in 2022 provided by MS, and were as follows:

• 3 fleet segments were *out of balance* with their fishing opportunities,

• 19 fleet segments were in balance with their fishing opportunities.

Trends were available for the 11 fleet segments:

• 3 fleet segments displayed a decreasing (improving) trend,
• 6 segments displayed no clear trend,

• 1 segments displayed a flat trend,

• 1 fleet segment displayed an increasing (deteriorating) trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 37 fleet segments in 2022. According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

• 22 fleet segments were *in balance* with their fishing opportunities,
• 15 fleet segments were *out of balance* with their fishing opportunities.

  • 2 fleet segment with 5 stocks-at-risk may not be in balance with their fishing opportunities,
  • 2 fleet segment with 4 stocks-at-risk may not be in balance with their fishing opportunities
  • 4 fleet segment with 3 stocks-at-risk may not be in balance with their fishing opportunities
  • 1 fleet segment with 2 stocks-at-risk may not be in balance with their fishing opportunities,

• 6 fleet segments with 1 stock-at-risk may not be in balance with their fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	23	7		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI Value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	29	6		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 26 fleet clusters:

- 22 were *in balance* with their fishing opportunities
- 4 were *out of balance* with their fishing opportunities,

Trends could be calculated for 23 clusters:

- 10 clusters displayed an increasing trend,
- 13 clusters displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 26 clusters:

- 23 clusters were *in balance* with their fishing opportunities,
- 3 clusters were *out of balance* with their fishing opportunities.

Trends could be calculated for 23 clusters:

- 10 clusters displayed an increasing trend,
- 12 clusters displayed a decreasing trend.
- 1 cluster displayed no clear trend

The Vessel Use Indicator (VUR)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for the 37 segments*:

- 26 segments were *in balance* with their fishing opportunities,
- 11 segments were *out of balance* with their fishing opportunities,

Trends could be calculated for 31 segments:

- 3 segments displayed an increasing trend,
- 4 segments displayed a decreasing trend,
- 20 segments displayed no clear trend,
- 4 segments displayed a null/flat trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends (Area 27 NAO)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.21.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

			Status 2022					Trends 2018-2022				
			Economic					Economic				
SR	Fleet segment/ clustered segment	Nb of vessels	CR/ BER	ROI	RoFTA	NPmargin	NVA/ FTE	CR/ BER	ROI	RoFTA	NPmargin	NVA/ FTE
NAO	**ESP NAO DFN1012 NGI ***	102										
NAO	ESP NAO DFN1218 NGI	131										
NAO	**ESP NAO DFN1824 NGI ***	16										
NAO	ESP NAO DRB0010 NGI	1219										
NAO	ESP NAO DRB1012 NGI	18										
NAO	ESP NAO DRB1218 NGI	88										
NAO	**ESP NAO DTS1218 NGI ***	69										
NAO	ESP NAO DTS1824 NGI	75										
NAO	ESP NAO DTS2440 NGI	92										
NAO	ESP NAO DTS40XX NGI	12										
NAO	ESP NAO FPO1012 NGI	80										
NAO	ESP NAO FPO1218 NGI	63										
NAO	**ESP NAO HOK1012 NGI ***	68										
NAO	ESP NAO HOK1218 NGI	73										
NAO	ESP NAO HOK1824 NGI	38										
NAO	**ESP NAO HOK2440 LLD ***	33										
NAO	ESP NAO HOK2440 NGI	54										
NAO	**ESP NAO PGP2440 NGI ***	57										
NAO	ESP NAO PMP0010 NGI	2323										
NAO	ESP NAO PMP1012 NGI	30										
NAO	ESP NAO PMP1218 NGI	12										
NAO	**ESP NAO PS 1012 NGI ***	19										
NAO	ESP NAO PS 1218 NGI	90										
NAO	ESP NAO PS 1824 NGI	93										
NAO	ESP NAO PS 2440 NGI	48										
NAO Morocco	**ESP NAO HOK1218 MA ***	14										
	Total active	4917										
	Total inactive	637										
	%inactive to total	11.47										

			Status 2022			Trends 2018-2022		
			Biological			Biological		Technical
Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR++	SHI	EDI	VUR++
ESP NAO DFN0010 NGI *	1							
ESP NAO DFN1012 NGI *	101	3						
ESP NAO DFN1218 NGI	131	4						
ESP NAO DFN1824 NGI *	14	1						
ESP NAO DFN2440 NGI *	2							
ESP NAO DRB0010 NGI	1219							
ESP NAO DRB1012 NGI	18							
ESP NAO DRB1218 NGI	88							
ESP NAO DTS1012 NGI *	11							
ESP NAO DTS1218 NGI *	58	4						
ESP NAO DTS1824 NGI	75	7						
ESP NAO DTS2440 NGI	92	7						
ESP NAO DTS40XX NGI	12	5						
ESP NAO FPO1012 NGI	80							
ESP NAO FPO1218 NGI	63							
ESP NAO HOK0010 NGI *	3							
ESP NAO HOK1012 NGI *	68							
ESP NAO HOK1218 NGI	73	2						
ESP NAO HOK1824 NGI	38	1						
ESP NAO HOK1218 LLD *	2							
ESP NAO HOK1824 LLD *	6	1						
ESP NAO HOK2440 LLD *	22							
ESP NAO HOK2440 NGI	54							
ESP NAO PGP1824 NGI *	4							
ESP NAO PGP2440 NGI *	53	1						
ESP NAO PMP0010 NGI	2323	5						
ESP NAO PMP1012 NGI	30							
ESP NAO PMP1218 NGI	12							
ESP NAO PS0010 NGI *	1							
ESP NAO PS1012 NGI *	18							
ESP NAO PS1218 NGI	90	1						
ESP NAO PS1824 NGI	93	1						
ESP NAO PS2440 NGI	48							
ESP NAO HOK0010 MA *	6							
ESP NAO HOK1012 MA *	5							
ESP NAO HOK1218 MA *	2	1						
ESP NAO HOK1824 MA *	1							

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

Area 37

There were 28 fleet segments in 2022, of which 27 were active. Of the 27 active segments, landings data were provided for 27 fleet segments and economic data aggregated by 20 fleet segments.

Sustainable harvest indicator (SHI)

Out of 27 fleet segments active in 2022, SHI indicator values were available for 25.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 12 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 13 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 80.97% of the total value of the landings in 2022 provided by MS, and were as follows:

- 3 fleet segments were *out of balance* with their fishing opportunities,
- 10 fleet segments were *in balance* with their fishing opportunities.

Trends were available for the 9 fleet segments:

- 7 fleet segments displayed a decreasing (improving) trend,
- 1 fleet segment displayed a flat trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 27 active fleet segments in 2021. According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

- 12 fleet segments were *in balance* with their fishing opportunities,
- 15 fleet segments were *out of balance* with their fishing opportunities.
    - 1 fleet segment with 6 stocks-at-risk may not be in balance with its fishing opportunities,
    - 1 fleet segment with 4 stocks-at-risk may not be in balance with its fishing opportunities,
    - 1 fleet segments with 3 stocks-at-risk may not be in balance with their fishing opportunities,
    - 4 fleet segments with 2 stocks-at-risk may not be in balance with their fishing opportunities,
    - 8 fleet segments with 1 stock-at-risk may not be in balance with their fishing opportunities.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below:

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	2		15	3

Economic Dependency Indicator (EDI)

Fleet segments' distribution over EDI classes is shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	22	1	1	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 20 clusters:

- 12 clusters were *in balance* with their fishing opportunities,
- 8 clusters were *out of balance* with their fishing opportunities,

Trends could be calculated for 18 clusters:

- 7 clusters displayed an increasing trend,
- 11 clusters displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 20 clusters:

- 13 clusters were *in balance* with their fishing opportunities,
- 7 clusters were *out of balance* with their fishing opportunities.

Trends could be calculated for 18 clusters:

- 9 clusters displayed an increasing trend,
- 9 clusters displayed a decreasing trend.

The Vessel Use Indicator (VUR)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for the 27 segments*:

- 18 segments were *in balance* with their fishing opportunities,
- 9 segments were *out of balance* with their fishing opportunities,

Trends were calculated for 24 segments:

- 3 segments displayed a decreasing trend,
- 20 segments displayed no clear trend,
- 1 segments displayed a null/flat trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends (Area 37, MBS)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.21.2. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

			Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
			Economic					Economic							Biological			Technical	Biological		Technical
SR	Fleet segment/ clustered segment	Nb of vessels	CR/ BER	ROI	RoFTA	NP margin	NVA/ FTE	CR/ BER	ROI	RoFTA	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR++	SHI	EDI	VUR++
MBS	ESP MBS DFN 0612 NGI	93											ESP MBS DFN 0612 NGI	93	3						
MBS	ESP MBS DFN 1218 NGI	60											ESP MBS DFN 1218 NGI	60	4						
MBS	**ESP MBS DRB 0612 NGI ***	67											ESP MBS DRB 0006 NGI	4							
													ESP MBS DRB 0612 NGI	**51**							
													ESP MBS DRB 1218 NGI	12							
MBS	ESP MBS DTS 0612 NGI	24											ESP MBS DTS 0612 NGI	24	1						
MBS	ESP MBS DTS 1218 NGI	139											ESP MBS DTS 1218 NGI	139	1						
MBS	ESP MBS DTS 1824 NGI	284											ESP MBS DTS 1824 NGI	284	6						
MBS	ESP MBS DTS 2440 NGI	124											ESP MBS DTS 2440 NGI	124	2						
MBS	ESP MBS FPO 0612 NGI	27											ESP MBS FPO 0612 NGI	27							
MBS	**ESP MBS FPO 1218 NGI ***	24											**ESP MBS FPO 1218 NGI ***	**21**							
MBS													ESP MBS FPO 2440 NGI *	3							
MBS	**ESP MBS HOK 0612 NGI ***	39											ESP MBS HOK 0006 NGI *	1							
													ESP MBS HOK 0612 NGI *	**37**	2						
MBS	**ESP MBS HOK 1218 LLD ***	27											ESP MBS HOK 0612 LLD *	2	1						
													ESP MBS HOK 1218 LLD *	**25**	2						
MBS	ESP MBS HOK 1218 NGI	15											ESP MBS HOK 1218 NGI	15	2						
MBS	**ESP MBS HOK 1824 LLD ***	15											**ESP MBS HOK 1824 LLD ***	**13**	1						
													ESP MBS HOK 2440 LLD *	2	1						
MBS	ESP MBS PMP 0006 NGI	93											ESP MBS PMP 0006 NGI	93							
MBS	ESP MBS PMP 0612 NGI	744											ESP MBS PMP 0612 NGI	744	1						
MBS	ESP MBS PMP 1218 NGI	10											ESP MBS PMP 1218 NGI	10							
MBS	ESP MBS PS 0612 NGI	10											ESP MBS PS 0612 NGI	10							
MBS	ESP MBS PS 1218 NGI	61											ESP MBS PS 1218 NGI	61							
MBS	ESP MBS PS 1824 NGI	72											ESP MBS PS 1824 NGI	72							
MBS	**ESP MBS PS 2440 NGI ***	23											**ESP MBS PS 2440 NGI ***	**21**	1						
													ESP MBS PS 40XX NGI *	2	1						
	Total active	1950																			
	Total inactive	367																			
	%inactive to total	15.84																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.

Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.

Source: own elaborations.

OFR

There were 12 fleet segments in 2022, of which 8 were active. Of the 8 active segments, landings data were provided for 8 fleet segments and economic data aggregated by 6 fleet segments.

Sustainable harvest indicator (SHI)

Out of 8 fleet segments active in 2022, SHI indicator values were available for 7.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 3 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The 4 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 71% of the total value of the landings provided by the MS, and were as follows:

- All 4 fleet segments were *in balance* with their fishing opportunities,

Trend was available for 3 fleet segment:

- 1 fleet segment displayed a decreasing (improving) trend.
- 1 fleet segment displayed a flat trend
- 1 fleet segment displayed no clear trend

Stocks at Risk Indicator (SAR)

SAR indicator was available for the 8 fleet segments active in 2022. According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

- 2 fleet segments were *in balance* with their fishing opportunities,
- 6 fleet segments were *out of balance* with their fishing opportunities.
    - 1 fleet segments with 6 stock-at-risk may not be in balance with their fishing opportunities
    - 1 fleet segments with 5 stock-at-risk may not be in balance with their fishing opportunities.
    - 2 fleet segments with 3 stocks-at-risk may not be in balance with their fishing opportunities,
    - 2 fleet segments with 1 stock-at-risk may not be in balance with their fishing opportunities.

Number of Overharvested Stocks (NOS)

The proportional distribution of NOS for the 7 fleet segments for which SHI has been calculated is shown in the table below:

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	3	4		

Economic Dependency Indicator (EDI)

Fleet segments' distribution over EDI classes is shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	5	2		

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoFTA was calculated for 6 clusters:

- 5 clusters were *in balance* with their fishing opportunities,
- 1 cluster were *out of balance* with their fishing opportunities.

Trends could be calculated for 6 clusters:

- 3 clusters displayed an increasing trend,
- 3 clusters displayed a decreasing trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 6 fleet clusters:

- 6 were *in balance* with their fishing opportunities,
- 1 were *out of balance* with their fishing opportunities.
-

Trends could be calculated for 6 clusters:

- 3 displayed an increasing trend,
- 3 displayed a decreasing trend.

The Vessel Use Indicator (VUR)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for 8 segments:

- All 8 segments were *in balance* with their fishing opportunities.

Trends could be calculated for 7 segments:

- 2 segments displayed a decreasing trend,
- 6 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends (Other fishing regions; OFR)

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.21.3. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

			Status 2022					Trends 2018-2022							Status 2022				Trends 2018-2022		
			Economic					Economic							Biological			Technical	Biological		Technical
SR	Fleet segment/ clustered segment	Nb of vessels	CR/ BER	ROI	RoFTA	NP margin	NVA/ FTE	CR/ BER	ROI	RoFTA	NP margin	NVA/ FTE	Fleet segment	Nb of vessels	SAR	SHI	EDI	VUR	SHI	EDI	VUR
OFR	ESP OFR DTS2440 NGI	39											ESP OFR DTS2440 NGI	39	3						
OFR	ESP OFR DTS40XX NGI	29											ESP OFR DTS40XX NGI	29	1						
OFR	ESP OFR HOK2440 LLD	65											ESP OFR HOK2440 LLD	65	6						
OFR	**ESP OFR HOK2440 NGI ***	11											ESP OFR HOK1824 NGI	3							
													ESP OFR HOK2440 NGI	6							
													ESP OFR HOK40XX NGI	2	1						
OFR	ESP OFR HOK40XX LLD	28											ESP OFR HOK40XX LLD	28	5						
OFR	ESP OFR PS40XX NGI	27											ESP OFR PS40XX NGI	27	3	0.64					
	Total active	199																			
	Total inactive	21																			
	%inactive to total	9.55																			

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.
Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.
Source: own elaborations.

Status and trends for the Spanish fleet in ALL REGIONS

Based on the SAR-indicator values for 2022 and according to the criteria in the Commission guidelines, almost 51.4% of the fleet segments may be in balance with their fishing opportunities (SAR-indicator available for all 72. Both biological indicators (SHI and SAR) for the same segment are only available for 39 segments For the SHI, only 39 out 72 active segments are considered as being meaningful to assess the balance or imbalance because

the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments). Of these, 35.9% are indicated as being in balance with their fishing opportunities (both SHI and SAR indicate “in balance”).

The economic indicator values indicate that 78.8% of fleet segments are in balance with their fishing opportunities, although a number of these are indicating a deteriorating trend.

VUR data indicate that 27.8%of fleet segments are out of balance with their fishing opportunities. Only three segments of 63 (for which the trend could be calculated (ESP NAO HOK1824 LLD, ESP NAO HOK2440 LLD and ESP NAO PMP1218 NGI) indicate an improving trend and 9 segments show a declining trend. For all other segments there is no clear trend over the 2018 – 2022 data period.

Comparison of indicator values

A comparison of indicator values computed by the EWG 24-13 and those in the fleet report submitted by the Member State in 2024 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

SHI indicator value for 48(40) fleet segments cannot be used meaningfully to assess balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

Of the remaining 32 segments, most of the segments indicate similar values for SHI and the resulting assessments regarding the balance of the fleet segments. However, in two fleet segments (ESP OFR PS 40XX NGI, ESP OFR HOK2440) the conclusions regarding the balance or imbalance of those fleet segments are contradictory. For those two segments the assessment by EWG24-13 is “in balance”, while the MS fleet report interpretation is “out of balance”. For 3 fleet segments (ESP OFR DTS2440 NGI and ESP OFR HOK1824 NGI, ESP MBS DTS0612 NGI) the MS calculated the value of SHI, while EWG24-13 considers this indicator not meaningful, but for a few other segments (e.g. ESP MBS HOK1218, ESP MBS PS128 NGI, MBS PS1824 NGI, ESP PS2440 NGI, ESP PS40XXNGI*, ESP OFR DTS2440 NGI, ESP OFR HOK2440 NGI) EWG24-13 provides a SHI-value, while the MS considers this indicator as not meaningful to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

Indicator trends were not provided in the fleet report. No comparison was possible.

Stocks at Risk Indicator (SAR)

Results for this indicator were provided for 2022. The MS reported at least 1 SAR for 30 fleet segments, which is a smaller number compared to the results of EWG24-13, which identified 36 fleet segments containing at least 1 SAR. The results of EWG24-13 identified in a lot of cases (e.g. ESP NAO DTS1218 NGI, ESP NAO DTAS1824 NGI, ESP MBS DTS1824 NGI, ESP MBS DFN0612 NGI) more SAR in a fleet segment compared to the MS fleet report.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparison between the MS annual fleet report and the estimations from the EWG24-13 for the CR/BER indicator revealed similar outputs and the only discrepancies found was for two fleet clusters (ESP NAO PGP2440 NGI, ESP MBS PS1218 NGI). For those two the EWG24-13 calculated them as “in balance” while the MS as “out of balance”.

39 fleet segments were indicated to be in balance while 13 were out of balance.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

ROI data was not reported.

From the 52 fleet clusters the MS provided RoFTA values for 50 of them. The comparison between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed similar outputs. However, for one fleet segment (ESP NAO PMP0010 NGI) the MS reported it in the annual fleet report as “out of balance”, while the EWG 24-13 as “in balance”, while the MS and the EWG24-13 have set different thresholds for that indicator.

38 fleet segments were in balance while 14 were out of balance.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

Comparison of the VUR data reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed similar outputs for most indicator values.

In 5 fleet segments of 72 reported, however, the MS report differed from the EWG report as to whether segments were in or out of balance. The MS calculated one segment (ESP MBS PS 2440 NGI *) to be out of balance while the EWG estimated them to be in balance. The MS calculated three segments (ESP MBS DFN1218 NGI *, ESP NAO FPO1218 NGI and ESP MBS HOK0612 NGI) to be in balance, however the EWG found it to be out of balance. Last for one segment (ESP MBS HOK0006 NGI) the EWG24-13 calculated the indicator, but the MS did not provide that information.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted by Spain provides indicator values separately by fleet segment based on DCF information and for all the indicators specified in the Commission guidelines (COM (2014) 545).

Fleet segments that are assessed by the Member State to be “out of balance” with their fishing opportunities are clearly identified in the fleet report.

The MS fleet report reported on 72 fleet segments in the Spanish fleet in 2022, of which 9 were considered by the MS to be out of balance. Segments were generally considered to be out of balance by the MS where the economic and/or biological indicator results showed imbalance. According to such a definition, the majority of the segments should be flagged as not being in balance with their fishing opportunities. The MS provides an explanation and a justification for its assessment that for the majority of these segments (with one or more indicators indicating “out of balance”) the overall assessment is “in balance”, resulting in a final total of 9 segments being considered to be out of balance.

An action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report.

Minor discrepancies between the results in the MS fleet report and the EWG 24-13 were identified. The economic and technical indicators were identical in most cases. The biological indicators on the other hand were similar, but discrepancies mainly reported for SHI indicator. Many of the issues raised by the EWG 22-13 and EWG 23-13 have largely been resolved and the remaining discrepancies previously identified between the MS and EWG 24-13 for the SAR and SHI indicators are smaller than reported in EWG 23-13.

Overview of action plan

The MS present an updated action plan for some segments with some new measures, targets and tools.

Adjustment of targets and tools

The update action plan for 2023 to 2025 changes the main objective for NAODRB1012 and NAODRB1218 to reduce fishing mortality F at maximum sustainable yield (MSY) and achieve positive values for the economic indicators, the main changes are:

- The total catch has been reduced from 3 000 tonnes to 2 000 tonnes
- The weekly catch limit per vessel has been reduced from 1 250 kg to 800 kg for hydraulic dredges and of 600 kg for towed dredges.
- Establish a reduction in effort of 180 GT and 1 800 kW by vessel decommissioning.

Transversal measures to promote the consumption of seafood organised by the Ministry of Agriculture, Fisheries and Food with the aim of valuing seafood products and the economic performance of the fleets, will be implemented.

Number of vessels

For the NAODRB1012 and NAODRB1218 MS include a decommissioning plan for 2024 and 2025 with the following scrapping prediction: 17 vessels in 2024 and 8 vessels in 2025.

3.4.22 Sweden (SWE)

Overview of indicator findings

Area 27

There were 36 fleet segments in 2022, of which 31 were active. Of the 31 active segments, landings data were provided for all active fleet segments and economic data for 9 aggregate segments in 2022.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2022, landings in value have been provided aggregated in 31 fleet segments and SHI indicator values were available for 28.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 7 fleet segments cannot be used meaningfully to assess the balance or imbalance because the indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments.

The EWG notes that for the 21 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 94.0% of the total value of the landings in 2022 provided by MS, and were as follows:

- 4 fleet segments were *out of balance* with their fishing opportunities,
- 17 fleet segments were *in balance* with their fishing opportunities.

