



Scientific Technical and Economic Committee for Fisheries (STECF)

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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-23-13)

Casey, J., Virtanen, J.

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Contact information

Name: STECF secretariat

Address: Unit D.02 Ocean and Water, Via Enrico Fermi 2749, 21027 Ispra VA, Italy

Email: jrc-stecf-secretariat@ec.europa.eu

Tel.: +39 0332 789343

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<https://joint-research-centre.ec.europa.eu>

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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 1380/2013 of the European Parliament and the Council on the Common Fisheries Policy).

Authors:**STECF advice:**

Bastardie, Francois; Borges, Lisa; Casey, John; Coll Monton, Marta; 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; Rihan, Dominic; Sabatella, Evelina Carmen; Sampedro, Paz; Somarakis, Stylianos; Stransky, Christoph; Ulrich, Clara; Uriarte, Andres; Valentinsson, Daniel; van Hoof, Luc; Velasco Guevara, Francisco; Vrgoc, Nedo.

EWG-23-13 report:

Avdic Mravlje, E., Bernreuther, M., Cano, S., Casey, J.(Chair), Davidjuka, I., Fabi, G., Ferreira, R., Gras, M., Grati, F., Guitton, J., Iriondo, A., Jakovleva, I., Jung, A., Le Grand, C., Malamidou, A., Minguez Velasco, A., O' Hea, B., Quemper, F., Ramos do Ó, J., Rodgers, P., Sys, K., Tsitsika, E., Van de Pol, L., Velinova, M., 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-23-13)**

Request to the STECF:

STECF is requested to assess the extent to which the STECF Expert Working Group 23-13 delivered on its Terms of Reference. The STECF is in particular requested to assess the following findings presented and to formulate its conclusions and recommendations on each of them:

- The assessment of both the status and trends of the balance situation of EU fleet segments in line with the Commission guidelines (COM(2014)545).
- The findings on whether, in accordance with the Commission Guidelines (COM(2014)545), the annual national fleet reports submitted by 31 May 2023 present an appropriate and complete analysis of balance between fleet capacity and fishing opportunity for each Member States' fleet segments.
- The observed discrepancies between the national balance assessments and those carried out by EWG 23-13 and the reasons for those as identified by the EWG.
- The opinions provided by the EWG for each Member State as to the effectiveness of the proposed measures provided in new or revised action plans submitted with the most recent fleet reports in addressing the imbalance in the fleet segments concerned.
- 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, whether it is a renewal or a new AP and identify the changes between the current AP and previous versions.
- The assessment of the balance situation in the outermost regions, taking account of the comments in Section 6.3 of STECF PLEN-23-02 regarding the ad hoc STECF contract that analysed data-limited parameters for the calculation of the indicators to assess the balance between fleet capacity and fishing opportunities (ref. STECF 2341).

STECF comments

STECF reviewed the report of the EWG 23-13 and notes that all the ToRs were addressed.

Values for the following indicators as specified in The Commission guidelines (COM(2014) 545) are presented for the period 2013-2022:

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 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 fleet indicator (IV). If more than 20% of the fleet segment is recurrently inactive it will be considered out of balance.
- The vessel use indicator (VUR). Average Days at Sea / Maximum Days at Sea.

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 State (MS). Comparisons between indicator values as computed by the EWG and those in the National fleet reports submitted by Member States by 31 May 2023 are based on the reference year 2021 unless specifically mentioned in the report.

TOR 1: The assessment of both the status and trends of the balance situation of EU fleet segments in line with the Commission guidelines (COM(2014)545).

Table 5.4.1 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 23-13.

For the EU as a whole, out of 582 active fleet segments in 2021, 87% had landings by weight and value available. Of these 582 active fleet segments, a meaningful value for the SHI could be computed for 34% of them, and a value for the SAR could be computed for 70%. Economic indicator values (CR/BER and RoFTA) were available for 62% of the total active fleet segments, while, for RoI, this percentage was only 9%.

For segments with a meaningful SHI value, the majority were indicated to be in balance (55%) and for the SAR, the majority were indicated to be out of balance (52%). With regard to each of the economic indicators, a majority of the segments were indicated to be in balance (67%, 64% and 50% for CR/BER, RoFTA and RoI, respectively). Finally, for the segments for which the technical indicator VUR could be computed, 49% were indicated to be in balance and 51% out of balance.

The main results by region are as follows:

North Atlantic Ocean (NAO)

- A meaningful SHI value could be estimated for 36% of the 331 active fleet segments, with 63% of them in balance.
- The SAR was estimated for 69% of the total segments in the region, 55% of which were indicated to be in balance and 45% 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 10%.
- The majority of the fleet segments considering CR/BER and RoFTA were indicated to be in balance (66% and 64%, respectively), however, RoI indicator indicates that 59% are out of balance.
- For the VUR technical indicator (available for 79% of the fleet segments of this area), half of the segments were indicated to be in balance and other half, out of balance.
- 23% of fleet segments had inactive vessels, and 93% of such segments were indicated to be in balance (proportion of inactive vessels in a segment is less than 10%).

Regarding the trends in indicator values:

- No trend or no clear trend could be observed in the SHI for 42% of the fleet segments in the NAO.
- 38% of the fleet segments had an improving trend, 9% a deteriorating trend, 2% were considered to have a flat trend and for 9% of the segments no trend could be calculated.
- For the three economic indicators, the majority of the segments had a deteriorating trend (50%, 59% and 72% for CR/BER, RoFTA and RoI, respectively).
- No clear overall picture could be depicted by the technical indicators as for the majority of the segments (69%), there was no clear trend.

Mediterranean and Black Seas (MBS)

- A meaningful value for the SHI could be computed for 31% of the 200 active fleet segments in this region, 69% of which were indicated to be out of balance and 31% in balance.
- The SAR was estimated for 76% of the total segments in this region, 40% of which were indicated to be in balance and 60% 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 7%.
- According to the economic indicator values, the majority of fleet segments were indicated to be in balance (72%, 70% and 64% for CR/BER, RoFTA and RoI, respectively).
- According to the VUR technical indicator, 42% of the segments were indicated to be in balance and 58% out of balance.
- 22% of fleet segments had inactive vessels, and 93% of such segments were indicated to be in balance (proportion of inactive vessels in a segment is less than 10%).

Regarding the trends of the indicators above:

- For the SHI, the trend was improving for 37% of the fleet segments in the MBS, 2% had a deteriorating trend, 3% a flat trend, no clear trend for 32% of the fleet segments and for the rest (26%), the trend could not be calculated.
- For the three economic indicators, an improving trend was observed for 39%, 39% and 21% of the fleet segments, considering the CR/BER, RoFTA and RoI, respectively, while it was deteriorating for 39%, 48% and 29%, 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 (40%), or the trend could not be calculated (30%).

Other Fishing Regions (OFR)

- A meaningful SHI value could be computed for 33% of the 51 fleet segments from this area, with 76% of them indicated to be in balance and 24% out of balance.
- The SAR was estimated for 57% of the total number of segments, 38% of which were indicated to be in balance and 62% 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 8%.
- The majority of the fleet segments considering these three economic indicators were in balance (52%, 52% and 75% for CR/BER, RoFTA and RoI, respectively).
- For the VUR technical indicator (with a coverage of 98% of the fleet segments of this area), 68% of the segments were in balance and 32% out of balance.
- 35% of fleet segments had inactive vessels, and all such segments were indicated to be in balance (proportion of inactive vessels in a segment is less than 10%).

Regarding the trends of the indicators above:

- For SHI no clear trend was observed, or it was not possible to obtain a trend for 65% of the fleet segments in the OFR, 18% had an improving trend and for 18% of the segments the trend could not be calculated.
- For the three economic indicators, the majority of the segments had a deteriorating trend (32%, 52% and 50% for CR/BER, RoFTA and RoI, respectively). An improving trend was assessed for 28%, 44% and 25% of the fleet segments (for CR/BER, RoFTA and RoI, respectively).
- No trend in the VUR could be calculated for 62% of the fleet segments and no clear trend could be detected for 20% of them.

- In the case of IV indicator, there was no clear trend for 49% of the segments and it could not be calculated for 17% of them.

Table 5.4.1. Total numbers of fleet segments and by supra-regions as calculated by the EWG 23-13 for the year 2021, together with the numbers of segments for which a value for each indicator could be computed, the numbers indicated to be in or out of balance and their trends.

			Nº active segments	Indicators						
Area				Biological		Economic			Technical	
			Total	SHI*	SAR	Cr/BER	RoFTA	RoI	VUR	IV
EU	Coverage	Total	582	197	407	359	359	50	507	136
	Balance	In balance		106	196	242	230	25	246	126
		Out of Balance		91	211	117	129	25	261	10
NAO	Coverage	Total	331	118	227	202	202	32	261	74
	Balance	In balance		74	124	134	124	13	129	67
		Out of Balance		44	103	68	78	19	132	7
	Trend	Trend deteriorating		11		101	119	23	20	17
		Trend improving		45		50	63	5	14	14
		No clear trend		49		31	0	0	181	33
		Flat trend		2		0	0	0	19	3
		Could not be calculated		11		20	20	4	27	7
MBS	Coverage	Total	200	62	151	132	132	14	196	44
	Balance	In balance		19	61	95	93	9	83	41
		Out of Balance		43	90	37	39	5	113	3
	Trend	Trend deteriorating		1		52	64	4	18	9
		Trend improving		23		52	51	3	32	14
		No clear trend		20		11	0	7	78	18
		Flat trend		2		17	0	0	0	0
		Could not be calculated		16		0	17	0	58	3
OFR	Coverage	Total	51	17	29	25	25	4	50	18
	Balance	In balance		13	11	13	13	3	34	18
		Out of Balance		4	18	12	12	1	16	0
	Trend	Trend deteriorating		0		8	13	2	2	3
		Trend improving		3		7	11	1	5	2
		No clear trend		11		9	0	0	10	8
		Flat trend		0		0	0	0	2	2
Could not be calculated		3		1	1	1	31	3		

* 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 F_{MSY} account for more than 40% of the total value of the landings by fleet segment.

STECF notes that in the EWG report, indicator coverage is defined as the number of fleet segments for which an indicator value is available expressed as a proportion (%) of the total number of fleet segments. It does not consider the number of vessels in the segments concerned. For example, consider two fleet segments A and B. Segment A has a value for the SHI and segment B does not. In this case coverage would be given as 50%. However, if segment A has 90 vessels and segment B has 10 vessels, coverage of the indicator in terms of number of vessels would be 90%. At present, indicator coverage in the EWG report is not expressed in terms of numbers of vessels.

TOR 2: The findings on whether, in accordance with the Commission Guidelines (COM(2014)545), the annual national fleet reports submitted by 31 May 2023 present an appropriate and complete analysis of balance between fleet capacity and fishing opportunity for each Member States' fleet segments.

EWG 23-13 considered that 9 of 22 fleet reports submitted by Member States were prepared fully in line with the Commission guidelines (Table 5.4.2). The other 13 Member States followed the guidelines to varying degrees (reported in Table 5.4.2 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 23-13 report, are listed in Table 5.4.2 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 5.4.2. Summary of the assessment made by the EWG 23-13 of whether annual national fleet reports follow the Commission Guidelines (CG)

Member State	In line with the CG	STECF Comments based on the EWG assessment
Belgium	Yes	
Bulgaria	Yes	
Croatia	Yes	
Cyprus	No	Not all the indicators are provided
Denmark	No	Some indicator values and trends are missing
Estonia	Yes	
Finland	No	Almost all the indicators missing.
France	No	Indicators are in line with the CG but the segmentation used is only partly aligned with the DCF one. The criteria for assessment do not only rely on the values computed for the indicators prescribed in the CG.
Germany	Yes	
Greece	No	Not all the indicators are provided
Ireland	No	Not all the indicators are provided
Italy	No	Some indicators reported separately by segment and GSA
Latvia	No	Not all the indicators are provided
Lithuania	Yes	
Malta	No	Biological indicators not provided
Netherlands	No	The report does not contain current information (for 2022)
Poland	No	Not all the indicators are provided
Portugal	Yes	
Romania	No	Not all the indicators are provided
Slovenia	No	SAR calculated using a different criterion from CG
Spain	Yes	
Sweden	Yes	

TOR 3: The observed discrepancies between the national balance assessments and those carried out by EWG 23-13 and the reasons for those as identified by the EWG.

For each fleet segment and indicator, the EWG 23-13 compared indicator values as calculated by the EWG and those provided in the Member States' fleet reports (see each National chapter in the EWG 23-13 report and Annex II). A summary of the differences found by Member States and indicators used was prepared by STECF and is presented in Table 5.4.3. 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 (EQU): 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 (DIS). 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.

Table 5.4.3. Summary of differences in indicator values between those calculated by EWG 23-13 and the Member States' fleet reports for 2021.

Member State	SHI	SAR	CR/BER	ROFTA	ROI	VUR	IV	Comments by the STECF based on the EWG assessment
Belgium	SIM	DIS	SIM	SIM	NP	DIS	SIM	In general, similar results but some discrepancies in the assessment of some segments.
Bulgaria	DIS	EQU	NC	NC	NP	NP	NC	Different approach for the calculation of economic and technical indicators, so comparisons are not possible. VUR and VUR220 not provided but alternative indicator is provided
Croatia	DIS	NC	SIM	DIS	NP	SIM	EQU	Different approach for the calculation of biological indicators, so comparisons are not possible
Cyprus	DIS	NC	EQU	EQU	NP	NC	DIS	Different fleet segmentations used for biological and technical. The equal values for CR/BER and RoFTA are only for 4 segments (2 are missing).
Denmark	DIS	DIS	DIS	NP	DIS	SIM	NC	General discrepancies found between the two calculations. IV was provided for 2022 so no comparison is possible.
Estonia	EQU	NP	SIM	NP	SIM	NC	NC	A mix of discrepancies in calculations and different segmentations or segments presented. Some indicators not provided or computed using a different methodology.
Finland	NC	NP	NP	NP	NP	NP	NP	All but SHI indicator are not provided in the report. SHI provided is not comparable.
France	SIM	SIM	SIM	SIM	NP	NC	NC	Similar values for those that can be compared. Alternative VUR (VUR90) indicator presented.
Germany	DIS	DIS	SIM	SIM	NP	DIS	NC	Biological and technical indicators show some discrepancies in the assessment of some fleet segments.
Greece	NC	NP	NP	SIM	NP	DIS	NC	SHI split by GSAs and for VUR some discrepancies. The rest of the indicators except ROFTA are not provided in the NP
Ireland	NC	NC	DIS	DIS	NP	NC	NP	Discrepancies in economic indicators mostly found in the method of calculation
Italy	NC	NC	EQU	DIS	NP	NC	NP	SHI and VUR split by GSA. Discrepancies in ROFTA probably due to use of different units
Latvia	DIS	NP	DIS	NP	NC	DIS	DIS	Some segments missing.
Lithuania	SIM	DIS	SIM	EQU	EQU	DIS	SIM	Different fleet segmentations for technical indicators.
Malta	NP	NP	SIM	SIM	NP	DIS	NC	No biological indicators provided by the MS report.
Netherlands	DIS	DIS	EQU	EQU	NC	EQU	SIM	Discrepancies in the assessment of some segments in the biological indicators.
Poland	SIM	DIS	SIM	NC	NC	SIM	DIS	ROFTA not calculated. ROI is provided so no possible the comparison
Portugal	DIS	DIS	SIM	SIM	NP	DIS	SIM	VUR calculated using maximum days. For the SHI, the discrepancies come from the use of different species.
Romania	SIM	DIS	NC	NP	NC	DIS	NP	SAR not calculated because catches of stocks-at-risk are less than 10% of total. Economic indicators use different segmentation.
Slovenia	EQU	DIS	DIS	SIM	NP	NC	SIM	SAR calculated using a different criterion from CG.

Spain	DIS	DIS	SIM	SIM	NP	DIS	DIS	Differences in terms of the balance assessment between the MS and the EWG for some segments.
Sweden	NC	NC	SIM	SIM	NP	DIS	NC	Biological indicators provided by the 2020 and not 2021.

STECF notes that generally, indicator trends were not provided in the fleet reports, therefore the EWG could not make any comparisons.

STECF notes that for many fleet segments, discrepancies between the SHI values computed by the EWG 23-13 for a given year (in this report the year 2021) 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/F_{MSY} 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 2022, which it will submit by 31 May 2023, is likely to base on F/F_{MSY} values for 2021 and stock assessments carried out in 2022. However, the EWG 23-13 derives its F/F_{MSY} values for 2021 from stock assessments carried out in 2023, which is likely to deliver an updated and often different value for F/F_{MSY} for 2021 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 (indicator = VUR) or the theoretical maximum number of days at sea for a fleet segment. Furthermore, the theoretical maximum number of days at sea would normally be assumed to be 220 days (hence VUR220) but can be determined by each Member State using expert judgement and available information (VURnn).

STECF has pointed out on many occasions (PLEN 22-03) that VUR220 is not always informative and for many fleet segments can be highly misleading (e.g., for small scale and pelagic fleets).

In the "traffic light" tables associated with each Member States in the EWG report, where available, both the VUR and VUR220 indicator status is shown. However, STECF stresses that when VUR is available, VUR220 should be ignored.

TOR 4: 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, whether it is a renewal or a new AP and identify the changes between the current AP and previous versions.

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

In 2023, new Action Plans were presented by Latvia, Malta and Spain. In addition, an update of existing APs was provided by Cyprus, Croatia, Denmark, France, Germany, Italy, Poland, Portugal and Romania. The remaining Member States did not submit any new or updated APs.

STECF notes that the EWG 23-13 has produced a table summarising the main elements of the APs, for the years 2022 and 2023 which is reproduced below (Table 5.4.4). 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 2023, for the Member States presenting a new or updated AP, all except the APs from Bulgaria, Malta, Italy, and Romania 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 timeframe. 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 5.4.4.

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

Table 5.4.4. Summary of action plans submitted in 2022 and 2023 as reported by the EWG.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Belgium	2022	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Belgium	2023	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Bulgaria	2022	yes	update	yes	yes	yes	The updated action plan (2020) is partly targeted because there is no information about the share of capacity that will be reduced. Two new measures were added to the AP and the information for each fleet segment was updated. However, it is still not clear how the proposed measures will improve the balance of the fleet.
Bulgaria	2022	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.
Cyprus	2022	yes	Update	yes	yes	yes	An action plan has been proposed for the fleet segment DTS VL2440 since the fleet report for the year 2020.
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.
Croatia	2022	Yes	Updated and Strengthened	Yes	Yes	Yes	The action plan clearly sets out the time frame and the objectives/targets. The direct outcome of the measures in the outcome is not quantifiable.
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.
Denmark	2022	yes	new	yes	yes	yes	Action Plan clear, targeted and limited in time (2022-2023): it provides a detailed plan for Baltic Sea and adjustments to the fleet structure with regard to mitigate the negative effects of Brexit (without precision on this second point). Both terminated by the end of 2023.
Denmark	2023	yes	update	yes	yes	yes	The action plan proposed the previous year is still ongoing and ends at the end of 2023.
Estonia	2022	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Estonia	2023	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented.
Finland	2022	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	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.
France	2022	yes	update	yes	yes	yes	An update from the one submitted in 2020. The level of details differs from segment to segment. The EWG could not assess if the actions proposed will influence the balance.
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.
Germany	2022	yes	Update	yes	yes	yes	The updated 2021 action plan proposes specific measures for eight fleet segments which operate in the Baltic Sea region. AP presents a wide range of measures of both a general type applicable for all fleets, as well as specific type to those fleet segments identified as being out of balance. Some of measures are as an ongoing basis from 2015. The measure for permanent cessation of fishing activities is applicable to the 2021-2022 period. In 2022, a provided action plan required the fleet reduce by TM VL2440 segment due to the implementation of a permanent cessation measure.
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.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Greece	2022	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. There is no clear time plan provided by MS.
Greece	2023	no	/	/	/	/	No action plan proposed by MS, justifications are provided in the fleet report
Ireland	2022	No	-	-	-	-	Ireland, based on the the Irish fleet Report 2021 considers that structural imbalance does not exist in any of its fleet segments and no action plans are proposed. The Irish view is that the imbalance identified in some fleets in the report is due to a difference in the rate of interest used in the calculation of the indicators.
Ireland	2023	No	-	-	-	-	Based on the available information, Ireland considers that structural imbalance does not exist in any of its fleet segments and no action plans are proposed,
Italy	2022	Yes	Update	Partly	Partly	Yes	Updated from at least 2017. Objectives are not specifically targeted at the fleet segments that are out of balance. The action plan describes several measures to be taken to reduce fishing mortality. Of these, only temporary closure periods are explicitly described. The other measures are mostly unfinalized and have not been implemented yet.
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.
Latvia	2022	No	-	-	-	-	Ongoing AP provided with 2019 fleet report. MS implemented measure for reducing the capacity in fleet segment TM VL2440 operating in the Baltic Sea through permanent withdrawal from fishing activity of a number of vessels, which were involved in cod fishery in 2014-2018.
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.
Lithuania	2022	No	-	-	-	-	Ongoing AP provided with 2020 fleet report. Timeframe: 2021-2023. Two types of measures targeting fleet segments NAO DFN VL1012 and NAO DTS VL2440 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	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.
Malta	2022	yes	resubmitted	no	no	no	Resubmitted the 2016 action plan. More a statement of intent to improve monitoring. The EWG could not assess if the actions proposed will influence the balance.
Malta	2023	yes	new	no	yes	no	The proposed action plan is largely a statement of intent to improve monitoring activities.
Netherlands	2022	No	-	-	-	-	No rationale for not presenting AP is elaborated in the fleet report.
Netherlands	2023	No	-	-	-	-	No rationale for not presenting AP is elaborated in the fleet report.
Poland	2022	yes	Update	yes	yes	yes	An action plan accompanied with 2020 fleet report was reviewed by MS. An action plan is proposed for eight of the fishing fleet segments which operated in the Baltic Sea region. The action plan includes three main measures which were specified for each segments identified by MS that were out of balance. A time frame is for three to five years without specific dates.
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.
Portugal	2022	yes	new	yes	yes	yes	Action Plan clear, targeted and limited in time (2022-2023): it targets the fleet HOK > 12m
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.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Romania	2022	yes	update	yes	yes	yes	Action Plan from 2020 and extended to 2027. The AP targets all 6 fleet segments but the objectives are unclear. The lack of relevant information means that the EWG is unable to assess of the potential effects of the proposed measures.
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.
Slovenia	2022	No	-	-	-	-	MS considers that all fleet segments are in balance. The EWG does not concur with the assessment. It appears that socio-economic objectives (employment) may have priority over stock conservation.
Slovenia	2023	No	-	-	-	-	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving 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	2022	Yes	Update	Yes	Yes	Yes	Updated from 2021. The objectives are clearly defined and the measures to achieve them are described. The objectives are appropriately targeted to the fleet segments which are not in balance. The AP implies that the targets are to be met by the time the AP expires, but it is not made explicit. Some parts of the AP set for 2021-2023 were met in 2022 and can be considered successful.
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.
Sweden	2022	no	/	/	/	/	AP 2021 is valid until 2023. MS has implemented a measure for reducing overcapacity in fleet targeting cod in the Baltic Sea. MS reported on the progress of AP 2021 implementation in the annual fleet report in 2022.
Sweden	2023	no	/	/	/	/	The action plan submitted by Sweden in 2021 expired in 2022. The MS has implemented permanent cessation of fishing activities aimed at reducing overcapacity in fleet targeting cod in the Baltic Sea. MS reported on the final results of AP 2021 implementation in the annual fleet report 2023.

TOR 5: The assessment of the balance situation in the outermost regions, taking account of the comments in Section 6.3 of STECF PLEN-23-02 regarding the ad hoc STECF contract that analysed data-limited parameters for the calculation of the indicators to assess the balance between fleet capacity and fishing opportunities (ref. STECF 2341).

STECF notes that there is a significant shortage of relevant data to compute the biological indicator SHI. SAR was available for 91% of the 64 segments identified in the OMR. However, the SHI could be computed for only 17% of these segments (see table 5.4.5).

Table 5.4.5. Balance indicators and their assessment available for each OMR by Member State for the year 2021

	Fleet segments (total)		SAR	SHI	VUR	Fleet segments (clustered)		Rofta	CR/BER	VUR ₂₂₀
France	33	Assessed FS	31	7	31	16	Assessed FS	15	15	16
		Imbalance	12	1	3		Imbalance	7	7	15
	% imbalance		39	14	10	% imbalance		47	47	94
Portugal	19	Assessed FS	15	1	19	15	Assessed FS	15	15	15
		Imbalance	0	0	5		Imbalance	4	3	10
	% imbalance		0	0	26	% imbalance		27	20	67
Spain	12	Assessed FS	12	3	12	6	Assessed FS	6	6	6
		Imbalance	2	0	3		Imbalance	3	3	6
	% imbalance		17	0	25	% imbalance		50	50	100
Total	64	Assessed FS	58	11	62	37	Assessed FS	36	36	37
		Imbalance	14	1	11		Imbalance	14	13	31
	% imbalance		24	9	18	% imbalance		39	36	84

STECF notes that new stock assessments conducted by IFREMER were presented to DG MARE via the French authorities. These were made available to the EWG with a view to increasing the proportions of fleet segments' catches accounted for by species for which values of F and F_{MSY} are available. This potentially would increase the number of fleet segments for which a meaningful SHI value could be computed. STECF further notes that these assessments were produced using the SPICT assessment model as endorsed by STECF (STECF PLEN 23-02). These assessments have not been independently reviewed.

STECF notes that the EWG 23-13 provided a comparison of the SHI indicator for the French OMR fleet segments with and without these additional stock assessments provided to the EWG. The EWG found that the inclusion of them in the SHI calculation would provide a meaningful value for the SHI for three fleet segments. Only one additional fleet segment would reach the 40% threshold

included in the guidelines. This implies that by the inclusion of these stock assessments the coverage would increase from 17% to 19% of fleet segments.

Regarding the economic indicators, STECF notes that the coverage of the economic indicators is close to 100% (36 out of 37 clustered segments are provided with CR/BER and RoFTA indicators) and that the majority of them (60%) indicated to be in balance according to the guidelines.

STECF conclusions

STECF concludes that all terms of reference were successfully addressed by EWG 23-13.

Conclusions on the indicators by supra-region

Based on the findings of the EWG 23-13 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 36% of the fleet segments in the North Atlantic Ocean (NAO) of which 63% are indicated to be in balance with fishing opportunities. There is an improving trend in the SHI for many fleet segments in the NAO.

Economic indicators are showing most fleet segments in the NAO to be in balance, although, overall, the trends indicate a worsening situation which appears to be related mainly to the increasing evolution of the main cost items of fleets throughout Member States.

A meaningful value for the SHI could be calculated for 31% of the fleet segments in the Mediterranean and Black Sea (MBS), of which 31% are indicated to be in balance with fishing opportunities. There is an improving trend in the SHI for many fleet segments in the MBS.

For the MBS, economic indicators are showing fleet segments to be in balance with fishing opportunities. However, the trends indicate a deteriorating situation, which appears to be related mainly to the increasing evolution of the main cost items of fleets throughout Member States.

A meaningful value for the SHI could be calculated for 33% of the fleet segments in the Other Fishing regions (OFR), of which 76% are indicated to be in balance with fishing opportunities. There is an improving trend in the SHI for many fleet segments in the MBS. No reliable assessment of the trends in biological indicators could be made for the majority (83%) of the OFR fleet segments due to a lack of relevant data.

For the OFR, economic indicators are showing a deteriorating or no clear trend for most of the fleet segments.

For the technical indicators, no clear trends can be detected for any of the supra-regions NAO, MBS and OFR.

Conclusions on the indicators of Outermost Fishing Regions (OMR)

Based on the findings of the EWG 23-13 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 only 17% of the fleet segments in the Outermost regions (OMR) of which 91% are indicated to be in balance with fishing opportunities.

Economic indicators are showing the majority of fleet segments (60%) in the OMR to be in balance.

For the technical indicators, no clear trend can be depicted for the OMR.

Including the 18 additional SPICT stock assessments provided by IFREMER for French fisheries in the OMR only increased the number of segments for which a meaningful value for the SHI could be computed by one segment (i.e. from 2, to 3 segments).

For the OMR, meaningful values for the SHI are limited to only a small proportion (17%) of the total number of fleet segments. In order to increase the coverage of the SHI it is desirable that all Member States concerned (France, Spain and Portugal) make every effort to collect and report stock-specific fishery dependent and where possible, fishery independent data as input for stock assessments. STECF suggests that where appropriate the National programmes of the Member States concerned could be amended accordingly.

Conclusions on the process

STECF concludes that the global coverage of the SHI indicator is limited in all the regions (36%, 31%, 33%, and 17% of the active fleet segments for NAO, MED, OFR and OMR, respectively), which hinders any reliable assessment of the biological balance indicators at overall regional level.

STECF concludes that it would also be informative to measure the coverage considering not only the number of segments for which any of the indicators is calculated, but also accounting for the number of vessels that each fleet segment includes.

STECF concludes that the VUR220 indicator is largely uninformative and if an alternative theoretical maximum number of days at sea is deemed more appropriate and used by Member States to provide a vessel utilisation indicator, the justification for its use should be clearly explained in the Member State's fleet report.

STECF concludes that if an alternative theoretical maximum is used it is imperative that when submitting their fleet reports, Member States also submit the data used to compute the indicator value so that the EWG is able to reproduce the indicator values for each fleet segment.

