



**COUNCIL OF
THE EUROPEAN UNION**

Brussels, 2 July 2010

**5382/09
ADD 1 REV 1**

PECHE 11

COVER NOTE

N° Cion. doc.: SEC(2008) 3108/2

Subject: Commission Staff Working Document I
Annual report from the Commission to the Council and the European
Parliament on Member States' efforts during 2007 to achieve a sustainable
balance between fishing capacity and fishing opportunities

Delegations will find attached a **new version** of document SEC(2008) 3108.

Encl.: SEC(2008) 3108/2



COMMISSION OF THE EUROPEAN COMMUNITIES

Brussels, 8.2.2010
SEC(2008) 3108/2

CORRIGENDUM:

Annule et remplace le document SEC(2008) 3108 final du 12.1.2009

Concerne uniquement la version anglaise

COMMISSION STAFF WORKING DOCUMENT I
ANNUAL REPORT FROM THE COMMISSION TO THE COUNCIL AND THE
EUROPEAN PARLIAMENT
on Member States' efforts during 2007 to achieve a sustainable balance between fishing
capacity and fishing opportunities

{COM(2008) 902final/2}
{SEC(2009) 645}

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FLEET MANAGEMENT UNDER THE COMMON FISHERIES POLICY

Entry-exit regime

From 1 January 2003 Member States have been obliged to respect a strict entry-exit regime applying to the capacity of their mainland fleets¹, measured in terms of both tonnage and power. Any entry of capacity into the fleet of a Member State has to be compensated by the previous exit of at least the same amount of capacity (entry to exit ratio of 1:1). The only exception being capacity increases resulting from works to improve safety, hygiene or living and working conditions on board in accordance with Article 11(5) of Council Regulation (EC) No 2371/2002. For entries of new vessels between 100 and 400 GT built with public aid (the administrative decisions granting aid were possible only until 31 December 2004) the Member State has to withdraw 35% more capacity than it introduces (entry to exit ratio of 1:1.35).

Another important rule is that capacity leaving the fleet with public aid cannot be replaced. Such capacity is subtracted directly from the maximum fleet capacity of each Member State. Capacity reductions supported with public aid are therefore permanent.

In July 2007 the Council adopted an amendment to the fleet management provisions which allows Member States, with effect from 1 January 2007, to re-allocate 4% of the capacity scrapped with public aid in order to improve safety on board, working conditions, hygiene and product quality. The amendment also includes the possibility to re-allocate for the purpose of the aforementioned safety improvements 4% of the average annual tonnage withdrawn with public aid between 1 January 2003 and 31 December 2006 for Member States that were part of the Community on 1 January 2003, and between 1 May 2004 and 31 December 2006 for the Member States that acceded to the Community on 1 May 2004. These amendments have slightly increased the tonnage ceilings for most Member States.

All of this means that, as a general rule, the capacity of the national fleets cannot increase with respect to its levels on 1 January 2003, for 'EU 15' Member States and on the accession date for the Member States, which acceded to the Community after 2003.

In practice this is likely to be the case. However, in accordance with Articles 6, 6a, 7 and 7a of Commission Regulation (EC) No 1438/2003, the implementing rules for the fleet policy allow for the registration of vessels outside the framework of the entry-exit regime if administrative decisions have been adopted by the national authorities:

- a) between 1 January 1998 and 31 December 2002 for those vessels to enter the fleet after 1 January 2003 in 'EU 15' Member States and,
- b) up to five years before the accession date for those vessels joining the fleet of Member States which acceded to the Community after 1 January 2003.

The combination of these rules results in the calculation by the Commission of a variable capacity ceiling for the fleet of each Member State, excluding the fleets registered in the outermost regions. The sum of all Member States capacity ceilings is compared to the total capacity of the Community fleet since 1 January 2003 in figure 1. Detailed results per Member State are available on the website of Directorate General for Fisheries and Maritime Affairs.

¹ For fleets registered in outermost regions, rules are slightly different (see below).

The capacity of each Member State in relation to its capacity ceiling on 31 December 2007 is shown in Table 1.

Reference Levels for the mainland fleet

The reference levels for the fleets of Member States are the sum of the global final objectives of the Fourth Multi-annual Guidance Programme (MAGP IV) as established by Article 12 of Council Regulation (EC) No 2371/2002. Since the reference levels are a legacy of MAGP IV² (period 1997-2002), the Council decided that they would not apply to the 'EU 10' Member States (Council Regulation (EC) No 1242/2004³). Member States may not exceed their reference levels at any time.