Trends could be calculated for 16 fleet segments:

- 3 fleet segments displayed an increasing (deteriorating) trend,
- 7 fleet segments displayed a decreasing (improving) trend,
- 7 fleet segments displayed no clear trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for all the active fleet segments in 2022.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 24-13 notes that the 2022 SAR indicator values indicate:

- 15 fleet segments were *in balance* with their fishing opportunities
- 16 fleet segments were *out of balance* with their fishing opportunities with

  - 1 fleet segment with 3 stocks-at-risk
  - 3 fleet segments with 2 stocks-at-risk
  - 12 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The number of fleet segments and the number of stocks classified as overharvested (NOS) expressed as a proportion (%) of the total number of stocks exploited by such fleet segments are given in the table below.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	22	1		

Economic Dependency Indicator (EDI)

The numbers of segments corresponding to varying levels of economic dependency (EDI) values are shown in the table below. Fleet segments reported are those for which F/F_{MSY} is calculated and landings are available.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	17	8	2	1

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

RoI was not calculated.

RoFTA was calculated for 9 segments:

- 5 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities,

Trends were calculated for 9 segments:

- 3 segments displayed an improving trend,
- 6 segments displayed a deteriorating trend.

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

CR/BER was calculated for 9 segments:

- 5 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with its fishing opportunities,

Trends were calculated for 9 segments:

- 3 segments displayed an improving trend,
- 4 segments displayed a deteriorating trend,
- 2 segments displayed no clear trend.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

The data required to calculate VUR (i.e., maximum days-at-sea) were provided by the MS and thus, VUR_{220} is not analysed here.

VUR was calculated for 9 clustered segments:

- 2 segments were *in balance* with their fishing opportunities,
- 7 segments were *out of balance* with their fishing opportunities.

Trends were calculated for 20 segments:

- 2 segments displayed a deteriorating trend,
- 18 segments displayed no clear trend.

The Inactive Fleet Indicators

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Synthesis of indicators and trends

Based on indicator values for 2022 and trends over the periods 2018 to 2022 inclusive, according to the criteria in the Commission guidelines, most of the fleet segments appear to be out of balance with fishing opportunities. The economic indicators reported by cluster showed unfavourable results for the active gear DTS1012* (North Sea) and for all passive gear segments except for DFNVL1012* (North Sea). The technical indicators are unfavourable for all segments except for DFNVL0812* (Baltic Sea) and active gear DTS1012* (North Sea). Both biological indicators showed improvement in relation to last year report with 51,6% of the fleet segments out of balance for the SAR indicator (65,3% in 2021) and 19,0% for the assessed fleet segments out of balance for SHI (58,8% in 2021).

The status of each indicator as computed by the EWG with respect to the criteria given in the Commission Guidelines (COM (2014)545) is illustrated in the table below.

Table 3.4.22.1. Status of Balance Indicators based on Commission Guidelines (COM 2014/545).

Fleet segment/ clustered segment	Nb of vessels	Status 2022 Economic CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE	Trends 2018-2022 Economic CR/ BER	RoFTA	ROI	NP margin	NVA/ FTE
SWENAO DFN0008 NGI *	259										
SWENAO DFN0010 NGI *	229										
SWENAO DFN0812 NGI *	46										
SWENAO DFN1012 NGI *	51										
SWENAO DTS0812 NGI *	36										
SWENAO DTS1012 NGI *	26										
SWENAO DTS1218 NGI *	65										
SWENAO DTS1824 NGI *	33										
SWENAO DTS2440 NGI *	20										
Total active	765										
Total inactive	173										
%inactive to total	18.4										

Fleet segment	Nb of vessels	Status 2022 Biological SAR	SHI	EDI	Technical VUR	Trends 2018-2022 Biological SHI	EDI	Technical VUR
SWENAO DFN VL0008 NGI	**115**							
SWENAO FPO VL0008 NGI	136	2						
SWENAO PGP VL0008 NGI	8							
SWENAO DFN VL0010 NGI	**21**							
SWENAO FPO VL0010 NGI	187							
SWENAO HOK VL0010 NGI	10							
SWENAO PGO VL0010 NGI	6							
SWENAO PGP VL0010 NGI	5							
SWENAO DFN VL0812 NGI	**45**	2						
SWENAO FPO VL0812 NGI	1	1						
SWENAO DFN VL1012 NGI	**6**	1						
SWENAO DFN VL1218 NGI	2							
SWENAO FPO VL1012 NGI	37	2						
SWENAO FPO VL1218 NGI	3	1						
SWENAO HOK VL1012 NGI	2							
SWENAO PGP VL1012 NGI	1							
SWENAO DTS VL0812 NGI	**28**	1						
SWENAO PMP VL0812 NGI	1							
SWENAO PS VL0812 NGI	1	1						
SWENAO TM VL0812 NGI	6	1						
SWENAO DRB VL1012 NGI	1							
SWENAO DTS VL1012 NGI	**24**	1						
SWENAO PMP VL1012 NGI	1							
SWENAO DTS VL1218 NGI	**61**							
SWENAO MGP VL1218 NGI	1							
SWENAO PMP VL1218 NGI	2	1						
SWENAO PS VL1218 NGI	1	1						
SWENAO DTS VL1824 NGI	**29**	1						
SWENAO TM VL1824 NGI	4	1						
SWENAO DTS VL2440 NGI	**11**	1						
SWENAO TM VL2440 NGI	9	3						

Note 1: Member States may report economic data for a combination of fleet segments. Such a combination is referred to as a cluster. For such clusters, the status of the economic indicators is reported for the entire cluster and not for the individual fleet segments that make up the cluster.
Note 2: The numbers in the column for the SAR indicator denote the number of stocks exploited by the fleet segment that were identified in the landings as stocks at risk.
Source: own elaborations.

Comparison of indicator values

In the Swedish report, economic and technical indicators are available for clustered segments grouped by main type of gear (´Passive´ named as DFN and ´Active´ named as DTS), vessel length and fishing area (Baltic and North Sea). So, the indicators were comparable for all 9 clusters: In 2022, MS reported 4 ‘Passive’ segments divided into 2 length classes in the Baltic Sea SWE NAO DFN0008 NGI* and SWE NAO DFN0812 NGI* and 2 the North Sea SWE NAO DFN0010 NGI* and SWE NAO DFN1012 NGI*. MS divided ‘Active’ segments into 5 length classes: in the Baltic Sea SWE NAO DTS0812 NGI* and in the North Sea SWE NAO DTS1012 NGI*, SWE NAO DTS1218 NGI*, SWE NAO DTS1824 NGI* and SWE NAO DTS2440 NGI*.

The biological indicator values in the Swedish fleet report for 2022 were downloaded from the STECF EWG 23-13 data and reported for 30 fleet segments.

A comparison between the indicator values computed by the EWG 24-13 and those in the fleet report submitted by 31 May 2023 are given in Annex II. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

In the MS annual fleet report the SHI has been provided according to STECF EWG 23-13 report for 2022.

Some differences were found between the values for 2022 presented in STECF EWG 23-13 report than those estimated by the EWG 24-13. Such differences are most likely due to revised estimates of Fishing mortality for the year 2022 arising from stock assessments undertaken in 2024.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SHI has been provided according to STECF EWG 23-13 report for 2022.

Like for SHI indicator minor differences in the value of the SAR indicator were found and are presented in annex II. Such difference relates only to the number of stocks at risk for two segments (DTS VL1824 and TM 2440).

Ratio between Current Revenue and Break-Even Revenue (CR/BER)

The comparisons between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed the same outputs for all values.

Trends are also the same.

Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

As for the CR/BER indicator, the comparisons between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 24-13 revealed the same outputs for all values. As for CR/BER, all clusters were comparable.

Trends are also the same.

The Vessel Use Indicator (VUR) and/or Vessel Use Indicator 220 (VUR220)

In the MS annual fleet report, the VUR Indicator was calculated as the ratio between average days at sea and maximum observed days at sea for each length category and gear group (for 9 segments identified by MS for 2022). Hence VUR220 is not considered here.

A discrepancy has been observed in the calculation of VUR between the MS annual fleet report and the estimation of the EWG 24-13 for the year 2022. The status in the EWG 24-13 estimation was “in balance” for SWE NAO DFN0812 NGI* and SWE NAO DTS1012 NGI* but the MS annual report indicated “out of balance”.

The difference could be due to different data for the determination of the average number of days at sea, namely the number of vessels of the clustered fleet segment, with higher number of vessels reported in the Swedish fleet report than the number in the JRC database.

The Member State considers low values of the vessels use indicator in the entire fleet may be due to management measures (such as the ban on targeted cod fishing from 1st January 2020), but also due to external factors such as pandemic related effects, weather, increased fuel costs and that fishers with individual fishing opportunities are limited by the quota allocated to them.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicators was not undertaken because of a number of implausible estimates for inactive vessels which were not resolved until late on the last day of the meeting.

Data on the active and inactive fleet are given separately by Member State in Section 3.2.2 of this report.

Assessment of fleet report

The fleet report submitted in 2024 provides indicator values separately by fleet segment based on DCF information and for all the indicators specified in the Commission guidelines (COM (2014) 545). Fleet segments that are assessed by the Member State to be “out of balance” with their fishing opportunities are clearly identified in the fleet report. No action plan for fleet segments assessed by the Member State to be “out of balance” is included in the fleet report

Low profit results related to low activity, is observed for the fleets operating in Baltic Sea with passive gears (from 48 to 58 days at sea) and for small scale fleets in North Atlantic. Member State considers that the critical indicator levels for small scale passive gear segments should not necessarily be interpreted as overcapacity taking into consideration these vessels are working part-time in fisheries and have a small proportion of total catches.

The action plan submitted by Sweden in 2021 expired in 2022. The MS has implemented a permanent cessation of fishing activities aimed at reducing overcapacity in fleet targeting cod in the Baltic Sea. From 2021 to 2023 the GT of the active fleet reduces from 27 020 to 21 931 (18.8%).

To improve the fleet efficiency by reducing the number of active vessels MS is preparing to change the actual system of allocation individual fishing opportunities on an annual basis to a system of transferable fishing rights for demersal fisheries. MS refers that such a system could contribute to a simpler, more transparent allocation system, help make fishing more profitable and make it easier for fishers to adjust their individual fishing opportunities.

Discrepancies in previous fleet reports

As commented in EWG 23-13 the fleet segments were not identified in accordance with the fleet classification specified in the fleet economic data call under the DCF. This was not corrected in the 2024 fleet report.

MS identified segments ´Active’ as DTS and ‘Passive’ as DFN for all segments. EWG 24-13 notes that the gear identification in clustered fleet segment does not consider the major fleet in the cluster. As an example, for DFN0010* the number of DFN vessels are 21 and FPO is 187.

EWG notes that MS provided the VUR indicator at a clustered level and not for all the fleet segments separately. EWG again stresses that, like the biologic indicators, technical indicator VUR should be estimated at fleet segment basis.

The Member State continues to consider that the critical indicator levels for small scale passive gear segments should not necessarily be interpreted as overcapacity.

Structural overcapacity and profitability

In the absence of an agreed definition for structural overcapacity, the EWG has interpreted this to mean whether fleet segments are out of balance with fishing opportunities.