STECF concludes that poor data remains a hurdle for the proper estimation of F/F_{MSY} and SHI, and that ongoing efforts to improve the collection of declarative data (e.g., logbook data) and biological data in places where they are deficient should be sustained and supported. STECF expects that progresses in obtaining additional values for F and F_{MSY} (or relevant proxies) will develop slowly and incrementally.

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@aquaa.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	Affiliation¹	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 Ugarteia z/g. E-48395 Sukarrieta, Bizkaia. Spain.	libaibarriaga@azti.es
Jardim, Ernesto	Marine Stewardship Council MSC, Fisheries Standard Director FSD, London	ernesto.jardim@msc.org
Jung, Armelle	DRDH, Techonopôle Brest-Iroise, BLP 15 rue Dumont d'Urville, Plouzane, France	armelle.jung@desrequinse.tdeshommes.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
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

Name	Affiliation¹	Email
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 Ugarte a 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 Ferrerri, 12, 84084 Fisciano, Salerno, Italy	evelina.sabatella@cnr.it
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

Name	Affiliation¹	<u>Email</u>
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	AZTI. Gestión pesquera sostenible. Sustainable fisheries management. Arrantza kudeaketa jasangarria, Herrera Kaia - Portualdea z/g. E-20110 Pasaia - GIPUZKOA (Spain)	auriarte@azti.es
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 Institute 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-23-13)

Virtual meeting, 16-21 October 2023

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

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)¹. Where possible, evaluation should use data reference years 2011 to 2021.

An Expert group of the STECF (Chair, Dr John Casey), EWG 23-13, will be convened from 16 to 20 October 2023 to undertake the following tasks and report to the STECF.

1.1 Terms of Reference for EWG-23-13

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)². Where possible, evaluation should use data reference years 2011 to 2022.

An Expert group of the STECF (Chair, Dr John Casey), EWG 23-13, will be convened from 16 to 20 October 2023 to undertake the following tasks and report to the STECF.

The STECF EWG is requested to:

1. Based on the data submitted by Member States under the 2023 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 Balance Indicator Guidelines:

- (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)

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 (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.

- (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 2023 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.
 - 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 2023.
 - 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 2022 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. **The Expert group is requested to list for the Outermost Regions of France (Reunion, French Guiana, Martinique, Guadeloupe, Saint-Martin and Mayotte), Portugal (Madeira and Azores) and Spain (Canary Islands), those fleet segments that according to the most updated set of data (2019 or later if available) for either the biological, economic or technical indicators in the Commission Guidelines, as computed by the STECF, were indicated to be out of balance with their fishing opportunities.** The list should contain information on 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 Expert group is furthermore requested to provide a list of the fleet segments for which information available does not allow to calculate the above indicators and to indicate for which indicators what kind of information was not available.

4. **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, OR 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 2023, 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 2023 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 2023 Member States' fleet reports are not based on the most recent data on the value of landings and scientific estimates for F/F_{MSY} , 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 22-15, no comparison between the values in the fleet report and those computed by the STECF EWG 23-13 was carried out.

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.

TASK 1 - ASSESSMENT OF BALANCE INDICATORS

3.1 Background

All indicator values computed by the STECF EWG 23-13 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 23-13 are available in ANNEX V of this report

3.2.1 Indicator Calculation Process

Economic and technical indicators for the period 2013-2021 were prepared by the STECF EWG 23-07 (2023 Annual Economic Report on the EU Fishing Fleet (AER 2023)). 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 20-22 September 2023 (WG 23-13 chaired by Armelle Jung). The values used for this report were those finalised and agreed following the preparatory expert group on the 22 of September 2023. 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 23-13. Indicator values were computed for each year over the period 2013-2021.

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 23-13.

Indicator		Calculate d by	Comments
Biological indicators	SHI Sustainable Harvest Indicator	Jerome Guitton	<ol style="list-style-type: none"> 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): <ul style="list-style-type: none"> • 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: <ol style="list-style-type: none"> 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 <ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 1. Calculated for 2009-2022* 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 23-13 : <ul style="list-style-type: none"> • For fleet segments operating in Area 27, the most recent ICES Advice on fishing opportunities was

			<p>accessed through the ICES website (up to the cut-off date 22/09/2023).</p> <ul style="list-style-type: none"> 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 from CR (Critically Endangered), EN (Endangered) and VU (Vulnerable) marine organisms used as human food (<i>Fishes, Mollusks and Echinoderms</i>) from the IUCN list was updated for 2022. These species were ranked by decreasing landing values (in weight) and added to the SAR selection data base. In 2022, due to time and human resources constrains the preparatory WG stopped the selection at the threshold of 100 t (all years combined). In 2023 the EWG succeed in including the remaining species for which EU fleets had some landing within the time series were included in the SAR list as well. 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. <p>The complete list of species identified as at risk for the year 2022 is given in Annex IV.</p>
Economic indicators	ROI or RoFTA The Return on Investment (ROI) or Return on Fixed Tangible Assets (RoFTA)	JRC	<ol style="list-style-type: none"> Calculated using the same principle as STECF EWG 23-07; The target reference value to which the indicator value is compared is the 5-year average (2017-2021) risk-free interest rate. Calculated for years 2013-2021, the most recent year for which DCF economic data are available. <p>Values are in real terms, i.e., nominal values adjusted for inflation (base=2020)</p>
	CR/BER Current revenue as proportion of break-even revenue	JRC	<ol style="list-style-type: none"> Calculated for years 2013-2021, the most recent year for which DCF economic data are available. The long-term viability analysis of CR/BER approach was taken. <ol style="list-style-type: none"> Values are in real terms, i.e., nominal values adjusted for inflation (base=2020)

Technical/inactivity indicators	VUR Fleet segment utilisation indicator Average Days at Sea / Maximum Days at Sea	JRC	<ol style="list-style-type: none"> 1. Calculated for years 2013-2021. 2. Calculated when MS provided either maximum observed days at sea (DAS) for each fleet segment or maximum theoretical DAS. <ol style="list-style-type: none"> 1. The EWG also used the value of 220 maximum theoretical days at sea (VUR₂₂₀) 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	<ol style="list-style-type: none"> 1. Number and proportion of inactive vessels, in number, GT and kW for years 2013-2021.

Data sources: 2023 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 report, the results of stock assessments carried out by a Russian-Norwegian WG and for which ICES did not provide advice in 2022 or 2023, were not taken into account in computing the SHI and SAR indicators in this report (EWG 23-13).

*based on provisional data

3.2.2 Data Source and Coverage

The data used by the STECF EWG 23-13 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 2008-2021/22 issued by DG MARE in 2023. 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 2021/2022. Capacity data (GT, kW, no. of vessels) was requested up to and including 2022, while employment and economic parameters were requested up to and including 2021. Most effort and all landings data were requested up to and including 2022, albeit on a voluntary basis, to allow for economic performance nowcasts to be estimated for 2022 and projections for 2023. 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 compared to previous years. 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 are not completely covered. These generally relate to distant-water fleet segments and include MS such as Estonia, Italy and Poland. Other MS, such as Latvia, simply did not provide any data on part of their fleet (high sea fleet).

Specific data issues at MS level, which can affect the quality and coverage of the balance indicators are summarised in the AER 2023 AER.

Numbers of active fishing vessels by member state and region are given in Table 3.2.2.1 and Table 3.2.2.2 respectively.

Table 3.2.2.1 Number of active vessels by length group and supra-region for each Member State in 2021.

MS	NAO								NAO Total	MBS						MBS Total	OFR						OFR Total	EU Total
	VL0008	VL0010	VL0812	VL1012	VL1218	VL1824	VL2440	VL40XX		VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX		VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX		
BEL	-	-	-	1	1	27	34	-	63	-	-	-	-	-	-	-	-	-	-	-	-	-	-	63
BGR	-	-	-	-	-	-	-	-	-	431	672	53	15	11	-	1 182	-	-	-	-	-	-	-	1 182
CYP	-	-	-	-	-	-	-	-	-	369	377	36	1	4	-	787	-	-	-	-	-	-	-	787
DEU	508	9	144	4	120	81	19	12	897	-	-	-	-	-	-	-	-	-	-	-	-	-	-	897
DNK	-	773	-	77	203	69	36	27	1 185	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1 185
ESP	-	3 929	-	389	584	240	290	12	5 444	100	1 019	357	380	153	2	2 011	-	-	-	3	104	88	195	7 650
EST	-	1 236	-	40	1	6	21	6	1 310	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1 310
FIN	-	1 138	-	51	16	6	13	3	1 227	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1 227
FRA	-	1 336	-	647	381	191	110	12	2 677	253	781	21	29	46	7	1 137	1 314	88	17	12	1	20	1 452	5 266
GRC	-	-	-	-	-	-	-	-	-	2 772	6 562	264	209	163	-	9 970	-	-	-	-	-	-	-	9 970
HRV	-	-	-	-	-	-	-	-	-	3 755	2 107	237	69	72	-	6 240	-	-	-	-	-	-	-	6 240
IRL	-	940	-	159	76	73	82	21	1 351	-	-	-	-	-	-	-	-	-	-	-	-	-	-	1 351
ITA	-	-	-	-	-	-	-	-	-	2 056	5 232	2 053	691	268	11	10 311	-	-	-	-	-	-	5	10 316
LTU	-	52	-	3	-	2	10	2	69	-	-	-	-	-	-	-	-	-	-	-	-	6	6	75
LVA	-	210	-	-	9	-	29	-	248	-	-	-	-	-	-	-	-	-	-	-	-	-	-	248
MLT	-	-	-	-	-	-	-	-	-	300	277	17	24	6	-	624	-	-	-	-	-	-	-	624
NLD	-	174	-	24	20	166	67	73	524	-	-	-	-	-	-	-	-	-	-	-	-	-	-	524
POL	-	525	-	131	46	58	46	2	808	-	-	-	-	-	-	-	-	-	-	-	-	1	1	809
PRT	-	2 732	-	232	267	122	118	10	3 481	-	-	-	-	1	-	1	-	-	-	1	10	3	14	3 496
ROU	-	-	-	-	-	-	-	-	-	9	99	18	3	1	-	130	-	-	-	-	-	-	-	130
SVN	-	-	-	-	-	-	-	-	-	25	38	9	-	-	-	72	-	-	-	-	-	-	-	72
SWE	270	232	88	70	73	35	23	-	791	-	-	-	-	-	-	-	-	-	-	-	-	-	-	791
EU Total	778	13 286	232	1 828	1 797	1 076	898	180	20 075	10 070	17 164	3 065	1 421	725	20	32 465	1 314	88	17	16	115	123	1 673	54 213

Table 3.2.2.2 Number of inactive vessels by length group and supra-region for each Member State in 2021

MS	NAO								NAO Total	MBS						MBS Total	OFR						OFR Total	EU total
	VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX	VL0008	VL0812		VL0006	VL0612	VL1218	VL1824	VL2440	VL40XX		VL0010	VL1012	VL1218	VL1824	VL2440	VL40XX		
BEL	-	-	1	4	2	-	-	-	7	-	-	-	-	-	-	-	-	-	-	-	-	-	-	7
BGR	-	-	-	-	-	-	-	-	-	260	364	12	3	-	-	639	-	-	-	-	-	-	-	639
CYP	-	-	-	-	-	-	-	-	-	31	32	2	-	1	-	66	-	-	-	-	-	-	-	66
DEU	31	3	7	3	3	-	256	42	345	-	-	-	-	-	-	-	-	-	-	-	-	-	-	345
DNK	387	8	12	-	-	-	-	-	407	-	-	-	-	-	-	-	-	-	-	-	-	-	-	407
ESP	800	29	41	10	14	-	-	-	894	66	212	40	12	4	-	334	-	-	1	3	21	5	30	1 258
EST	617	26	-	1	-	-	-	-	644	-	-	-	-	-	-	-	-	-	-	-	-	-	-	644
FIN	1 919	86	14	2	3	1	-	-	2 025	-	-	-	-	-	-	-	-	-	-	-	-	-	-	2 025
FRA	151	37	10	6	-	-	-	-	204	61	136	3	4	1	-	205	438	35	1	9	-	1	484	893
GRC	-	-	-	-	-	-	-	-	-	1 083	1 079	95	13	7	-	2 277	-	-	-	-	-	-	-	2 277
HRV	-	-	-	-	-	-	-	-	-	624	722	100	34	37	-	1 517	-	-	-	-	-	-	-	1 517
IRL	511	80	16	2	3	-	-	-	612	-	-	-	-	-	-	-	-	-	-	-	-	-	-	612
ITA	-	-	-	-	-	-	-	-	-	347	968	312	27	22	2	1 678	-	-	-	-	1	1	2	1 680
LTU	44	5	1	2	13	-	-	-	65	-	-	-	-	-	-	-	-	-	-	-	-	-	-	65
LVA	77	-	-	-	-	-	-	-	77	-	-	-	-	-	-	-	-	-	-	-	-	-	-	77
MLT	-	-	-	-	-	-	-	-	-	114	104	4	11	2	-	235	-	-	-	-	-	-	-	235
NLD	132	13	15	20	12	4	-	-	196	-	-	-	-	-	-	-	-	-	-	-	-	-	-	196
POL	8	2	4	4	1	-	-	-	19	-	-	-	-	-	-	-	-	-	-	-	-	-	-	19
PRT	3 917	77	120	34	31	3	-	-	4 182	-	-	-	-	-	-	-	-	-	-	-	-	-	-	4 182
ROU	-	-	-	-	-	-	-	-	-	4	26	2	-	1	-	33	-	-	-	-	-	-	-	33
SVN	-	-	-	-	-	-	-	-	-	34	24	6	1	-	-	65	-	-	-	-	-	-	-	65
SWE	42	5	3	-	-	-	109	14	173	-	-	-	-	-	-	-	-	-	-	-	-	-	-	173
EU Total	8 636	371	244	88	82	8	365	56	9 850	2 624	3 667	576	105	75	2	7 049	438	35	2	12	22	7	516	17 415

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 $SHI \geq 40\%$ 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 2021. 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) 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. For instance, in the 2021-2023 data calls, Latvia, which appears to have full coverage for most of the indicators, provided data only on the Baltic Sea fleet, since no data on the distant water fleets were submitted. In such cases, there is no way of knowing what the actual coverage would be because certain fleet segments are completely missing from the submitted DCF data. Information on active fleet segments in 2021 for which landings in value can be identified as missing is presented in Table 3.2.3.2.

Table 3.2.3.1 Coverage of each balance indicator in terms of landed value submitted by MS for the reference year 2021. 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%	99%	100%	100%	0%	100%
BGR	100%	100%	68%	96%	96%	0%	96%
CYP	100%	90%	29%	90%	90%	0%	0%
DEU	100%	89%	73%	100%	100%	0%	100%
DNK	100%	100%	92%	100%	100%	100%	0%
ESP	100%	99%	64%	98%	98%	40%	98%
EST	100%	100%	72%	85%	85%	85%	0%
FIN	100%	100%	70%	100%	100%	13%	100%
FRA	100%	95%	57%	93%	93%	0%	93%
GRC	100%	100%	4%	100%	100%	0%	100%
HRV	100%	100%	77%	99%	99%	0%	99%
IRL	100%	96%	76%	76%	76%	0%	91%
ITA	100%	100%	59%	91%	91%	0%	98%
LTU	100%	100%	99%	82%	82%	82%	82%
LVA	100%	100%	91%	100%	100%	0%	100%
MLT	100%	100%	54%	100%	100%	90%	100%
NLD	100%	100%	76%	100%	100%	0%	100%
POL	100%	100%	71%	100%	100%	0%	100%
PRT	100%	98%	40%	100%	100%	0%	100%
ROU	100%	100%	97%	62%	62%	65%	65%
SVN	100%	100%	0%	100%	100%	0%	100%
SWE	100%	100%	94%	37%	37%	0%	37%

* when value of fishing rights available.

Table 3.2.3.2 Summary table showing for each Member State the number of fleet segments for which economic data and landings in value were available in 2021, the number of active fleet segments, and the active fleet segments in 2021 with missing values.

MS	Supra region	No. of fleet segments	No. of active segments	No. of inactive segments	Data availability (by no. of fleet segments)			Data provision format		Fleet segments with missing landings value or weight	Fleet segments with 1 or more essential economic variable
					Landings in value	Landings in weight	Economic data	Landings data	Economic data		
BEL	NAO	11	8	3	4	4	4	Aggregate fleet segments			
BGR	MBS	28	24	4	24	24	16	Fleet segment	Aggregate fleet segments		
CYP	MBS	11	7	4	7	7	6	Fleet segment	Aggregate fleet segments		(1) MBS PS 1824 NGI
DEU	NAO	29	22	7	15	15	15	Aggregate fleet segments			
DNK	NAO	20	17	3	17	17	17	Fleet segment			
ESP	MBS	32	27	5	27	27	20	Fleet segment	Aggregate fleet segments		
	NAO	59	49	10	49	49	32				
	OFR	12	8	4	8	8	6				
EST	NAO	9	6	3	4	4	3	Fleet segment	Aggregate fleet segments	(1) EST NAO DTS40XX IWE	
FIN	NAO	14	8	6	5	5	5	Aggregate fleet segments			
FRA	MBS	33	28	5	28	28	16	Fleet segment	Aggregate fleet segments		
	NAO	58	54	4	53	53	32				
	OFR	50	35	15	32	32	16				
GRC	MBS	25	20	5	14	14	14	Aggregate fleet segments			
HRV	MBS	36	31	5	30	30	23	Fleet segment	Aggregate fleet segments		
IRL	NAO	35	30	5	30	30	10	Fleet segment	Aggregate fleet segments		(2) NAO FPO1012, NAO HOK0010
ITA	MBS	33	27	6	27	27	20	Fleet segment	Aggregate fleet segments		(2) OFR PS 40XX IWE, OFR DTS40XX IWE
	OFR	4	2	2	2	2	-				
LTU	NAO	11	6	5	6	6	3	Fleet segment	Aggregate fleet segments		
	OFR	2	2	0	2	2	1	Fleet segment	Aggregate fleet segments		
LVA	NAO	4	3	1	3	3	3	Fleet segment			
MLT	MBS	24	19	5	10	10	10	Aggregate fleet segments			
NLD	NAO	33	27	6	11	11	11	Aggregate fleet segments			
POL	NAO	23	18	5	8	11	8	Fleet segment		(2) NAO TM 40XX, NAO FPO 2439	
	OFR	1	1		-	1	-	Fleet segment		(1) OFR TM 40XX	
	MBS	1	1	0	1	1	1	Fleet segment			
PRT	NAO	72	56	16	50	50	50	Aggregate fleet segments			
	OFR	3	3	0	2	2	2	Fleet segment			
ROU	MBS	10	6	4	6	6	3	Fleet segment	Aggregate fleet segments		
SVN	MBS	14	10	4	3	3	3	Aggregate fleet segments			
SWE	NAO	32	27	5	26	26	9	Fleet segment	Aggregate fleet segments		
EU fleet		729	582	147	504	508	359				


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_2023/

The input data and balance indicator calculation results can be viewed thematically at fleet segment, country and supra-region level. 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 visualisation tool deals mainly with 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 23-13 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 alpha 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 582 active fleet segments in 2021 (54,213 vessels), landings in weight were available for 508 fleet segments or aggregate fleet segments, while value of landings were available for 508 segments. SHI indicator values were available for 462 segments, of which 197 were considered meaningful to assess balance or imbalance ($SHI \geq 40\%$). Economic indicator values (CR/BER and RoFTA) were available for 359 fleet segments or aggregate fleet segments. RoI values (with value of fishing quota) were available for 50 fleet segments or aggregate fleet segments from 7 Member States.

The SAR indicator was available for 407 fleet segments in 2021. According to the criteria in the 2014 Commission guidelines, EWG 23-13 notes that the SAR results indicate that there were 196 segments that may have been in balance with their fishing opportunities ($SAR=0$) and 211 segments that may have not been in balance with their fishing opportunities, as follows:

- 1 segments (,2%) with 10 stocks-at-risk,
- 1 segments (,2%) with 9 stocks-at-risk,
- 2 segments (,5%) with 8 stocks-at-risk,
- 4 segments (1%) with 6 stocks-at-risk,
- 6 segments (1.5%) with 5 stocks-at-risk,
- 5 segments (1.2%) with 4 stocks-at-risk,
- 10 segments (2.5%) with 3 stocks-at-risk,
- 42 segments (10%) with 2 stocks-at-risk,
- 140 segments (34%) 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 2021, showing the number of fleet segments at regional level (NAO, MBS and OFR) per number of SAR found.

SR	Number of SAR									
	0	1	2	3	4	5	6	8	9	10
NAO	124	59	21	6	4	5	4	2	1	1
MBS	61	66	18	4	1	1	0	0	0	0
OFR	11	15	3	0	0	0	0	0	0	0
EU fleet	196	140	42	10	5	6	4	2	1	1

3.3.1 NAO – North Atlantic (area 27)

Out of 331 active fleet segments in 2021, landings in weight were provided for 284 fleet segments or aggregate fleet segments, while value of landings were provided for 281 segments, i.e., not provided for 3 segments.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 260 segments, of which 118 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 118 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 63% of the total value of the landings in 2021 provided by MS, and were as follows:

- 63% (74 segments) may be in balance with their fishing opportunities;
- 37% (44 segments) may not be in balance with their fishing opportunities.

For 45 (38%) segments, an improving trend was assessed for SHI while a deteriorating trend was observed for 11 (9%) segments. A further 49 (42%) segments had no clear trend, 2 segment had a null/flat trend and no trend could be calculated for the remaining 11 segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 227 fleet segments, of which 103 segments may not have been in balance with their fishing opportunities in 2021. According to the criteria in the 2014 Commission guidelines, EWG 23-13 notes that the SAR results indicate that:

- 1 segments with 10 stocks-at-risk,
- 1 segments with 9 stocks-at-risk,
- 2 segment with 8 stocks-at-risk,
- 4 segments with 6 stocks-at-risk,
- 5 segments with 5 stocks-at-risk,
- 4 segments with 4 stocks-at-risk,
- 6 segments with 3 stocks-at-risk,
- 21 segments with 2 stocks-at-risk,
- 59 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 2021 in the North Atlantic region (NAO) is 32 and the number of segments for which trends are calculated is 28.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoI indicator values for the 32 fleet segments indicate that:

- 41% (13 segments) may be in balance with their fishing opportunities.
- 59% (19 segments) may not be in balance with their fishing opportunities;

For 5 (16%) segments, an increasing trend was assessed for RoI while a decreasing trend was observed for 23 (72%) segments. No trend could be calculated for the remaining 4 segments.

RoFTA is available for 202 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% (124 segments) may be in balance with their fishing opportunities.
- 39% (78 segments) may not be in balance with their fishing opportunities.

For 63 (31%) segments, an increasing trend was assessed for RoFTA while a decreasing trend was observed for 119 (59%) segments. No trend could be calculated for the remaining 20 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 202 in 2021 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:

- 67% (134 segments) may be in balance with their fishing opportunities.
- 33% (68 segments) may not be in balance with their fishing opportunities;

An increasing trend for CR/BER was assessed for 50 (25%) fleet segments while a decreasing trend was observed for 101 (50%) segments. A further 31 (15%) fleet segments had no clear trend and no trend could be calculated for the remaining 20s segments.

The Vessel Use Indicator (or Vessel Utilisation ratio)

The Vessel Use Indicator (VUR) was available for 261 fleet segments⁴ in NAO in 2021. According to the criteria in the 2014 Commission Guidelines, the expert group notes the VUR indicator values indicate that:

- 49% (129 segments) may be in balance with their fishing opportunities;
- 51% (132 segments) may not be in balance with their fishing opportunities.

An improving trend for the Vessel Use Indicator was assessed for 14 (5%) fleet segments while an deteriorating trend was observed for 20 (8%) segments. No clear trend was found for 181 (69%) segments, a null/flat trend was found for 19 (7%) segments and no trend could be calculated for the remaining 27 (10%) segments.

The Inactive Fleet Indicators

The EU inactive fleets in the North Atlantic (NAO) comprised 74 segments in 2021, of which 90% (67 segments) were in balance and 10% (7 segments) were out of balance, according to the guidelines.

Overall, 14 (19%) fleet segments showed a decreasing (improving) trend in the number of inactive vessels and 17 (23%) showed an increasing (deteriorating) trend. A further 33 (43%) segments were flat or showed no clear trend. And no trend could be calculated for the remaining 7 segments.

3.3.2 MBS - Mediterranean and Black Sea (area 37)

Out of 200 active fleet segments in 2021, landings in weight and value were provided for 177 fleet segments or aggregate fleet segments.

Sustainable Harvest Indicator (SHI)

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

SHI indicator values were available for 163 segments, of which 62 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 62 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 63% of the total value of the landings in 2021 provided by MS, and were as follows:

- 31% (19 segment) may be in balance with their fishing opportunities;
- 69% (43 segments) may not be in balance with their fishing opportunities.

For 1 segment, an increasing (deteriorating) trend was assessed for SHI while a decreasing (improving) trend was observed for 23 (37%) segments. A further 20 (32%) segments had no clear trend, 2 segment showed a flat trend and no trend could be calculated for the remaining 16 segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 151 fleet segments, of which 90 segments may not have been in balance with their fishing opportunities in 2021. According to the criteria in the 2014 Commission guidelines, EWG 23-13 notes that the SAR results indicate that there were:

- 1 segments with 5 stocks-at-risk,
- 1 segments with 4 stocks-at-risk,
- 4 segments with 3 stocks-at-risk,
- 18 segments with 2 stocks-at-risk,
- 66 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 2021 in the Mediterranean and Black Sea (MBS) is 14.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the RoI indicator values for the 14 fleet segments indicate that:

- 64% (9 segments) may be in balance with their fishing opportunities.
- 36% (5 segments) may not be in balance with their fishing opportunities.

For 3 (21%) segments, an increasing trend was assessed for RoI while a decreasing trend was observed for 4 (29%) segments. Remaining 7 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:

- 70% (93 segments) may be in balance with their fishing opportunities.
- 30% (39 segments) may not be in balance with their fishing opportunities.

For 51 (39%) segments, an increasing trend was assessed for RoFTA while a decreasing trend was observed for 64 (48%) segments. For the remaining 17 (13%) 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:

- 72% (95 segments) may be in balance with their fishing opportunities.
- 28% (37 segments) may not be in balance with their fishing opportunities;

An increasing trend for CR/BER was assessed for 52 (39%) fleet segments while a decreasing trend was observed for 52 (39%) segments. A further 11 (13%) segments had no clear trend and the remaining 17 (13%) segments showed flat trend.

The Vessel Use Indicator (or Vessel Utilization ratio)

The Vessel Use Indicator (VUR) was available for 196 fleet segments in MBS in 2020. According to the criteria in the 2014 Commission guidelines EWG notes that the VUR indicator values indicate that:

- 42% (83 segments) may be in balance with their fishing opportunities;
- 58% (113 segments) may not be in balance with their fishing opportunities.

An improving trend for the Vessel Use Indicator was assessed for 32 (16%) fleet segments while a deteriorating trend was observed for 18 (9%) segments. No clear trend was found for 78 (40%) segments, 10 (5%) segments showed a flat trend and no trend could be calculated for the remaining 58 (30%) segments.

The Inactive Fleet Indicators

The EU inactive fleets in the MBS comprised 44 segments in 2020, of which 93% (41 segments) were in balance and 7% (3 segments) were out of balance, according to the guidelines.

Overall, 14 (32%) fleet segments showed an improving trend in the number of inactive vessels and 9 (20%) segments showed a deteriorating trend. A further 18 (41%) segments showed no clear trend and no trend could be calculated for the remaining 3 (7%) segments.

3.3.3 OFR - Other Fishing Regions and French Outermost Regions

Out of 51 active fleet segments in 2020, landings in weight and value were provided for 47 fleet segments or aggregate fleet segments.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 39 segments, of which 17 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 17 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 75% of the total value of the landings in 2020 provided by MS, and were as follows:

- 76% (13 segments) may be in balance with their fishing opportunities;
- 24% (4 segments) may not be in balance with their fishing opportunities.

Overall, 3 (17%) segments showed a improving trend, and 11 (65%) segments showed no clear trend. No trend could be calculated for the remaining 3 segments.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 29 fleet segments, of which 18 segments may not have been in balance with their fishing opportunities in 2021. According to the criteria in the 2014 Commission guidelines, EWG 23-13 notes that the SAR results indicate that there were:

- 3 segments with 3 stocks-at-risk,
- 15 segments with 2 stocks-at-risk,
- 11 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 2021 in OFR is 4.

According to the criteria in the 2014 Commission guidelines, the EWG notes that the *RoI* indicator values for the 6 segments indicate that:

- 75% (3 segments) may be in balance with their fishing opportunities.

- 25% (1 segments) may not be in balance with their fishing opportunities,

For 1 segment, an increasing trend was assessed for RoI while a decreasing trend was observed for 2 segments. Remaining 1 segment the trend could not be calculated.

RoFTA is available for 25 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 25 segments indicate that:

- 52% (13 segments) may be in balance with their fishing opportunities.
- 48% (12 segments) may not be in balance with their fishing opportunities.

For 11 (44%) segments, an increasing trend was assessed for RoFTA while a decreasing trend was observed for 13 (52%) segments. No trend could be calculated for the remaining 1 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 25.

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:

- 52% (13 segments) may be in balance with their fishing opportunities.
- 48% (12 segments) may not be in balance with their fishing opportunities;

An increasing trend for CR/BER was assessed for 7 (28%) segments while a decreasing trend was observed for 8 (32%) segments. A further 9 (36%) segments had no clear trend and no trend could be calculated for the remaining 1 segment.