In the same way as it is done for the entry exit regime, the reference levels are revised to take into account the amount of capacity scrapped, the increase in tonnage under the provisions of Article 11(5) of Regulation 2371 and the 35% extra capacity withdrawn for new vessels of 100 GT or more built with public aid after 1 January 2003.

For the 'EU 15' Member States, the comparison between the capacity of their fleets and the reference levels is shown in figure 2. For the majority of the 'EU 15' Member States, the reference levels are in fact much greater than the capacity ceilings resulting from the entry-exit regime, which makes the former irrelevant. Detailed results per Member State are available on the website of Directorate General for Maritime Affairs and Fisheries.

Management of fleet reference levels in the outermost regions

The fishing fleets registered in the Community outermost regions, namely the French Overseas Departments, the Spanish Canary Islands and the Portuguese Azores and Madeira have to comply with specific reference levels for these regions in accordance with Council Regulation (EC) No 639/2004⁴ and Commission Regulation (EC) No 2104/2004⁵.

Community Fishing Fleet Register

In 2004, the new Community Fleet Register (CFR) was set up in accordance with Commission Regulation (EC) No 26/2004. The more comprehensive CFR was necessary in order to follow up the new CFP rules for managing the fishing capacity of the EU fleet which entered into force on 1st January 2003. This system, following the 2002 CFP reform, gives more responsibility to the Member States in achieving a better balance between the fishing capacity of their fleets and the available resources.

The CFR is the main tool for monitoring the fishing fleet. In accordance with Commission Regulation (EC) No 26/2004, Member States are obliged on a quarterly basis to transmit electronically all relevant information ("snapshots" shall be sent on the first working day of March, June, September and December) on the characteristics of 88,236 (on 31 December 2007) commercial fishing vessels, together with information on entries to and exits from the fleet. Furthermore, the CFR is managed via a web-based application, called the Community Fleet Register On the Net (FRONT). The FRONT is also available for the general public on the following web page: <http://ec.europa.eu/comm/fisheries/fleet/index.cfm>

² 4th Multiannual Guidance Programs

³ Council Regulation (EC) No 1242/2004 (OJ L 236 of 7 July 2004, p. 1 – 2)

⁴ Council Regulation (EC) No 639/2004 (OJ L 102 of 7 April 2004, p. 9 – 11)

⁵ Commission Regulation (EC) No 2104/2004 (OJ L 365 of 10 December 2004, p. 19 – 21)

It is important to note that all information which is provided in this Annex and can be found on the "Europa" site⁶ has been taken from the CFR, with the exception of:

- data on entries corresponding to administrative decisions taken by national authorities before 1 January 2003 (or accession date for Member States which acceded after 1 January 2003) and for which the special transitional provisions established in the regulation apply;
- data on exits with public aid in some cases where this information was not available.

Only in these two cases has the information been taken directly from the Member States.

Evolution of Community fishing fleet capacity

Figures 4, 5 and 6 aim at providing a historical perspective for the evolution of fishing capacity in the Community. They are based on the data available in the CFR and comprise the whole Community fleet, including the vessels registered in the outermost regions. They show the evolution of the capacity of the Community fishing fleet since 1992. The graph for tonnage needs to be interpreted with care since the tonnage measurement units have changed over the period covered; this may be easily appreciated during the years 1999 to 2001. Despite this shortcoming these graphs show a steady but modest decline in fleet capacity in terms of tonnage and power and a slightly greater reduction in terms of number of vessels. It may also be noticed that the successive enlargements have moderately increased the overall fishing capacity, but the global reduction trend has remained unchanged.

⁶ http://ec.europa.eu/fisheries/fleet/index.cfm?method=FM_Reporting.AnnualReport

SUMMARY TABLES AND GRAPHS

Table 1: Compliance with the entry-exit ceiling at 31 December 2007 (except outermost regions)