Structural overcapacity not identified by the MS

Long-term profitability is identified in the report only on the basis of the economic indicators (RoI/ RoFTSA) specified in the guidelines

Low profitability in the small-scale ´Passive gear´ segments is linked to the part-time nature of fisheries, effects of pandemic and related factors (raising fuel costs in the period), which is reflected in the “out of balance” status of economic indicators for 3 out of 4 passive gear segments during the period 2018-2022 (SWE NAO DFN0008 NGI*, SWE NAO DFN0010 NGI* and SWE NAO DFN0812 NGI*). In 2022 these three fleet segments contribute to more than 90% of the passive gear fleet in terms of number of vessels but only 7% to 8% of landing value of entire fleet.

Considering the recent measures to limit overcapacity in the ‘Active’ gear fleet, especially for the higher length class (DTS VL2440), there is no overcapacity indicated in the active gear segments, with exception of SWE NAO DTS1012 NGI * (North Sea), with negative economic indicators and deteriorating trend over the 2018-2022 period. Negative trend was also observed for SWE NAO DTS2440 NGI *. However, EWG notes that after the decommission observed in 2022 and particularly in 2023, positive results could be expected for the ‘Active’ gear fleets.

Overview of action plan

No new or revised action plans were proposed by MS in 2024.

Adjustment of targets and tools

No new or revised action plans have been submitted by the Member State.

Number of vessels

No new or revised action plans have been submitted by the Member State.

3.5 Overview of Action Plans

In response to Task 2h of the Terms of reference, Table 3.5.1. summarises for each Member State, the current status of Action Plans submitted with the fleet reports submitted in 2024 in relation to Action Plans already included or identified as on-going in the fleet reports submitted in 2023.

Table 3.5.1. Summary of action plans.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Belgium	2023	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Belgium	2024	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Bulgaria	2023	yes	unclear	No	No	No	The provided action plan is not based on the MS's overall assessment in fleet report and comparison of technical, economic and biological indicators for 2019-2021. The explanation provided about the planned measures is general and does not give enough information about specific MS actions to balance fleet capacity.
Bulgaria	2024	yes	update	No	Yes	No	The updated action plan is partly targeted because there is no information about the share of capacity that will be reduced. The measures were added to the AP related to the EMFF activities and does not have a link to the segments considered out of balance in the MS Fleet report. However, it is still not clear how the proposed measures will improve the balance of the fleet.
Cyprus	2023	yes	Update	yes	yes	yes	A renewed action plan has been proposed for the fleet segment DTS VL2440. The proposed measure is the permanent cessation of fishing activities for two trawlers from a segment total of 4 trawlers operating in the territorial waters of Cyprus should the vessel owners volunteer to decommission their vessels. A time frame of 2 years (until 2023) was given for reaching the target for permanent cessation. In case of no volunteers on permanent cessation, certain fisheries areas will be closed and gear selectivity improvement applies since 2024
Cyprus	2024	yes	Update	yes	yes	yes	Updated from 2023. Nevertheless, the time frame target for permanent cessation has been shifted from 2023 to 2024, due to delays in the preparation of the methodology to be used for compensating the owners for the permanent cessation. The related time frames for replacing the diamond meshed trawl net at the cod end, and for closing an area for trawling, have been moved from 2024 to 2025. The MS identified the concern regarding one fleet segment.
Croatia	2023	yes	Updated and Strengthened	Yes	Yes	Yes	MS presented an updated action plan concerning the imbalance fleet segments, based on temporary and permanent cessations and completed with supplementary measures. The timeframe is defined and was extended for the permanent cessations The targets are also defined, but not always quantifiable. An adjustment of the expected result has been established.
Croatia	2024	yes	Continuation	yes	yes	yes	MS will continue to implement the actions prescribed in the 2023 action plan concerning the imbalance fleet segments. The actions are based on temporary and permanent cessations and completed with supplementary measures. The timeframe and targets are also defined for main actions.
Denmark	2023	yes	update	yes	yes	yes	The action plan proposed the previous year is still ongoing and ends at the end of 2023.
Denmark	2024	yes	update	no	no	no	No new action plan with with a clear timeframe or targeted to specific imbalanced fleet segments was proposed. Only very general measures are included.
Estonia	2023	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Estonia	2024	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Finland	2023	no	/	/	/	/	No action plan proposed by MS. The MS considers its fishing fleet to be in balance with fishing opportunities, with no identified structural overcapacity.
Finland	2024	no	/	/	/	/	No action plan proposed by MS. The MS considers its fishing fleet to be in balance with fishing opportunities, with no identified structural overcapacity.
France	2023	yes	update	yes	yes	yes	The AP was updated with new segments in Outermost regions. The actions for these segments do not relate to fleet capacity reduction. The new actions added for the vessel's segments (operating in Mediterranean and Atlantic) provided in previous AP. Time frame was extended to 2024.
France	2024	yes	update	yes	No	yes	The new AP was updated with the 4 new segments (Area 27, Area 37 and Other regions). The plan contains a wide range of general as well as more-specific measures for imbalanced fleet segments. Objectives are clearly described.

* year relates to the year of the MS's fleet report that included the AP

**Appropriately targeted? - Are the measures in the AP specifically aimed at redressing the imbalance in the fleet segments concerned?

Source: own elaborations.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Germany	2023	yes	Update	yes	yes	yes	Updated from 2022. The AP proposes specific measures for some fleet segments and clearly indicate baseline for targets and measures to be set for the fleet segments concerned.
Germany	2024	yes	Update	yes	yes	yes	Updated from 2023. The AP includes a range of general measures (i.e., shifting relevant fishing opportunities to coastal fisheries, marketing support, suspension of fishing to protect cod stocks in the western Baltic Sea, suspension of fishing to protect herring stocks in the western Baltic Sea, and permanent cessation of fishing activities targeting cod and herring in the western Baltic), applicable to seven fleet segments for which problems have been identified.
Greece	2023	no	/	/	/	/	No action plan prposed by the MS, justifications are provided in the fleet report
Greece	2024	no	/	/	/	/	MS considers that certain fleet segments are not in balance with their fishing opportunities. An Action plan is in preparation but was not submitted with the annual fleet report. It is proposed to complete the action plan by the end of 2024
Ireland	2023	No	/	/	/	/	Based on the fleet reports of 2021-2024, it is the view of the Irish that structural imbalance is not present in any of the Irish fleet segments and no action plans have been proposed. It is the Irish view that any imbalance identified in some fleets in the fleet report is due to the difference in the rate of interest used in calculating the indicators.
Ireland	2024	No	/	/	/	/	Based on the available information, Ireland considers that structural imabalance does not exist in any of its fleet segments and no action plans are proposed.
Italy	2023	Yes	Update	No fleet segments mentioned	Partly	Partly	Updated from at least 2017. Objectives are not specifically targeted at the fleet segments that are out of balance, but rather refer to GSAs. The action plan describes several measures to be taken to reduce fishing mortality. Of these, only temporary closure periods are explicitly described and percentage targets for a reduction of fishing capacity for specific GSAs were issued. The other measures are mostly unfinalized and/or have not been implemented yet.
Italy	2024	Yes	Update with some new actions added	Fleet segments provided by GSAs	Mostly	Mostly	The action plan (AP) presented in this year´s fleet report is a revised version of last year´s action plan. Specific tools for a reduction in fishing pressure have been adjusted, the MS presents a table with the scrapping targets per GSA by segment (period 2021-2027). The measures in the action plan presented by the MS are mostly GSA-specific. In the scrapping plan, the minimum tonnage to be withdrawn is provided by fleet segment per GSA, however, the number of vessels affected cannot be determined
Latvia	2023	Yes	New	Yes	Yes	Yes	Timeframe: 31.12.2023. The target is the Baltic fleet segment of trawlers TM VL2440 through permanent withdrawal from fishing activity of 9 vessels involved in sprat and herring fishery. The EWG could not assess if the actions proposed will influence the balance.
Latvia	2024	No	/	/	/	/	MS stated that the measures to balance the fleet segment VL2440, included in Annex VII of the Annual Report on the Latvian Fishing Fleet 2022, are in the implementation phase and the effect of the reduction of the segment should be evaluated in the following years.
Lithuania	2023	No	/	/	/	/	Ongoing AP provided with 2020 fleet report. Timeframe: 2021-2023. Two types of measures targeting fleet segments NAO DFN 1012 and NAO DTS 2440 operating in the Baltic Sea - a system of transferable fishing concessions and a scrapping scheme with public compensation for permanent cessation of fishing for reducing overcapacity. No action plan for the distant water fleet segment (OFR TM 40XX).
Lithuania	2024	Yes	New	Yes	Yes	Yes	The AP foreseen 4 vessels of the NAO DTS VL2440 fleet segment would be withdrawn in 2024 with public compensation for permanent cessation, resulting in a 40% reduction in the fleet segment's total tonnage and a 42% decrease in power. The Lithuania Programme for the European Maritime Fisheries and Aquaculture Fund 2021–2027 aims, by the end of 2029, to withdraw vessel capacity expressed in gross tonnage (GT) of 468.00 and kW of 884.00 in terms of power.
Malta	2023	yes	new	no	yes	no	The proposed action plan is largely a statement of intent to improve monitoring activities.
Malta	2024	yes	new	no	yes	yes	The proposed action plan is largely a statement of intent to improve monitoring activities. Some measures have been specified such as equipping vessels with a tablet (to transmit catches electronically), a sampling plan for lampara), obliging all vessels to be equipped with VMS or GPRS tracking devices, prohibition of fishing in certain bays from middle of february to middle of july, etc.).

* year relates to the year of the MS's fleet report that included the AP

**Appropriately targeted? - Are the measures in the AP specifically aimed at redressing the imbalance in the fleet segments concerned?