The Vessel Use Indicator (or Vessel Utilisation ratio)

The Vessel Use Indicator (VUR) was available for 50 fleet segments in OFR in 2021. According to the criteria in the 2014 Commission guidelines EWG notes that the VUR indicator values indicate that:

- 68% (34 segments) may be in balance with their fishing opportunities;
- 32% (16 segments) may not be in balance with their fishing opportunities.

An increasing trend was observed for 5 (10%) segments and a decreasing trend was observed for 2 segments. No clear trend was found for 10 (20%) segments, a null/flat trend was found for 2 segments and no trend could be calculated for the remaining 31 (62%) segments.

The Inactive Fleet Indicators

18 fleet segments in the OFR had inactive vessels in 2021, all of which were in balance according to the guidelines.

Overall, 3 segments showed a deteriorating trend, 2 segments showed an improving trend, 10 segments showed no clear trend and no trend could be calculated for the remaining 3 segments.

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 2021 and trends over the period 2017-2021 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.

SR	Status	SHI		SAR	CR/BER		RoI		RoFTA		VUR		Inactive vessels #	
	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	in balance	out of balance
NAO	Improving	34	11		42	8	3	2	54	9	2	12	13	1
	Deteriorating	4	7		52	49	8	15	59	60	19	1	11	6
	No clear trend	30	19		28	3	0	0	0	0	75	106	33	0
	Flat/null	0	2		0	0	0	0	0	0	19	0	3	0
	No trend calculated	6	5		12	8	2	2	11	9	14	13	7	0
NAO TOTAL		74	44	227	134	68	13	19	124	78	129	132	67	7
MBS	Improving	6	17		45	7	3	0	41	10	9	23	4	1
	Deteriorating	0	1		30	22	0	4	39	25	12	6	10	0
	No clear trend	10	10		6	5	0	0	0	0	29	49	20	0
	Flat/null	1	1		14	3	0	0	0	0	10	0	2	0
	No trend calculated	2	14		0	0	6	1	13	4	23	35	9	0
MBS TOTAL		19	43	151	95	37	9	5	93	39	83	113	45	1
OFR	Improving	2	1		5	2	1	0	9	2	3	2	2	0
	Deteriorating	0	0		2	6	1	1	3	10	2	0	3	0
	No clear trend	8	3		5	4	0	0	0	0	9	1	8	0
	Flat/null	0	0		0	0	0	0	0	0	2	0	2	0
	No trend calculated	3	0		1	0	1	0	1	0	18	13	3	0
OFR TOTAL		13	4	29	13	12	3	1	13	12	34	16	18	0
Balance result - EU fleet		106	91	407	242	117	25	25	230	129	246	261	130	8
Indicator coverage EU fleet		197		407	359		50		359		507		138	

North Atlantic Ocean (NAO)

Out of 118 fleet segments in the NAO for which the SHI could be estimated and meaningfully to assessed, 44 segments were *out of balance* and 74 *in balance* with fishing opportunities in 2021. For segments for which a trend in SHI could be detected the situation was improving for 45 segments, and worsening for 11. Null or no clear trend could be observed for 51 segments.

According to each of the economic indicators, the majority of fleet segments in the NAO were *in balance* with their fishing opportunities in 2021 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 62 fleet segments in the MBS for which the SHI could be estimated and meaningfully to assessed, 43 segments were *out of balance* and 19 *in balance* with their fishing opportunities in 2021. For segments for which a trend in SHI could be detected the situation was improving for 23 segments, and worsening for 1. Null or no clear trend could be observed for the rest 38 segments.

According to each of the economic indicators, the majority of fleet segments in the MBS were *in balance* with their fishing opportunities in 2021 and overall, the trends are improving or deteriorating in a similar number of fleet segments.

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 17 fleet segments for which the SHI could be estimated and meaningfully to assessed, 13 segments were *in balance* and 4 segments *out of balance* with fishing opportunities in 2021. For segments for which a trend in SHI could be detected the situation appeared to be improving for 3 segments, and worsening for none. Null or no clear trend was observed for 14 segments.

For the limited number of segments for which economic indicators could be computed, approximately half were found to be *in balance* with their fishing opportunities in 2021. The sparse data indicate that the economic situation appeared to be worsening.

The technical indicators imply that the majority of fleet segments were *in balance* with their fishing opportunities in 2021.

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 2021 and for the year 2022 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 23-13 based on data submitted by Member States under the 2023 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 23-13 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 2021 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 2023.

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 2023 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 2021, of which 8 were active. Of the 8 active fleet segments, landings and economic data were provided aggregated in 4 fleet segments.

Sustainable Harvest Indicator (SHI)

Out of 8 active fleet segments in 2021, SHI indicator values were available for 4 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 3 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 99.14% of the total value of the landings in 2021 provided by MS, and were as follows:

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

Trends were available for the 3 fleet segments:

- 2 segments displayed a **decreasing** (improving) trend,
- 1 segment displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all the 4 active fleet segments in 2021. EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 3 fleet segments may be *in balance* with their fishing opportunities,
- 1 fleet segment with 2 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		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	2	2		

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

RoFTA was calculated for 4 segments:

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

Trends were calculated for 4 segments:

- 1 segment 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 4 segments:

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

Trends were calculated for 4 segments:

- 1 segment displayed an **increasing** trend,
- 3 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 8 segments:

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

Trends were calculated for 7 segments:

- all segments displayed **no clear** trend.

The Inactive Fleet Indicators

In total, inactive vessels accounted for 10% of the total number of vessels, 6% of the total GT and 6.6% of the total kW. At the national level, inactive vessels accounted for less than 20% of the fleet, i.e., were *in balance* in all 3 categories (#, GT and kW).

In 2021, there were 3 inactive vessel length groups (VL1218, VL1824 and VL2440). In previous years (2008-2016), these length classes were clustered into one segment (VL2440). Trends in number of inactive vessels showed an increasing (deteriorating) trend for two segments, while one segment shows no trend. In case of GT, one segment showed an increasing (deteriorating) trend while the two segments are without trend. Regarding kW, one segment is without trend, one has increasing (deteriorating) and one decreasing (improving) trend.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission guidelines, the majority of the fleet segments appear to be out of balance with fishing opportunities. The exception is BEL NAO PMP 1824 NGI for which all values indicate that the segment is in balance. The most important segment by numbers of vessels and landings (BEL NAO TBB2440 NGI) appears to be in balance according to the economic indicators, whereas the SAR indicator suggests that this segment is out of balance (2 stocks-at-risk). The trends for the biological indicators are generally improving, while the economic indicators are deteriorating for

the most important segments in terms of numbers of vessels (3 out of 4 segments). The only segment with increasing trends is BEL NAO PMP1824 NGI* which only contains one vessel.

These observations are not completely in line with the assessment of balance in the Member States' fleet report submitted in 2023, 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.

					<div><div></div>in balance</div>	<div><div></div>out of balance</div>	<div><div></div>borderline</div>	<div><div></div>insufficiently profitable</div>	<div><div></div>improving</div>	<div><div></div>deteriorating</div>	<div><div></div>Null/flat trend</div>	<div><div></div>no clear trend</div>																		
					Status 2021 according to thresholds and criteria in the 2014 Guidelines									Trends 2017-2021																
					Biological			Economic				Activity		Inactive		Biological			Economic				Activity		Inactive					
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₀	#	GT	KW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₀	#	GT	KW	
NAO	DTS	VL1824	BEL NAO DTS2440 NGI *	8																										
NAO	DTS	VL2440	BEL NAO DTS2440 NGI *	5																										
NAO	DRB	VL1824	BEL NAO PMP1824 NGI *	1																										
NAO	FPO	VL1012	BEL NAO PMP1824 NGI *	1																										
NAO	PMP	VL1824	BEL NAO PMP1824 NGI *	1																										
NAO	TBB	VL1218	BEL NAO TBB1824 NGI *	1																										
NAO	TBB	VL1824	BEL NAO TBB1824 NGI *	17																										
NAO	TBB	VL2440	BEL NAO TBB2440 NGI	29																										
NAO	INACTIV	VL1218	BEL NAO INA1218 NGI	1																										
NAO	INACTIV	VL1824	BEL NAO INA1824 NGI	4																										
NAO	INACTIV	VL2440	BEL NAO INA2440 NGI	2																										
BEL Total				70																										

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

Indicator values computed by the EWG 23-13 and those in the fleet report submitted by 31 May 2023 are compared in Annex II to this report.

Sustainable Harvest Indicator (SHI)

In the MS report, the SHI values were presented for 2013 to 2022. However, the comparison between SHI values reported in the Belgian annual fleet report and those estimated in the framework of EWG 23-13 was only conducted for 2021 and revealed similar outputs for 2 out of 3 fleets where the SHI may be considered as meaningful to assess balance or imbalance (BEL NAO DTS2440 NGI* and BEL NAO TBB2440 NGI). The EWG notes that the presented values of the SHI from the Belgian fleet report were not identical to those estimated in the framework of EWG 23-13, but that the resulting assessment of the status of the segments was similar. The SHI for the third fleet segment (BEL NAO TBB1824 NGI*) is also similar (SHI MS: 0.99, SHI EWG23-13: 1.02), but lead to different perceptions of the balance of this segment (MS: "in balance", EWG23-13: "out of 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 2013 to 2022. As for the SHI, the comparison between SAR values reported in the Belgian annual fleet report and those estimated in the framework of EWG 23-13 was only conducted for 2021 and revealed similar outputs for the 3 fleets (BEL NAO DTS2440 NGI*, BEL NAO TBB1824 NGI* and BEL NAO TBB2440 NGI), where no SAR was identified. In BEL NAO TBB2440 NGI one SAR was identified by the MS, whereas EWG23-13 identified 2 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 23-13 revealed different values of indicator but similar outputs for all values.

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 23-13 revealed different values of indicator but similar outputs for most of the values: BEL NAO TBB2440 NGI were "out of balance" in 2021 according to MS fleet report and "in balance" according to EWG estimations.

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 23-13 revealed similar outputs for all segments except for the segment BEL NAO PMP1824 NGI* where the segment is in balance according the EWG 23-13 estimate and out of balance according Belgian fleet report.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicator reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed similar outputs for all values, although the indicator values differ.

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 in the fleet report for 2022 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 assessment of balance in the Member States' fleet report submitted in 2023 is similar to last year's report, where the two most important fleet segments BEL NAO TBB1824 NGI and BEL NAO TBB2440 NGI were assessed as being in balance with their fishing opportunities. The MS did not address any comments made by EWG 22-15.

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.

Belgium did not identify structural overcapacity of the Belgian fleet and is considered by the MS to be in balance with its fishing opportunities in 2022. The MS concluded the same for 2021.

Despite positive and upward-trending economic indicators suggesting long-term profitability for the complete Belgian fishing fleet, two out of the four segments (BEL NAO DTS2440 NGI* and BEL NAO TBB1824 NGI*) may be out of balance according to the economic indicators RoFTA and CR/BER calculated by EWG 23-13. Notably, these two segments rank second and third, respectively, in terms of number of vessels, contributing a substantial 26% to the overall Gross value of landings for the Belgian fishing fleet.

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 28 fleet segments in the Bulgarian fleet in 2021, of which 24 were active. Of the 24 active fleet segments, landing data were provided for all segments while economic data were available to calculate the indicators for 17 aggregated fleet segments.

Sustainable Harvest Indicator (SHI)

Out of 24 fleet segments active in 2021, SHI indicator values were available for 12 fleet segments.

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 12 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 68.19% of the total value of the reported landings in 2021. SHI values indicated that

- 10 fleet segments may *not be in balance* with its fishing opportunities,
- 2 fleet segments may *be in balance* with its fishing opportunities.

Trends could be calculated for 6 segments:

- 4 segments displayed an **increasing** trend,
- 2 segments displayed **no clear** trend.

Stocks-at-Risk Indicator (SAR)

The SAR indicator was available for 24 fleet segments in 2021. For 6 fleet segments, one or more stocks-at-risk were detected:

- 6 fleet segments may *not be in balance* with its fishing opportunities,
- 18 fleet segments may *be in balance* with its 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	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		6	9	

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

RoI was not calculated.

RoFTA 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 13 segments:

- 6 segments displayed an **increasing** trend,
- 7 segments displayed a **decreasing** 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,
- 4 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 13 segments:

- 7 segments displayed an **increasing** trend,
- 6 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 25 segments*:

- 18 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:

- 4 segments displayed an **increasing** trend,
- 1 segment displayed a **decreasing** trend,
- 1 segment displayed a **null/flat** trend.
- 11 segments displayed **no clear** trend.

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

The Inactive Fleet Indicators

In 2021, 4 vessel length classes had inactive vessels (VL0006, VL0612, VL1218 and VL1824).

The total inactive fleet accounted for 35.09% of the total number of vessels, 21.68% of the total GT and 27.92% of the total kW. At the national level, inactive vessels accounted for more than

20% of the fleet in all 3 categories (#, GT and kW), and thus are indicated to be *out of balance*, and there is no detectable trend in the values.

The fleet segment with the highest level of inactivity was the VL0612 group with 19.99% in terms of number of vessels, 12.04% in GT and 17.95% in kW.

Synthesis of indicators and trends

The status of 28 fleet segments and trends for the Bulgarian fleet in the Black Sea Region is shown below. Based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission guidelines, three fleet segments are out of balance and five fleets are in balance for all economic indicators. The remaining segments are indicated to be in balance according to most indicators, with the exception of three segments PS VL0006, PGP VL0612 and PMP VL0006 detected out of balance based on negative results for RoFTA and CR/BER indicators. The SHI could be meaningfully assessed for 12 fleet segments. Only the BGR MBS TM 1824 NGI and BGR MBS TM 2440 NGI segments are suggested to be in balance, while the other 10 segments may be imbalanced according to the SHI indicator. The SAR values indicated imbalance for six fleet 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.

					<div><div></div>in balance<div></div>out of balance<div></div>borderline<div></div>insufficiently profitable<div></div>improving<div></div>deteriorating<div></div>Null/flat trend<div></div>no clear trend</div>																									
					Status 2021 according to thresholds and criteria in the 2014 Guidelines										Trends 2017-2021															
SR	FT	VL	Fleet segment	No of vessels	Biological			Economic					Activity		Inactive			Biological			Economic					Activity		Inactive		
					SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	
MBS	DFN	VL0006	BGR MBS DFN0006 NGI	332																										
MBS	DFN	VL0612	BGR MBS DFN0612 NGI	476																										
MBS	DFN	VL1218	BGR MBS DFN1218 NGI *	14																										
MBS	DFN	VL1824	BGR MBS DFN1218 NGI *	2																										
MBS	DFN	VL2440	BGR MBS DFN1218 NGI *	1																										
MBS	FPO	VL0612	BGR MBS FPO0612 NGI *	29																										
MBS	HOK	VL0006	BGR MBS HOK0006 NGI	13																										
MBS	HOK	VL0612	BGR MBS HOK0612 NGI *	17																										
MBS	PGP	VL0006	BGR MBS PGP0006 NGI	11																										
MBS	PGP	VL0612	BGR MBS PGP0612 NGI *	7																										
MBS	PGP	VL1218	BGR MBS PGP0612 NGI *	1																										
MBS	PMP	VL0006	BGR MBS PMP0006 NGI	64																										
MBS	PMP	VL0612	BGR MBS PMP0612 NGI	133																										
MBS	PMP	VL1218	BGR MBS PMP1218 NGI *	16																										
MBS	PMP	VL1824	BGR MBS PMP1218 NGI *	1																										
MBS	PS	VL0006	BGR MBS PS 0006 NGI *	11																										
MBS	PS	VL0612	BGR MBS PS 0006 NGI *	3																										
MBS	TBB	VL0612	BGR MBS TBB1218 NGI *	1																										
MBS	TBB	VL1218	BGR MBS TBB1218 NGI *	2																										
MBS	TBB	VL1824	BGR MBS TBB1218 NGI *	2																										
MBS	TM	VL0612	BGR MBS TM 1218 NGI *	6																										
MBS	TM	VL1218	BGR MBS TM 1218 NGI *	20																										
MBS	TM	VL1824	BGR MBS TM 1824 NGI	10																										
MBS	TM	VL2440	BGR MBS TM 2440 NGI	10																										
MBS	INACTIV	VL0006	BGR MBS INAD0006 NGI	260																										
MBS	INACTIV	VL0612	BGR MBS INAD0612 NGI	364																										
MBS	INACTIV	VL1218	BGR MBS INA1218 NGI	12																										
MBS	INACTIV	VL1824	BGR MBS INA1824 NGI	3																										
BGR Total				1821																										

*Note: 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.*

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison of the indicator values computed by the EWG 23-13 and those in the fleet report submitted by 31 May 2023 are given in Annex II to this report. Points of note for each indicator are listed below.

Sustainable Harvest Indicator (SHI)

The MS provides values for the SHI indicator for the last 3 years (2019-2021). The comparison between SHI reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed different outputs for all values. The MS could meaningfully assess 9 fleet segments that all showed an imbalance with respect to the SHI indicator. In contrast, the EWG reports 12 fleet segments with meaningful SHI values, of which 10 fleet segments were indicated to be out of balance in 2021. The differences between SHI values are only minor (+/- 10% compared to the EWG estimate) for DFN fleet segments, but are higher (50% to 250% compared to the EWG estimate) for all other fleet segments

Differences between the SHI values as computed by the EWG and the MS are due to differences in the data used to compute the indicator; the MS includes only overfished ($F > F_{MSY}$) stocks whereas the EWG considers all F/F_{MSY} values, irrespective of the value of F compared to F_{MSY} . The MS also only included results from stock assessments that were updated in 2022.

Stocks at Risk Indicator (SAR)

The MS annual fleet report presents SAR indicators for 2019, 2020 and 2021. The comparison between EWG 23-13 and the MS was made based on the SAR indicator for the year 2021. The MS report considers DGS (spiked dogfish (*Squalus acanthias*)) as the sole SAR stock fished by Bulgarian fleets. There are no differences between the EWG and MS with respect to the SAR indicator values for the year 2021, and both assessments identify 6 fleet segments with stocks-at-risk in 2021.

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

The CR/BER indicator for the 17 segments provided in the fleet report. The EWG 23-13 notes that a direct comparison for the CR/BER trends reported in the MS fleet report and those estimated in the framework of EWG is not feasible due to differences between the time series. The indicators estimated for EWG reported for the period 2017-2021 and Bulgarian fleet report include results calculated for 2019-2021. However, when comparing data for 2021 the CR/BER values in the MS fleet report are negative for two segments: HOK VL0006 and HOK VL0612. The indicator values computed by EWG 23-13 show CR/BER values as negative for four segments: HOK VL0006, PGP VL0612, TM VL1218 and TM VL2440.

The fleet report provides values for CR/BER by segment which accounts for potential loss of benefits (calculated as a product of the value of the capital assets and the average interest rate on long-term low risk investments for Bulgaria for the period 2016- 2020). Hence the CR/BER values in the Bulgarian fleet report relate to long-term profitability. The value of the CR/BER indicator for 15 segments in the fleet report was greater than 1, thereby indicating that those segments are profitable and are able to cover their costs in the long-term.

The highest indicator value is observed for segment PMP VL0006, TM VL1824 and TM VL2440 in 2021.

The EWG 23-13 note that the difference of the results for CR/BER in the fleet report for segments HOK VL0612, TM VL1824, TM VL2440 and EWG values is unclear.

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 (2017-2021 for EWG estimations and 2019 -2021 in the fleet report).

The EWG 23-13 note that for 2021 the highest RoFTA indicator values observed in the fleet report are for segments PMP VL0006, PMP VL0612 and TM VL2440 which indicate long-term profitability. The negative value of RoFTA was reported for two segments: HOK VL0006 and HOK VL0612. The estimations provided for EWG show negative results for three segments HOK VL0006, HOK VL0612 and PGP VL0612. The reason for the negative results in a segment PGP VL0612 could be clustered data provided for the data call.

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

The MS annual fleet report did not provide information values for VUR and VUR₂₂₀. However, the MS provided a detailed description of a different approach to estimate an alternative technical indicator which is consistent with that provided in previous years.

Values for VUR or VUR₂₂₀ were not provided in the fleet report. No comparison or indicator values or trends with those computed by the EWG 23-13 was possible.

The Inactive Fleet Indicators

Inactive vessels have been reported as total number per year and are not split by fleet segments in the annual fleet report. Hence no comparison with the EWG 23-13 indicator values by fleet segment was possible. The information in the fleet report stated that the highest level of unused capacity is observed for small-scale vessels less than 12 meters. This could be explained by the seasonal nature of fisheries, low return on funds, repair activities etc.

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 and biological indicators, but lacks an assessment of fleet segments with respect to all indicators, and an overview or concluding statement on which fleet segments may be imbalanced according to the MS. The biological and economic indicators were provided for the most recent years (2019, 2020, 2021). The technical indicator assessment was made from 2019 to 2022. The applied methodology to calculate balance indicators and fleet segmentation are according to the guidelines and DCF framework, respectively.

The fleet report asserts that implementation of fisheries management measures adopted in recent years at European and regional level has led to improved management of marine resources and their sustainable exploitation. The EWG notes however that the MS does not provide support for this statement based on the balance indicators provided in the fleet report.

Discrepancies in previous fleet reports

The comparison for the ROI reported in the MS fleet report and those estimated in the framework of EWGs was not possible in previous years due to only RoFTA being estimated for Bulgaria by EWG. In the report for 2023 RoFTA is provided instead of ROI which made a comparison possible for 2021.

In response to the comments of EWG 22-15 on the biological indicators, the MS's fleet report for 2022, submitted in 2023 included three changes. The MS reported biological indicators for the last three years (2019-2021). The MS took into account the ratio of a fleet segments' landings with a stock assessment to all landings in order to assess whether the SHI indicator is meaningful and turbot was removed from the SAR list.

Overview of action plan

The MS considers that the attached action plan, with implementation foreseen in 2023 and 2024, is prepared in accordance with Article 22 of the Regulation (EU) 1380/2013.

The proposed action plan is largely a statement of intent to improve fishery sector activities commencing over 2023 -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. Also, the action plan does not identify fleet segments for which actions are planned and does not identify any reasoning as to why such measures are required. 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.

The MS considers that the attached action plan, with implementation foreseen in 2023 and 2024, is prepared in accordance with Article 22 of the Regulation (EU) 1380/2013.

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 did not identify any segment-specific structural overcapacity in its fleet report submitted in 2023. However, the report indicates that the aim of the action plan is to restore the balance for some fleet segments but it is not clear from the fleet report to which fleets the action plan is to apply, or the causes of the imbalance the action plan is aimed to address.

EWG 23-13 notes that the RoFTA indicator provided in the MS fleet report shows negative values for 6 segments in 2019, 3 segments in 2020 and 2 segments in 2021 indicating that some segments may be becoming more profitable. However, according to the MS conclusion the RoFTA values for all other fleet segments show overcapitalisation, which in the long run also implies that all 18 segments are economically ineffective.

The MS's conclusion is that all 18 segments (even those where RoFTA is indicated 'green') may become unprofitable in future.

Adjustment targets and tools

The EWG notes that the action plan does not identify imbalanced fleet segments as was done in the action plan that accompanied the fleet report submitted in 2022. In addition, no targets and tools are provided. Implementation of the proposed measures according to the Bulgarian action plan appears to be scheduled to commence over the period 2023-2024.

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 36 fleet segments in the Croatian fleet in 2021, of which 31 were active. Of the 31 active segments, landings data were provided for 30 segments while economic data were provided aggregated by 23 fleet segments.

Sustainable Harvest Indicator (SHI)

Out of 31 fleet segments active in 2021, SHI indicator values were available for 30.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 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 EWG notes that for the 13 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 76.62% of the total value of the landings in 2021 provided by MS, and were as follows:

- 10 fleet segments may not be in balance with their fishing opportunities;
- 3 fleet segments may be in balance with their fishing opportunities.

Trends could be calculated for 10 fleet segments:

- 5 segments displayed a **decreasing** trend,

- 5 segments displayed a flat or no trend,
- any of the segments displayed an **increasing** (deteriorating) trend.

Stocks at Risk Indicator (SAR)

SAR indicator was evaluated for the 30 fleet segments that reported landings in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 9 fleet segments may be in balance with their fishing opportunities,
- 21 fleet segments 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	0	12	14	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	21	5	1	3

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

In 2021 RoI was not calculated for any fleet segment.

RoFTA was calculated for 23 segments:

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

Trends could be calculated for 20 segments:

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

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

CR/BER was calculated for 23 segments:

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

Trends could be calculated for 20 segments:

- 13 segments displayed an **increasing** trend,
- 4 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, VUR₂₂₀ is not analysed here.

VUR was calculated for all the 31 active segments:

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

Trends could be calculated for 27 segments:

- 6 segments displayed a **flat** trend,
- 21 segments displayed **no clear** trend.

The Inactive Fleet Indicators

In 2021, 5 vessel length classes had inactive vessels (VL0006, VL0612, VL1218 VL1824 and VL2440).

The Croatian inactive fleet accounted for 19.56% of the total number of vessels, 27.94% of the GT and 28.42% of the kW.

At the national level, inactive vessels accounted for more than 20% of the fleet in GT and kW, and are thus, *out of balance*, but showed a **decreasing** (improving) trend in the smaller vessel segments. Regarding the VL2440 segment a deteriorating trend was observed. In terms of number of vessels, the percentage was under 20% since 2020 so that in terms of numbers, it has reached balance.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission guidelines, the majority of fleet segments appear to out of balance with fishing opportunities. The biological indicators suggest that, excluding FPO and DTS0612, all segments for which a meaningful SHI is available may also be out of balance, but trends for segments DTS1218 and PMP0612 showed an improving situation (decreasing trend in SHI).

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.

					<div><div><div>in balance</div><div>out of balance</div><div>borderline</div><div>insufficiently profitable</div><div>improving</div><div>deteriorating</div><div>Null/flat trend</div><div>no clear trend</div></div></div>																													
					Status 2021 according to thresholds and criteria in the 2014 Guidelines															Trends 2017-2021														
					Biological			Economic					Activity			Inactive				Biological			Economic					Activity			Inactive			
					SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW					
SR	FT	VL	Fleet segment	No of vessels																														
MBS	DFN	VL0006	HRV MBS DFN0006 NGI	345																														
MBS	DFN	VL0612	HRV MBS DFN0612 NGI	679																														
MBS	DFN	VL1218	HRV MBS DFN1218 NGI	18																														
MBS	DRB	VL0612	HRV MBS DRB0612 NGI	9																														
MBS	DRB	VL1218	HRV MBS DRB1218 NGI	16																														
MBS	DTs	VL0006	HRV MBS DTs0612 NGI *	4																														
MBS	DTs	VL0612	HRV MBS DTs0612 NGI *	137																														
MBS	DTs	VL1218	HRV MBS DTs1218 NGI	155																														
MBS	DTs	VL1824	HRV MBS DTs1824 NGI	29																														
MBS	DTs	VL2440	HRV MBS DTs2440 NGI	9																														
MBS	FPO	VL0006	HRV MBS FPO0006 NGI	48																														
MBS	FPO	VL0612	HRV MBS FPO0612 NGI	125																														
MBS	HOK	VL0006	HRV MBS HOK0006 NGI	104																														
MBS	HOK	VL0612	HRV MBS HOK0612 NGI *	239																														
MBS	HOK	VL1218	HRV MBS HOK0612 NGI *	7																														
MBS	MGO	VL0006	HRV MBS MGO0006 NGI	272																														
MBS	MGO	VL0612	HRV MBS MGO0612 NGI *	50																														
MBS	MGO	VL1218	HRV MBS MGO0612 NGI *	2																														
MBS	PGP	VL0006	HRV MBS PGP0006 NGI	2951																														
MBS	PGP	VL0612	HRV MBS PGP0612 NGI *	818																														
MBS	PGP	VL1218	HRV MBS PGP0612 NGI *	1																														
MBS	PGO	VL0006	HRV MBS PMP0006 NGI *	5																														
MBS	PMP	VL0006	HRV MBS PMP0006 NGI *	25																														
MBS	PGO	VL0612	HRV MBS PMP0612 NGI *	1																														
MBS	PMP	VL0612	HRV MBS PMP0612 NGI *	21																														
MBS	PMP	VL1218	HRV MBS PMP0612 NGI *	1																														
MBS	PS	VL0006	HRV MBS PS 0612 NGI *	1																														
MBS	PS	VL0612	HRV MBS PS 0612 NGI *	28																														
MBS	PS	VL1218	HRV MBS PS 1218 NGI	37																														
MBS	PS	VL1824	HRV MBS PS 1824 NGI	40																														
MBS	PS	VL2440	HRV MBS PS 2440 NGI	63																														
MBS	INACTIV	VL0006	HRV MBS INA0006 NGI	624																														
MBS	INACTIV	VL0612	HRV MBS INA0612 NGI	722																														
MBS	INACTIV	VL1218	HRV MBS INA1218 NGI	100																														
MBS	INACTIV	VL1824	HRV MBS INA1824 NGI	34																														
MBS	INACTIV	VL2440	HRV MBS INA2440 NGI	37																														
HRV Total				7757																														

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

Indicator values computed by the EWG 23-13 and those in the fleet report submitted by 31 May 2023 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 reference year 2021.