Member State	GT			kW		
	Fleet capacity A	Entry/Exit ceiling B	A/B	Fleet capacity C	Entry/Exit ceiling D	C/D
	at 31-12-2007			at 31-12-2007		
Belgium	19.292	21.447	89,95%	60.620	60.720	99,84%
Bulgaria	8.332	8.351	99,77%	63.048	63.173	99,80%
Denmark	76.419	93.288	81,92%	276.440	327.646	84,37%
Germany	68.540	71.105	96,39%	159.614	167.133	95,50%
Estonia	19.329	23.961	80,67%	49.118	58.032	84,64%
Ireland	66.135	84.716	78,07%	195.996	231.746	84,57%
Greece	90.641	93.600	96,84%	517.843	524.224	98,78%
Spain	435.760	441.763	98,64%	991.847	1.019.734	97,27%
France	192.506	194.293	99,08%	825.161	846.063	97,53%
Italy	198.581	202.592	98,02%	1.161.781	1.205.636	96,36%
Cyprus	4.998	11.436	43,70%	39.240	50.444	77,79%
Latvia	33.695	40.755	82,68%	57.160	65.701	87,00%
Lithuania	60.965	74.061	82,32%	68.969	75.721	91,08%
Malta	15.040	16.363	91,91%	97.523	125.986	77,41%
Netherlands	146.564	175.766	83,39%	333.036	384.630	86,59%
Poland	29.963	43.842	68,34%	96.693	111.388	86,81%
Portugal	92.818	98.973	93,78%	317.947	328.123	96,90%
Romania	2.426	2.473	98,12%	8.107	8.147	99,50%
Slovenia	970	1.057	91,80%	10.352	10.974	94,33%
Finland	15.994	18.276	87,51%	167.729	183.723	91,29%
Sweden	43.325	45.254	95,74%	213.931	221.161	96,73%
United Kingdom	212.880	235.084	90,55%	859.854	927.993	92,66%
Total at 31-12-2007	1.835.174	1.998.455	91,83%	6.572.007	6.998.097	93,91%

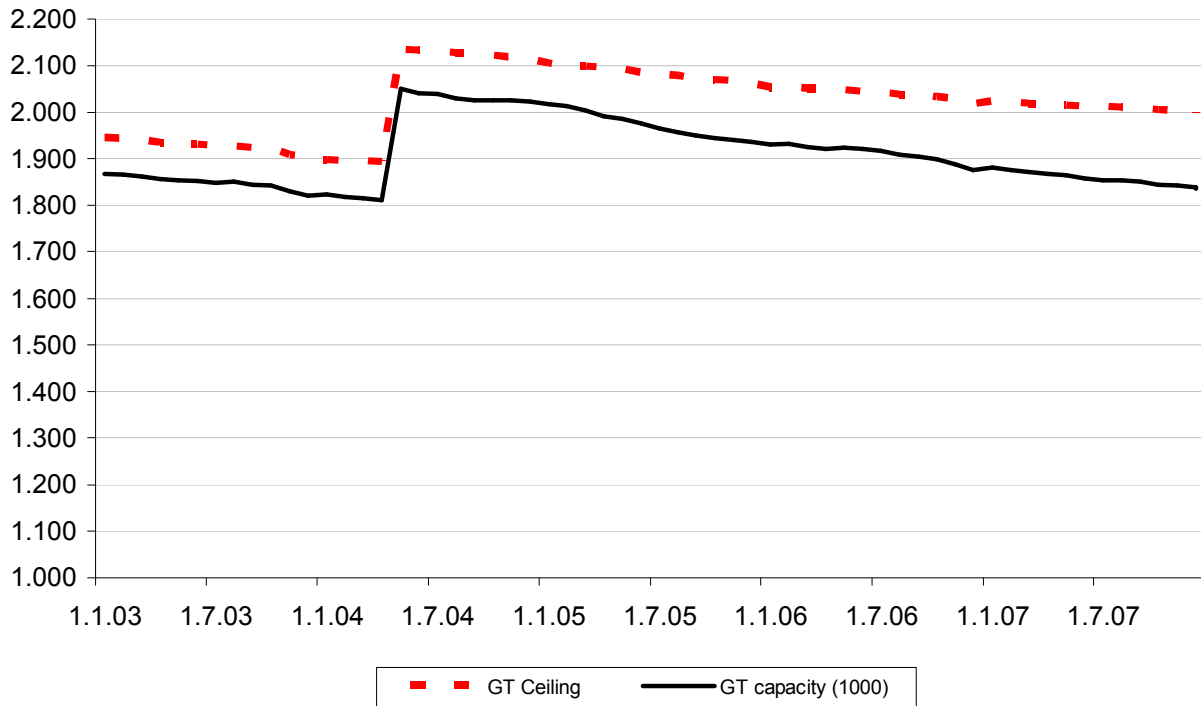
NB : Data extracted from the Community Fleet Register on 09-10-2008

Bold Italic indicates that the ceiling has been exceeded.