Source: own elaborations.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Netherlands	2023	No	/	/	/	/	No rationale for not presenting AP is elaborated in the fleet report.
Netherlands	2024	No	/	/	/	/	The rationale given not to include any action plan is given as follows: "The consequences of the North Sea sole stock benchmark and the ongoing negotiations between the Coastal States on the pelagic stock management."
Poland	2023	yes	Update	yes	yes	yes	Some updates were performed in the action plan which were added to the 2023 MS report. An action plan applies to the vessels operating within the Baltic Sea region. The DTS VL1824 segment was withdrawn from the action plan due to it being definitively wound down in 2022. A timeframe is for three to five years without specific dates. However, a 5 year period was indicated for 2023 to 2027. The remedial measure for seven segments set out in the action plan will be implemented under the European Marine, Fisheries and Aquaculture Fund.
Poland	2024	yes	Update	yes	yes	yes	Updated from 2023. The AP clearly specifies the targets and tools. However, no specific implementation date was indicated, only that the plan is to be implemented over the 3-5 year period 2023-2027 . The MS identified the concern regarding seven fleet segments operating in the Baltic Sea. The EWG 24-13 is unable to assess the extent to which the measures in the action plan are likely to redress the imbalance in the fleet segments concerned.
Portugal	2023	yes	Update	yes	yes	yes	Action Plan from 2022 and extended to the end of 2025 which provides permanent cessation of activity of 16 vessels from the fleet HOK >12m. The AP is strengthened by temporary cessation measure in 2023 for 40 vessels from the same fleet. The AP is clear, targeted and limited in time. In 2023, 26 applications meeting the scheme's eligibility requirements were submitted and an Order prohibited swordfish fishing for a total of 45 days affecting 28 vessels.
Portugal	2024	yes	Update	yes	yes	yes	Action Plan from 2022 and extended to the end of 2025 which provides permanent cessation of activity of 16 vessels from the fleet HOK >12m. The AP is strengthened by temporary cessation measure in 2023 for 40 vessels from the same fleet. The AP is clear, targeted and limited in time.
Romania	2023	yes	update	no	yes	yes	The action plan proposed the previous year is still ongoing and ends in 2027. The action plan does not specifically target any fleet segments for indicators that appear out of balance.
Romania	2024	yes	update	no	no	no	The action plan is largely a statement of intent to imprive monitoring activities. The action plan proposed the previous year is still ongoing and ends in 2027. The action plan does not specifically target any fleet segments
Slovenia	2023	No	/	/	/	/	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving a a sustainable balance between fishing capacity and fishing opportunities. MS considers that all segments of Slovenian fleet are in balance and did not present an action plan.
Slovenia	2024	No	/	/	/	/	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving a a sustainable balance between fishing capacity and fishing opportunities. MS considers that all segments of Slovenian fleet are in balance and did not present an action plan.
Spain	2023	Yes	New	Yes	Yes	Yes	New AP. The objectives are clearly defined and the measures to achieve them are described. The objectives are appropriately targeted to the fleet segments which are out of balance.
Spain	2024	Yes	Update	Yes	Yes	Yes	Updated from 2023, with some new measures, targets and tools for some segments. The objectives are clearly defined and the measures to achieve them are described.
Sweden	2023	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Sweden	2024	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.

* year relates to the year of the MS's fleet report that included the AP

**Appropriately targeted? - Are the measures in the AP specifically aimed at redressing the imbalance in the fleet segments concerned?

Source: own elaborations.

4 TASK 4 -STOCKS ON WHICH FLEET SEGMENTS ARE RELIANT – ALL REGIONS

ANNEX III lists for each Member State, those fleet segments that according to the Commission guidelines and based on indicator values (2020 or later if available) for either i) the SHI or ii) the SAR, as computed by the STECF, were indicated to be out of balance with their fishing opportunities, together with the fish stocks on which such segments rely and the fishing area to which such segments are attributed.

Annex III is available as part of an Excel workbook which provides separate worksheets containing lists for the North Atlantic (Area 27) the Mediterranean and Black Seas (Area 37), the Outermost regions of France, Portugal and Spain (OMR), and other fishing regions (OFR).

The workbook name is STECF 24-13 - Annexes - Ia-Ib-Ic-III.xlsx and is available at

https://stecf.ec.europa.eu/reports/balance-between-capacity-and-fishing-opportunities_en

5 CONTACT DETAILS OF EWG-24-13 PARTICIPANTS

[1] - Information on EWG participant's affiliations is displayed for information only. In any case, Members of the STECF, invited experts, and JRC experts shall act independently. In the context of the STECF work, the committee members and other experts do not represent the institutions/bodies they are affiliated to in their daily jobs. STECF members and experts also declare at each meeting of the STECF and of its Expert Working Groups any specific interest which might be considered prejudicial to their independence in relation to specific items on the agenda. These declarations are displayed on the public meeting's website if experts explicitly authorized the JRC to do so in accordance with EU legislation on the protection of personnel data. For more information: http://stecf.jrc.ec.europa.eu/adm-declarations

STECF members		
Name	**Affiliation**	**Email**
John CASEY (EWG 24-13 chair)	Independent consultant	blindlemoncasey@gmail.com
Fabio GRATI	National Research Council (CNR) – Institute for Biological Resources and Marine Biotechnologies (IRBIM), L.go Fiera della Pesca, 2, 60125, Ancona, Italy	fabio.grati@cnr.it
Armelle JUNG	Des requins et des Hommes BLP Technopole Brest-Iroise 15 rue Dumont d'Urville 29280 Plouzane, France	armelle@desrequinsetdeshommes.org

Invited experts		
Name	**Address**	**Email**
Edvard AVDIC MRAVLJE	Fisheries research institute of Slovenia	edoavdic@gmail.com
Matthias BERNREUTHER	Thünen Institute - Federal Research Institute for Rural Areas, Forestry and Fisheries, Institute of Sea Fisheries, Bremerhaven, Germany	matthias.bernreuther@thuenen.de
Suzana CANO	Direção Geral de Recursos Naturais, Segurança e Serviços Marítimos	sfcano@dgrm.mm.gov.pt
Richard CURTIN	Bord Iascaigh Mhara	richardwcurtin@gmail.com
Irina DAVIDJUKA	Independent Expert	irina.davidiuk@inbox.lv
Rita FERREIRA	Direção-Geral de Recursos Naturais, Segurança e Serviços Marítimos	rlferreira@dgrm.mm.gov.pt
Jerome GUITTON	Institut Agro 65 rue de saint brieuc	Jerome.guitton@institut-agro.fr

Invited experts		
Name	**Address**	**Email**
	35700 RENNES France	
Myrto IOANNOU	Department of Fisheries and Marine Research, Cyprus	mioannou@dfmr.moa.gov.cy
Irina JAKOVLEVA	Fisheries Service under Ministry of Agriculture. Naujoji uosto. Klaipeda. Repubic of Lithuania	irina.jakovleva@zuv.lt
Christelle LE GRAND	IFREMER - RBE/UEM – Unite d'Economie Maritime Centre de Brest France	christelle.le.grand@ifremer.fr
Anna-Aikaterini MALAMIDOU	Fisheries Research Institute, Greece	malamidou@inale.gr
Alvaro MINGUEZ VELASCO	Ministry of Agriculture, Fisheries and Food	amvelasco@mapa.es
Brendan O' HEA	Marine Institute Rinville, Oranmore Co., Galway, Ireland	brendan.ohea@marine.ie
Jose Luis PEREZ GIL	Spanish Institute of Oceanography (IEO)	joseluis.perez@ieo.csic.es
João RAMOS DO Ó	Direção Geral Recursos Naturais e de Segurança Marítima, Portugal	jramos.do.o@gmail.com
Philip RODGERS	Lincoln International Business School	phil@erinecon.com
Klaas SYS	Research institute for agriculture, fisheries and food	klaas.sys@ilvo.vlaanderen.be
Efthymia TSITSIKA	Greek Government, Ministry of Rural Development & Food, Acharnon 2, 101 76, Athens, Greece	kodesina@yahoo.com
Maria VALIENTE-VIANA	Ministry of Agriculture, Fisheries and Food	mvaliente@mapa.es
Willy VANHEE	Private expert	wvanhee@telenet.be
Mihaela VELINOVA	Ministry of agriculture and food, Bulgaria	m.velinova@hotmail.com
Youen VERMARD	Ifremer, France	youen.vermard@ifremer.fr

JRC experts		
Name	**Affiliation[1]**	**Email**
Michael Gras	European Commission, Joint Research Centre (JRC), Ispra, Italy	Michael.GRAS@ec.europa.eu
Jarno VIRTANEN	European Commission, Joint Research Centre (JRC), Ispra, Italy	jarno.virtanen@ec.europa.eu

European Commission		
Name	**Affiliation[1]**	**Email**
Michael Gras	JRC STECF secretariat	JRC-STECF-SECRETARIAT@ec.europa.eu
Jarno VIRTANEN	JRC STECF secretariat	JRC-STECF-SECRETARIAT@ec.europa.eu
Antonios STAMOULIS	DG Mare 99 Rue Joseph II, J99 01/020 B-1049 Brussels/Belgium	Antonios.STAMOULIS@ec.europa.eu

Observers		
Name	**Affiliation[1]**	**Email**
Clara Azarian	Frenche general directorate of fisheries – DGAMPA, France	clara.azarian@mer.gouv.fr

6 LIST OF ANNEXES

Annexes appended to the report

Annex I – Methods of calculating indicators and trends – appended to report.

Electronic annexes:

Annex II – Indicator Comparison Tables.xlsx

Annex IA – Biological indicator stock reference list
Annex IB – Reference list for stocks at risk
Annex IC – Detailed information for stocks at risk
Annex III – Stocks on which fleet segments are reliant (areas 27 and 37 Separately)

Annex IV – Species identified as SAR in 2022 according to the Commission Guidelines COM(2014) 545)

ANNEX V – Balance capacity – indicator table

The above electronic Annexes are located in four separate Excel workbooks and are published on the meeting's web site at:

https://stecf.ec.europa.eu/reports/balance-between-capacity-and-fishing-opportunities_en

STECF 24-13 - Annexes - Ia-Ib-Ic-III.xlsx
STECF 24-13 ANNEX II indicator comparison tables.xlsx
STECF 24-13 ANNEX-IV Stocks at risk.xlsx
STECF 24-13 Balance capacity – indicator table.xlsx

7 LIST OF BACKGROUND DOCUMENTS SOME HYPERLINKS TO ADD - JRC

Background documents are published on the meeting's web site on:

https://stecf.ec.europa.eu/reports/balance-between-capacity-and-fishing-opportunities_en

List of background documents:

EWG-24-13 – Doc 1 - Declarations of invited and JRC experts (see also section 6 of this report – List of participants)
https://stecf.ec.europa.eu/meetings-calendar/meetings-past-future/wg-24-13-balancecapacity-2024-09-03_en

COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL Guidelines for the analysis of the balance between fishing capacity and fishing opportunities according to Art 22 of Regulation (EU) No 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy.

https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52014DC0545

COMMUNICATION FROM THE COMMISSION TO THE COUNCIL AND THE EUROPEAN

PARLIAMENT Guidelines for the analysis of the balance between fishing capacity and fishing opportunities for fleet segments consisting of vessels of less than 12 metres in length in the outermost regions according to Article 22 of Regulation (EU) No 1380/2013 of the European Parliament and of the Council on the Common Fisheries Policy

https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52024DC0223&qid=1733223858711

Fleet capacity reports for the year 2023 submitted by Member States by 31 May 2024. https://oceans-and-fisheries.ec.europa.eu/fisheries/rules/fishing-fleet-capacities/fleet-capacity-reports-2023_en

8 ANNEX I - METHODS OF CALCULATING INDICATORS AND TRENDS

A1.1 Sustainable Harvest Indicator (SHI)

According the 2014 Balance Indicator Guidelines (COM 2014, 545 final), the sustainable harvest indicator is a measure of how much a fleet segment relies on stocks that are overfished. Here, "overfished" is assessed with reference to F_{MSY} values over time ($F / F_{MSY} > 1$), and reliance is calculated in economic terms (landed value). Values of the indicator above 1 indicate that a fleet segment is, on average, relying for its income on fishing opportunities which are structurally set above levels corresponding to exploitation at levels corresponding to MSY. According to the 2014 Balance Indicator Guidelines this could be an indication of imbalance if it has occurred for three consecutive years. Shorter time period should be considered in the case of small pelagic species.