The comparison between biological indicators reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 is only possible for unclustered segments and shows discrepancies. MS indicated the dredges and trawl segments as balanced while the EWG 23-13 pointed to those segments as out of balance. Moreover, in the MS annual fleet report the fleet segment PMP0612 was considered not applicable, while the EWG 23-13 computed its status as out of balance. The reasons for both dissimilarities could be in the different list of stocks considered to compute the SHI and also the F/F_{MSY} reference values used by the MS (Report of the Subregional Committee for the Adriatic Sea, Split, Croatia, 30 May–2 June 2023).

MS presented an overview of available and meaningful SHI values per fleet segment for the period 2012–2021, but no comparison with EWG 23-13 outputs in term of trends was made as no trend assessment was explicitly presented by the MS. However, in MS annual report a general increasing trend is observed for PS fleet segments until 2020, but with a decrease (improvement) in 2021. Overall, the trend in the fleet report is consistent with the flat trend or no trend reported by the EWG 23-13.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report SAR has been provided for the reference year 2021. MS annual fleet report outlined that the targeted stocks which are considered at risk - small pelagic species (sardine and anchovy) and large pelagic species (Bluefin tuna and swordfish) - are all managed according to catch reduction schemes (ANE, PIL) or quotas (BFT, SWO) and that they do not include them in computing the SAR indicator. As a result the SAR indicators were only computed for fleet segments in the Atlantic that reported catches of, bluefin tuna, red coral and European eel.

MS reported the SAR indicator for 23 aggregated segments, while the EWG 23-13 calculation was based on individual segments and a direct comparison between the two sets of values is not always possible.

MS considered the PS 1218 segment in balance while the EWG 23-13 SAR value indicates it to be out of balance based on anchovy (ane.gsa17-18) and sardine (pil.gsa17-18) catches.

On the other hand, the EWG 23-13 evaluated the DFN 0006 segment as being in balance, while MS pointed to it as out of balance for eel (eel.gsa17).

Also, the MS'S SAR assessment for the MGO segments indicates 1 SAR (out balance), while the EWG 23-13 evaluated no SAR (in balance). In fact, the MS annual fleet report made clear reference to the MGO segments, in which a few vessels (around 3%) target red coral, a species classified as endangered according to the IUCN "red list" and in Croatia assessed as critically endangered. However, MS consider that the balance status of those segments, cannot be considered as out of balance, given the small share of vessels that have been issued specific authorizations for red coral.

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 23-13 revealed similar outputs.

In the MS fleet report, the CR/BER indicator values for 23 clustered fleet segments for the year 2021 are close to those of the EWG 23-13 assessment, indicating that:

- 15 segments are in balance,
- 8 segments are out of balance.

In the MS annual fleet report, the trend for CR/BER was assessed for all segments for the period 2013-2021. While an increasing trend was reported for 16 segments, a decreasing trend was observed for 3 segments. No significant trend is observed for 4 segments. However, the EWG 23-13 analysed the trend only for 20 fleet segments, showing 13 segments having an **increasing** trend and 4 having a **decreasing** trend.

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

In MS fleet report RoFTA indicates for 23 segments the following:

- 12 fleet segments are in balance; while
- 10 fleet segments values are out of balance;
- 1 fleet segment is considered as not sufficiently profitable.

The comparison between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed similar outputs for all values. However, the RoFTA indicates that segments DBR0612, DBR1218 and DTS1218 are in balance while the EWG 23-13 values indicate insufficiently profitable.

An increasing trend for RoFTA in the MS annual fleet report is observed for 22 fleet segments while a decreasing trend was observed only for 1 segment. The EWG 23-13 analysed the trend only for 20 fleet segments showing increasing trends for 14 and decreasing trends for 6.

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 23-13 revealed similar outputs for most values.

Regarding MS fleet report, the 23 aggregated segments showed:

- 2 segments were in balance,
- 15 segments were out of balance.

Regarding the trends (from 2013 to 2022) for the MS fleet report outputs were as follows:

- none displayed an **increasing** trend,
- 2 displayed a **declining** trend,
- 15 displayed no significant trend,
- 6 displayed **flat/null** trend.

MS annual fleet report treated 23 aggregated segments, while EWG calculations are based on 31 segments. The difference is related to the fact that MS annual fleet report did not estimate VUR for fleet segments containing few vessels and, for confidentiality reasons, are clustered (e.g.: DRB VL2440, MGP VL0618, etc.).

The Inactive Fleet Indicators

Inactive vessels have been reported as number, GT and kW in the MS annual fleet report and were the same as those computed by the EWG 23-13.

Assessment of fleet report

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).

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 national assessment of overall balance status per fleet segment provided in MS annual fleet report was made taking into consideration first, the available biological indicators (SHI - Sustainable Harvest Indicator and SAR- Stocks-at-risk Indicator). Fleet segments for which SHI was not available, technical, economic and social indicators were used for the assessment, together with additional information on fleet behaviour.

MS considers that there are some imbalances in its fleet, in particular in cases where the status of the stocks exploited by such segments is taken into account (PS segments).

Regarding the DTS segments, MS states that biological indicators (SHI and SAR) showed an improving situation. However, technical indicators are out of balance and the economic results have been fluctuating along the time.

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

The 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, because of 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 to be in balance.

Based on balance assessment of their fleet segments, the MS included an action plan for those fleet segment assessed to be out of balance.

The EWG 23-13 found some discrepancies between the assessment of balance by the MS and what might be implied by relevant indicator values presented in the fleet report. However, justification for such differences was included in the fleet report were well contextualised and justified.

There is a discrepancy between the SAR computed by the MS and those computed by the EWG 23-13. This divergence resulted from the different stocks considered by MS and EWG 23-13 in computing the SAR for different fleet segments.

Discrepancies in previous fleet reports.

EWG 22-15 pointed out discrepancies between the Member States' assessments and the EWG's assessment with regard to the SAR indicator. The issue remained in the fleet report submitted by 31 May 2023 and it seems to be related to the difference in the stocks taken into account in computing SAR values.

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 has assessed the DTS and PS segments to be out of balance with their fishing opportunities.

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, the DTS 1218 and PS 1218 seem to be profitable in the long-term.

Overview of action plans

MS submitted an updated action plan concerning imbalanced segments with the fleet reports by 31 May 2023. That action plan is a continuation of the Action Plan from 2022, updated and supplemented with additional information considering STECF EWG 22-15 comments.

Regarding the PS segments, the action plan has been updated putting a stronger focus towards balancing the fleet capacity with the availability of resources. It includes a permanent cessation scheme to address the 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 comprises a stronger capacity reduction in a form of 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, and in case the over catch and effort persist, further reductions shall be considered through permanent cessation scheme. In addition, the existing spatio-temporal scheme shall be thoroughly revised and adjusted according to scientific data.

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.

The action plan clearly sets out the adjustment targets and tools and a clear timeframe for its implementation aiming to achieve a balance between capacity and fishing opportunities. There is a quantitative evaluation to estimate the likely reduction in catches arising from the scraping of vessels. The potential outcome of the updated action plan measures in terms of improving the fisheries and the status of target stocks is not assessed.

Number of vessels

In the action plan submitted by the MS it is only possible to access the number of vessels target by the permanent cession that shown in table below.

Fleet Segment	Number of vessels
DRB VL0612	5
DRB VL1218	6
DTS VL0612	15
DTS VL1218	32
DTS VL1824	12
DTS VL2440	4
PS VL0612	5
PS VL1218	7
PS VL1824	15
PS VL2440	15
TOTAL	116

The number of vessels targeted with the temporary cession or with the supplementary measures is not stated.

3.4.4 Cyprus (CYP)

Overview of indicator findings

Area 37

There were 11 fleet segments in the Cypriot fleet in 2021, of which 7 were active. Of the 7 active segments, landings data were provided for 7 segments and economic data were provided for 6 segments. MS all indicators presented for 2021. Indicator values referred to, are those computed by the EWG 23-13 based on data submitted by Member States under the 2023 fleet economic data call and the most recent assessments and advice for relevant scientific bodies on stock status and exploitation rates.

Sustainable Harvest Indicator (SHI)

Out of the 7 fleet segments active in 2021, landings in value have been provided aggregated in 7 fleet segments and SHI indicator values were available for 6.

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 1 fleet segment for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 29.38% of the total value of the landings by the segment in 2021. The value of the SHI indicated that provided by MS, and was as follows:

- 1 fleet segments may not be in balance with their fishing opportunities.

The time series of SHI values for the fleet segment indicated above displayed a **decreasing** (improving) trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for all the 7 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 3 fleet segments may be in balance with their fishing opportunities
- 4 fleet segments may be 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%
N of fleet segments			1	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.

EDI value	0-25%	25-50%	50-75%	75-100%
N of fleet segments	4	2		

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

RoI was not calculated.

RoFTA was calculated for 6 segments:

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

Trends were calculated for the 6 segments:

- 1 segments displayed an **increasing** trend,
- 5 segments displayed a **decreasing** trend.

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

CR/BER was calculated for 6 segments:

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

Trends were calculated for the 6 segments:

- 1 segments displayed an **increasing** trend,
- 4 segments displayed a **decreasing** trend,
- 1 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. VUR₂₂₀ is analysed here.

VUR₂₂₀ was calculated for 7 segments:

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

Trends could be calculated for 7 segments:

- 1 segments displayed an **increasing** trend,
- 1 segments displayed a **decreasing** trend,
- 5 segments displayed **no clear** trend.

The Inactive Fleet Indicators

In 2021, 4 length classes included inactive vessels (VL0006, VL0612, VL1218 and VL2440).

The Cypriot inactive fleet accounted for 7.7% of the total number of vessels, 7.2% of the GT and 7.3% of the kW. At the national level, inactive vessels accounted for less than 20% of the fleet in all 3 categories (#, GT and kW), and thus, appear *in balance*. In terms of number of vessels, trends for 2 are **increasing** (deteriorating), 1 has **no clear** and 1 exhibited a **flat** trend; for GT 1 is **increasing** (deteriorating), 2 showed **no clear** trend and 1 shows a **decreasing** (improving) trend; for kW 1 has an **increasing** (deteriorating) trend, 2 show **no clear** and 1 has a **decreasing** (improving) trend.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission guidelines, half of the fleet segments appear to be out of balance with fishing opportunities. , Based on EWG calculations the PG LV0006, PG VL0612 and DTS VL2440 segments for CR/BER and RoFTA values are indicated to be in balance; for the PG VL0006, PGO VL0006 and PGO VL0612 segments SAR values also indicate in balance. The available trends in CR/BER mostly shows a deteriorating situation, although 1 segment has no trend and 1 segment shows an improving trend. The trends in RoFTA show as improving or deteriorating for different fleet segments.

The SHI indicators shows that PGP VL1218 may not be in balance with its fishing opportunities. The SAR indicator shows that PS VL1824, PGP VL1218, PG VL0612 and DTS VL2440 may not be in balance with their fishing opportunities.

The above observations are not always in line with the 2021 balance indicator values provided for 5 fleet segments in the Member State's Fleet Report 2023. The estimates in the fleet report are based on three most recent years 2019-2021 for biological indicators, two years 2020-2021 for economic indicators six years 2016-2021 for Inactive fleet and Vessel Utilisation indicators. MS identifies that the DTS VL2440 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.

					<div></div> in balance	<div></div> out of balance	<div></div> borderline	<div></div> insufficiently profitable	<div></div> improving	<div></div> deteriorating	<div></div> Null/flat trend	<div></div> no clear trend																		
Status 2021 according to thresholds and criteria in the 2014 Guidelines																		Trends 2017-2021												
					Biological			Economic				Activity			Inactive		Biological			Economic				Activity			Inactive			
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	
MBS	DTS	VL2440	CYP MBS DTS2440 NGI A	4	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	PG	VL0006	CYP MBS PG 0006 NGI A	27	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	PG	VL0612	CYP MBS PG 0612 NGI A	297	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	PGO	VL0006	CYP MBS PGO0006 NGI L	342	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	PGO	VL0612	CYP MBS PGO0612 NGI L	80	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	PGP	VL1218	CYP MBS PGP1218 NGI A	36	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	PS	VL1824	CYP MBS PS 1824 NGI A	1	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	INACTIV	VL0006	CYP MBS INA0006 NGI	31	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	INACTIV	VL0612	CYP MBS INA0612 NGI	32	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	INACTIV	VL1218	CYP MBS INA1218 NGI	2	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
MBS	INACTIV	VL2440	CYP MBS INA2440 NGI	1	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
CYP Total				853	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison Indicator values computed by the EWG 23-13 and those in the fleet report submitted in 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 for the reference year 2021.

The comparison between biological indicators reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed some discrepancies. For PGP VL1218 the MS

annual report indicated "in balance" (SHI=0.94), while the EWG 23-13 indicated this fleet segment as "out of balance" (SHI=1.13).

In addition, in 2 fleet segments (DTS VL2440 and PS VL1824), the MS annual report provided the SHI values, while the EWG 23-13 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 2019-2021 in the fleet report.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report a table with a number of species which are defined as SAR (*Alopias vulpinus*, *Prionace glauca*, *Sciaena umbra*, *Umbrina cirrosa*, *Dentex dentex*, *Anguilla anguilla*, and *Epinephelus marginatus*) are reported for the period 2019-2021. From this table in the fleet report, it is not clear which are the SAR values for the reference year 2021, therefore it is impossible to make a comparison with the values computed by EWG 23-13.

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

In the EWG 23-13 report values for CR/BER are available for six fleet segments whereas after clustering, in the Cyprus fleet report, there are only four.

The comparison between CR/BER reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 could be made for 4 segments only. Two segments PGO VL0006 the PGO VL VL0612 were clustered with others segments in the fleet report.

Both the PGO VL0006 and PGO VL VL0612 segments appear out of balance according to the EWG 23-13 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 no differences in the indicator value.

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 23-13 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 in the framework of EWG 23-13 could be made for 4 segments only. Two segments PGO VL0006 the PGO VL VL0612 were clustered with other segments in the fleet report.

Both the PGO VL0006 and PGO VL0612 segments appear out of balance in the calculation by EWG 23-13 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 no differences in the indicator value.

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 (VUR₂₂₀)

A discrepancy has been observed in the calculation of VUR between the MS annual fleet report and those computed by EWG 23-13.

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.

EWG 23-13 reported the VUR₂₂₀ because the data reported by the MS under the 2023 fleet economic data call did not include information on the maximum observed days at sea per fleet segment. Hence no comparison was possible.

No trends analysis could be undertaken

The Inactive Fleet Indicators

Inactive vessels have been reported as number, GT and kW in the MS annual fleet report, and they revealed similar outputs in term of fleet segment as those computed by EWG 23-13.

Indicator trends between reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed differences for VL1218 and VL 2440 segments. For calculation trends the MS used 2016-2021 period, when EWG 23-13 calculation based on 2017-2021 period. That might cause the differences.

Assessment of fleet report

The fleet report submitted in 2023 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 main exception being, that values for the SAR indicator were missing from the report.

The fleet report provides a revised the action plan relating to one segment (DTS VL2440) only. No action plan is proposed for the PGO VL0006 and PGO VL0612 segments which according to the economic indicators computed by EWG 23-13 may be out of balance. The MS reports that all economic and technical indicators of the PGP VL1218 fleet segment indicate out of balance. However, MS states in report that real economic performance is not negative as indicators shows and concluded that this segment is in balance but they provide no explanation as to why they arrive at this conclusion.

Discrepancies in previous fleet reports

The assessment of balance in the Member States' fleet report submitted in 2023 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 2023, 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 fleet report submitted by 31 May 2023 the DTS VL2440 segment is assessed to be out of balance although the EWG and MS values for both economic indicators indicate that this segment is in balance in 2021.

In the report presents the estimates of the long-term profitability by fleet segments based on RoFTA and CR/BER values.

Overview of action plans.

An renewed action plan has been proposed for the fleet segment DTS VL2440 since the fleet report for 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) is 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. A decision on whether this will also be implemented will be taken following expiry of the 2-year implementation period. Both measures will apply during 2024.

However, with the data and information provided in the fleet report submitted by Cyprus and the action plan, the EWG 23-13 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 2023. An additional measure of introducing the closed area for trawling in the north-west part of Cyprus. If 2 vessels do not volunteer to be decommissioned, the additional measure of a closed area to trawling will come into force in 2024.

Number of vessels

Two vessels targeted by action plan.

3.4.5 Denmark (DNK)

Overview of indicator findings

Area 27

There were 20 fleet segments in the Danish fleet in 2021, of which 17 were active. Landings and economic data were provided for 17 segments.

Sustainable Harvest Indicator (SHI)

Out of 17 fleet segments active in 2021, landings in value have been provided aggregated in 17 fleet segments and SHI indicator values were available for 17. 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 13 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 92.33% of the total value of the landings in 2021 provided by MS, and were as follows:

- 2 segments may *not be in balance* with their fishing opportunities;
- 11 segments may be *in balance* with their fishing opportunities.

Trends were calculated for 13 fleet segments:

- 1 segment displayed an **increasing** (deteriorating) trend,
- 7 segments displayed a **decreasing** (improving) trend,
- 5 segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 17 fleet segments in 2021.

- 6 fleet segments may be *in balance* with their fishing opportunities,
- 11 segments may be *out of balance* with their fishing opportunities:
 - 1 segment with 10 stocks-at-risk,
 - 1 segment with 8 stocks-at-risk,
 - 1 segment with 6 stocks-at-risk,
 - 3 segments with 4 stocks-at-risk,
 - 1 segment with 3 stocks-at-risk,
 - 1 segment with 2 stocks-at-risk,
 - 3 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	7	9		

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	15	1	1	

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

RoI was calculated for 17 segments:

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

Trends were calculated for 17 segments:

- 1 segment displayed an **increasing** trend,
- 16 segments displayed a **decreasing** trend.

RoFTA was calculated for 17 segments:

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

Trends were calculated for 17 segments:

- 3 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 17 segments:

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

Trends were calculated for 17 segments:

- 2 segments displayed an **increasing** trend,
- 14 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 not provided by the MS and thus, VUR₂₂₀ is analysed here.

VUR₂₂₀ was calculated for 17 segments:

- 5 segments may be *in balance* with their fishing opportunities,
- 12 segments may be *out of balance* with their fishing opportunities.

Trends were calculated for the 17 segments:

- 2 segments displayed a **decreasing** trend,
- 15 segments displayed **no clear** trend.

The Inactive Fleet Indicators

In 2021, 3 length classes included inactive vessels (VL0010, VL1012 and VL1218).

The Danish inactive fleet accounted for 25.5% of the total number of vessels, 3.8% of the GT and 7.5% of the kW. At the national level, inactive vessels accounted for less than 20% of the fleet in 2 categories (GT and kW), and thus may be *in balance*. In terms of number, the fleet was indicated to be *out of balance*. For two categories (number and kW), all 3 fleet segment trends were found to be increasing. For GT, 1 fleet segment trend was found to be increasing and 2 showed no trend.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 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 2017-2021 shows a worsening situation. The activity indicator (VUR₂₂₀) is out of balance for the majority of fleet segments, and no clear were observed for most of these segments.

The SHI indicator in 2021 appears in balance for most segments and the trend over the period 2017-2021 is improving.

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.

					<div><div></div>in balance</div>	<div><div></div>out of balance</div>	<div><div></div>borderline</div>	<div><div></div>insufficiently profitable</div>	<div><div></div>improving</div>	<div><div></div>deteriorating</div>	<div><div></div>Null/flat trend</div>	<div><div></div>no clear trend</div>																		
					Status 2021 according to thresholds and criteria in the 2014 Guidelines										Trends 2017-2021															
					Biological			Economic				Activity			Inactive		Biological			Economic				Activity			Inactive			
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₀	#	GT	KW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₀	#	GT	KW	
NAO	DRB	VL1218	DNK NAO DRB1218 NGI	33																										
NAO	DTS	VL0010	DNK NAO DTS0010 NGI	6																										
NAO	DTS	VL1012	DNK NAO DTS1012 NGI	11																										
NAO	DTS	VL1218	DNK NAO DTS1218 NGI	111																										
NAO	DTS	VL1824	DNK NAO DTS1824 NGI	38																										
NAO	DTS	VL2440	DNK NAO DTS2440 NGI	36																										
NAO	DTS	VL40XX	DNK NAO DTS40XX NGI	17																										
NAO	PGP	VL0010	DNK NAO PGP0010 NGI	677																										
NAO	PGP	VL1012	DNK NAO PGP1012 NGI	44																										
NAO	PGP	VL1218	DNK NAO PGP1218 NGI	20																										
NAO	PMP	VL0010	DNK NAO PMP0010 NGI	90																										
NAO	PMP	VL1012	DNK NAO PMP1012 NGI	22																										
NAO	PMP	VL1218	DNK NAO PMP1218 NGI	29																										
NAO	PMP	VL1824	DNK NAO PMP1824 NGI	14																										
NAO	TBB	VL1218	DNK NAO TBB1218 NGI	10																										
NAO	TBB	VL1824	DNK NAO TBB1824 NGI	17																										
NAO	TM	VL40XX	DNK NAO TM 40XX NGI	10																										
NAO	INACTIV	VL0010	DNK NAO INAO010 NGI	387																										
NAO	INACTIV	VL1012	DNK NAO INA1012 NGI	8																										
NAO	INACTIV	VL1218	DNK NAO INA1218 NGI	12																										
DNK Total				1592																										

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison Indicator values computed by the EWG 23-13 and those in the fleet report submitted by 31 May 2023 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 2023. Points of note for each indicator are given below.

Indicator values computed by the EWG 23-15 and those in the fleet report submitted by 31 May 2023 are compared in Annex II. The MS fleet report also gives indicator values for fleet segments DRB1012 and TM1218, but values for these fleet segments could not be computed by the EWG 23-13 because these segments were not found to be active in 2021, whereas the MS fleet report uses fleet, activity and landings data from 2022.

Although the necessary data for trend calculation was provided, the MS annual fleet report did not provide any trends for the economical, ecological and technical indicators.

Sustainable Harvest Indicator (SHI)

Denmark presented SHI values calculated until year 2021. The comparison between SHI reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 showed small discrepancies that affected the perception of balance for two fleet segments. For DTS40XX, EWG 23-13 estimates the fleet segment to be *in balance*, while the MS reports estimates it to be out of balance. For PMP0010, the EWG estimates the segment to be *out of balance*, while the MS report estimates it to be *in balance*. It is noted that the discrepancies between the EWG estimates and the fleet report estimates resulting in different conclusions on balance are small (0.04 and 0.02 respectively). For DTS0010 and PMP1012, the MS report does 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 does provide these values (and finds them to be in balance). Indicator trends were provided in the fleet report and the comparison reveals differences. All indicator values show increasing or no trends in the fleet report, while the EWG observed one deteriorating trend.

Stocks at Risk Indicator (SAR)

Denmark presented SAR values calculated until year 2021. The comparison between SAR reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed different outputs for several fleet segments. For DTS0010, EWG 23-30 found the segment to be *in balance*, while the MS found it to be *out of balance*. For DTS40XX, PMP1012, PMP1824, TBB1218 and TM40XX, the EWG found the segments to be *out of balance*, whereas the MS found it be *in balance*.

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 23-13 revealed different outputs for several fleet segments, resulting in a different outcome (balance or imbalance) for two fleet segments. For DTS1824 and PMP1824, 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 2017-2021, 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 23-13 revealed similar outputs for all but one value: For DTS2440, the MS annual fleet report finds fishing opportunities to be *in balance*, whereas the EWG finds fishing opportunities to be *out of balance*.

Although the data to calculate trends for ROI is provided, the MS annual fleet report does not provide trends for the period 2017-2021, 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)

Although MS fleet report gives VUR values, EWG 23-13 does not, because the maximum days at sea per fleet segment in 2021 were not provided to the EWG in response to the 2023 fleet economic data call. Although comparison between VUR₂₂₀ values was possible, a comparison of VUR values would be more informative.

In the MS annual fleet report, the VUR Indicator was calculated as the ratio between days at sea and both maximum days at sea for each length group and gear type, as well as the theoretical maximum number of days (220). The balance assessment of VUR and VUR₂₂₀ differed only for two segments with large vessels (DTS1824 and DTS40XX). For the (largely imbalanced) small-scale fleets, no difference was found.

The comparison between VUR₂₂₀ reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed similar outputs for all fleet segments.

The MS annual fleet report did not provide trends for the period 2017-2021, so these could not be compared to the findings of the EWG.

The Inactive Fleet Indicators

Inactive vessels have been reported as number, GT and kW for year 2022 in the MS annual fleet report, but the EWG 23-13 dataset provides data for year 2021 so they are not directly comparable hence no comparison was made.

Assessment of fleet report

The fleet report submitted in 2023 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, a new action plan was proposed as some imbalance fleet segments were identified.

The Expert group notes that the fleet report 2023 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

Several discrepancies reported in EWG 22-15 were addressed in this year's MS fleet report. Last year, when SAR values in the fleet report were 0, the status was blank, rather than *in balance*. This has been addressed in the 2023 report. Furthermore, last year's report did not provide a value for VUR₂₂₀, and maximum days at sea per segment were not provided, so VUR/VUR₂₂₀ values could not be compared. This year, both VUR and VUR₂₂₀ values are given in the fleet report, allowing for a comparison between the VUR₂₂₀ values of the MS fleet report and the EWG. Maximum days at sea were not provided to the EWG, so no comparison of VUR values could be made.

In last year's fleet report, the assessment of balance between fleet capacity and fishing opportunities was not done based on fleet segment, but rather based on fisheries and vessel length category, making comparison between EWG and MS fleet report findings impossible. This has been addressed this year.

Other issues identified in EWG 22-15 remain unresolved: The inactive vessels were reported for 2022, meaning they were not comparable to the (2021) values available to the EWG. It is advised that MS provide the data on inactive vessels both for the most recent year (in this case, 2022), and for the previous years (2017-2021). This would also allow for trend calculation in the MS 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 annual fleet report identifies overcapacity in 2021, based on VUR values in 15 out of 19 fleet segments, and based on VUR₂₂₀ values in 13 out of 19 segments. 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/VUR₂₂₀ 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 specifies some plans for improvement of the fleet. This mainly consists of two scrapping schemes, for the Baltic Sea fleet and vessels affected by Brexit. The action plans regarding scrapping were initiated in 2022 and the capacity reduction is expected to be achieved by the end of 2023. The schemes aim to reduce capacity by 30 vessels (4179.5 GT and 10709 kW)

through the Brexit Adjustment Reserve and 33 vessels (639.7 GT and 3986 kW) through the scrapping scheme for the Baltic Sea.

Besides these scrapping schemes, there are no action plans with a clear timeframe or 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 have not been specified further.

Adjustment targets and tools

The scrapping schemes for the Baltic Sea fleet and vessels affected by Brexit provide clear adjustment targets for capacity reduction. Other proposed measures (for small-scale fisheries), do not provide clear adjustment targets and tools, and do not provide a clear timeframe.

Number of vessels

The action plans provided by the MS identifies the number of vessels targeted by some of the action plans, namely the scrapping schemes. These target 30 vessels through the Brexit Adjustment Reserve and 33 vessels through the Baltic Sea scrapping scheme. 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 2021, of which 6 were active. Of the 6 active segments, landings data were provided for 5 segments and economic data were provided aggregated in 3 fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet 6 segments active in 2020, 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 71.73% of the total value of the landings in 2021 provided by MS, and were as follows

- 3 fleet segments may be *out of balance* with their fishing opportunities: with
 - 2 fleet segment showing *no clear trend* and
 - 1 fleet segments showing a *flat trend*.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 4 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 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.
 - 2 fleet segments with 1 stock-at-risk
 - 1 fleet 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				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.

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

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 3 segments:

- 1 segment displayed an *improving* trend,
- 2 segments 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 the 3 segments:

- 1 segment displayed an *improving* trend,
- 1 segment displayed a *deteriorating* 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 not provided by the MS and thus, VUR₂₂₀ is analysed here.

VUR₂₂₀ was calculated for 3 segments:

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

Trends were calculated for the 3 segments:

- 2 segments displayed **no clear trend**
- 1 segment displayed a **deteriorating** trend.

The Inactive Fleet Indicators

In 2021, 3 vessel length groups had inactive vessels (VL0010, VL1012 and VL1824).

The total inactive fleet accounted for 33.0% of the total number of vessels, 5.4% of the total GT and 12.4% of the total kW. At the national level, inactive vessels accounted for more than 20% of the number of vessels but less than 20% for the other 2 categories (GT and kW).

By length group:

- 2 segments were **in balance** in terms of number of vessels, with one segment **out of balance**,
- All 3 segments were **in balance** in terms of GT and kW.

Trends were calculated for two of the segments:

- 1 segment displayed a **deteriorating** trend for number of vessels and GT, but an **improving** trend for kW
- 1 segment displayed **no clear trend** across all three segments

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission guidelines, the majority of fleet segments appear to be out of balance with fishing opportunities when looking at both SHI and SAR.

The technical indicator VUR₂₂₀ 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. Based on the results of the indicator, the MS provided context and justification for lower values for TM fleet segments (decreased Baltic Sea fishing quotas, high dependency on weather conditions and ice coverage etc.), and in addition, for PG vessels the low values are linked to the part time nature of fisheries.

The PG VL1012 segment shows favorable SAR and economic indicators, however SHI and VUR₂₂₀ indicate out of balance. For the PG0010 segment, which contains the majority of vessels, (1,236), all indicators may be out of balance, except for NVA/FTE.