Figure 1: Overall trend of the Community fleet capacity ceiling (except outermost regions)

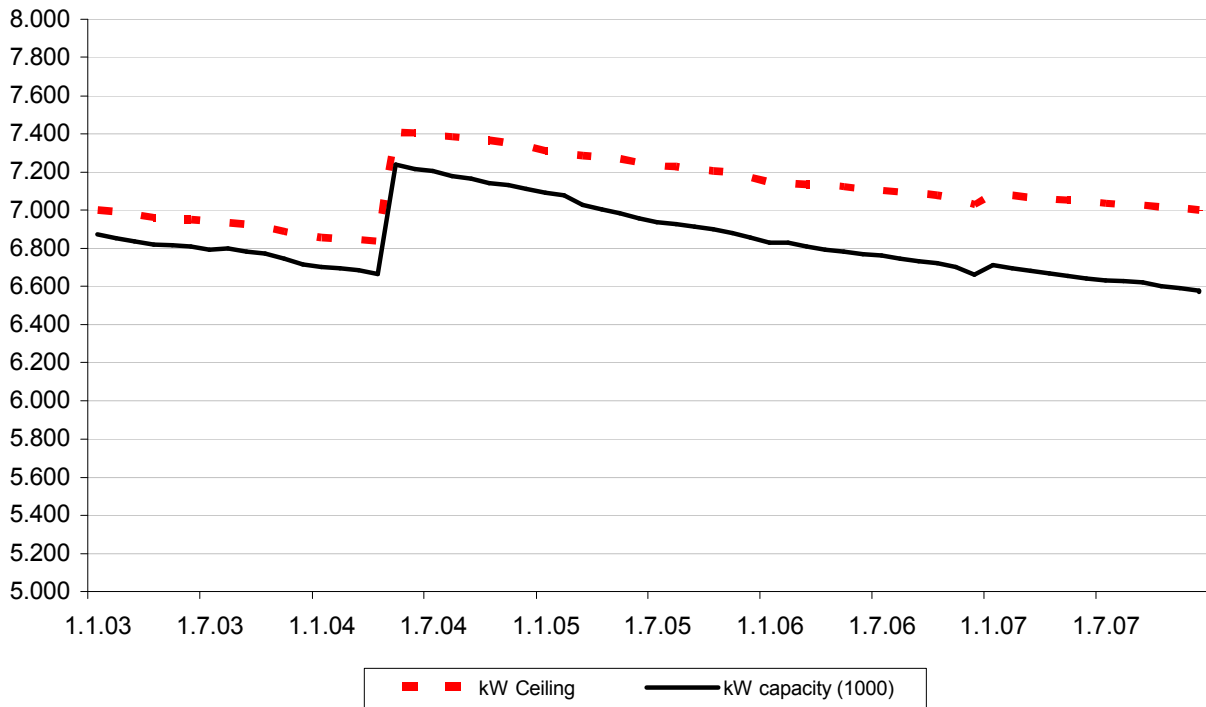
Tonnage of the Community fleet compared to its tonnage ceiling.

Trend between 01-Jan-03 and 31-Dec-07



Engine power (kW) of the Community fleet compared to its power ceiling.

Trend between 01-Jan-03 and 31-Dec-07



(NB: Situation as registered in the Community Fleet Register on 09-10-2008)

Note: Increase of the overall fleet capacity on 1 May 2004 is due to the accession of the 'EU 10' Member States

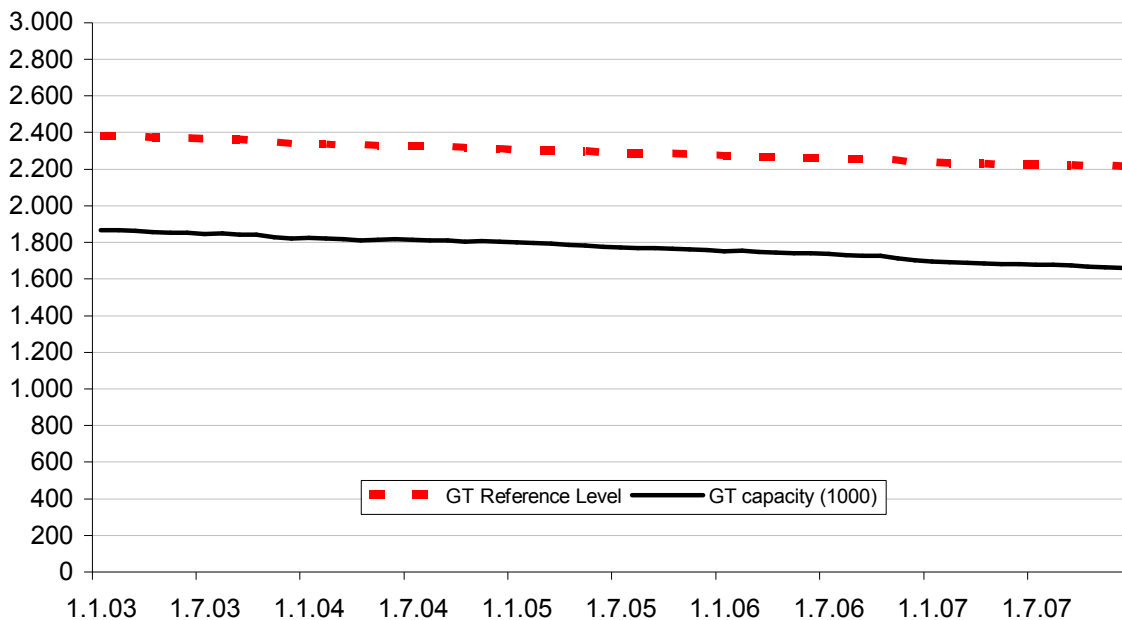
Table 2: Compliance with Reference Levels at 31 December 2007 (except outermost regions)