A detailed description and discussion of the methodology can be found in the STECF report 15-02. According to the 2014 Balance Indicator Guidelines the SHI is calculated for each national fleet segment (or cluster of segments dependent on the information provided by Member States via the economic data call), using the following formula:

$$\frac{\sum_{i=1}^{i=n} V_i \frac{F_i}{Fmsy_i}}{\sum_{i=1}^{i=n} \sum V_i}$$

In which, Fi is the fishing mortality available for stock i from scientific assessments (e.g. ICES, STECF, GFCM, ICCAT, IOTC, NOAA advice and following new 2023 guidelines, national stock assessment for OMR fleets less than 12 m vessel length) and Vi is the value of landings from stock i. Data on Fi (mean F) and F_{MSY} for fish stocks found in Area 27 were obtained from the ICES online database, a database of stock assessments output summaries (http://standardgraphs.ices.dk/stockList.aspx). For Area MBS output from assessments carried out by STECF working group was compiled by JRC (https://stecf.jrc.ec.europa.eu/web/stecf/dd/medbs/sambs). In addition, information on F/F_{MSY} was scrutinized from GFCM Stock Assessment Results tool (STAR) (https://www.fao.org/gfcm/data/star/es/). Information on tuna / tuna-like species was obtained from the ICCAT (http://www.iccat.es/en/) and IOTC website (http://www.iotc.org/). In addition, we considered stocks fished by European fleets in NAFO area (www.nafo.int) as well as in SPRFMO (e.g, jack mackerel, www.sprfmo.int). CECAF report was also used for area 34. And, for the first year, the Stock smart NOAA database was also used (https://apps-st.fisheries.noaa.gov/stocksmart). The full indicator time series (2018-2023) was updated based on the most recent assessments available (2023 or 2024 is most cases) and F_{MSY} point estimates.

Landings data are in many cases not available at species level and often more than one stock is present in a certain area. Sometimes the genus code is used in logbooks, and it covers more than one species for example RED for Sebastes spp (it covers for REB *Sebastes mentella* and REG *Sebastes norvegicus*). STECF EWG 17-08 decided to use the last five years of landings data provided in the ICES advice sheets at the stock level to estimate the proportion of each stock in the DCF landing's data. STECF 18-14 applied the same approach. The use of data from the ICES database is necessary since data reported under the DCF do not contain landings from shared stocks by non-EU fishing fleets.

For the Mediterranean Sea, stocks may be assessed either as belonging a single or multiple GSAs and in such cases more than one assessment may be carried out. In such cases to associate a landings value to the F/F_{MSY} estimate for each stock assessment, we simple

divide the total landings value reported for the combined GSAs by the number of assessments.

For example, for hake (HKE) in GSAs1 two assessments are carried out; one for hke in GSA 1 and a second for hke in GSAs 1, and 3 combined. Therefore, 50% of the total landings value from GSA 10 is associated with the value of F/F_{MSY} resulting for the GSA 1 assessment and 50% to that for GSAs 1 and 3.

The most important issues related to the calculation of indicator values discussed and addressed during the EWG 19-13 Prep and previous Prep. Meeting are outlined below:

- Stock Assessment Selection - The 2014 Balance Indicator Guidelines state the calculation of the SHI indicator should take into account '*the most recent value of fishing mortality available from scientific assessments'*. The EWG 20-11 Prep. Meeting discussed the approach which should be taken in the absence of recent, updated stock assessments, and agreed that the SHI should take into account all stocks for which the most recent assessment was undertaken in 2019 or more recently.

- Norway Lobster FUs - Information from the ICES stock assessment graph database has been used to split the *Nephrops* landings in a given area into Functional Unit (FU) based estimates (if there was more than one FU in a given area). An average over the last five years' landings by FU has been used to calculate the splitting factors. Only *Nephrops* FUs with harvest rates and F_{MSY} values available (category 1 *Nephrops* stocks) are included in the calculation of the SHI indicator. Possible shortcomings of this method are described in section 3.4.2.

- Numerous stocks are assessed at national level and we have no peer review RFMO's validation. That is often the case for very coastal and valuable resources (e.g. scallops). We recommend to develop a framework to be able to include all those "non RFMO" assessment. It should also be used to asses stock that are evaluated for OMR.

- EWG 22-15 Prep. Meeting participants noted that the list of F/F_{MSY} ratios in the JRC database includes outcomes of the assessment carried out in the framework of STECF meetings and some within the GFCM framework (but not all). In order to further increase the accuracy of the SHI calculation for the Mediterranean, information on F and F_{MSY} time series was therefore extracted from reports of the GFCM Working Group on Stock Assessment of Demersal Species (WGSAD), the Working Group on Stock Assessment of Pelagic Species (WGSAP), as well as stock assessment forms available online (http://www.fao.org/gfcm/data/safs/en/). EWG 22-15 Prep. Meeting notes that this was a time consuming process since in many cases data has to manually be extracted from graphs provided in stock assessment forms, and considers that a single database with a complete list of updated assessments (as is available for the ICES region) should be required for the Mediterranean and Black Sea and for high migratory species especially looking for Tuna species assessments. For Tuna, F/F_{MSY} has been collected through ICCAT and IOTC but sometimes reports only provide short time series.
- In cases where stock assessments were available from more than one source, the more updated stock assessment was taken into account for SHI calculations. Where

STECF and GFCM assessment were available and values of F and/or F_{MSY} differed, both assessments were retained and the SHI calculations were based on an average of the two assessment results.

- he 2024 Commission guidelines (COM(2024) 223 Final) allow Member States to use the results of national fish stock assessments that have not undergone external peer review, as input to computing the SHI but only for fleet segments less than 12m in length. Hence the additional national stock assessment results are being selectively applied to fleet segments less than 12m and ignored for segments greater than 12m in length even if both segment length groups are exploiting the same stocks. Such an approach may give rise to misleading and/or biased SHI estimates. Furthermore, there is a risk that computational errors could also occur as a result of having to use different stock assessment results to compute SHI values for different fleet segment length groups. Ideally, the same stock assessment information should be used for all fleet segments that exploit a particular stock.

Instances where the SHI indicator values are based on stocks that comprise less than 40% of the total value of landings by those fleet segments are highlighted in the indicator table. The Commission guidelines specify that for such fleet segments, SHI indicator values cannot be used meaningfully to assess the balance or imbalance. No trend analysis was performed for such fleet segments.

A1.2 Stocks at Risk Indicator (SAR)

According to the 2014 Balance Indicator Guidelines (COM 2014, 545 final), the stocks at risk indicator is a measure of how many stocks that are biologically vulnerable are being affected by the activities of the fleet segment, i.e., stocks which are at low levels and are at risk of not being able to replenish themselves and which are either important in the catches of the fleet segment or where the fleet segment is important in the overall effects of fishing on the stock. If a fleet segment takes more than 10% of its catches taken from a stock which is at risk, or the fleet segment takes 10% or more of the european fleets' total catches from a stock at risk, the 2014 Balance Indicator Guidelines suggest that this could be treated as an indication of imbalance.

According to the 2014 Balance Indicator Guidelines the SAR indicator aims to count the number of stocks that are exploited by a fleet segment and which are currently assessed as being at high biological risk either regarding the total catch of the stock or the total catch of the fleet segment. According the definition of the SAR indicator in the 2014 Balance Indicator Guidelines, a stock at risk (SAR) means a stock which is either:

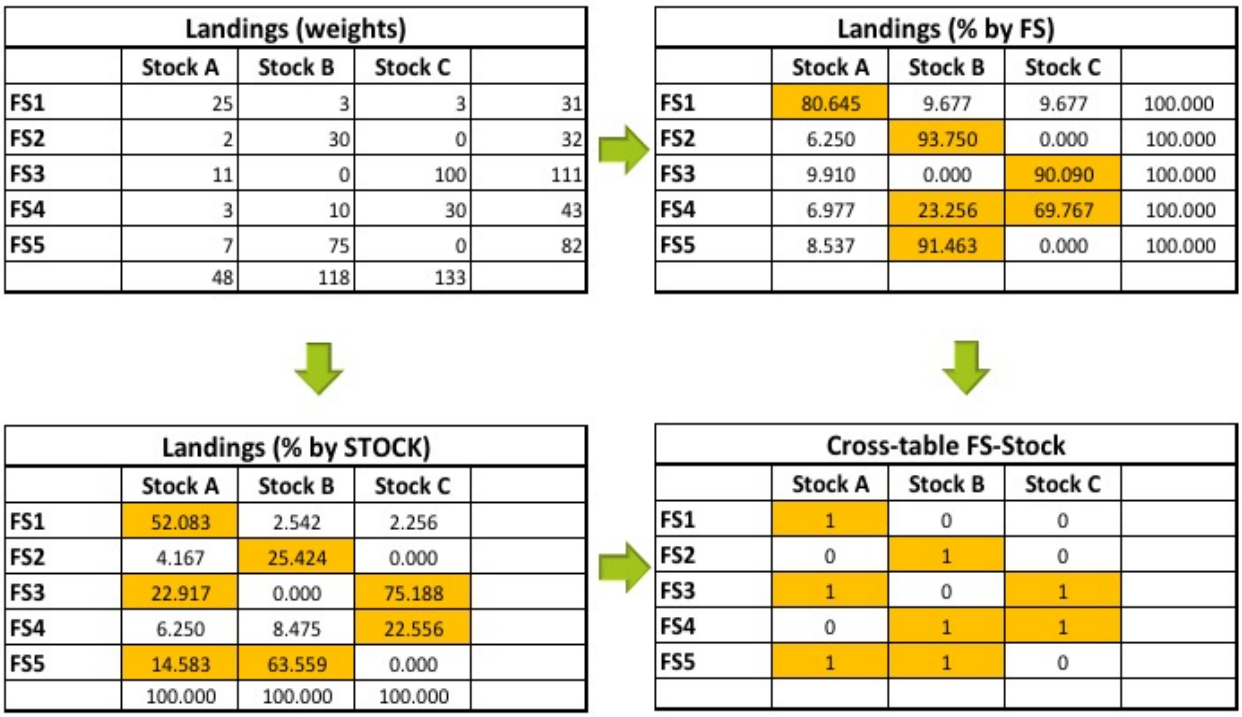
a) assessed as being below the B_{lim}; or
b) subject to an advice to close the fishery, to prohibit directed fisheries, to reduce the fishery to the lowest possible level, or similar advice from an international advisory body, even where such advice is given on a data-limited basis; or
c) subject to a fishing opportunities regulation which stipulates that the fish should be returned to the sea unharmed or that landings are prohibited; or
d) a stock which is on the IUCN 'red list' or is listed by CITES.

AND for which either:

1- the stocks make up to 10% or more of the catches by the fleet segment; **or**
2- the fleet segment takes 10% or more of the total catches from that stock.