The biological indicators suggest that the TM VL 2440 segment may be out of balance, although the economic data, which represents all three vessel length segments, shows good economic performance.

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.

					<div></div> in balance	<div></div> out of balance	<div></div> borderline	<div></div> insufficiently profitable	<div></div> improving	<div></div> deteriorating	<div></div> Null/flat trend	<div></div> no clear trend																		
					Status 2021 according to thresholds and criteria in the 2014 Guidelines										Trends 2017-2021															
					Biological			Economic					Activity		Inactive			Biological			Economic					Activity		Inactive		
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	
NAO	PG	VL0010	EST NAO PG 0010 NGI	1236	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
NAO	PG	VL1012	EST NAO PG 1012 NGI	40	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
NAO	TM	VL1218	EST NAO TM 2440 NGI *	1	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
NAO	TM	VL1824	EST NAO TM 2440 NGI *	6	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
NAO	TM	VL2440	EST NAO TM 2440 NGI *	21	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
NAO	DTs	VL40XX	EST NAO DTs40XX IWE	6	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
NAO	INACTIV	VL0010	EST NAO INA0010 NGI	617	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
NAO	INACTIV	VL1012	EST NAO INA1012 NGI	26	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
NAO	INACTIV	VL1824	EST NAO INA1824 NGI	1	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
EST Total				1954	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>

*Note: 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.*

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison Indicator values computed by the EWG 23-13 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 2021. Three segments appear to be out of balance, while one segment may be in balance. No trends were presented by the MS.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report no values for SAR or trends are provided hence a comparison with SAR values calculated by EWG 23-13 was not possible.

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 23-13 revealed a similar status, 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: PG1012, PG0010 and TM1840. The EWG fleet segment used is TM2440. The comparison between CR/BER trends presented in the MS annual fleet report and those estimated in the framework of EWG 23-13 are similar.

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

RoFTA information was not provided in the MS report.

The calculations of the fleet segments with respect to being in or out of balance were very similar for RoI between the MS annual report and the EWG calculations.

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 23-13.

In the MS annual fleet report the VUR Indicator was presented for 2022. EWG 23-13 however was only able to calculate VUR₂₂₀ for three segments, VL0010, VL1012 and VL2440, because the data presented by the MS under the DCF guidelines did not provide information on the maximum observed days at sea per fleet segment and the theoretical maximum number of 220 days was used for the calculation.

A comparison between VUR values for 2021 is not appropriate because the basis for the indicator calculations was different. Comparison between VUR trends was also not appropriate.

The Inactive Fleet Indicators

The information on the number of inactive vessels has been provided in the MS annual fleet report for 2022, however it has only been presented for one fleet segment. EWG 23-13 calculated indicators for three fleet segments. Two fleet segments, VL1012 and VL1218, were in balance across all three categories (vessel numbers, GT and kW), while VL0010 was out of balance in vessel numbers.

EWG 23-13 calculated trends for two fleet segments. VL1012 shows no clear trend across all indicators, while VL0010 shows a decreasing trend for both number of vessels and GT but an improving trend for kW.

Estonia considers that computing the proportion of inactive vessels in the coastal fleet length classes VL0010 and VL1012 is not meaningful due to the dependency of these fisheries on the season, directed species and fishing gear used.

EWG 23-13 notes that a comparison for the Inactive Fleet Indicator is not appropriate due to the mismatch in the data.

Assessment of fleet report

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). 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.

The SAR indicator for 2021 was not calculated by the MS, the MS presented the values extracted from the STECF JRC web page for the EWG 22-15 report. In addition, the biological indicators (SHI and SAR) and economic indicators are not provided for the high seas fleet segment VL40XX due to lack of data or issues of confidentiality (low number of vessels in the segment).

The values of SHI, and the economic and technical indicators were calculated by the MS for some fleets and are based on data for the period of 2017-2021. CR/BER data has been presented as a graph rather than a table however (in which segments are not identified), and due to the width of the graph the latest data for 2021 was missing from the plot.

Discrepancies in previous fleet reports

The data provided for SAR are extracted from the STECF JRC webpage, relate to 2020, and are therefore not comparable with the calculations of EWG 23-13.

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 2023 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 13 fleet segments in the Finnish fleet in 2021, of which 8 were active. Of the 8 active segments, landings and economic data were provided aggregated in 5 fleet segments.

Sustainable harvest indicator (SHI)

Out of the 8 fleet segments active in 2021, SHI indicator values were available for 5.

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 69.92% of the total value of the landings in 2021 provided by MS, and were as follows:

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

Trends were calculated for 3 segments:

- 1 fleet segment displayed an *increasing* (deteriorating) trend with two segments showing *no clear trend*.

Stocks at Risk Indicator (SAR)

SAR indicator was available for all 5 active fleet segments in 2021.

- All 5 segments may be *out of balance*, with their fishing opportunities
 - 1 fleet segment with 3 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.

	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	2	2	1	

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

RoI was calculated for 2 segments:

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

Trends could be calculated for 1 segments:

- 1 segment displayed an *increasing* trend

RoFTA was calculated for 5 segments:

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

Trends were calculated for 5 segments:

- All 5 segments displayed an **increasing** trend.

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

CR/BER was calculated for 5 segments:

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

Trends for the 5 segments were as follows:

- All 5 segments displayed an **increasing** 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 8 segments:

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

Trends were calculated for 8 segments:

- All 8 segments displayed **no clear** trend.

The Inactive Fleet Indicators

In 2021, 6 vessel length classes had inactive vessels (VL0010, VL1012, VL1218, VL1824 VL2440 and VL40XX).

The total inactive fleet accounted for 62.3% of the total number of vessels, 35.9% of the total GT and 53.5% of the total kW. At the national level, inactive vessels accounted for more than 20% of the fleet in all 3 categories (#, GT and kW), and thus, **out of balance**, and displayed **increasing** (deteriorating) trends.

By vessel length group:

- 5 segments were **in balance** in all 3 categories
- 1 segment (VL0010) was **out of balance**.

Trends were calculated for 5 segments:

- One segment displayed a deteriorating trend in all 3 categories
- One segment displayed an **improving** trend in all 3 categories
- Three segments displayed a deteriorating trend in 2 categories, but no clear trend in the third category.

Synthesis of indicators and trends

Based on the biological STECF indicator estimations, two Finnish segments (NAO TM1218, NAO TM1824) may be out of balance with their fishing opportunities, as the SHI-values are higher than 1 (with an increasing trend), indicating that they rely financially ($F/F_{MSY} > 1$) on stocks that are fished at rates greater than F_{MSY} . NAO TM2440 has an SHI value of less than 1 indicating that it may be in balance and shows no clear trend.

When considering the economic indicators for 2021, the situation may be interpreted differently. The economic indicators CR/BER, RoI, and RoFTA are all assessed as being in balance for two segments (NAO TM1218 and NAO TM1824), in contrast to 2019 when four segments were in balance. For the year 2021 two segments (PG1012 and TM2440) are out of balance for both CR/BER

and RoFTA, while the segment PG0010 is in balance for CR/BER but out of balance for RoFTA. All fleet segments show an improving trend for all economic indicators.

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.

					<div></div> in balance	<div></div> out of balance	<div></div> borderline	<div></div> insufficiently profitable	<div></div> improving	<div></div> deteriorating	<div></div> Null/flat trend	<div></div> no clear trend																	
					Status 2021 according to thresholds and criteria in the 2014 Guidelines										Trends 2017-2021														
					Biological		Economic					Activity			Inactive		Biological		Economic					Activity			Inactive		
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW
NAO	PG	VL0010	FIN NAO PG 0010 NGI	1138																									
NAO	PG	VL1012	FIN NAO PG 1012 NGI *	45																									
NAO	PG	VL1218	FIN NAO PG 1012 NGI *	3																									
NAO	TM	VL1012	FIN NAO TM 1218 NGI *	6																									
NAO	TM	VL1218	FIN NAO TM 1218 NGI *	13																									
NAO	TM	VL1824	FIN NAO TM 1824 NGI	6																									
NAO	TM	VL2440	FIN NAO TM 2440 NGI *	13																									
NAO	TM	VL40XX	FIN NAO TM 2440 NGI *	3																									
NAO	INACTIV	VL0010	FIN NAO INA0010 NGI	1919																									
NAO	INACTIV	VL1012	FIN NAO INA1012 NGI	86																									
NAO	INACTIV	VL1218	FIN NAO INA1218 NGI	14																									
NAO	INACTIV	VL1824	FIN NAO INA1824 NGI	2																									
NAO	INACTIV	VL2440	FIN NAO INA2440 NGI	3																									
NAO	INACTIV	VL40XX	FIN NAO INA40XX NGI	1																									
FIN Total				2252																									

*Note: 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.*

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

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 2022 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 poor state, while the third is in a good state. According to EWG 23-13 estimations of SHI, two fleet segments cannot be assessed, one fleet segment is assessed as being in balance and two fleet segments are assessed as being out of 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 2021 fleet report, that the biological indicator (SHI), calculated by EWG 21-16, using 2019 data, "was not sufficiently accurate to reflect the situation or current status of the fleet segments concerned". The MS points to the fact that EWG 21-16 also noted that the situation could be assessed differently, given that the financial indicators all showed that the segments were in balance. The MS states that the national TFC, transferrable fishing concessions, system creates the conditions for improving the profitability of the fishing fleet and reducing vessel capacity by market forces alone.

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

Stocks at Risk Indicator (SAR)

In the Finnish annual fleet report no SAR values have been provided for the reference year 2021 or any other previous years. The EWG 23-13 SAR value for the FS PG0010 segment indicates two stocks at risk (Salmon - sal.27.32, sal.27.22-31) and according to the criteria in the Commission guidelines, may be out of balance with its fishing opportunities.

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 2021 or any other previous years.

Consequently, no trend was presented for this indicator.

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 2021 or any other previous years.

Consequently, no trends were presented for these indicators.

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

In the Finnish annual fleet report no VUR or VUR₂₂₀-values have been provided for the reference year 2021 or any other previous years.

Consequently, no trends were presented for these indicators.

The Inactive Fleet Indicators

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 of all fleet segments and 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. SHI data has been provided for a number of pelagic stocks; however, it is not possible to compare these with the calculations of the EWG. Nevertheless, the MS did supply some biological, economic or technical analysis on the state of the most important fleet segments.

The current Finnish management system is considered by the MS to be well functioning in order to secure a balance between fishing opportunities and capacity and no action plan was proposed.

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 23-13 could be made. Furthermore, the information presented in the Finnish fleet report for 2022 is insufficient to judge the suitability of the Member State's assessment of balance.

Discrepancies in previous fleet reports

EWG 23-13 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

The MS has not identified any structural overcapacity in the fleet, nor has it estimated the long-term profitability by fleet segment. 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 Member State says that the use of a Fishing Quota System means that capacity reduction measures are not necessary, except in exceptional circumstances.

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 141 fleet segments in the French national fleet in 2021, of which 117 were active fleet segments. Indicator results are presented below by Supra-region.

Area 27

In the French North Atlantic fleet, there were 58 fleet segments in 2021, of which 54 were active. Of the 54 active segments, landings data were provided for 53 segments and economic data for 32 aggregated fleet segments.

Sustainable harvest indicator (SHI)

Out of 54 fleet segments active in 2021, SHI indicator values were available for 51.

SHI indicator values for 37 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 14 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 60.5% of the total value of the landings in 2021 provided by MS, and were as follows:

- 14 segments may be *in balance* with their fishing opportunities;
- 0 segments may be *out of balance* with their fishing opportunities.

Trends could be calculated for 13 fleet segments:

- 6 segments displayed a **decreasing** (improving) trend,
- 7 segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 54 active fleet segments in 2021 of which

- 36 fleet segments may be *in balance* with their fishing opportunities;
- 18 fleet segments may be *out of balance* with their fishing opportunities.
 - 1 segment with 9 stocks-at-risk,
 - 1 segment with 6 stocks-at-risk,
 - 2 segments with 5 stocks-at-risk,
 - 1 segment with 4 stocks-at-risk,
 - 2 segments with 3 stock-at-risk,
 - 3 segments with 2 stocks-at-risk,
 - 8 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	10	37	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. 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	46	4	1	

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

RoI was not calculated.

RoFTA was calculated for 32 segments:

- 23 segments were *in balance* with their fishing opportunities,
- 9 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 32 segments:

- 13 segments displayed an **increasing** trend,
- 19 segments displayed a **decreasing** trend.

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

CR/BER 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:

- 7 segments displayed an **increasing** trend,
- 12 segments displayed a **decreasing** trend,
- 13 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, VUR₂₂₀ is not analysed here.

VUR was calculated for 53 segments:

- 22 segments were *in balance* with their fishing opportunities,
- 31 segments were *out of balance* with their fishing opportunities.

Trends could be calculated for 51 segments:

- 1 segment displayed an **increasing** trend,
- 3 segments displayed a **decreasing** trend,
- 44 segments displayed **no clear** trend,
- 3 segments displayed a **null/flat** trend.

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

The Inactive Fleet Indicators

In 2021, 6 vessel length classes had inactive vessels (VL0010, VL1012, VL1218, VL1824, VL2440 and VL40XX).

The French Area 27 inactive fleet accounted for 3.31% of the total number of vessels, 1.07% of the total GT and 2.1% of the total kW. At the North Atlantic fleet level, inactive vessels accounted for less than 20% of the fleet in all 3 categories (#, GT and kW), and thus, were *in balance*.

All 6 segments were **in balance** (<20%) and displayed **decreasing** trend for vessel numbers (#) and kW. In contrast, an **increasing** (deteriorating) trend for GT was apparent.

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.

					Status 2021 according to thresholds and criteria in the 2014 Guidelines												Trends 2017-2021																	
					Economic						Activity						Economic						Activity						Inactive					
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₀	#	GT	KW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₀	#	GT	KW					
NAO	DFN	VL0010	FRA NAO DFN0010 NGI A	308																														
NAO	DFN	VL1012	FRA NAO DFN1012 NGI A	133																														
NAO	DFN	VL1218	FRA NAO DFN1218 NGI A *	54																														
NAO	PGO	VL1218	FRA NAO DFN1218 NGI A *	1																														
NAO	PGP	VL1218	FRA NAO DFN1218 NGI A *	4																														
NAO	DFN	VL1824	FRA NAO DFN1824 NGI A	31																														
NAO	DFN	VL2440	FRA NAO DFN2440 NGI A *	27																														
NAO	DRB	VL0010	FRA NAO DRB0010 NGI A	63																														
NAO	DRB	VL1012	FRA NAO DRB1012 NGI A	89																														
NAO	DRB	VL1218	FRA NAO DRB1218 NGI A *	93																														
NAO	DRB	VL1824	FRA NAO DRB1218 NGI A *	7																														
NAO	DRB	VL2440	FRA NAO DRB1218 NGI A *	1																														
NAO	DTS	VL0010	FRA NAO DTS0010 NGI A *	71																														
NAO	DTS	VL1012	FRA NAO DTS1012 NGI A *	143																														
NAO	PS	VL0010	FRA NAO DTS1012 NGI A *	1																														
NAO	PS	VL1012	FRA NAO DTS1012 NGI A *	3																														
NAO	DTS	VL1218	FRA NAO DTS1218 NGI A	137																														
NAO	DTS	VL1824	FRA NAO DTS1824 NGI A *	113																														
NAO	MGP	VL1824	FRA NAO DTS1824 NGI A *	19																														
NAO	DTS	VL2440	FRA NAO DTS2440 NGI A *	55																														
NAO	MGP	VL2440	FRA NAO DTS2440 NGI A *	6																														
NAO	DTS	VL40XX	FRA NAO DTS40XX NGI A	9																														
NAO	FPO	VL0010	FRA NAO FPO0010 NGI A	263																														
NAO	FPO	VL1012	FRA NAO FPO1012 NGI A	74																														
NAO	FPO	VL1218	FRA NAO FPO1824 NGI A *	7																														
NAO	FPO	VL1824	FRA NAO FPO1824 NGI A *	9																														
NAO	FPO	VL2440	FRA NAO FPO1824 NGI A *	1																														
NAO	HOK	VL0010	FRA NAO HOK0010 NGI A	221																														
NAO	HOK	VL1012	FRA NAO HOK1012 NGI A	42																														
NAO	HOK	VL1218	FRA NAO HOK2440 NGI A *	1																														
NAO	HOK	VL1824	FRA NAO HOK2440 NGI A *	2																														
NAO	HOK	VL2440	FRA NAO HOK2440 NGI A *	19																														
NAO	MGO	VL0010	FRA NAO MGO0010 NGI A *	179																														
NAO	MGO	VL1012	FRA NAO MGO0010 NGI A *	11																														
NAO	MGP	VL0010	FRA NAO MGP0010 NGI A *	14																														
NAO	MGP	VL1012	FRA NAO MGP1012 NGI A *	59																														
NAO	TBB	VL0010	FRA NAO MGP1012 NGI A *	1																														
NAO	TBB	VL1012	FRA NAO MGP1012 NGI A *	3																														
NAO	TM	VL1012	FRA NAO MGP1012 NGI A *	6																														
NAO	MGP	VL1218	FRA NAO MGP1218 NGI A *	42																														
NAO	TBB	VL1218	FRA NAO MGP1218 NGI A *	3																														
NAO	PGO	VL0010	FRA NAO PGO0010 NGI A *	102																														
NAO	PGO	VL1012	FRA NAO PGO0010 NGI A *	6																														
NAO	PGP	VL0010	FRA NAO PGP0010 NGI A	69																														
NAO	PGP	VL1012	FRA NAO PGP1012 NGI A	25																														
NAO	PMP	VL0010	FRA NAO PMP0010 NGI A	44																														
NAO	PMP	VL1012	FRA NAO PMP1012 NGI A *	53																														
NAO	PMP	VL1218	FRA NAO PMP1012 NGI A *	6																														
NAO	PS	VL1218	FRA NAO PS 1218 NGI A *	28																														
NAO	PS	VL1824	FRA NAO PS 1218 NGI A *	2																														
NAO	TM	VL1218	FRA NAO TM 1824 NGI A *	5																														
NAO	TM	VL1824	FRA NAO TM 1824 NGI A *	8																														
NAO	TM	VL2440	FRA NAO TM 1824 NGI A *	1																														
NAO	TM	VL40XX	FRA NAO TM 40XX NGI A	3																														
NAO	INACTIV	VL0010	FRA NAO INAO010 NGI A	151																														
NAO	INACTIV	VL1012	FRA NAO INAI012 NGI A	37																														
NAO	INACTIV	VL1218	FRA NAO INAI218 NGI A	10																														
NAO	INACTIV	VL1824	FRA NAO INAI1824 NGI A	6																														

*Note: 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.*

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Area 37

There were 33 fleet segments in the French Mediterranean fleet in 2021, of which 28 were active. Of the 28 active segments, landings data were available for 28 segments and economic data aggregated by 16 fleet segments.

Sustainable harvest indicator (SHI)

Out of 28 fleet segments active in 2021, SHI indicator values were available for 23.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for all 21 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 2 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 0.5% of the total value of the landings in 2021 provided by MS, and were as follows:

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

Trends could be calculated for 2 fleet segments:

- 1 segment displayed a **null/flat** trend,
- 1 segment displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 28 fleet segments in 2021 of which

- 14 fleet segments may be *in balance* with their fishing opportunities;
- 14 fleet segments may be *out of balance* with their fishing opportunities.
 - 1 segment with 2 stocks-at-risk,
 - 13 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	9	6	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.

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 16 segments:

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

Trends were calculated for the 16 segments:

- 3 segments displayed an *increasing* trend,
- 13 segments displayed a *decreasing* trend.

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

CR/BER was calculated for 16 segments:

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

Trends for the 16 segments were as follows:

- 4 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)

VUR could be calculated for 36 segments:

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

Trends could be calculated for 9 segments:

- 3 segments displayed an *increasing* trend,
- 4 segments displayed *no clear* trend,
- 2 segments displayed a *null/flat* trend.

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

The Inactive Fleet Indicators (MBS)

In 2021, 6 vessel length classes in the MBS fleet had inactive vessels.

The total inactive fleet accounted for 3.3% of the total number of vessels, 0.5% of the total GT and 1.48% of the total kW. At the Mediterranean fleet level, inactive vessels accounted for less than 20% of the fleet in all 3 categories (#, GT and kW), and thus, were *in balance*.

By length group, all 6 segments were *in balance* (<20%) and displayed *no clear* trend for vessel numbers (#) and vessels kW, apart from the VL1218 segment, which displayed a *null/flat* trend for vessels GT.

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.

					<div><div>in balance</div><div>out of balance</div><div>bordeline</div><div>insufficiently profitable</div><div>improving</div><div>deteriorating</div><div>Null/flat trend</div><div>no clear trend</div></div>																								
					Status 2021 according to thresholds and criteria in the 2014 Guidelines														Trends 2017-2021										
					Biological		Economic					Activity			Inactive		Biological		Economic					Activity			Inactive		
					SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW
SR	FT	VL	Fleet segment	No of vessels																									
MBS	DFN	VL0006	FRA MBS DFN0006 NGI A	122																									
MBS	DFN	VL0612	FRA MBS DFN0612 NGI A	486																									
MBS	DFN	VL1218	FRA MBS DFN1218 NGI A *	2																									
MBS	FPO	VL1218	FRA MBS DFN1218 NGI A *	2																									
MBS	HOK	VL1218	FRA MBS DFN1218 NGI A *	10																									
MBS	PGP	VL1218	FRA MBS DFN1218 NGI A *	2																									
MBS	DTs	VL1218	FRA MBS DTS1824 NGI A *	3																									
MBS	DTs	VL1824	FRA MBS DTS1824 NGI A *	27																									
MBS	DTs	VL2440	FRA MBS DTS2440 NGI A *	30																									
MBS	TM	VL2440	FRA MBS DTS2440 NGI A *	1																									
MBS	FPO	VL0006	FRA MBS FPO0006 NGI A	74																									
MBS	FPO	VL0612	FRA MBS FPO0612 NGI A	68																									
MBS	HOK	VL0006	FRA MBS HOK0006 NGI A	15																									
MBS	HOK	VL0612	FRA MBS HOK0612 NGI A	94																									
MBS	PGO	VL0006	FRA MBS PGO0006 NGI A	18																									
MBS	PGO	VL0612	FRA MBS PGO0612 NGI A	35																									
MBS	PGP	VL0006	FRA MBS PGP0006 NGI A	23																									
MBS	PGP	VL0612	FRA MBS PGP0612 NGI A	68																									
MBS	PMP	VL0612	FRA MBS PMP0612 NGI A *	7																									
MBS	DRB	VL0006	FRA MBS PS 0612 NGI A *	1																									
MBS	DRB	VL0612	FRA MBS PS 0612 NGI A *	10																									
MBS	MG0	VL0612	FRA MBS PS 0612 NGI A *	7																									
MBS	PMP	VL1218	FRA MBS PS 0612 NGI A *	1																									
MBS	PS	VL0612	FRA MBS PS 0612 NGI A *	6																									
MBS	PS	VL1218	FRA MBS PS 0612 NGI A *	1																									
MBS	PS	VL1824	FRA MBS PS 0612 NGI A *	2																									
MBS	PS	VL2440	FRA MBS PS 2440 NGI A *	15																									
MBS	PS	VL40XX	FRA MBS PS 2440 NGI A *	7																									
MBS	INACTIV	VL0006	FRA MBS INAD0006 NGI A	61																									
MBS	INACTIV	VL0612	FRA MBS INAD0612 NGI A	136																									
MBS	INACTIV	VL1218	FRA MBS INA1218 NGI A	3																									
MBS	INACTIV	VL1824	FRA MBS INA1824 NGI A	4																									
MBS	INACTIV	VL2440	FRA MBS INA2440 NGI A	1																									

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

OFR

There were 50 fleet segments in the French OFR fleet in 2021, of which 35 were active. Of the 35 active segments, landings data were available for 32 segments and economic data for 16 fleet segments.

Sustainable harvest indicator (SHI)

Out of 35 fleet segments active in 2020, SHI indicator values were available for 26.

According to the criteria in the 2014 Commission 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 8 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 79.6% of the total value of the landings in 2021 provided by MS, and were as follows:

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

Trends could be calculated for 5 fleet segments:

- 5 segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 32 fleet segments in 2021. The 2021 SAR indicator values indicate:

- 20 fleet segments may be in balance with their fishing opportunities;

- 12 fleet segments may be out of balance with their fishing opportunities;

- 1 segment with 2 stocks-at-risk,
- 11 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		

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	21	5		

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

RoFTA was calculated for 16 segments:

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

Trends could be calculated for 16 segments:

- 9 segments displayed an *increasing* trend,
- 7 segments displayed a *decreasing* trend.

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

CR/BER was calculated for 16 segments:

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

Trends could be calculated for 16 segments:

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

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

Note: VUR_{220} is calculated on a standard year of 220 fishing days and is available in every case. VUR is calculated using the maximum days at sea provided by the Member State (where available).

VUR was calculated for 33 segments:

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

Trends could be calculated for 26 segments:

- 15 segments displayed an *increasing* trend,
- 2 segments displayed a *decreasing* trend,
- 9 segments displayed *no clear* trend.

The Inactive Fleet Indicators

In 2021, 5 vessel length classes by outermost region fleets, totalling 16 segments, had inactive vessels.

The total inactive fleet accounted for 7.88% of the total number of vessels, 2.7% of the total GT and 5.86% of the total kW. At the OMR fleet level, inactive vessels accounted for less than 20% of the fleet in all 3 categories (#, GT and kW).

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.

					Status 2021 according to thresholds and criteria in the 2014 Guidelines														Trends 2017-2021													
					<div><div>in balance</div><div>out of balance</div><div>bordeline</div><div>insufficiently profitable</div><div>improving</div><div>deteriorating</div><div>Null/flat trend</div><div>no clear trend</div></div>																											
SR	FT	VL	Fleet segment	No of vessels	Biological														Biological													
					Economic					Activity				Inactive					Economic					Activity				Inactive				
					SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	KW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	KW			
OFR	DFN	VL0010	FRA OFR DFN0010 GF A *	32																												
OFR	DFN	VL0010	FRA OFR DFN0010 GP A *	71																												
OFR	DFN	VL0010	FRA OFR DFN0010 MQ A *	56																												
OFR	DFN	VL1012	FRA OFR DFN1012 GF A *	57																												
OFR	DTS	VL1824	FRA OFR DTS1824 GF A *	7																												
OFR	FPO	VL0010	FRA OFR FPO0010 GP A *	105																												
OFR	FPO	VL0010	FRA OFR FPO0010 MQ A *	165																												
OFR	HOK	VL0010	FRA OFR HOK0010 GP A *	124																												
OFR	HOK	VL0010	FRA OFR HOK0010 MQ A *	133																												
OFR	DFN	VL0010	FRA OFR HOK0010 RE A *	1																												
OFR	HOK	VL0010	FRA OFR HOK0010 RE A *	129																												
OFR	HOK	VL1012	FRA OFR HOK0010 RE A *	3																												
OFR	PGO	VL0010	FRA OFR HOK0010 RE A *	2																												
OFR	PGP	VL0010	FRA OFR HOK0010 RE A *	4																												
OFR	DFN	VL0010	FRA OFR HOK0010 YT A *	8																												
OFR	HOK	VL0010	FRA OFR HOK0010 YT A *	83																												
OFR	HOK	VL1218	FRA OFR HOK1218 RE A *	15																												
OFR	HOK	VL1824	FRA OFR HOK1218 RE A *	4																												
OFR	PGO	VL0010	FRA OFR PGP0010 GP A *	9																												
OFR	PGP	VL0010	FRA OFR PGP0010 GP A *	167																												
OFR	DFN	VL1012	FRA OFR PGP0010 MQ A *	1																												
OFR	FPO	VL1218	FRA OFR PGP0010 MQ A *	1																												
OFR	FPO	VL1824	FRA OFR PGP0010 MQ A *	1																												
OFR	HOK	VL1012	FRA OFR PGP0010 MQ A *	11																												
OFR	HOK	VL1218	FRA OFR PGP0010 MQ A *	1																												
OFR	PGO	VL0010	FRA OFR PGP0010 MQ A *	19																												
OFR	PGP	VL0010	FRA OFR PGP0010 MQ A *	181																												
OFR	PS	VL0010	FRA OFR PGP0010 MQ A *	2																												
OFR	DFN	VL1012	FRA OFR PGP1012 GP A *	2																												
OFR	FPO	VL1012	FRA OFR PGP1012 GP A *	3																												
OFR	HOK	VL1012	FRA OFR PGP1012 GP A *	8																												
OFR	PGP	VL1012	FRA OFR PGP1012 GP A *	3																												
OFR	PS	VL0010	FRA OFR PS 0010 GP A *	23																												
OFR	HOK	VL2440	FRA OFR PS 40XX IWE A *	1																												
OFR	PS	VL40XX	FRA OFR PS 40XX IWE A *	20																												
OFR	INACTIV	VL0010	FRA OFR INA0010 GF A *	28																												
OFR	INACTIV	VL0010	FRA OFR INA0010 GP A *	86																												
OFR	INACTIV	VL0010	FRA OFR INA0010 MQ A *	226																												
OFR	INACTIV	VL0010	FRA OFR INA0010 RE A *	49																												
OFR	INACTIV	VL0010	FRA OFR INA0010 YT A *	49																												
OFR	INACTIV	VL1012	FRA OFR INA1012 GF A *	18																												
OFR	INACTIV	VL1012	FRA OFR INA1012 GP A *	10																												
OFR	INACTIV	VL1012	FRA OFR INA1012 MQ A *	3																												
OFR	INACTIV	VL1012	FRA OFR INA1012 RE A *	3																												
OFR	INACTIV	VL1012	FRA OFR INA1012 YT A *	1																												
OFR	INACTIV	VL1218	FRA OFR INA1218 RE A *	1																												
OFR	INACTIV	VL1824	FRA OFR INA1824 GF A *	7																												
OFR	INACTIV	VL1824	FRA OFR INA1824 MQ A *	1																												
OFR	INACTIV	VL1824	FRA OFR INA1824 RE A *	1																												
OFR	INACTIV	VL40XX	FRA OFR INA40XX YT A *	1																												
FRA Total				6159																												

*Note: 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.*

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Status and trends for the French fleet in ALL REGIONS

Based on the indicator values for 2021 and trends over 2018-2021 and according to the criteria in the Commission guidelines, for the majority of fleet segments, the technical indicators show imbalance for Area 27. The biological indicators could not be estimated for all observed segments, however for those fleets where sufficient information was available, approximately 60% of the active segments were in balance. While the economic indicators characterise a profitable fishery, a decreasing trend in indicator values was observed.