Member State	GT			kW		
	Fleet capacity A	Reference level B	A/B	Fleet capacity C	Reference level D	C/D
	at 31-12-2007			at 31-12-2007		
Belgium	19.292	21.447	89,95%	60.620	60.720	99,84%
Denmark	76.419	122.775	62,24%	276.440	420.854	65,69%
Germany	68.540	84.250	81,35%	159.614	175.883	90,75%
Ireland	66.135	84.716	78,07%	195.996	231.746	84,57%
Greece	90.641	107.215	84,54%	517.843	584.387	88,61%
Spain	435.760	667.808	65,25%	991.847	1.521.355	65,19%
France	192.506	211.627	90,97%	825.161	854.220	96,60%
Italy	198.581	209.062	94,99%	1.161.781	1.242.230	93,52%
Netherlands	146.564	204.103	71,81%	333.036	490.454	67,90%
Portugal	92.818	160.830	57,71%	317.947	384.103	82,78%
Finland	15.994	21.674	73,79%	167.729	209.769	79,96%
Sweden	43.325	50.458	85,86%	213.931	254.296	84,13%
United Kingdom	212.880	268.071	79,41%	859.854	1.077.850	79,77%
Total at 31-12-2007	1.659.455	2.214.037	74,95%	6.081.798	7.507.865	81,01%

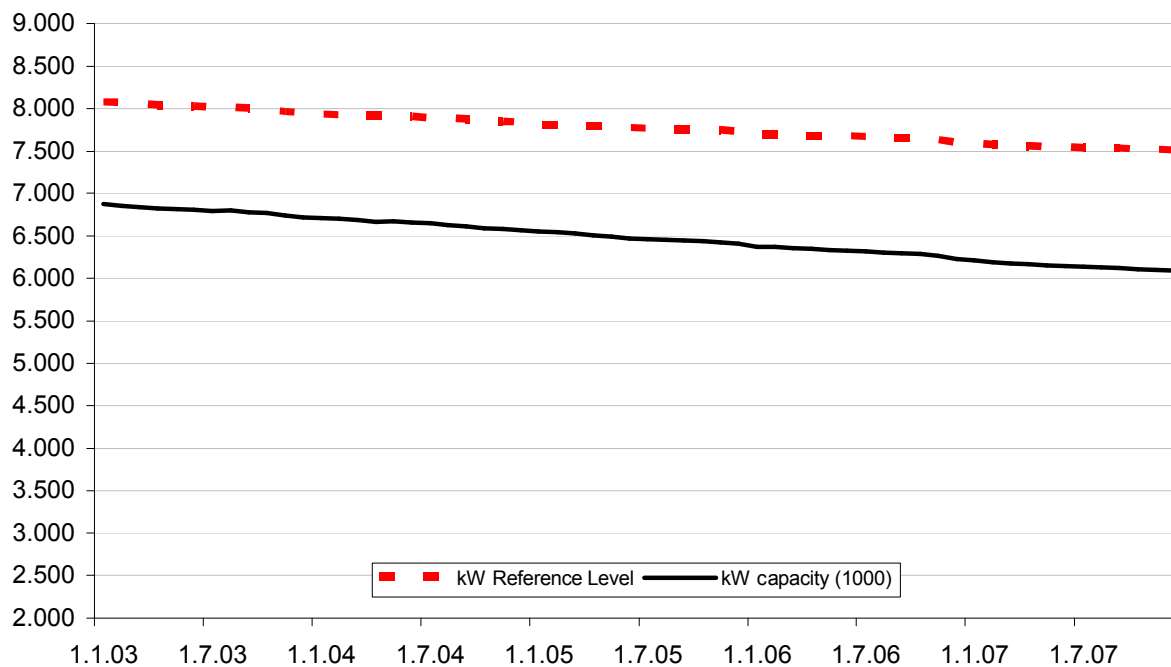
NB : Data extracted from the Community Fleet Register on 09-10-2008