The meaning of these last two conditions are represented in Figure A1.1. Here, three stocks are exploited by five fleet segments, and landings data (in weights) are available for each stocks/fleet segment. The marginal sum of landings for each fleet segment is computed (by row) and used to scale each landing value to its relative contribution (in percentage) to the total landings for each fleet segment. In the meantime, the marginal sum of landings for each stock (by column) is computed and used to scale each landing value to its relative contribution (in percentage) to the total landings for each stock. According to the SAR definition, all the cases in which either the relative contribution by fleet segment or by stocks is equal to or larger than 10% are selected and considered for the SAR. Then, the value of the SAR for each fleet segment corresponds to the number (if any) of the stocks over the threshold (highlighted in orange) and listed as “at risk”. In the example of Fig. A1.1, if all the stocks (A, B, and C) are defined “at risk”, the Fleet segments 1 and 2 will have a SAR=1, while the Fleet segments 2-5 will have a SAR=2.

Figure A1.1. Example of pre-processing of landings data for the computation of the SAR indicator.



Landings (weights)

	Stock A	Stock B	Stock C	
FS1	25	3	3	31
FS2	2	30	0	32
FS3	11	0	100	111
FS4	3	10	30	43
FS5	7	75	0	82
	48	118	133	

Landings (% by FS)

	Stock A	Stock B	Stock C	
FS1	80.645	9.677	9.677	100.000
FS2	6.250	93.750	0.000	100.000
FS3	9.910	0.000	90.090	100.000
FS4	6.977	23.256	69.767	100.000
FS5	8.537	91.463	0.000	100.000

Landings (% by STOCK)

	Stock A	Stock B	Stock C	
FS1	52.083	2.542	2.256	
FS2	4.167	25.424	0.000	
FS3	22.917	0.000	75.188	
FS4	6.250	8.475	22.556	
FS5	14.583	63.559	0.000	
	100.000	100.000	100.000	

Cross-table FS-Stock

	Stock A	Stock B	Stock C	
FS1	1	0	0	
FS2	0	1	0	
FS3	1	0	1	
FS4	0	1	1	
FS5	1	1	0	

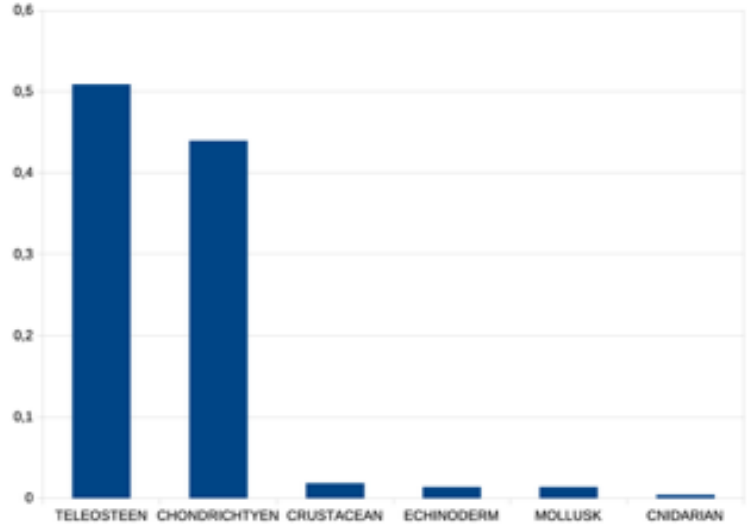
Source: own elaborations.

During the preparatory meeting EWG 23-17, more than 500 stocks were examined. For 2022 Balance Group, ‘400 items were considered at risk for at least one year of the time period 2009-2021. They are representing over 400 stocks considering that some regulation relates to groups (e.g. Mobula listing in CITES count for one item but consist in 8 species)
The total number of Stocks as Risk increased from 2012 to 2022, mainly due to the introduction of new fishing regulation texts including some fishing prohibition to data limited species with scientific concerns but also due to the improvement in quality and availability of some RFMO’s assessments (Figure A1.2). It should be noted that for 2022 the vulnerable species were considered for SAR selection as IUCN approach for Threatened species. Since 2021, a large number of IUCN species were reviewed at regional or global ; as these assessments were mainly made available in 2022 it allows the Preparatory EWG 22-15 to include new species.

For 2022, 14% of the stocks were selected based on quantitative data (SSB/B lim),it was 20% for 2021 SAR list. SAR selection due to RFMO’s advices based on quantitative data

different from Blim represent 20% of the cases. Whereas 14% of the stocks or species were selected based on regulations (EC or RFMOs). All these values have decreased in 2022 compare to 2021 essentially because a large number of stocks/species listed as International conventions (IUCN or CITES) were able to be entered in the SAR selection list during the preparatory meeting.

Figure A1.2. Distribution of SAR per species group in 2022 (n=4320).



Source: own elaborations.

The same methodology described in the STECF 15-02 / 15-15 reports was applied by the expert selecting stocks for the calculation of the SAR. The calculation of the indicator was then carried out using a SQL coding. The code is designed to compute the SAR indicator value, for the temporal range defined by the input data, for each fleet segment, by crossing-checking DCF landings data provided by JRC with a list of stocks-at-risk prepared by *ad hoc* contract and validated during the preparatory working group.

The same methodology used for attributing landings data available at species level to stocks was used for the calculation of the SAR indicator (see section 3.3.1). The full list of stocks at risk identified for the assessed fleet segments for years 2009 – 2022 are given in Annex IA to this report.

The most important issues related to the calculation of indicator values discussed and (where possible) addressed during the EWG 24-13 Prep. Meeting and previous Prep. Meeting are outlined below:

- *GFCM* - Whearas in parallel stock status information for Mediterranea are maiking easily accessible and thee numbre of stock assessment have increased, more stocks were able to be considered and some new items have been adeeed as SAR.
- The Barent Sea stocks of NEA cod, NEA haddock, Sebastes mentella or Greenland Halibut, used to be assessed by ICES were not processed in 2024 as management and data collection for these stocks are shared between Norway and Russia. "*Due to the temporary suspension of Russian scientists from ICES, this assessment was conducted by a Joint Russian-Norwegian working group on Arctic Fisheries (JRN-AFWG) consisting of scientists from VNIRO (Russia) and IMR (Norway) (Howell et al., 2022)".* For the EWG 24-13 as well as the EWGs 23-13 and 22-15 the 2021

assessment data was used for these stocks. It was evaluated that this proxy was not of major issue for the indicator calculation.

- When B_{lim} was not available a proxy of 0.4 SSB_{msy} were agreed to be used for some RFMO's stocks as for instance the inclusion of Striped Marlin (*Tetrapturus audax*) in IOTC.
- The experts agreed to select only the "critically endangered" (CR),"Endangered" (EN) and "Vulnerable" (VU) species of marine species (e.g fish, mollusk and echinoderm) used for human food consumption listed on the IUCN Red list as stocks at risk for the SAR calculation. This represent an improvement in the approach for a better evaluation of the fleet segment involved in landing stocks or species in threatened status. For 2021 the prep EWG 22-15 applied a threshold at 100t total landing (all year combined) for inclusion in the SAR list. For 2022 the prep EWG 24-13 was able to include the remaining species /stocks which increased the SAR list to 400 items.
- However some other groups such as Marine mammals, birds, reptiles, corals, etc. category would also make sense to be considered in the future, in relation with ETP and sensitive species methodology developed for the STECF EWG 22-05 of fish product transparency.
- SAR definition criteria "c" includes some EC Regulations for fishing opportunity. However the temporal measures listed in such Regulations cannot be included in the SAR selection (eg. Porcupine bank closure from 01-31 May). Specific gear restrictions were not taken into account neither (for calculation simplification purpose, see above).
- The group stressed that the information on SAR criteria "c" and "d" are still heterogeneous from the various relevant reports and selection of stocks still dependent on interpretation, with the exception of criteria "a" and "b" . However, some progress was noticeable since 5 years in term of quality and clarity of the RFMO's advice.
- The group highlight the impossibility to perform properly the calculation for some highly distributed stocks. Only the first threshold calculation can be performed (the stocks make up to 10% or more of the catches by the fleet segment) but the second one is partial (the fleet segment takes 10% or more of the total catches from that stock.) considering that the EWG does not have access to the total catch of the corresponding stocks. This is the case of some Outermost regions stocks but it's also the case for mainland where some stocks are assessed at by member states (eg. Scallops), these national assessments while available might be considered for estimation. National regulations together with National expert knowledge may also prove to be informative regarding the identification of SARs, especially regarding localized areas and stocks.
- There is a need to take into account other International conventions in defining a SAR for fish and other marine organisms. These International Conventions could be considered in the future: Bonn, Bern, Ospar, Barcelona, SPAW, CMS, etc.

- The report from that exercise in made publicly available through STECF EWG reports or Data dissemination tool platform; this reference document aims to be more easily appropriated by MS and increases transparency in the SAR assessment process.

- While the current balance/capacity exercise focuses on fleet segments and exploited resources, consideration may need to be given to extending the scope to include fisheries impacts on habitats and ecosystems. Recently, ICES started to worked on a selection of habitats in order to build a VEM's index (Vulnerable Marine Ecosystem) and evaluate the impact of fisheries on ecosystems in the framework of an EU request. However, so far we have a list of VEM but not really linked it to fisheries. This may be worth further consideration as a means to progress along such lines.

- Since 2021 the online platform for Biological Indicator (Agrocampus Atlas) offers the possibility to check directly the FS involved in landing the stocks listed at risk; this can be considered as a major improvement for experts to explain MS situation in regards to SAR values assessments as potentially imbalance as well as trying to evaluate the discrepancies between MS and JRC calculation for SAR.

A dedicated paragraph analyzing the situation for OFR was performed during the main EWG 24-13. It can be an interesting approach enable to evaluate the economical weight each SAR value represent for the corresponding fleet segment it has been allocated while calculation process ran. It represent an additional tool for interpretation of the meaning of getting flagged as 'unbalance' which can represent many different situation. Such an exercise could be an asset for the overall Balance national chapter.

A1.3. Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

According the 2014 Commission guidelines (COM 2014, 545 final), the Return on Investment (RoI) or Return on Fixed Tangible Assets (RoFTA) indicator compares the long-term profitability of the fishing fleet segment to other available investments. If this value is smaller than the low-risk long-term interest rates available elsewhere, then this suggests that the fleet segment may be overcapitalised. If the return on investment or net profit is less than zero and less than the best available long-term risk-free interest rate, this is an indication of long-term economic inefficiency that could indicate the existence of an imbalance.

RoI (also referred to as capital productivity) is the return of the investment divided by the cost of the investment. It measures profits in relation to the capital invested, i.e. indicates how profitable a sector is relative to its total assets. The higher the return, the more efficient the sector is in utilising its asset base.

When data on intangible assets (e.g. fishing rights, natural resource) are not available, the Return on Fixed Tangible Assets (RoFTA) is used as an approximation of RoI.

RoI is calculated for EWG 24-13 as:

Net profit / (value of physical capital + value of quota and other fishing rights)

where,

Net profit = (Income from landings + other income + income from leasing out quota) - (crew wage + unpaid labour + energy costs + repair costs + other variable costs + other non-variable costs + lease/rental payments for quota or value of quota + annual depreciation)

RoI is compared against a Target Reference Point (TRP). For this exercise, the 5-year average of the risk-free long-term interest rate for each MS was used.

RoFTA is calculated as

Net profit / (value of physical capital);

where,

Net profit = (income from landings + other income) - (crew wage + unpaid labour + energy costs + repair costs+ other variable costs + other non-variable costs + annual depreciation)

Note: Indicators are not calculated if one or more of the essential cost and/or income items are not provided e.g. Net profit is not calculated if consumption of fixed capital is not provided. Conversely, RoI is calculated only when value of quota and other fishing rights is available.