The observations on status and trends cannot be compared for all fleet segments with the indicator values in the Member States' fleet report submitted in 2023 where the fleet segmentation for the Atlantic fleets differs from that used by the Expert group, and alternative indicators including EDI, NOS and VUR90 are used to assess some fleet segments.

According to the estimated value by EWG 23-13, the economic indicators CR/BER and RoFTA show that most of the French fleet segments appear to be mostly in balance with their fishing opportunities in all regions, with often decreasing trends. The estimates provided by fishing areas for economic indicators RoFTA and CR/BER show a profitable fishery for 22 out of 32 segments in the Northeast Atlantic (Area 27) and 11 out of 16 segments in Mediterranean Sea (Area 37). For the Other fishing regions (OFR) only 3 segments from 16 show insufficient profitability. A similar pattern is observed for the technical indicator (VUR) in Area 37, where 28 from 36 segments were in balance and OFR where 30 from 33 were in balance. In turn in Area 27, only 22 segments out of a total of 53 were in balance. Where applicable, the biological indicator SHI suggests that all fleet segments in the Northeast Atlantic and Mediterranean Sea are in balance. Only for 2 segments in the outermost regions, the SHI indicator identifies an imbalance. For the majority of fleet segments there is no trend or a decreasing trend. However, for Area 37, the two segments that could be meaningfully assessed covered less than 1% of the landings value. According to the SAR indicator values, the majority of segments in Area 27 and OFR may be in balance (36 out 54 segments, and 20 out of 32 segments, respectively). In Area 37, 14 out of 28 fleet segments may be out of balance according to the SAR indicator. However, it should be noted that the fleet segments in Area 27 have relatively more segments with more than one stock-at-risk (55.6%), compared to OFR and Area 37 (8.3% and 7.1%, respectively).

Comparison of indicator values

The biological and technical balance indicators provided in the MS' fleet report and used by in their assessment of balance cannot be compared with the balance indicators calculated by the EWG for all fleet segments because of the following reasons:

- (i) for the fleet segments in the North Atlantic, France uses an alternative fleet segmentation (spatial disaggregation of fleet segments according to subdivision) to the DCF segmentation used by the EWG;
- (ii) the fleet report submitted by France includes the indicator VUR₉₀, which is a permissible alternative the vessel utilisation ratio (VUR) but which is not computed by the EWG. The suitability and utility of VUR₉₀ is discussed elsewhere (see sub-section „The VUR indicator“ below).
- (iii) the indicators SHI, SAR and VUR₂₂₀ are considered unreliable by the MS.

However, in the fleet report submitted in 2023, for the first time, the MS provided a additional, separate set of balance indicators (see French fleet report for 2022 ANNEX 1) for which fleet segmentation in all regions, corresponds with the DCF segmentation used by the EWG. The EWG notes that the additional set of indicators values were provided by the Member State to facilitate a direct comparison. However, due to errors in communication, the EWG was not made aware that ANNEX 1 of the fleet report was available in digital format until the penultimate afternoon of the EWG 23-13 meeting. Consequently, a full comparison of indicator values was not carried out.

However, it was possible to undertake a comparison between the SHI values by DCF segment computed by the EWG and equivalent SHI values given in the French fleet report ANNEX 1.

A second comparison was also carried out for economic indicators, but this was restricted to a comparison for three segments.

The outcome of each of the above comparisons is described below.

The EWG is unclear as to the value of undertaking such a comparison, other than to see if the indicator values in the fleet report and those computed by the EWG are the same or different. This is especially the case for the North Atlantic area, where the MS's assessment of whether fleet segments are in balance with their fishing opportunities in their fleet report, uses a different segmentation to that used by the EWG.

SHI indicator comparisons

The data in ANNEX 1 of the French fleet report, were used to compare the SHI indicator values with those calculated by the EWG. The SHI indicator values are compared in ANNEX II to this report (ANNEX II indicator comparison tables ALL MS.xlsx) and can be summarised as follows:

The EWG notes that there are generally only minor differences in the two sets of SHI values. There are some differences that are most likely due to factors concerned with the use of different input data; (i) the reference year of the assessment, (ii) the consideration of additional species in the SHI indicator by the MS where assessments were undertaken prior to 2017 and (iii) differences in landing volumes of fleet segment related to differences in assumed spatial coverage of fleet segments.

The EWG notes however that the SHI values reported by the MS (ANNEX 1 of the fleet report) for fleet segments operating in the North Atlantic, are consistently lower than those calculated by the EWG. It is likely that this is related to the fact that for stocks where F_{MSY} is expressed as a range, the Member State uses, the $F_{MSYupper}$ estimate to compute the SHI, which is in accordance with the guidelines. The EWG estimates are all based on the point estimates of F_{MSY} .

In addition, the landing coverage of stocks assessed with F_{MSY} reference points is very similar, with mostly insignificant differences between the values calculated by the EWG and those reported by the MS, confirming that the landing data used by the MS is similar to the landing data used by the EWG.

Following the DCF segmentation and only considering the SHI indicator, the MS reports three fleet segments as imbalanced while the EWG identified two imbalanced fleet segments of which one segment was considered imbalanced by both the MS and EWG.

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. For this purpose, three segments operating in the North Atlantic area over 2019-2021, were randomly-selected:

- unclustered segment FRA NAO DFN1824 NGI A
- clustered segment FRA NAO DTS1012 NGI A *
- clustered segment FRA NAO HOK2440 NGI A *.

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 23-13 are very similar. The limited comparison undertaken, may imply that the two datasets are similar in their entirety, although a thorough comparison would need to be undertaken to confirm whether that is the case.

The vessel utilization indicator

The French fleet report provides values for an alternative to VUR and VUR_{220} prescribed in the Commission guidelines. The indicator provided is VUR_{90} which the 90th percentile of the sea days deployed by all the vessels in a segment. Because the EWG did not have access to the data for the

number of sea days per vessel, the EWG was unable to compute values for VUR₉₀ so no comparison with the VUR₉₀ values given in the French fleet report could be made.

Concerning the use of VUR₉₀ which is an internally derived metric specific to each segment, the EWG notes that defining a theoretical maximum number of days-at-sea based on such a metric can give rise to misleading results, especially the resulting trends in indicator values over time. There are a number of plausible reasons for this, some of which are given below:

- If the number of deployed/observed days-at-sea of all/most vessels within a segment is low, and below the true theoretical maximum number of days-at-sea, the VUR₉₀ indicator value (the ratio: average days at sea for the vessels in the segment/90th percentile of the observed days at sea) would tend towards and most likely be close to 1.0, implying that the segment is “in balance”. In other words, any imbalance in that segment would not be detected.
- An internal scoring system to determine the maximum number of days-at-sea, such as the 90% percentile as used by the MS, is likely subjected to variability over time. The EWG notes that is unclear whether this variability is a true feature of the theoretical maximum number of days-at-sea, or a data artefact. In the latter case which is likely the case in most situations, the development of the VUR indicator is both driven by changes in the average days-at-sea and the theoretical maximum which complicates the interpretation of trends in the VUR indicator.
- A VUR indicator based on an internal scoring system may fail to detect trends over time. I.e., if a negative trend in terms of days-at-sea would be present in a fleet segment that could indicate an imbalance, the 90% percentile would also decrease (eventually at the same rate if all vessels experience the same decline). As a result, both the average number of days-at-sea, and the theoretical maximum would decline, causing that the indicator would not detect an imbalance.
- For fleet segments consisting of few vessels, determination of the theoretical maximum number of days-at-sea is likely very sensitive which may hamper interpretation. I.e. when the number of vessels changes in a small fleet segment with a variable number of days-at-sea spent by such vessels, the value corresponding to the 90% percentile could change markedly when vessels enter or exit the fleet segment. Likewise, if vessels enter or exit a fleet segment, this will likely change the number of days-at-sea (and the VUR indicator). There is no clear rationale why this should be the case.

Given the above considerations, which are not exhaustive, the EWG considers that the VUR₉₀ indicator will tend to give higher values for the Vessel Utilisation Indicator than the VUR or VUR₂₂₀ prescribed in the Commission guidelines. Furthermore, VUR₉₀ is unlikely to depict trends in the indicator values over time.

The EWG considers that to detect trends in the Vessel utilization index over time, it would be preferable to use an absolute value for theoretical days at sea, such as VUR₂₂₀, although for reasons previously outlined by the Balance / Capacity EWG and endorsed by the STECF, VUR₂₂₀ is unlikely to be a credible indicator of balance between capacity and fishing opportunities for fleet segments whose theoretical maximum days at sea are far less than 220.

Assessment of fleet report

The indicator values calculated by France are based on data for the years 2019 – 2021. 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 an Annex to the fleet report.

The EWG notes however that the segmentation is partly aligned with the DCF segmentation. The fleet segments in the Mediterranean Sea and Outermost regions follow the segmentation of the DCF, whereas the fleet segments in the North Atlantic go beyond the DCF segmentation by spatial disaggregation based on subdivisions of the DCF fleet segments. The MS argues that this segmentation aligns better with the characteristics of the different fleets. The EWG does not have the information required to assess the appropriateness of the segmentation used.

According to the MS fleet report submitted in 2023, out of a total of 202 fleet segments, 188 were active of which 26 were assessed to be out of balance, 149 were in balance, 13 required further

monitoring and 14 were inactive segments. The EWG noted the increase in data collection and monitoring in the outermost regions which resulted in an increase in the number of fleet segments for which balance indicators could be computed.

The MS considers segments to be out of balance when one of the following conditions was met,

- for the fleets in the mainland (Areas 27 and 37):
 - segments are assessed as imbalanced if one of its indicators has been imbalanced during each of the last 3 years
 - segments are not considered to require monitoring by the French authorities on account of specific characteristics which mean that an imbalance cannot be determined according to the indicators available
- for fleets of the outermost regions:
 - segments where the SHI indicator is negative (greater than 1) for at least the last 3 years assessed in the report for 2023, i.e. 2019 to 2021, or where there is no data,
 - segments fishing stocks in poor condition for at least the last 3 years assessed in the report for 2023 (i.e. 2019 to 2021) and where the economic dependence on stocks in poor condition is greater than 40%.

The EWG notes that the criteria for segments to be assessed as imbalanced differ across geographical areas, and that the criteria for assessment do not only rely on the values computed for the indicators prescribed in the guidelines.

For the fleets in the mainland, the fleet report provides various arguments why certain segments require additional monitoring and therefore are not considered as imbalanced by the MS. The EWG does not consider that the requirement for additional monitoring does not indicate 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.

For the outermost regions, the technical, economic and SAR indicators are not considered by the MS to assess whether a segment is imbalanced, although these indicators are provided in the fleet report. Next to SHI, the MS relies on an alternative biological criterion to assess whether a fleet is imbalanced that relates to fishing of a fleet segment on stocks in poor condition, and its economic dependency on those stocks. The MS considers this indicator more appropriate for data deficient segments as it considers all stock assessments. Although a list of stocks in poor condition is provided in the fleet report, it is unclear to the EWG how this list is compiled.

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, except for the fleet segment defined in the Regional segmentation of France as AT MdN_Mches t DFN VL1012. The same fleet segment was also assessed as imbalanced in the fleet report submitted in 2022. The MS provided several arguments in the fleet report why the technological and economic indicators are not fully conclusive for the vast majority of French fleet segments. However, it is unclear why such indicators were considered appropriate or that particular fleet.

The SHI and SAR indicators are presented in annexes to the fleet report as well as a detailed description of the methodology. However, France notes that in absence of a reference list of potential SAR stocks across the EU, the SAR indicators presented in the fleet report may deviate from the SAR indicators calculated by the EWG. France also submits additional biological indicators, EDI and NOS, for the reason that those indicators enable it to better assess fleets, in particular those fleets where the SHI indicator is unreliable due to the low coverage.

The inactive fleet indicator (VUR 90) is provided for fleet segments of more than 12 metres length overall, as it is not considered by the MS to be suitable for the mixed fishing activity of vessels <12m. VUR and VUR₂₂₀ are not reported. The EWG notes that a methodology of the VUR 90 is provided in ANNEX 5 of the French fleet report. The VUR 90 considers the 90th percentile of the days-at-sea of all vessels within a segment as the theoretical maximum days-at-sea. The EWG considerations on the use of VUR90 are given above in the sub-section "The vessel utilisation indicator".

The EWG 23-13 notes that the MS' 2023 fleet report has made progress in terms of data collection for the outermost regions which contributed to increasing the number of balance indicators that could be calculated. In the MS fleet report submitted in 2022, there were 91 segments not assessed due to the lack of monitoring whereas, in the report submitted this year (2023), out of 188 active segments, only 13 were not sufficiently monitored.

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 Mediterranean and Outermost regions. Nevertheless, the MS argues that it would be useful to further disaggregate the DCF segmentation for the Atlantic fleets given the specific characteristics of the different fleets. As a result, the French segmentation for the Atlantic supra region as used in previous fleet reports has been maintained. The MS states that this segmentation allows for a closer and more appropriate analysis of the fleets in this zone, reflecting the wide range of activities across the fleets in the Bay of Biscay, the Channel and the North Sea.

The MS has also provided technical and economic indicators in the fleet report submitted in 2023 as was requested by the previous EWGs. The French fleet reports for previous years did not include technical and economic indicators, since the assessment was based only on biological indicators. Therefore, it was unclear whether the indicators were not considered due to the difficulty of calculating them based on the available information collected, or whether the indicators were calculated but the results were not appropriate for analysis. It was also unclear whether the indicators were calculated according to the guidelines or not.

Following the comments of the EWG 22-15, the MS has adjusted the data and methodology of the calculation of the SHI indicator which previously deviated from what is prescribed in the guidelines. In contrast to previous reports, the SHI indicator is now based on the F/F_{MSY} values of the most recent assessment, as well as, based on landed value and not on landed volume.

As requested by previous EWGs, the MS has provided the indicator values (including some alternative calculation methods of some indicators) in Annex 1 and Annex 5 to the fleet report, as well as information on fleet composition in terms of number of vessels by segment (Annex 1) and landing volume by species and fleet segment (Annex 6).

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 23-13 notes MS fleet report identifies structural overcapacity based only on biological indicators. The French fleet report emphasises that the results of the economic and technical indicators are undermined by several factors, in particular related to:

- applied method when variables were based on sampling involving non-exhaustive data or extrapolation of economic data from one region to another (in particular between Guadeloupe and Martinique);
- segment size where variables were reported only for segments comprising more than three vessels in accordance with the rules on confidentiality applied to statistical data.

The grouping of segments into economic clusters did not always allow the real economic balance in segments to be analysed in detail, particularly for minor segments that form part of a cluster.

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 Action plan provided in the Annex 4 of the Fleet report 2023 is an update and continuation from the 2016, 2018, 2019, 2020 and 2021 action plans. It includes all nine fleet segments operating in the Mediterranean and Atlantic areas (provided as 8 rows in the action plan) that were assessed by the MS to be out of balance and which were also included in the previous year action plan. The major update to the action plan is that it now includes an additional seventeen fleet segments from the outermost regions.

The plan contains a wide range of general as well as more-specific measures for such fleet segments. The timeframe for the actions that were implemented in the previous APs, in order to achieve the fishing capacity reduction targets for nine segments, was prolonged to 2024 in the updated action plan.

For the new seventeen fleet segments from the outermost regions two actions are mentioned:

- improvement of biological and economic data collection, in particular through partnerships between scientists and fishermen.
- call for the European guidelines to be developed so that they take into account assessments of data-limited stocks in SHI indicator calculations. Deploy RFMOs to carry out international assessments on key shared stocks.

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 within a given timeframe. In contrast, the proposed measures addressing the fleet segments in the outermost regions do not provide clear targets and are not timebound.

A complete and detailed description about the previous Action Plan implementation was provided per segment and action in Annex 3 to the fleet report.

There are four amendments to the action plan:

- i) a fleet exit plan has been in place since late 2022 for trawlers in GSA7 and is forecast to cover a total of 15 vessels by the end of 2023. This exit plan is applicable for active vessels of between 18 and 24 metres in length fishing for hake HKE (37.GSA7) and red mullet MUT (37.GSA7) by means of trawlers (ME ME DTS VL1824), and active vessels of between 24 and 40 metres in length fishing for hake HKE (37.GSA7) and red mullet MUT (37.GSA7) by means of trawls (ME ME DTS VL2440);
- ii) the fishing capacity reduction targets were extended from 2023 to 2024 for all listed segments;
- iii) for vessels of between 0 and 6 metres in length fishing for eel in the Mediterranean, France only authorises fishing for yellow and silver eel;
- iv) the following new fleet segments were identified by the MS in the Action Plan though they do not specify any actions that aim to improve the balance between capacity and fishing opportunities:

Additional fleet segments included in the Action plan in 2023 Report	Number of vessels in the segment in 2021
Longliners of 12 to 18 metres in length – La Réunion – zone 51 (OM Reunion PP excl. seiners HOK VL1218)	15
Longliners of 0 to 10 metres in length – La Réunion – zone 51 - OM Mayotte PP excl. seiners HOK VL0010	84
Netters of 0 to 10 metres in length – Mayotte – zone 51 – OM Mayotte PP excl. seiners DFN VL0010	8
Netters of 0 to 10 metres in length – Guadeloupe – zone 31 – OM Guadeloupe DFN VL0010	71
Vessels using pots or traps of 0 to 10 metres in length – Guadeloupe – zone 31 – OM Guadeloupe FPO VL0010	107
Longliners of 0 to 10 metres in length – Guadeloupe – zone 31 – OM Guadeloupe HOK VL0010	130
Longliners of 10 to 12 metres in length – Guadeloupe – zone 31 – OM Guadeloupe HOK VL1012	8
Vessels using passive gear (other than nets and hooks) of 0 to 10 metres in length – Guadeloupe - zone 31 -OM Guadeloupe PGO VL0010	9
Vessels using various passive gear only of 0 to 10 metres in length – Guadeloupe - zone 31 - OM Guadeloupe PGP VL0010	174
Small purse seiners of 0 to 10 metres in length – Guadeloupe – zone 31 – OM Guadeloupe PS_ VL0010	23

Netters of 0 to 10 metres in length – French Guiana – zone 31 – OM French Guiana DFN VL0010	32
Netters of 10 to 12 metres in length – French Guiana – zone 31 – OM French Guiana DFN VL1012	57
OM French Guiana DTS VL1824	7
Netters of 0 to 10 metres in length – Martinique – zone 31 – OM Martinique DFN VL0010	52
Vessels using various passive gear only of 0 to 10 metres in length – Martinique – zone 31 - OM Martinique PGP VL0010	201
Vessels using passive gear (other than nets and hooks) of 0 to 10 metres in length – Martinique - zone 31 -OM Martinique PGO VL0010	18
Vessels using pots or traps of 0 to 10 metres in length – Martinique – zone 31 – OM Martinique FPO VL0010	156

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 749 vessels.

Description of fleet segment	Number of vessels in 2021
Active vessels of between 18 and 24 metres in length fishing for hake HKE (37.GSA7) and red mullet MUT (37.GSA7) by means of trawlers (ME ME DTS VL1824)	27
Active vessels of between 24 and 40 metres in length fishing for hake HKE (37.GSA7) and red mullet MUT (37.GSA7) by means of trawls (ME ME DTS VL2440)	30
Vessels of between 0 and 12 metres in length engaged in 'ganguì' fishing in the Mediterranean (ME ME VL0012 - ganguì fishing)	13
Vessels of between 0 and 6 metres in length fishing for eel in the Mediterranean	212
Purse seine vessels of 12 to 18 metres in length fishing for European pilchard (PIL.27.8abd) in the Bay of Biscay (AT GG_Ib PS_VL1218) and in the Celtic Sea - West Scotland (AT MC_OE_Is PS_VL1218)*	28
Vessels AT GG_Ib OTM VL1012 fishing for European pilchard in the Bay of Biscay.	4
Vessels AT MdN_Mchest DFN VL1012 fishing for common sole in the Eastern Channel	23
AT ELE VL0024 vessels fishing eel in the Atlantic supra-region	412

*represents two segments

3.4.9 Germany (DEU)

Overview of indicator findings

Area 27

There were 29 fleet segments in 2021, of which 22 were active. Of the 22 active segments, landings data were provided for 13 fleet segments and economic data for 14 fleet segments.

Sustainable harvest indicator (SHI)

Out of 22 fleet segments active in 2021, landings in value have been provided aggregated in 15 fleet segments and SHI indicator values were available for 13.

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 9 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 73.35% of the total value of the landings by the fleet segments in 2021. The values of SHI indicated that:

- 4 fleet segments may not be in balance with their fishing opportunities;

- 5 fleet segments may be in balance with their fishing opportunities.

The time series of SHI values for the fleet segments indicated above displayed:

- 4 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 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 9 fleet segments may be in balance with their fishing opportunities;
- 6 fleet segments may be 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%
N of fleet segments	4	8	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	10		1	2

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

RoI was not calculated.

RoFTA was calculated for 14 segments:

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

Trends were calculated for 9 segments:

- 0 segments displayed an **increasing** trend,
- 9 segments displayed a **decreasing** trend.

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

CR/BER was calculated for 14 segments:

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

Trends were calculated for 9 segments:

- 7 segments displayed a **decreasing** 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, VUR₂₂₀ is not analysed here.

VUR was calculated for the 22 segments*:

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

Trends for the 12 segments were as follows:

- 2 segments displayed a **decreasing** trend,
- 10 segments displayed **no clear** trends.

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

The Inactive Fleet Indicators

In 2021, 7 vessel length segments had inactive vessels (VL0008, VL0010, VL0812 VL1012, VL1218, VL1824, VL2440).

The German inactive fleet accounted for 14.7% of the total number of vessels, 2.5% of the total GT and 5.5% of the total kW. At the national level, inactive vessels accounted for less than 20% of the fleet in vessel number and thus, was *in balance*, and overall displayed a **decreasing** (improving) or **no clear** trend. All segments were *in balance* in terms of numbers, GT and kW.

Synthesis of indicators and trends

Based on biological indicator values (SHI and SAR) for 2021 and trends over the period 2017 to 2021 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, 4 of them indicate an improving situation and 2 segments are have clear trend.

By the EWG calculation DTS VL1824, DTS VL2440 and TBB VL1218 segments for CR/BER and RoFTA values indicate as in balance. The available trends in CR/BER mostly shows a deteriorating situation, although DTS VL2440 and DTS VL40XX segments has no trend. The trends in RoFTA are deteriorating for all fleet segments. Nine segments were out of balance according to the technical indicator (VUR).

Due to changes in segmentation of small scaled fisheries (old segments VL0008 and VL1012) which applied for the Baltic Sea region since 2021, the trend is not available.

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

					<div><div>in balance</div><div>out of balance</div><div>bordeline</div><div>insufficiently profitable</div><div>improving</div><div>deteriorating</div><div>Null/flat trend</div><div>no clear trend</div></div>																													
					Status 2021 according to thresholds and criteria in the 2014 Guidelines															Trends 2017-2021														
					Biological			Economic					Activity			Inactive				Biological			Economic					Activity			Inactive			
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	KW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	KW					
NAO	DFN	VL1218	DEU NAO DFN2440 NGI *	5																														
NAO	DFN	VL2440	DEU NAO DFN2440 NGI *	2																														
NAO	FPO	VL1824	DEU NAO DFN2440 NGI *	1																														
NAO	FPO	VL2440	DEU NAO DFN2440 NGI *	1																														
NAO	DTS	VL0812	DEU NAO DTS1012 NGI *	7																														
NAO	DTS	VL1218	DEU NAO DTS1218 NGI	18																														
NAO	DTS	VL1824	DEU NAO DTS1824 NGI	9																														
NAO	DTS	VL2440	DEU NAO DTS2440 NGI	10																														
NAO	DTS	VL40XX	DEU NAO DTS40XX NGI	5																														
NAO	PG	VL0008	DEU NAO PG 0008 NGI A *	80																														
NAO	PG	VL0010	DEU NAO PG 0008 NGI L *	5																														
NAO	PG	VL0008	DEU NAO PG 0008 NGI L *	428																														
NAO	PG	VL0812	DEU NAO PG 0812 NGI A *	58																														
NAO	PG	VL0812	DEU NAO PG 0812 NGI L *	79																														
NAO	TBB	VL0010	DEU NAO TBB1012 NGI *	4																														
NAO	TBB	VL1012	DEU NAO TBB1012 NGI *	4																														
NAO	TBB	VL1218	DEU NAO TBB1218 NGI	97																														
NAO	TBB	VL1824	DEU NAO TBB1824 NGI	70																														
NAO	TBB	VL2440	DEU NAO TBB2440 NGI *	6																														
NAO	TBB	VL40XX	DEU NAO TBB2440 NGI *	2																														
NAO	TM	VL1824	DEU NAO TM 40XX NGI *	1																														
NAO	TM	VL40XX	DEU NAO TM 40XX NGI *	5																														
NAO	INACTIV	VL0008	DEU NAO INAO008 NGI	256																														
NAO	INACTIV	VL0010	DEU NAO INAO010 NGI	31																														
NAO	INACTIV	VL0812	DEU NAO INAO812 NGI	42																														
NAO	INACTIV	VL1012	DEU NAO INA1012 NGI	3																														
NAO	INACTIV	VL1218	DEU NAO INA1218 NGI	7																														
NAO	INACTIV	VL1824	DEU NAO INA1824 NGI	3																														
NAO	INACTIV	VL2440	DEU NAO INA2440 NGI	3																														
DEU Total				1242																														

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison Indicator values computed by the EWG 23-13 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 for the reference year 2021.

The comparison between SHI reports in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed similar outputs for most fleet segments (PG VL0812A, DTS VL0812, DTS VL1218, DTS VL1824, DTS VL2440, and DTS VL40XX). Exceptions are: PG VL0812L and TBB VL2440 which indicate "in balance" (SHI=0.63 and 0.94, respectively) in the MS fleet report whereas the EWG 23-13 values indicate out of balance (SHI=1.11 for both). A further discrepancy was observed for TM VL40XX that indicates "out of balance" (SHI=1.04) in the MS fleet report whereas the EWG 23-13 value for SHI indicates "in balance" (SHI=0.94).

The comparison between SHI trends reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed similar outputs.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has been provided for the reference year 2021.

The comparison between SAR reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed similar outputs for 10 fleet segments. Exceptions are DFN VL1218 and TBB VL40XX, for which EWG 23-13 did not compute an estimate for SAR, while in the MS annual report they were indicated as "in balance" and "out of balance", respectively.

For PG VL0008 and TBB VL2440, EWG 23-13 estimated the SAR as "in balance", while in the MS annual report they were indicated "out of balance".

For TM VL40XX, EWG 23-13 estimated the SAR as "out of balance", while in the MS annual report this was indicated "in 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 23-13 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 the same as those computed by the EWG 23-13.

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 in the framework of EWG 23-13 revealed similar outputs for all values.

Trends are similar for this indicator with exceptions of DTS VL40XX, where EWG 23-13 estimates indicate a decreasing trend (deterioration) while the MS annual fleet indicates an increasing trend (improvement).

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.

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

In the MS annual fleet report, the VUR Indicator was provided. Hence VUR₂₂₀ 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 23-13. The status in the EWG 23-13 estimation was "in balance" for PG VL0008A, DTS1824 NGI, NAO DTS1012 NGI and NAO DTS1218 NGI segments for which the MS annual report indicated "out of balance".

Trends are similar for this indicator with exceptions of DTS VL2440 and TBB VL1012, where EWG 23-13 values indicate "no trend" while the MS annual report values indicate "increasing" trends.

No trend analysis could be undertaken for the PG VL0008A, PG VL0812A, PG VL0008L and PG VL0812L segments, as this new segmentation has only been used in the fleet report since 2021.

The Inactive Fleet Indicators

The tables in the MS fleet report contain only the total number of vessels in each fleet segment. The number of inactive vessels were reported embedded in the text of the report, but no values for the inactive fleet indicator were provided by the MS.

To facilitate such a comparison in future the Member State is urged to provide for each segment, the total number of vessels, the number of inactive vessels and the inactive fleet indicator values in a summary table.

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 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.

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 indicator values in the fleet report are generally in line with those computed by the EWG 23-13.

The Fleet Report 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 2022 and those of the EWG were reported in the EWG 22-15 report. Hence, the Member State had no such discrepancies to address in its report submitted in 2023.

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, estimates of the long-term profitability by fleet segment based on ROI and CR/BER values are given.