**Figure 2: Overall trend of the Community fleet reference levels
(Only for the Member States concerned, except the outermost regions)**

**Tonnage of the Community fleet compared to its reference level.
Trend between 01-Jan-03 and 31-Dec-07**



**Engine power (kW) of the Community fleet compared to its reference level.
Trend between 01-Jan-03 and 31-Dec-07**



NB : Situation as registered in the Community Fleet Register on 09-10-2008

Table 3: Fleet capacity variations between 1 January 2003 and 31 December 2007 (except outermost regions)

Member States	N° of vessels	GT	kW	N° of vessels	GT	kW	N° of vessels	Δ GT	Δ GT in %	Δ kW	Δ kW in %
EU-15 :	01-01-2003			31-12-2007			Fleet capacity variations				
BE	132	24.363	68.304	102	19.292	60.620	-30	-5.071	-20,81%	-7.684	-11,25%
DK	3.813	103.218	366.318	2.961	76.419	276.440	-852	-26.799	-25,96%	-89.878	-24,54%
DE	2.244	66.844	161.045	1.871	68.540	159.614	-373	1.696	2,54%	-1.431	-0,89%
IE	2.088	87.290	242.996	1.924	66.135	195.996	-164	-21.155	-24,24%	-46.999	-19,34%
EL	19.150	101.769	592.100	17.580	90.641	517.843	-1.570	-11.129	-10,94%	-74.257	-12,54%
ES	13.628	465.580	1.146.141	11.898	435.760	991.847	-1.730	-29.821	-6,41%	-154.294	-13,46%
FR	5.712	212.032	910.753	5.179	192.506	825.161	-533	-19.525	-9,21%	-85.592	-9,40%
IT	15.753	216.114	1.277.046	13.812	198.581	1.161.781	-1.941	-17.532	-8,11%	-115.264	-9,03%
NL	779	183.669	418.521	730	146.564	333.036	-49	-37.105	-20,20%	-85.485	-20,43%
PT	8.209	99.701	332.423	7.420	92.818	317.947	-789	-6.883	-6,90%	-14.476	-4,35%
FI	3.572	19.805	190.149	3.162	15.994	167.729	-410	-3.811	-19,24%	-22.420	-11,79%
SE	1.814	45.918	225.304	1.530	43.325	213.931	-284	-2.593	-5,65%	-11.373	-5,05%
UK	7.422	241.001	942.376	6.778	212.880	859.854	-644	-28.121	-11,67%	-82.522	-8,76%
Total	84.316	1.867.304	6.873.475	74.947	1.659.455	6.081.798	-9.369	-207.849	-11,13%	-791.676	-11,52%
EU-10 :	01-05-2004			31-12-2007			Fleet capacity variations				
EE	1054	26.613	64.967	964	19.329	49.118	-90	-7.284	-27,37%	-15.849	-24,39%
CY	901	11.987	52.960	867	4.998	39.240	-34	-6.989	-58,31%	-13.720	-25,91%
LV	898	44.447	74.273	879	33.695	57.160	-19	-10.753	-24,19%	-17.112	-23,04%
LT	308	76.738	80.718	251	60.965	68.969	-57	-15.773	-20,55%	-11.750	-14,56%
MT	2251	16.452	126.664	1385	15.040	97.523	-866	-1.412	-8,58%	-29.142	-23,01%
PL	1283	58.872	160.981	867	29.963	96.693	-416	-28.909	-49,10%	-64.289	-39,94%
SI	176	1.057	10.974	179	970	10.352	3	-87	-8,20%	-622	-5,67%
Total	6.871	236.167	571.537	5.392	164.960	419.054	-1479	-71.207	-30,15%	-152.483	-26,68%
New :	01-01-2007			31-12-2007			Fleet capacity variations				
BG	2533	8.245	62.293	2536	8.332	63.048	3	87	1,05%	756	1,21%
RO	436	2.357	7.680	439	2.426	8.107	3	69	2,95%	426	5,55%
Total	2.969	10.602	69.973	2.975	10.759	71.155	6	156	1,47%	1.182	1,69%
Total EU fishing fleet at 31-12-2007				77.922	1.670.214	6.152.953					

NB : Data extracted from the Community Fleet Register on 09-10-2008

Table 4: Fleet capacity variations between 1 January 2003 and 31 December 2007 in the outermost regions