EWG 24-13 applied the criteria from the 2014 Commission guidelines to comment on whether fleet segments where `in balance´ or `out of balance´. When the indicator value was less than the interest rate, but greater than zero the comment, `not sufficiently profitable´ was used.

The RoFTA indicator has been calculated and is presented under section 3.6 for all Member States when RoI is not available. RoI is only available for countries that provide data on fishing rights (income, costs /or estimated value of fishing rights).

Indicator Trends

Trends were calculated according to the filters detailed below for the years 2017 – 2021 (Table 3.3.3.1).

Table 3.3.3.1. Methodology used to automatically generate comments on indicator trends.

Filter 1	Filter 2	Result
At least the last 3 consecutive years with data	Slope* >0.05	Increasing
	Slope* <-0.05	Decreasing
	-0.05=<Slope*=<0.05	No clear trend**
	Slope = 0	Flat / null

* The slope is calculated with the intercept of the trend line / the first value of the trend (a/i0)

** A threshold of 5% is used to indicate whether the value is significant or not.

Source: own elaborations.

A1.4. Ratio Current Revenue and Break-Even Revenue (CR/BER)

According to the 2014 Commission guidelines (COM 2014, 545 final), the ratio between current revenue and break-even revenue measures the economic capability of the fleet

segment to keep fishing on a day-by-day basis: does income cover the pay for the crew and the fuel and running costs for the vessel? If not, there may be an imbalance. If the ratio between current revenue and break-even revenue is less than one, this is an indication of short-term economic inefficiency that could indicate the existence of an imbalance.

As recommended by STECF 18-14, the long-term viability analysis of CR/BER, as outlined in the 2014 Balance Indicator Guidelines, was used.

Current revenue to break-even revenue ratio (CR/BER) is calculated as:

Current revenue (CR) / Break Even Revenue (BER)

In which:

CR = income from landings + other income
BER = fixed costs / (1-[variable costs / current revenue])

In which:

Fixed costs = other non-variable costs + annual depreciation + opportunity cost of capital
And,
Variable costs = crew wage + unpaid labour + energy costs + repair costs + other variable costs

As for the RoI or RoFTA indicator, fleet segments frequently need to be grouped together in clusters in order to deliver economic data that does not breach confidentiality requirements. Fleet segments should only be clustered when the number of vessels in the fleet segment is too low to ensure confidentiality of sensitive economic data. As economic data are often only provided by the main fleet segment contained in the cluster, the other minor fleet segments in the cluster may not contain any data.

Indicator Trends

Trends were calculated according to the filters detailed below for the years 2017 – 2021 (Table 3.3.4.1).

Table 3.3.4.1 Methodology used to automatically generate comments on indicator trends.

Filter 1	Filter 2	Result
At least the last 3 consecutive years with data	Slope* >0.05	Increasing
	Slope* <-0.05	Decreasing
	-0.05=<Slope*=<0.05	No clear trend**
	Slope = 0	Flat / null

* The slope is calculated with the intercept of the trend line / the first value of the trend (a/i0)

** A threshold of 5% is used to indicate whether the value is significant or not.

Source: own elaborations.

A1.5.The Inactive Fleet Indicator

According to the 2014 Commission guidelines (COM 2014, 545 final), the Vessel Use Indicators describe how intensively vessels in a fleet segment are being utilized. One of

these Vessel Use Indicators is the Inactive Fleet Indicator, which describes the proportion of vessels that are not actually active at all (i.e. that did not fish at any time in the year).

The inactive vessels are split according to length classes. For each subgroup, the number of vessels, total GT and kW are provided per year. No thresholds for the indicator could be applied in EWG 24-13.

Indicator Trends

Trends were calculated according to the filters detailed below, (Table 3.3.5.1), although no trends were given in the EWG 24-13 report.

Table 3.3.5.1. Methodology used to automatically generate comments on indicator trends.

Filter 1	Filter 2	Result
At least the last 3 consecutive years with data	Slope* >0.05	Increasing
	Slope* <-0.05	Decreasing
	-0.05=<Slope*=<0.05	No clear trend**
	Slope = 0	Flat / null

* The slope is calculated with the intercept of the trend line / the first value of the trend (a/i0)

** A threshold of 5% is used to indicate whether the value is significant or not.

Source: own elaborations.

A1.6.The Vessel Use Indicator

According to the 2014 Commission guidelines (COM 2014, 545 final), the 'Vessel Use Indicators' describe how intensively vessels in a fleet segment are being utilised. One of these Vessel Use Indicators is the Vessel Utlilisation Ratio (VUR). This indicator concerns the average activity levels of vessels that fished at least once during the year, taking into account the seasonality of the fishery and other restrictions. Under normal conditions, it can be expected that 10% or less of the vessels in a fleet segment should be inactive, which could be due to major repairs, refits, conversions or pending sales and transfers. If more than 20% of the fleet segment is recurrently inactive or if the average activity level of vessels in a fleet segment is recurrrently less than 70% of the potential, workable activity of comparable vessels, this could indicate technical inefficiency, that may reveal the existence of an imbalance, unless it can be explained by other reasons, such as unexpected climatic or man-made events or emergency measures as foreseen in the CFP.

Two sets of values for this indicator were included in the balance indicator tables prepared by JRC; VUR per fleet segment based on a theoretical maximum Days At Sea (DAS) submitted voluntarily by some Member States, and VUR_{220} per fleet segment based on a reference DAS of 220 days. Member States also have the facility to provide an alternative vessel utilization indicator VUR*nn*, where according to the Member State, "*nn*" represents most appropriate theoretical Maximimum days at sea for a fleet segment.

Indicator Trends

Trends were calculated according to the filters detailed below for the years 2017 – 2021 (Table 3.3.6.1).

Table 3.3.6.1. Methodology used to automatically generate comments on indicator trends.

Filter 1	Filter 2	Result
At least the last 3 consecutive years with data	Slope* >0.05	Increasing
	Slope* <-0.05	Decreasing
	-0.05=<Slope*=<0.05	No significant trend**
	Slope = 0	Flat / null

* The slope is calculated with the intercept of the trend line / the first value of the trend (a/i0)

** A threshold of 5% is used to indicate whether the value is significant or not.

Source: own elaborations.

A1.7. Net profit margin

The Net Profit Margin, proposed by STECF 18-14, measures the percentage of revenue retained as surplus after covering all explicit and implicit costs, including the opportunity costs of labour and capital. It reflects the economic profit and resource rent generated by fisheries, indicating their operating efficiency and capacity to generate surplus compared to alternative uses of labour and capital in the economy.

Formula:

Net Profit Margin = Net Profit/Revenue

Where

Net Profit = Income from landings + other income – crew costs – unpaid labour - energy costs – repair costs – other variable costs – non variable costs – depreciation cost – opportunity cost of capital; where opportunity cost of capital = fixed tangible asset value * 3.5%

Revenue = income from landings + other income

According to EWG 21-13, a negative net profit indicates imbalance, while a positive net profit suggests balance. However, a net profit margin below 10% is considered insufficiently profitable, as it falls short of the potential maximum economic yield target.

Indicator Trends

Trends were calculated according to the filters detailed below for the years 2017 – 2021 (Table 3.3.4.1).

Table 3.3.4.1. Methodology used to automatically generate comments on indicator trends.

Filter 1	Filter 2	Result
At least the last 3 consecutive years with data	Slope* >0.05	Increasing
	Slope* <-0.05	Decreasing
	-0.05=<Slope*=<0.05	No clear trend**
	Slope = 0	Flat / null

* The slope is calculated with the intercept of the trend line / the first value of the trend (a/i0)

** A threshold of 5% is used to indicate whether the value is significant or not.

Source: own elaborations.

A1.8. Net Value Added per Full-Time Equivalent Employment (NVA/FTE)

The NVA per FTE indicator measures labour productivity by calculating the average net value generated by each full-time worker. It is calculated by dividing the Net Value Added (NVA) by the number of full-time equivalent (FTE) employees, reflecting the economic contribution of labour in the fisheries sector.

Formula:

NVA per FTE = NVA/FTE

Where:

NVA = Income from landings + Other income – Energy costs – Repair costs – Other variable costs – Non-variable costs – Depreciation cost

FTE = Full-Time Equivalent Employment

A negative NVA signifies imbalance, while a positive NVA/FTE indicates balance. However, an NVA/FTE below €1,500 suggests insufficient labour productivity, implying that the sector is not generating enough value added per worker.

Indicator Trends

Trends were calculated according to the filters detailed below for the years 2017 – 2021 (Table 3.3.4.1).

Table 3.3.4.1. Methodology used to automatically generate comments on indicator trends.

Filter 1	Filter 2	Result
At least the last 3 consecutive years with data	Slope* >0.05	Increasing
	Slope* <-0.05	Decreasing
	-0.05=<Slope*=<0.05	No clear trend**
	Slope = 0	Flat / null

* The slope is calculated with the intercept of the trend line / the first value of the trend (a/i0)

** A threshold of 5% is used to indicate whether the value is significant or not.

Source: own elaborations.

9 ANNEX IV - SPECIES IDENTIFIED AS SAR FOR 2022 ACCORDING TO COM (2014) 545 FINAL) AND FOR WHICH THE CUMULATIVE ANNUAL CATCH SINCE 2008 HAS EXCEEDED 100 T.

Annex IV is given in electronic form with filename

ANNEX-IV_EWG 24-13 Stocks at risk.xlsx

https://stecf.ec.europa.eu/reports/balance-between-capacity-and-fishing-opportunities_en

Getting in touch with the EU

In person

All over the European Union there are hundreds of Europe Direct centres. You can find the address of the centre nearest you online (european-union.europa.eu/contact-eu/meet-us_en).

On the phone or in writing

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

— by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),

— at the following standard number: +32 22999696,

— via the following form: european-union.europa.eu/contact-eu/write-us_en.

Finding information about the EU

Online

Information about the European Union in all the official languages of the EU is available on the Europa website (european-union.europa.eu).

EU publications

You can view or order EU publications at op.europa.eu/en/publications. Multiple copies of free publications can be obtained by contacting Europe Direct or your local documentation centre (european-union.europa.eu/contact-eu/meet-us_en).

EU law and related documents

For access to legal information from the EU, including all EU law since 1951 in all the official language versions, go to EUR-Lex (eur-lex.europa.eu).

EU open data

The portal data.europa.eu provides access to open datasets from the EU institutions, bodies and agencies. These can be downloaded and reused for free, for both commercial and non-commercial purposes. The portal also provides access to a wealth of datasets from European countries.

STECF

The Scientific, Technical and Economic Committee for Fisheries (STECF) has been established by the European Commission. The STECF is being consulted at regular intervals on matters pertaining to the conservation and management of living aquatic resources, including biological, economic, environmental, social and technical considerations.

Science for policy

The Joint Research Centre (JRC) provides independent, evidence-based knowledge and science, supporting EU policies to positively impact society

EU Science Hub
Joint-research-centre.ec.europa.eu

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