Overview of action plans

The report on the balance between the fishing capacity and fishing opportunities of the German fleet in 2022 highlights 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. The MS fleet report asserts that causes of the decline in stocks are mainly overfishing due to total allowable catches being set too high, as well as changing environmental conditions owing to climate change.

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 2023. The targets and tools are defined clearly and are the same as those described in the report submitted in 2022. The timeframe for implementation (starting and ending years) is described by fleet segment and measure.

Number of vessels

A total of 165 vessels are targeted by the action plan.

3.4.10 Greece (GRC)

Overview of indicator findings

Area 37

There were 25 fleet segments in 2021, of which 20 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 2021, SHI indicator values were available for 13.

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 values of SHI indicated that:

- 1 fleet segment may be *out of 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.

- 11 segments may be *in balance* with their fishing opportunities.
- 3 segments may be *out of balance*, with their fishing opportunities
 - 1 fleet segment 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.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments			7	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			

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

RoI was not calculated.

RoFTA was calculated for 14 segments:

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

Trends could be calculated for 12 segments:

- 4 segments displayed an *improving* trend.
- 8 segments displayed a *deteriorating* trend

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

CR/BER was calculated for 14 segments:

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

Trends could be calculated for 12 segments:

- 4 segments displayed an *improving* trend.
- 8 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, VUR₂₂₀ is not analysed here.

VUR was calculated for the 19 segments*:

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

Trends could be calculated for 15 segments:

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

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

The Inactive Fleet Indicators

In 2021, 5 vessel length classes had inactive vessels (VL0006, VL0612, VL1218, VL1824 and VL2440). The Greek inactive fleet accounted for 18.6% of the total number of vessels, 11.3% of the total GT and 14.3% of the total kW. At the national level, inactive vessels accounted for less than 20% of the fleet in all 3 categories (#, GT and kW), and thus, were considered *in balance*.

By vessel length group:

- 3 segments displayed an *increasing* trend in all three categories.
- 1 segment displayed a *decreasing* trend in two categories but *no clear trend* in vessel number.
- 1 segment displayed *no clear trend* in two categories but a *flat trend* in vessel number.

Synthesis of indicators and trends

Based on indicator estimations for 2021 and trends over 2017-2021, 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 all available indicators, but without a meaningful SHI available. 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, and show positive trends for economic indicators but no trend for technical indicators. 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. The pots and/or traps segments appear to be in balance on the economic and technical indicators, and they show an improving trend.

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. All five inactive fleet segments appear to be in balance. Four fleet segments show a deteriorating trend, while the fifth segment shows 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.

					<div><div></div>in balance</div>	<div><div></div>out of balance</div>	<div><div></div>borderline</div>	<div><div></div>insufficiently profitable</div>	<div><div></div>improving</div>	<div><div></div>deteriorating</div>	<div><div></div>Null/flat trend</div>	<div><div></div>no clear trend</div>																	
					Status 2021 according to thresholds and criteria in the 2014 Guidelines										Trends 2017-2021														
					Biological		Economic					Activity			Inactive		Biological		Economic					Activity		Inactive			
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW
MBS	DFN	VL0006	GRC MBS DFN0006 NGI	2001																									
MBS	DFN	VL0612	GRC MBS DFN0612 NGI	4721																									
MBS	DFN	VL1218	GRC MBS DFN1218 NGI *	101																									
MBS	DFN	VL1824	GRC MBS DFN1218 NGI *	2																									
MBS	DRB	VL0006	GRC MBS DRB0612 NGI *	2																									
MBS	DRB	VL0612	GRC MBS DRB0612 NGI *	8																									
MBS	DRB	VL1218	GRC MBS DRB0612 NGI *	1																									
MBS	DTS	VL1218	GRC MBS DTS1218 NGI *	3																									
MBS	DTS	VL1824	GRC MBS DTS1824 NGI	83																									
MBS	DTS	VL2440	GRC MBS DTS2440 NGI	135																									
MBS	FPO	VL0006	GRC MBS FPO0006 NGI	44																									
MBS	FPO	VL0612	GRC MBS FPO0612 NGI *	281																									
MBS	FPO	VL1218	GRC MBS FPO0612 NGI *	5																									
MBS	HOK	VL0006	GRC MBS HOK0006 NGI	725																									
MBS	HOK	VL0612	GRC MBS HOK0612 NGI	1552																									
MBS	HOK	VL1218	GRC MBS HOK1218 NGI *	95																									
MBS	HOK	VL1824	GRC MBS HOK1218 NGI *	7																									
MBS	PS	VL1218	GRC MBS PS 1218 NGI	59																									
MBS	PS	VL1824	GRC MBS PS 1824 NGI	117																									
MBS	PS	VL2440	GRC MBS PS 2440 NGI	28																									
MBS	INACTIV	VL0006	GRC MBS INA0006 NGI	1083																									
MBS	INACTIV	VL0612	GRC MBS INA0612 NGI	1079																									
MBS	INACTIV	VL1218	GRC MBS INA1218 NGI	95																									
MBS	INACTIV	VL1824	GRC MBS INA1824 NGI	13																									
MBS	INACTIV	VL2440	GRC MBS INA2440 NGI	7																									
GRC Total				12247																									

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison of Indicator values computed by the EWG 23-13 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 2022, however they have been split by GSAs and gear groups (PS, OTB and SSF). EWG 23-13 only calculated SHI for one fleet segment for 2021, 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 23-13 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 23-13 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 23-13 revealed similar outputs for most values. In general, the balance indication is the same for available segments between the MS and EWG assessment, however three segments, DFN1218, DRB0612 and FPO0006 are not in agreement (EWG assessment is out of balance).

The MS annual fleet report did not provide a time series of the indicator or any conclusion based on the indicators. Therefore, no comparison can be made with the trend calculated by EWG 23-13.

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

The MS annual fleet report provides VUR data for nine segments each gear group – OTB, PS and 'coastal' is divided into three vessel length categories). Four of the segments are comparable, and have similar values, with those calculated by EWG 23-13. The other five segments are not comparable with values from EWG 23-13 as they refer to clustered fleet segments.

The Inactive Fleet Indicators

The comparison between the inactive fleet indicator (based on number of vessels and calculated by EWG) reported in the MS annual fleet report and by EWG 23-13 revealed similar outputs for all values.

The MS annual fleet report did not calculate any value or the trend for the indicator. Therefore, no comparison was possible.

Assessment of fleet report

The fleet report submitted in 2023 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 been improved in recent years. A number of weaknesses in the management system still remain, relating to the large number of vessels in the fleet, 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 States' fleet report submitted for 2022 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 for 2022 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 2022 fleet report has provided more of the requested information than previous fleet reports. Indicator values have been calculated 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.

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, those purse seiners fishing sardine and anchovy, and bottom trawlers fishing for hake. In recent years the reference thresholds for SHI for these sectors have been exceeded. The MS is in the process of revising management plans for these segments, and intends to submit to COM a revised proposal of management plans once ongoing scientific studies are completed.

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 and PS fleet segments, which need to be revised taking into account that reference thresholds for SHI, as defined at national level, have been exceeded for anchovy and sardine as well as for the hake. Linked to the obligation to protect these stocks, the Member State views there is an obligation to adopt action plans for these segments. In addition, scientific studies, currently being carried out, and which are due to finish this year, are expected to provide the scientific basis for revised proposals of management plans for OTB and PS.

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.

3.4.11 Ireland (IRL)

Overview of indicator findings

Area 27

There were 26 fleet segments in 2021, of which 21 were active. Of the active segments, landings data were available for all and economic data were available to calculate the indicators for 7 aggregated segments.

Sustainable harvest indicator (SHI)

SHI indicator values were available for 15 fleet segments active in 2021.

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 15 segments satisfied this criterion:

- 6 fleet segments are thought to be out of balance with their fishing opportunities;
- 9 fleet segments may be in balance with their fishing opportunities.

Trends could be calculated for 14 fleet segments:

- 9 segments displayed a **decreasing (improving)** trend,
- 3 segment displayed an **increasing (deteriorating)** trend,
- 2 segments displayed **no clear trend**.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for 22 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines:

- 15 fleet segments appear to be in balance with their fishing opportunities,
- 7 segments may be 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	2	20	1	2

Economic Dependency Indicator (EDI)

18 segments of the 25 reported exhibited an economic dependency (EDI) value below 20%, 7 were greater than 20% dependent and the mean was 21.7%.

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

RoI was not calculated.

RoFTA was calculated for 10 segments:

- 7 segments were in balance with their fishing opportunities,
- 3 segments were out of balance with their fishing opportunities,
- 1 segment was insufficiently profitable.

Trends could be calculated for 3 segments:

- 2 segments displayed an **increasing (improving)** trend,
- 1 segment displayed a **decreasing (deteriorating)** trend.

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

CR/BER was calculated for 10 segments:

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

Trends could be calculated for only 3 segments:

- All 3 segments displayed an **increasing (improving)** trend,
- 0 segments displayed a **decreasing (deteriorating)** trend, or **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, VUR₂₂₀ is not analysed here.

VUR was calculated for 27 segments*:

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

No VUR trend could be calculated for any segment.

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

The Inactive Fleet Indicators

In 2020, 5 vessel length classes had inactive vessels (VL0010, VL1012, VL1218, VL1824 and VL2440). The Irish inactive fleet accounted for 31.2% of the total number of vessels, 4.7% of GT and 11.1% of the total kW. The total of inactive vessels is thus, in balance by all three measures for all five fleets. Trends were available for 4 fleets:

Measured by numbers:

- 1 segment displayed a **decreasing (improving)** trend,
- 1 segment displayed an **increasing (deteriorating)** trend,
- 2 segments displayed **no clear trend**.

Measured by GT:

- 2 segments displayed a **decreasing (improving)** trend,
- 1 segment displayed an **increasing (deteriorating)** trend,
- 1 segment displayed **no clear trend**.

Measured by kW:

- 2 segments displayed a **decreasing (improving)** trend,
- 2 segments displayed an **increasing (deteriorating)** trend,
- 0 segments displayed **no clear trend**.

The segment with the highest level of inactivity is the VL0010 segment at 26.0% in terms of number of vessels, 1.7% in GT and 5.3% in kW.

Synthesis of indicators and trends

One or more indicator values could be computed for all but 2 of the 35 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 2021 continues the mixed picture of 2020. SHI values were computed for 15 segments, 9 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 2021 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.

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Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison of Indicator values computed by the EWG 21-16 and those in the fleet report submitted by 31 May 2023 are 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 and natural variation. Nevertheless, a consideration of the technical indicators is provided. Points of note for each indicator are listed below.

Sustainable harvest indicator (SHI)

Ireland presented SHI values calculated by the STECF EWG 22-16 and extracts from the JRC website on 12th April 2021, where 2020 values were reported. According to fleet report, although according to the SHI, values for 9 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.

Values for period 2008-2021 are provided in the fleet report. No comparison was made with the WG 22-15 indicator values

Stocks at Risk Indicator (SAR)

Ireland concludes that Irish fleets take minor catches of the vulnerable stocks, and that there is not sufficient information to assess whether fleets take more than 10% of the landings of the vulnerable stocks.

Values for the period 2009-2021 are provided in the fleet report. No comparison was made with the EWG 21-16 indicator values.

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

According to the Ireland fleet report, the results of CR/BER are negative for 9 segments, adding two further segments, DTS0010 and TBBVL2440, to the 2020 report, while the EWG 23-13 identified seven segments indicated as out of balance.

The comparison between CR/BER reported in the MS fleet report and those estimated in the framework of EWG 20-11 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 MS annual fleet report, RoFTA was calculated for 18 segments, 8 of which were indicated to be out of balance. Only one of the five demersal trawl and seine fleet segments (DTSVL0010) were out of balance.

Nevertheless, the number of fleet segments out of balance fell from 11 in 2020 to 8 in 2021. EWG 23-13 identified only 3 segments out of balance; DTS1824, TBB 2440, and TM 2440.

The discrepancies are due to the method of calculation of the indicator: Ireland calculated the indicator with the 5-year average interest rate from the ECB to Ireland while EWG 23-13 used the real interest rate. Furthermore, in contrast to EWG 23-07 (AER) and EWG 23-13, 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.

The comparison of trends between the MS annual fleet report and the EWG 23-13 could be done for 9 segments and showed different results for 1 segment. The difference can be explained by the discrepancies in the calculations explained above.

The Vessel Use Indicator (VUR)

The MS annual fleet report did not provide information for VUR and VUR₂₂₀. Indicator trends were not provided in the fleet report. No comparison was possible.

Assessment of fleet report

The EWG 23-13 notes the following:

The fleet report submitted in 2023 provides indicator values separately by fleet segment based on DCF information and for the majority 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.

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.

Based on the available information, Ireland 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 impact of Brexit on Irish fleets.

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 indicates that Ireland considers that there is only limited overcapacity in the fleet but that there is clear evidence of some structural overcapacity, particularly in the smaller, segments. Where there is significant overcapacity in a segment, fishing enterprises may continue to make a financial profit but may also expect to have difficulty covering their depreciation.

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. However, a voluntary permanent cessation of fishing scheme provoked by Brexit is in progress to remove some 8,000GT (approximately 60 vessels) from the polyvalent and beam trawl fleets. It is anticipated in the fleet report that this will make available an additional €30m worth of quota for the remaining enterprises.

3.4.12 Italy (ITA)

Overview of indicator findings

There were 37 fleet segments in 2021, of which 29 were active. Of the 29 active segments, landings were provided for 29 fleet segments and economic data were provided aggregated for 20 fleet segments.

Sustainable harvest indicator (SHI)

Area 37

Out of 27 fleet segments active in 2021, SHI indicator values were available for 25.

According to the criteria in the 2014 Balance Indicator Guidelines, the 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 in 2021 by those fleet segments.

The EWG notes that for the 15 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 58.67% of the total value of the landings in 2020 provided by MS, and were as follows:

- 12 fleet segments may not be in balance with their fishing opportunities;
- 3 fleet segments may be in balance with their fishing opportunities.

Trends could be calculated for 14 fleet segments:

- 8 fleet segments displayed a **decreasing** trend,
- 6 fleet segments displayed **no clear** trend,

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all the 27 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 10 fleet segments may be in balance with their fishing opportunities,
- 17 fleet segments may be out of balance with their fishing opportunities.
 - 1 fleet segment with 4 stocks-at-risk,
 - 1 fleet segment with 3 stocks-at-risk,
 - 5 fleet segments with 2 stocks-at-risk,
 - 10 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	20	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	15	6	1	3

OFR

Sustainable harvest indicator (SHI)

Out of the 2 active fleet segments in 2021, SHI indicator values were available for 2 segments.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator value for 1 fleet segment can be used meaningfully to assess the balance or imbalance.

The EWG notes that this fleet segment for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 73.69% of the total value of the landings in 2021 provided by MS, and may not be in balance with its fishing opportunities.

A trend could be calculated for 1 fleet segment:

- 1 fleet segment displayed no clear trend.

Stocks at Risk Indicator (SAR)

The SAR indicator was available for all the 2 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 0 fleet segments may be in balance with their fishing opportunities,
- 2 fleet segments may be out of balance with their fishing opportunities.
- 2 fleet segments with 1 stock-at-risk.

Number of Overharvested Stocks (NOS)

The proportional distribution of NOS for the 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			1	

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%
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N of fleet segments	1		1	
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Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

There were 37 fleet segments in the Italian fleet in 2021 of which 29 were active. After clustering 20 segments were available for analysis.

RoFTA was calculated for 20 segments:

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

Trends could be calculated for 19 segments:

- 7 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 20 segments:

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

Trends could be calculated for 19 segments:

- 6 segments displayed an **increasing** trend,
- 8 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, VUR₂₂₀ is not analysed here.

VUR was calculated for 29 segments*:

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

Trends could be calculated for 24 segments:

- 3 segments displayed an **increasing** trend,
- 8 segments displayed a **decreasing** trend,
- 13 segments displayed **no clear** trend.
-

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

The Inactive Fleet Indicators

In 2021, 6 vessel length segments in MBS (VL0006, VL0612, VL1218, VL1824, VL2440 and VL40XX) and 2 vessel length segments (VL2440, VL40XX) in OFR had inactive vessels.

The inactive Italian fleet accounted for 14% of the total number of vessels, 9.3% of the total GT and 12% of the total kW.

At the national level, inactive vessels accounted for less than 20% of the fleet in all 3 categories (#, GT and kW) and thus, was *in balance*, and displayed an overall **increasing** (deteriorating) trend.

The segment with the highest levels of inactivity was the VL0612 group at 8.1% of the total number of vessels.

By vessel length group:

- All 8 segments were *in balance* in all 3 categories, with varying trends.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 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 exception is ITA MBS PS2440 NGI, which is the only segment 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*, ITA MBS PGP0006 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 2021 by those fleet segments) so this assessment is solely based on one biological indicator. Furthermore, the majority of the economic indicators for these segments also indicate that they are in balance.

The majority of fleet segments, excepting MBS DTS 0612 NGI, MBS PS 1824 NGI and MBS HOK 1824 NGI (which is barely positive in terms of CR/BER and out of balance according to RoFTA), appeared to be in balance for economic variables. More than half of segments show a deteriorating trend or no clear trend for economic indicators.

38% by number of active segments appear to be in balance according to VUR variables. While most segments show a worsening trend (33%) in VUR, 54% 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.

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Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison Indicator values computed by the EWG 23-13 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)

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 23-13. 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)

No discrepancies were found between the MS annual fleet report and those estimated in the framework of EWG 23-13.

18 fleet segments were in balance while 2 were out of balance.

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

ROI data was not reported.

The comparison between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed different results for all segments. The probable reason is that the values in the Italy fleet report were not shown as %.

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 23-13. 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 indicator reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed similar outputs for all values.

Assessment of fleet report

The fleet segment submitted in 2023 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, 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 23-13 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 23-13.

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 but no overall assessment on the balance or imbalance for single fleet segments was presented in the report.

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, the majority of which 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 EWG22-15 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 22-15.

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

No structural overcapacity was identified by Italy for 2022.

The economic indicators of long-term profitability for the entire Italian fishing fleet, based on EWG 23-13 estimations, are positive with a positive trend. Three segments (MBS DTS 0612 NGI, MBS PS 1824 NGI and MBS HOK 1824 NGI) of the twenty segments in the Italian fishing fleet that are out of balance in terms of economic indicators, represent only 1.8% of all active vessels and 2.3% of Gross value of landings of the Italian fishing fleet.

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 increasing the number of temporary closures for 2023. The EWG notes that the plan includes a continuation of measures already established prior to and including 2022.

These measures include:

- The number of temporary closure days for 2023 were increased compared to last year (2022).
- 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.
- In GSAs 8 – 11, Italy will continue to monitor and manage its quotas of two shrimp species. The specific national management plan for *Ensis minor*, introduced in 2022, will be updated. The results of a project aimed at collecting data to draw up a specific management plan for the fishing of small pelagic species in the Campania region (GSA 10) are expected in November 2023.
- A maximum catch limit according to EU regulation 195/2023 was introduced for three crustacean species in the Strait of Sicily
- Italy will intensify ("step up monitoring") control and monitoring in the FRAs and the Fossa di Pomo to ensure compliance with the total ban on fishing in these areas.
- National and Ministerial Decrees were issued regarding management measures and lists of authorized vessels for e.g. swordfish, albacore and dolphin fish fishing.
- Projects on trawl selectivity studies are being initiated with the aim of improving the selectivity of nets and thereby reducing discard rates.

Adjustment targets and tools

The action plan 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, e.g. the number of temporary closure days for 2023 were increased compared to last year (2022), but no clear time frame for reaching balance between fishing opportunities and capacity have been provided.

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. Since it is not apparent which segments operate in which GSAs and the targeted segments are not defined in the action plan, the number of vessels affected cannot be determined.

3.4.13 Latvia (LVA)

Overview of indicator findings

Area 27

There were 4 fleet segments in the Latvian fleet in 2021, of which 3 were active. Of the 3 active segments, landings and economic data were provided for all segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2021, landings in value have been provided aggregated in 3 fleet segments and SHI indicator values were available for 3.

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 2 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 90.92% of the total value of the landings in 2021 provided by MS, and were as follows:

- 2 fleet segments may *not be in balance* with their fishing opportunities;
- 0 fleet segments may be *in balance* with its fishing opportunities.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 3 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG notes that the 2021 SAR indicator values indicate:

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

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

RoI was not calculated.

RoFTA was calculated for 3 segments:

- 3 segments were *in balance* with its fishing opportunities.

Trends were calculated for 3 segments:

- 3 segments displayed an **increasing** trend.

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

CR/BER was calculated for 3 segments:

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

Trends were calculated for 3 segments:

- 3 segments displayed an **increasing** 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 3 segments:

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

Trends were calculated for 3 segments:

- All 3 segments displayed **no clear** trend.

The Inactive Fleet Indicators

In 2021, 1 vessel length segment had inactive vessels (VL0010).

The total inactive Latvian vessels account for 23.7% of the total number of vessels, 2.2% of the total GT and 2.6% of the total kW.

At the national level, inactive vessels accounted for more than 20% of the fleet in number of vessels and thus, was *out of balance*, and displayed an **increasing** trend in terms of GT and a **decreasing** trend in terms of kW. The one inactive segment was *out of balance* in terms of vessel number with an **increasing** trend. In terms of GT and kW was found to be *in balance* with an **increasing** trend in terms of GT and a **decreasing** trend in terms of kW.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission guidelines, one of three fleet segments appears to be out of balance with fishing opportunities (TM VL2440) and one indicates some potential imbalance (PGP VL 0010). The SHI indicator suggests that all fleet segments may be out of balance with no clear trend. The SAR indicator suggests that all fleet segments may be in balance with the exception of PGP VL0010. However, the values of CR/BER and RoFTA show an increasing (improving) trend for the segment regardless of the decline observed in 2021.

The above observations are in line with the assessment of balance in the Member States' fleet report submitted in 2023 despite the discrepancies for CR/BER. A new action plan has been proposed for unbalanced 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.

					<div><div><div></div>in balance</div><div><div></div>out of balance</div><div><div></div>borderline</div><div><div></div>insufficiently profitable</div><div><div></div>improving</div><div><div></div>deteriorating</div><div><div></div>Null/flat trend</div><div><div></div>no clear trend</div></div>																															
					Status 2021 according to thresholds and criteria in the 2014 Guidelines												Trends 2017-2021																			
					Biological			Economic					Activity				Inactive				Biological			Economic					Activity				Inactive			
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW							
NAO	PGP	VL0010	LVA NAO PGP0010 NGI	210																																
NAO	TM	VL1218	LVA NAO TM 1218 NGI	9																																
NAO	TM	VL2440	LVA NAO TM 2440 NGI	29																																
NAO	INACTIV	VL0010	LVA NAO INAO010 NGI	77																																
LVA Total				325																																

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison of indicator values computed by the EWG 23-13 and those in the fleet report submitted by 31 May 2023 are given in Annex II.

Sustainable harvest indicator (SHI)

In the MS annual fleet report the SHI has been provided for the reference year 2021 for two of the three active fleet segments. Data were not provided in the Member State's report for the PGP-VL0010-NGI segment, but it was computed by the EWG.

Discrepancies were found between the MS annual fleet report and those estimated in the framework of EWG 23-13. Fleet segment TM VL1218 was found to be in balance with its fishing opportunities while the EWG 23-13 found that this fleet segment was out of balance. Fleet segment TM VL2440 was found to be out of balance both by the MS annual fleet report and the EWG 23-13.

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 in the framework of EWG 23-13. For all fleet segments the indicator values from the MS annual fleet report are lower than the one calculated by the EWG. 2 fleet segments (TM VL1218 and TM VL2440) reveal positive values for this indicator in agreement with the EWG 23-13 assessment and one fleet segment (PGP VL0010) reveals value for CR/BER below 1, indicating signs of unprofitability with potential over-capitalisation.

No conclusion on trend assessment was presented by the MS.

Trends for CR/BER based on EWG 23-13 calculations for the 3 segments were as follows:

- 3 segments displayed an increasing (improving) trend (PGP VL0010, TM VL1218 and TM VL2440).

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

In the Latvian annual fleet report, ROI was calculated where RoFTA was estimated by EWG 23-13. No comparison was possible on the value of the indicators. However, EWG 23-13 notes that ROI in the MS fleet report for TM VL1218 and TM VL2440 have the same values as those for RoFTA calculated by the EWG. This might be because, in the ROI calculation, MS uses 0 (zero) as an estimated value for fishing rights due to the absence of a fishing rights market in Latvia.

For fleet segment PGP VL0010 no comparison was possible on the value of the indicators as the Member State notes that coastal vessels not engaged in commercial fishing and involved only in fishing for self-consumption are excluded from the analyses in the MS fleet report.

Although the balance conclusion for both indicators revealed similar outputs:

- 3 segments were in balance with their fishing opportunities.

No conclusion on trend assessment was presented by the MS.

Trends for RoFTA based on EWG 23-13 calculations for the 3 segments were as follows:

- 3 segments displayed an increasing trend (PGP VL0010, 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.

Some discrepancy has been observed in VUR values between the MS annual fleet report and those calculated by EWG 23-13. For fleet segment PGP VL0010 this may be due to the exclusion from the MS analysis of coastal vessels not engaged in commercial fishing and involved only in fishing for self-consumption.

Nevertheless, the outputs in terms of fleet segments status are the same and show that two fleet segments (PGP VL0010 and TM VL 2440) appear to be out of balance.

No conclusions with respect to trends in VUR were presented in the MS annual fleet report. No clear trends in VUR values based on EWG 23-13 calculations were detected.

The Inactive Fleet Indicators

MS fleet report does not provide information on length segment PGP VL0010, which in the EWG 23-13 dataset reveals a value of 23.7% implying that the fleet segment is out of balance with an increasing trend. Inactive vessels information is missing from the EWG 23-13 dataset for VL1218 and VL2440 but was presented in the MS annual report. The IFI indicator for the segment VL1218 shows zeros in the last six years, as there were no inactive vessels in this segment. For fleet segment VL2440 IFI indicator has increased in the last three years by 4.8%, 6.1%, and 9%, respectively, but marked a decrease of 12.9% in 2022 as a result of decommissioning. Nevertheless, this segment is indicated to be out of balance.

Assessment of fleet report

The EWG 23-13 notes the following:

The fleet report submitted in 2023 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.

Exceptions exist regarding IFI for fleet segment PGP VL0010 and SAR for all 3 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;
- inactive vessels due to the small number and low capacity;
- coastal vessels listed in the Fleet Register not engaged in commercial fishing and involved only in fishing for self-consumption.

Based on the combined analysis of the indicator values, the MS concluded that for fleet segment TM VL2440, capacity is not in balance with its fishing opportunities in terms of SHI, IFI and VUR indicators. To address the imbalance a new action plan is presented by the MS.

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 2022 have not been explicitly addressed in the fleet report submitted by 31 May 2023.

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. Analysis of economic indicators shows that all three fleet segments imply long-term profitability apart from an observed decrease in 2021.

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.

The new action plan provided by the MS envisages similar measures for the same segment (VL2440 TM) but is aimed at vessels involved in sprat and herring fishery in the Baltic Sea.

Adjustment targets and tools

A new action plan is proposed due to the imbalance observed on IFI, VUR and SHI indicators for the fishing fleet segment TM VL2440. The proposed measure is a cessation of fishing activities for 9 trawlers targeting sprat and herring in the Baltic Sea who spent at least 90 days at sea per year in the last two years. The action plan aims to achieve a 30% reduction of the vessels number in the fleet segment, up to 34% of the gross tonnage and up to 32% of the engine power by the end of 2023.

EWG 23-13 notes that adjustment targets and tools in the AP are well described. The measures are tailored to the imbalanced fleet segment and a clear timeframe is set.

Number of vessels

The action plan presented by MS identifies 9 vessels with a corresponding capacity of 1500 GT and 3500 kW.

3.4.14 Lithuania (LTU)

Overview of indicator findings

There were 13 fleet segments in the Lithuanian national fleet in 2021, of which 8 were active (6 in NAO and 2 in OFR). Of the 8 active segments, landings data were available for all the segments while economic data were provided aggregated by 4 fleet segments.

Sustainable harvest indicator (SHI)

Area 27

Out of 6 fleet segments active in 2021, landings in value have been provided aggregated in 6 fleet segments and SHI indicator values were available for 5.

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 87.40% of the total value of the landings in 2021 provided by MS, and were as follows:

- 3 fleet segments may *be out of balance* with their fishing opportunities.

Trends were available for three fleet segments:

- 1 fleet segment displayed an **increasing** (deteriorating) trend,
- 2 fleet segments displayed **no clear** 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 2021 provided by MS, and were as follows:

- 2 fleet segments may be *in balance* with their fishing opportunities.

Trends were available for the two fleet segments:

- 2 fleet segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 6 fleet segments in NAO and 2 in OFR:

Area 27

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

OFR

- 2 fleet segments appear to be *in balance*.

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			3	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			3

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 were calculated for 4 segments:

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

Trends were calculated for the 4 segments:

- 3 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 4 segments:

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

Trends for the 4 segments were as follows:

- 1 segment displayed an **increasing** trend,
- 3 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 8 segments:

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

Trends were calculated for 8 segments:

- 1 segment displayed an **increasing (improving)** trend,
- 1 segment displayed a **decreasing (deteriorating)** trend,
- 5 segments displayed **no clear** trend.