Member State	Segment code*	01/01/2003			31/12/2007			Fleet capacity variations				
		Number of vessels	GT	kW	Number of vessels	GT	kW	Number of vessels	Δ GT	Δ GT in %	Δ kW	Δ kW in %
Spain	CA1	1.083	2.117	16.492	953	1.947	16.416	-130	-170	-8,02%	-76	-0,46%
	CA2	100	4.019	14.749	83	3.514	12.308	-17	-505	-12,56%	-2.442	-16,55%
	CA3	133	46.202	84.116	67	26.902	39.370	-66	-19.300	-41,77%	-44.746	-53,20%
	Total	1.316	52.338	115.358	1.103	32.363	68.094	-213	-19.975	-38,16%	-47.264	-40,97%
France	4FC	248	343	10.943	238	404	13.036	-10	61	17,70%	2.093	19,13%
	4FD	46	4.174	13.553	53	5.039	17.056	7	864	20,70%	3.503	25,85%
	4FF	85	324	4.513	119	466	5.780	34	142	43,98%	1.267	28,07%
	4FG	63	7.199	20.172	54	6.068	17.057	-9	-1.131	-15,71%	-3.115	-15,44%
	4FH	5	288	1.010	5	143	577	0	-144	-50,18%	-433	-42,87%
	4FJ	1.097	2.071	59.005	1.079	1.891	72.890	-18	-180	-8,67%	13.885	23,53%
	4FK	8	848	2.598	4	370	1.373	-4	-478	-56,36%	-1.225	-47,15%
	4FL	915	2.465	96.814	858	2.426	111.026	-57	-38	-1,56%	14.212	14,68%
	4FM	1	12	220	0	0	0	-1	-12	-100,00%	-220	-100,00%
Total	2.468	17.723	208.828	2.410	16.808	238.795	-58	-915	-5,17%	29.967	14,35%	
Portugal	4K6	422	400	2.729	417	472	3.710	-5	72	18,06%	980	35,92%
	4K7	51	3.622	12.746	48	3.371	11.770	-3	-252	-6,95%	-976	-7,65%
	4K8	5	193	1.006	5	208	1.170	0	15	7,63%	164	16,32%
	4K9	1475	2.266	20.428	634	1.676	23.110	-841	-590	-26,03%	2.682	13,13%
	4KA	115	10.047	29.489	110	8.158	24.361	-5	-1.890	-18,81%	-5.127	-17,39%
Total	2.068	16.529	66.398	1.214	13.884	64.121	-854	-2.644	-16,00%	-2.276	-3,43%	
Total EU outermost regions	5.852	86.589	390.583	4.727	63.055	371.010	-1.125	-23.534	-27,18%	-19.573	-5,01%	

NB : Data extracted from the Fleet Register on : 13/10/2008 * Description of the outermost regions fleets segmentation codes are given in the Technical Annex 3

