

**FISHERIES**



# Results of the CFP Reform Impact Assessment-

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**European  
Commission**  
Maritime Affairs  
and Fisheries

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# Methodology

- **Combination of quantitative (2 bio-economic models), trend and qualitative analysis;**
- **80+% of EU landings and 75+% of employment on board, all fleet segments and MS covered;**
- **Processing and aquaculture included;**
- **30 indicators mostly on environmental, economic and social dimension. Comparisons for 2012, 2017 and 2022;**
- **Results are best possible estimates based on available data.**



# List of indicators used for the assessment

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



# Risks

- **Results depend on assumptions about future evolution of variables; in particular:**
  - the pace at which scientific advice will develop to cover poorly known/unknown stocks;
  - the evolution of fuel prices;
  - the evolution of first sale prices of EU landings;
  - WTO negotiations (tariffs and subsidies).
- **Sensitivity tests for different values of these variables**



# Contents of the SQ scenario

- **CFP until 2022 includes Regulations enacted since 2002, including the LTMPs (existing and in the pipeline), the Control Regulation and the IUU Regulation. Lisbon Treaty also taken into account.**
- **Continuation of EFF and CMO. No EU policy on ITRs. No changes to external dimension.**



# Main results

- **Slow improvements, mainly associated with the signs of recovery of some fish stocks, but ...**
- **...environmental, social and economic indicators remain far from sustainability.**
- **And confirm the necessity of the CFP reform.**



# Status Quo Environmental Impacts

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

**In general target are not met as consequence of discarding, unassessed stocks, F target > Fmsy in the LTMPs and large overcapacity.**



# Status quo

## Economic Impacts

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



# Status quo Social Impacts

- **Total employment in the catching sector continues to decline,**
- **Average wages slowly increase by 2022 but overall remain well below national average; increases mostly in LSF segment,**
- **Many fishing dependent communities continue to decline.**



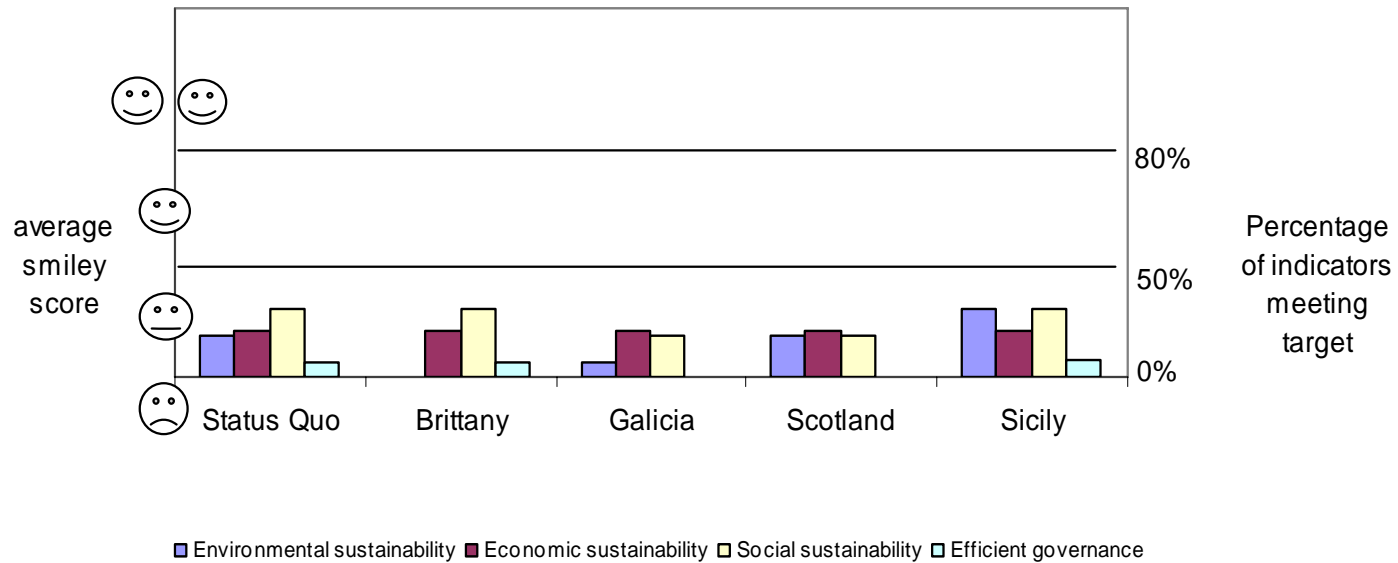
# Status quo

## Governance impacts

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



# Average score of status quo scenario in 4 regions



Thank for your attention