Figure 3: Trend in the number of EU fishing vessels between 1992 and 2007

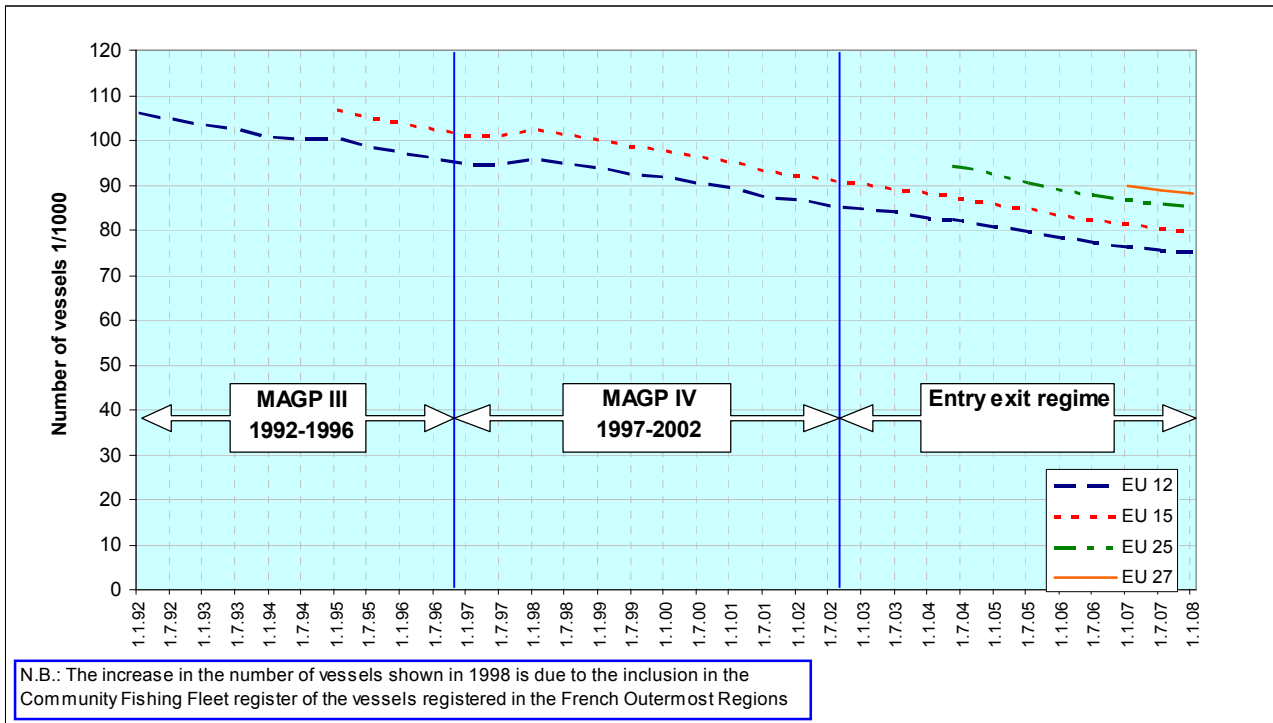


Figure 4: Trend in the EU fishing fleet capacity in terms of tonnage between 1992 and 2007

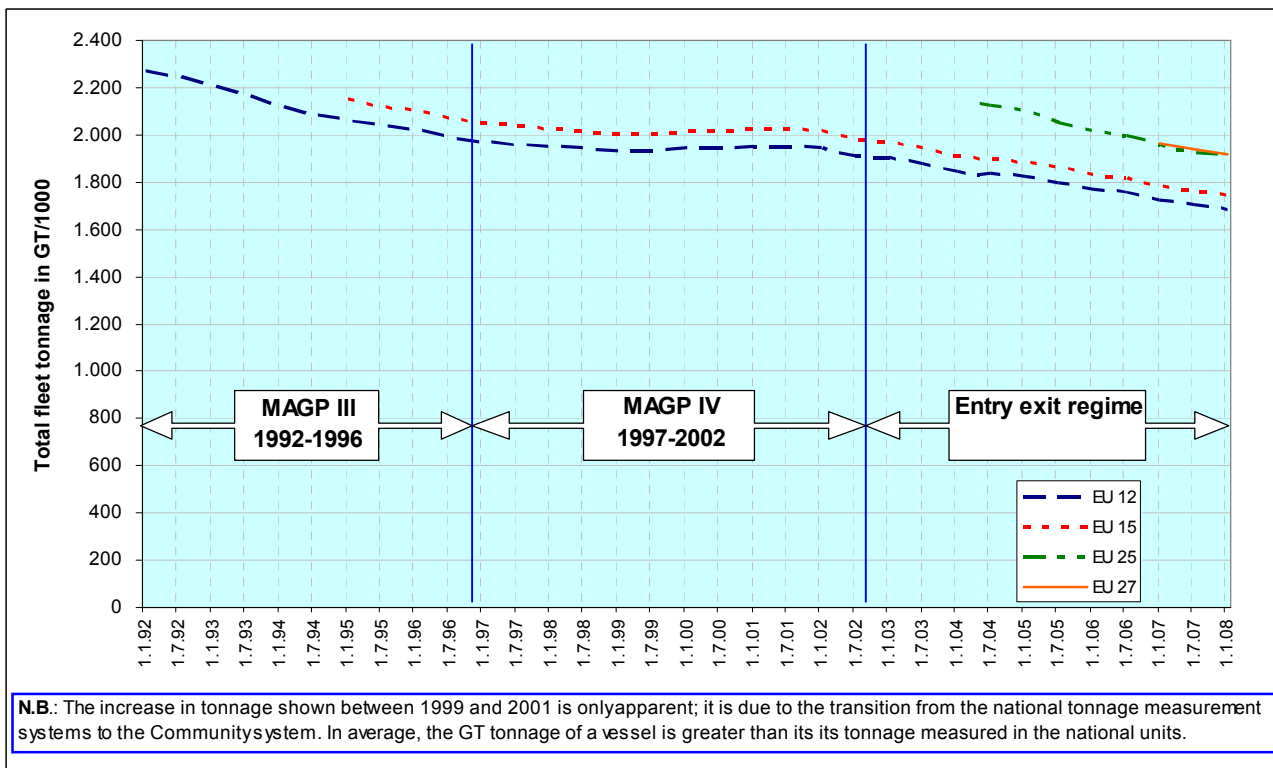


Figure 5: Trend in the EU fishing fleet capacity in terms of power (kW) between 1992 and 2007