The Inactive Fleet Indicators

In 2021, 5 vessel length segments had inactive vessels (VL0010, VL1012, VL1218, VL1824 and VL2440).

The Lithuanian inactive fleet accounted for 46% of the total number of vessels, 4.8% of the total GT and 10.5% of the total kW.

At the national level, inactive vessels accounted for more than 20% of the fleet in terms of number category, and thus, was *out of balance* and displayed **increasing** (deteriorating) trend. Inactive vessels were *in balance* and displayed **decreasing** trends in the other 2 categories (GT and kW).

The segments with the highest level of inactivity were the VL0010 segment at 31.4% in terms of number of vessels and VL2440 with 3.8% of GT and 6.2% of kW.

By vessel length group:

- 1 segment was *out of balance* in terms of vessel numbers,
- 4 segments were *in balance* in terms of vessel numbers,
- 5 segments were *in balance* in terms of GT and kW.

Synthesis of indicators and trends

Based on biological indicator values for 2021 and trends over 2017-2021, and according to the criteria in the Commission guidelines, six fleet segments appear not to be in balance with fishing opportunities. Three 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 23-13 but the SAR values differ. The economic indicators suggest that distant fleet segment OFR TM 40XX and NAO PG VL0010 fleet segment are in balance with fishing opportunities, while NAO DFN VL1012 and NAO TM VL2440 are out of balance.

The above observations are largely in line with the indicator values in the MS fleet report submitted in 2023, apart from the SAR biological indicator.

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.

						<div> ■ in balance ■ out of balance ■ borderline ■ insufficiently profitable ■ improving ■ deteriorating ■ Null/flat trend ■ no clear trend </div>													
						Status 2021 according to thresholds and criteria in the 2014 Guidelines													
						Biological				Economic				Activity				Inactive	
SR	FT	VL	Fleet segment	No of vessels		SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	KW	
NAO	DFN	VL1012	LTU NAO DFN1012 NGI *	3															
NAO	DFN	VL2440	LTU NAO DFN1012 NGI *	1															
NAO	PG	VL0010	LTU NAO PG 0010 NGI	52															
NAO	TM	VL1824	LTU NAO TM 2440 NGI *	2															
NAO	TM	VL2440	LTU NAO TM 2440 NGI *	9															
NAO	TM	VL40XX	LTU NAO TM 2440 NGI *	2															
OFR	DTS	VL40XX	LTU OFR TM 40XX NEU *	2															
OFR	TM	VL40XX	LTU OFR TM 40XX NEU *	4															
NAO	INACTIV	VL0010	LTU NAO INAD010 NGI	44															
NAO	INACTIV	VL1012	LTU NAO INA1012 NGI	5															
NAO	INACTIV	VL1218	LTU NAO INA1218 NGI	1															
NAO	INACTIV	VL1824	LTU NAO INA1824 NGI	2															
NAO	INACTIV	VL2440	LTU NAO INA2440 NGI	13															
LTU Total				140															

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicators

A comparison of indicator values computed by the EWG 23-13 and those in the fleet report submitted by 31 May 2023 are given in Annex II.

Sustainable harvest indicator (SHI)

In the MS annual fleet report the SHI has been provided for the reference year 2021.

Despite the fact that the Lithuanian Baltic Sea fleet in 2021 consisted of 6 fleet segments SHI was estimated for only 3 of these segments, all of which were out of balance. The three segments for which SHI was estimated are NAO TM 1824, NAO TM 2440 and NAO TM 40XX.

A comparison between indicator values in the MS Fleet reports for 2023 and the values for equivalent fleet segments as estimated by EWG 23-13 indicate that the status of the 3 segments for which a comparison can be made remains the same. There are similar outputs for all values. All fleet segments may be out of balance.

The SHI values for 2 of the NAO segments estimated for the period 2017-2021 show no clear trend, while one NAO segment shows an increasing trend.

The SHI values for the OFR TM 40XX fleet segment in the fleet report shows a decreasing trend whereas the EWG estimates show no clear trend.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has been provided for the reference year 2021 for 6 NAO fleet segments, and 1 OFR segment.

The comparison between SAR reported in the MS annual fleet report for NAO segments and those estimated in the framework of EWG 23-13 revealed contrasting outputs for 4 fleet segments. The MS annual fleet reports that 4 fleet segments are in balance, while EWG 23-13 values indicate that these fleet segments are out of balance.

For the OFR, the SAR values computed by the MS and EWG 23-13 for one segment (OFR TM VL40XX), both indicate the segment to be in balance. A SAR indicator values was available for a

second segment (OFR DTS VL40XX, also indicated to be in balance) in the EWG 23-13 data but was not reported in the fleet report.

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

In the MS annual fleet report the CR/BER ratio has been provided for the reference years 2017-2021 for 4 fleet segments.

A comparison between indicator values in the MS Fleet report and the values for equivalent fleet segments as estimated by EWG 23-13 for 2021 show only minor differences.

The fleet segment NAO DFN VL1012 was found to be out of balance or insufficiently profitable, while NAO PG VL0010, NAO TM VL2440 and OFR TM VL40XX was found to be in balance.

Based on EWG 23-13 analysis the fleet segments NAO PG VL0010 show a decreasing trend for the period 2017-2021, whereas NAO DFN VL1012, NAO TM VL2440 and the distant fleet OFR TM VL40-XX show an increasing trend.

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

In the MS annual fleet report RoFTA indicator is provided for the reference years 2017-2021 for 4 fleet segments. ROI is estimated for the same fleet segments as RoFTA.

The comparison between RoFTA and ROI for 4 fleet segments reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed the same outputs for all values and trends.

Fleet segments NAO DFN VL1012 and NAO TM VL2440 appears to be out of balance for RoFTA and ROI but with increasing trend. Distant fleet OFR TM VL40XX is indicated as in balance with an increasing trend.

Trends were improving for all fleet segment except for NAO PG VL0010 which shows a deteriorating trend.

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 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 VUR₂₂₀.

A discrepancy has been observed in the values of VUR between the MS annual fleet report and the ones estimated from EWG 23-13. 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 23-13 values indicate that the majority of the fleet segments are in balance (except NAO PG VL0010) while MS fleet report found 3 fleet segments as borderline and 2 fleet segments (NAO PG VL0010 and NAO TM VL2440) may be out of balance.

A comparison of the trends in VUR between the fleet report and EWG 23-13 values was not possible due to the clustered segments and different periods used (EWG 23-13 presented trends for 2017-2021 while MS for 2017-2011). Nevertheless, EWG 23-13 indicator values show no clear trend in the data for most of the fleet segments (except for NAO DFN VL1012 with a decreasing (deteriorating) trend and NAO TM VL2440 with an increasing (improving) trend).

Inactive Fleet Indicator

Inactive vessels have been reported as number, GT and kW in the MS annual fleet report. EWG 23-13 indicate that all segments are in balance, apart from the number of inactive vessels in NAO INA0010 which may be out of balance.

This indicator is increasing in all categories for two fleet segments and showing no clear trend in all categories for 2 fleet segments. The indicator is showing no clear trend in GT for 1 fleet segment, while is increasing for number of vessels and kW.

Assessment of fleet report

The EWG 23-13 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).

The comparison between indicator values in the MS Fleet reports and the values for equivalent fleet segments, as estimated by EWG 23-13, show that many of the indicators for all the segments for which a comparison can be made, are similar.

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.

Fleet segment NAO DFN VL1012 shows a potential imbalance but is covered by an ongoing action plan.

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.

Based on the combined analysis of the results of the indicators, the MS concluded that fishing opportunities for large scale trawlers and netters had a decreasing trend, due to COVID-19 management restrictions, closure of cod fisheries and increase of costs.

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

MS fleet report submitted by 31 May 2023 identifies overcapacity for fleet segment NAO DFN VL1012 segment based on CR/BER and RoFTA indicator results. Analysis of economic indicator values in the fleet report and those in this EWG report indicate that the other fleet segments may be considered long-term profitable.

For the large-scale trawlers and netters, 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 Atlantic cod fisheries and restrictions COVID-19 restrictions, which have led to net losses for the NAO TM 24-40 fleet segment in 2020 and 2021, termination of fisheries for NAO DTS 24-40 segment from 2019 and long-term losses for NAO DFN 10-12 segment.

Overview of action plans

The action plan provided by MS in 2021 (Lithuanian fleet report for 2020) seems to be the same as that provided with the 2019 fleet report in terms of targets and measures but with amended timeframe from 2020 to 2021-2023.

The action plan relates to the fleet segments NAO DFN VL1012 and NAO DTS VL2440 operating in Baltic Sea which are reliant on the Baltic Sea cod stock. The following measures are currently being implemented under the 2021 Action Plan in order to reduce the pressure on the stock:

- System of transferable fishing concessions (TFC) as an effective tool to address overcapacity.

Scrapping scheme with public compensation for permanent cessation of fishing for reducing overcapacity, if relevant amendment of Regulation (EU) N° 508/2014 allows it.

Adjustment targets and tools

No new or revised action plan has been proposed with the fleet report submitted in 2023. The current action plan is intended to run from 2021-2023.

Number of vessels

No new or revised action plan has been proposed by the MS.

3.4.15 Malta (MLT)

Overview of indicator findings

Area 37

There were 24 fleet segments in 2021, of which 19 were active. Of the 19 active segments, landing data was provided for 10 aggregated fleet segments and economic data were provided aggregated in 9 fleet segments.

Sustainable harvest indicator (SHI)

Out of 19 active fleet segments in 2021, SHI indicator values were available for 10.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 6 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 54.01% of the total value of the landings in 2021 provided by MS, and were as follows:

- 1 fleet segment may not be *in balance* with their fishing opportunities,
- 3 fleet segments may be *in balance* with their fishing opportunities.

No trends were available.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 10 fleet segments in 2021

- 2 fleet segments may be in balance with their fishing opportunities,
- 8 fleet segments may not be in balance with their fishing opportunities.
 - 1 fleet segment with 3 stocks-at-risk,
 - 2 fleet segments with 2 stock-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	1	3	5	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 11 segments:

- 7 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:

- 6 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 11 segments:

- 7 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:

- 6 segments displayed an **increasing** trend,
- 2 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, VUR₂₂₀ is not analysed here.

VUR was calculated for 20 segments*:

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

Trends could be calculated for 9 segments:

- 2 segments displayed a **decreasing** trend,
- 5 segments displayed **no clear** trend
- 2 segments displayed a **null/flat** trend.

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

Inactive Fleet Indicator

In 2021, 5 vessel length segments had inactive vessels (VL0006, VL0612, VL1218, VL1824 and VL2440).

The Maltese inactive fleet accounted for 27,36% of the total number of vessels, 33.9% 25.25% of the total GT and 26,52% of the total kW. At the national level, inactive vessels accounted for more than 20% of the fleet in vessel number and thus, was *out of balance* and there was no trend detected.

The segments with the highest level of inactivity were the VL0006 segment with 13.27% in terms of number of vessels, the VL0612 segment with 13.49% of the kW and VL1824 with 13.12% of GT.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission guidelines, over half of the fleet segments appear to be out of balance with their fishing opportunities. While the economic indicators indicate balance for the fleet segments HOK1218 NGI, HOK1824 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 each of the first four segments, or an imbalance with respect to the SHI indicator for the latter segment. No SHI-value is meaningful for MGO1824 NGI*, but the remaining indicators (except for VUR₂₂₀) indicate that this segment may be in balance with its fishing opportunities. In terms of economic and technical indicators, HOK1218 NGI and MGO1824 NGI* segments appear to be in balance for CR/BER, RoFTA, ROI and VUR. The PGP0006 NGI*, PMP0006 NGI and PMP0612 NGI segments seem to be out of balance for the same indicators, as well as for the biological indicators, but shows an increasing trend for economic indicators. The MGO0612 NGI segment shows a negative trend for RoFTA, while the DTS2440 NGI* shows an increasing trend for CR/BER and RoFTA indicators.

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.

					<div></div> in balance	<div></div> out of balance	<div></div> borderline	<div></div> insufficiently profitable	<div></div> improving	<div></div> deteriorating	<div></div> Null/flat trend	<div></div> no clear trend																		
					Status 2021 according to thresholds and criteria in the 2014 Guidelines										Trends 2017-2021															
					Biological			Economic				Activity			Inactive			Biological			Economic				Activity			Inactive		
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	
MBS	DTS	VL1824	MLT MBS DTS2440 NGI *	7																										
MBS	DTS	VL2440	MLT MBS DTS2440 NGI *	5																										
MBS	HOK	VL1218	MLT MBS HOK1218 NGI	14																										
MBS	HOK	VL1824	MLT MBS HOK1824 NGI *	13																										
MBS	MGO	VL0612	MLT MBS MGO0612 NGI	9																										
MBS	MGO	VL1218	MLT MBS MGO1824 NGI *	2																										
MBS	MGO	VL1824	MLT MBS MGO1824 NGI *	1																										
MBS	DFN	VL0006	MLT MBS PGP0006 NGI *	3																										
MBS	HOK	VL0006	MLT MBS PGP0006 NGI *	3																										
MBS	PGP	VL0006	MLT MBS PGP0006 NGI *	267																										
MBS	DFN	VL0612	MLT MBS PGP0612 NGI *	4																										
MBS	DFN	VL1824	MLT MBS PGP0612 NGI *	1																										
MBS	HOK	VL0612	MLT MBS PGP0612 NGI *	41																										
MBS	PGP	VL0612	MLT MBS PGP0612 NGI *	102																										
MBS	PMP	VL0006	MLT MBS PMP0006 NGI	27																										
MBS	PMP	VL0612	MLT MBS PMP0612 NGI	121																										
MBS	PS	VL1218	MLT MBS PS 1824 NGI *	1																										
MBS	PS	VL1824	MLT MBS PS 1824 NGI *	2																										
MBS	PS	VL2440	MLT MBS PS 1824 NGI *	1																										
MBS	INACTIV	VL0006	MLT MBS INA0006 NGI	114																										
MBS	INACTIV	VL0612	MLT MBS INA0612 NGI	104																										
MBS	INACTIV	VL1218	MLT MBS INA1218 NGI	4																										
MBS	INACTIV	VL1824	MLT MBS INA1824 NGI	11																										
MBS	INACTIV	VL2440	MLT MBS INA2440 NGI	2																										
MLT Total				859																										

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison Indicator values computed by the EWG 23-13 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)

No SHI-values were presented in the MS fleet report for the reference year 2021. It is not clear why SHI indicators are not presented, although F/F_{MSY} values are reported for 2021. 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, i.e. implying balance. 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 2021. A general statement is made that overall, the SAR indicator is not available for Malta for 2012-2022, 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.

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 23-13 revealed similar outputs for most values.

The following segments were defined as out of balance: MGO0612 NGI, PMP0612 NGI PGP0006 NGI* and PMP0006 NGI.

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 23-13 revealed similar outputs for most values.

The following segments were defined as out of balance: MGO0612 NGI, PMP0612 NGI PGP0006 NGI* and PMP0006 NGI.

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 23-13 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 10 segments where the VUR indicator is out of balance. The difference in the results for EWG estimations and information provided in the MS fleet report for the VUR indicator is unclear.

Inactive Fleet Indicator

The comparison between the inactive fleet indicator reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 is not feasible due to the information in MS fleet report provided only for 2022. The EWG inactive fleet indicator is available for the period 2017-2021.

Assessment of fleet report

The EWG 23-13 notes that the fleet report submitted in 2023 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 2021. 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 (only values for 2022 are provided) which makes the values estimated for EWG incomparable with values provided in the report.

Discrepancies in previous fleet reports

The Maltese fleet report submitted in 2023 has not been adjusted 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.

According to the information provided in the fleet report no structural overcapacity is detected in the Maltese fleet in 2021. In addition, no information on the long-term profitability of fleet segments is provided in the fleet report.

Overview of action plan

The new action plan is provided in Annex I of the fleet report for 2022 (submitted in 2023). 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 23-13 is unable to comment on 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 2026.

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 33 fleet segments in 2021, of which 27 were active. Of the 27 active segments, landings and economic data were provided aggregated for 11 fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2021, 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 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 the 7 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 76.11% of the total value of the landings in 2021 provided by MS. Of these:

- 4 fleet segments may *not be in balance* with their fishing opportunities;
- 3 fleet segments may be *in balance* with their fishing opportunities.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 11 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG notes that the 2021 SAR indicator values indicate:

- 11 fleet segments may 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	4	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.

	0-25%	25-50%	50-75%	75-100%
N of fleet segments	6	1	4	

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

RoI was not calculated.

RoFTA was calculated for 11 segments:

- 5 segments were *in balance* with their fishing opportunities,
- 6 segment was *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:

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

Trends were calculated for 11 segments:

- 2 segments displayed an **increasing** trend,
- 8 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, VUR₂₂₀ is not analysed here.

VUR was calculated for 27 segments*:

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

Trends were calculated for 20 segments:

- 20 segments displayed **no clear** trend.

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

The Inactive Fleet Indicators

In 2021, 6 vessel length classes had inactive vessels (VL0010, VL1012, VL1218, VL1824, VL2440 and VL40XX).

The Dutch inactive fleet accounted for 27.2% of the total number of vessels, 3.9% of the total GT and 7.5% of the total kW. At the national level, inactive vessels accounted for more than 20% of the fleet in vessel number and thus, was *out of balance* and displayed a **decreasing** (improving) trend.

The segment with the highest level of inactivity is the VL0010 segment with 18.3% of the total Dutch fleet.

EWG 23-13 reported that:

- All fleet segments were *in balance* for the number of vessels, GT and kW.
- An **increasing** (deteriorating) trend was recorded for VL1824 in terms of number, GT and KW of inactive vessels and **decreasing** (improving) trend was recorded for VL2440 in terms of number, GT and KW.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission guidelines, the majority of fleet segments appeared to be out of balance or indicate some potential imbalance with fishing opportunities. In particular, SHI, RoFTA and CR/BER indicators suggest that segment TBB VL2440 is not in balance with a worsening situation (decreasing trend) for RoFTA and CR/BER. As SHI, VUR and VUR₂₂₀ indicators suggest, fleet segment PG VL1012 seems also imbalanced with a decreasing trend for CR/BER and ROFTA but with an improving situation (decreasing trend) for SHI.

Fleet segments TBB VL40XX and TM VL40XX also indicate some potential imbalance according to the SHI values but with an improving situation (decreasing trend) for SHI for TBB VL40XX and an increasing trend for CR/BER and RoFTA for TM VL40XX.

The segment DTS VL2440 appear to be in balance for both SAR and SHI, although RoFTA and CR/BER indicators suggest that this segment is not in balance with a worsening situation (decreasing trend). Fleet segment TBB VL0010 reveals similar outputs – seems in balance according to SAR (no SHI calculated for the segment) but RoFTA, CR/BER and VUR indicators suggest that the segment is not in balance with a worsening situation (decreasing trend) for RoFTA and CR/BER but the segment represents very small share of the total Dutch fleet (5 of 720 vessels).

DFN VL1824 is not in balance for RoFTA and VUR indicators with decreasing trend for both CR/BER and RoFTA and no trend for VUR but the segment represents negligible share of the total Dutch fleet (1 of 720 vessels).

A comparison between indicator values provided in the MS Fleet report and values for equivalent fleet segments, as estimated by EWG 23-13, 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 SHI (for 4 of the 6 fleet segments for which SHI was provided by MS) and SAR (for TM VL40XX).

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.

					<div><div>in balance</div><div>out of balance</div><div>bordeline</div><div>insufficiently profitable</div><div>improving</div><div>deteriorating</div><div>Null/flat trend</div><div>no clear trend</div></div>																									
					Status 2021 according to thresholds and criteria in the 2014 Guidelines										Trends 2017-2021															
SR	FT	VL	Fleet segment	No of vessels	Biological										Biological															
					Economic					Activity					Inactive					Economic					Activity					Inactive
					SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW		SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW
NAO	DFN	VL1218	NLD NAO DFN1824 NGI *	2																										
NAO	DFN	VL1824	NLD NAO DFN1824 NGI *	1																										
NAO	FPO	VL1218	NLD NAO DFN1824 NGI *	4																										
NAO	FPO	VL1824	NLD NAO DFN1824 NGI *	1																										
NAO	HOK	VL1218	NLD NAO DFN1824 NGI *	1																										
NAO	MGO	VL1824	NLD NAO DFN1824 NGI *	7																										
NAO	DTS	VL1824	NLD NAO DTS1824 NGI *	7																										
NAO	DTS	VL2440	NLD NAO DTS2440 NGI *	35																										
NAO	DTS	VL40XX	NLD NAO DTS2440 NGI *	1																										
NAO	PG	VL0010	NLD NAO PG 0010 NGI *	161																										
NAO	PG	VL1012	NLD NAO PG 1012 NGI *	20																										
NAO	DRB	VL1012	NLD NAO TBB0010 NGI *	1																										
NAO	DTS	VL0010	NLD NAO TBB0010 NGI *	8																										
NAO	DTS	VL1012	NLD NAO TBB0010 NGI *	2																										
NAO	TBB	VL0010	NLD NAO TBB0010 NGI *	5																										
NAO	TBB	VL1012	NLD NAO TBB0010 NGI *	1																										
NAO	DRB	VL1218	NLD NAO TBB1218 NGI *	1																										
NAO	DRB	VL1824	NLD NAO TBB1218 NGI *	1																										
NAO	DRB	VL2440	NLD NAO TBB1218 NGI *	5																										
NAO	DRB	VL40XX	NLD NAO TBB1218 NGI *	4																										
NAO	DTS	VL1218	NLD NAO TBB1218 NGI *	1																										
NAO	TBB	VL1218	NLD NAO TBB1218 NGI *	10																										
NAO	TM	VL1218	NLD NAO TBB1218 NGI *	1																										
NAO	TBB	VL1824	NLD NAO TBB1824 NGI *	149																										
NAO	TBB	VL2440	NLD NAO TBB2440 NGI *	27																										
NAO	TBB	VL40XX	NLD NAO TBB40XX NGI *	60																										
NAO	TM	VL40XX	NLD NAO TM 40XX NGI *	8																										
NAO	INACTIV	VL0010	NLD NAO INA0010 NGI *	132																										
NAO	INACTIV	VL1012	NLD NAO INA1012 NGI *	13																										
NAO	INACTIV	VL1218	NLD NAO INA1218 NGI *	15																										
NAO	INACTIV	VL1824	NLD NAO INA1824 NGI *	20																										
NAO	INACTIV	VL2440	NLD NAO INA2440 NGI *	12																										
NAO	INACTIV	VL40XX	NLD NAO INA40XX NGI *	4																										
NLD Total				720																										

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison of indicator values computed by the EWG 23-13 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 indicator has been provided for the reference year 2021 for six fleet segments.

The comparison between SHI reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed different outputs for the fleet segments PG VL1012, TBB VL2440, TBB VL40XX and TM VL40XX. The SHI reported in the MS annual fleet report shows that these fleet segments are in balance with their fishing opportunities while the EWG 23-13 indicator values suggest the opposite, although the trends are the same for both the MS annual fleet report and the EWG 23-13 showing a decreasing trend.

Data were not provided in the Member State's report for the DTS-VL1824-NGI segment, but it was 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 2021 for eleven fleet segments.

All fleet segments were found to be in balance in both MS annual fleet report and EWG 23-13, except for TM VL40XX which was found to be out of balance in the MS annual 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 23-13 revealed the same outputs for all values. Four fleet segments (DTS VL 2440, TBB VL 0010, TBB VL1824 and TBB VL2440) seems to be out of balance for CR/BER.

Values for the period 2015-2021 are provided accompanied by trend indication for 4 segments with an increasing trend for TM VL40XX and a decreasing trend for TBB VL2440, TBB VL40XX and DTS VL2440. A non-significant trend at 5% is indicated for the other 7 segments and no comparison on the trend was possible for them.

Trends based on EWG 23-13 calculations for the 11 segments were as follows:

- 2 segments displayed an increasing trend (including TM VL40XX),
- 8 segments displayed a decreasing trend (including TBB VL2440, TBB VL40XX and DTS VL2440),
- 1 segment displayed no clear trend.

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

In the Dutch annual fleet report, both ROI and RoFTA were calculated, while only RoFTA was estimated by EWG 23-13. Therefore, a comparison was carried out for RoFTA, revealing the same outputs for all values. Six fleet segments (DFN VL1824, DTS VL 1824, DTS VL 2440, TBB VL0010, TBB VL1824 and TBB VL2440) seems to be out of balance for RoFTA and five segments are in balance (PG VL0010, PG VL 1012, TBB VL1218, TBB VL40XX and TM VL40XX).

In the Dutch annual fleet report ROI and RoFTA values for the period 2015-2021 are provided accompanied by trend indication for 2 segments (DTS VL2440 and TBB VL2440) with a decreasing trend. A non-significant trend at 5% is indicated for the other 9 segments and no comparison on the trend was possible for them.

Trends for RoFTA based on EWG 23-13 calculations for the 11 segments were as follows:

- 1 segment displayed an increasing trend,
- 10 segments displayed a decreasing trend (including DTS VL2440 and TBB VL2440).

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 23-13 revealed the same outputs for all values.

Values for the period 2015-2021 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 29 of the MS fleet report).

VUR was calculated for 11 segments:

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

Trend assessment for VUR was provided by the MS and showed no clear or no trend with the exception of DFN VL1824 and DFN VL2440 with a decreasing trend.

Trends based on EWG 23-13 calculations based on VUR for the 11 segments were as follows:

- 11 segments displayed no trend (or no trend could be calculated).

The Inactive Fleet Indicators

Inactive vessels have been reported as number, GT and kW in the MS annual fleet report, and they revealed similar outputs in term of fleet segment as the ones estimated in the framework of the EWG 23-13 dataset. While the inactivity of the Dutch fleet lays below 10% in terms of gross tonnage and engine power, the large number of small inactive vessels brings the total inactive vessel percentage by number above the 20% threshold.

Assessment of fleet report

The EWG 23-13 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).

Fleet segments that are assessed by the Member State to be “out of balance” with their fishing opportunities are not clearly identified in the fleet report.

No action plan is included in the fleet report and no overall conclusion for fleet segments assessed by the Member State to be “out of balance”.

Although some of the EWG 23-13 findings are reflected in the fleet report submitted by Netherlands, the report does not contain current information (for 2022) required under point 9 of the Commission guidelines COM (2014) 545 which specifies additional information that should be included. Only some of the information for 2021 was provided.

Although some fleet segments show some indications of imbalance according to analysis of the results for SHI, SAR, CR/BR, RoFTA and VUR indicators, reasons for not considering them as such are explained to some extent in the fleet report. However, no overall conclusions on balance are given by the MS. Furthermore, no action plan is proposed for any of the fleet segments and no rationale behind such a judgement is elaborated in the fleet report.

Discrepancies in previous fleet reports.

The discrepancies between the STECF assessment of the balance between capacity and fishing opportunities relating to Netherlands's previous fleet report have not been fully considered in the fleet report submitted by 31 May 2023. No action plan was provided for segments that were indicated to be the imbalanced.

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 RoFTA and CR/BER values.

The assessment in the fleet report suggests long-term profitability on the Dutch fleet with a decreasing trend for RoFTA. The estimation by segments identifies two fleet segments (DTS VL2440 and TBB VL2440) to be “out of balance” with a decreasing trend for both RoFTA and CR/BER, two fleet segments (TBB VL0010 and TBB VL1824) to be “out of balance” with no trend and two segments (DFN VL1824 and DTS VL1824) “out of balance” for 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 23 fleet segments in 2021, of which 18 were active. Of the 18 active segments, weight of landings was provided aggregated by 11 segments, value of landings and economic data were provided aggregated by 8 fleet segments.

Sustainable harvest indicator (SHI)

Out of 19 fleet segments active in 2021, landings in value have been provided aggregated in 11 fleet segments and SHI indicator values were available for 8.

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 23-13 notes that for the 4 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 74.87% of the total value of the landings in 2021 provided by MS, and were as follows

- 4 fleet segments may not be in balance with their fishing opportunities.

The time series of SHI values were available for 3 fleet segments and they were as follows: **no trend**, **flat/null**, and **decreasing** (improving).

Stocks at Risk Indicator (SAR)

SAR indicator was available for all the 11 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 5 fleet segments may be in balance with their fishing opportunities;
- 6 fleet segments may be 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%
N of fleet segments		5	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	4		2

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

RoFTA was calculated for 8 segments:

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

Trends could be calculated for 6 segments:

- 0 segments displayed an **increasing** trend,
- 6 segment displayed a **decreasing** trend.

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

CR/BER was calculated for 8 segments:

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

Trends could be calculated for 6 segments:

- 4 segments displayed an **increasing** trend,
- 2 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 18 segments*:

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

Trends could be calculated for 12 segments:

- 8 segments displayed **no clear** trend,
- 2 segments displayed a **decreasing** trend,
- 2 segments displayed a **null/flat** trend.

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

The Inactive Fleet Indicators

In 2020, 5 vessel length segments had inactive vessels (VL0010, VL1012, VL1218, VL1824 and VL2440).

The inactive fleet accounted for 2.3% of the total number of vessels, 1.24% of the total GT and 1.96% of the total kW. At the national level, inactive vessels accounted for less than 20% of the fleet in vessel number and thus, was *in balance* and displayed **decreasing** (improving) trends.

The segments with the highest level of inactivity were the VL0010 segment with 0.97% in terms of number of vessels, the VL1824 segment with 0.96% of the kW and with 0.58% of GT.

By indicator categories:

- All segments were *in balance* in all 3 categories (#, GT and kW),
- 2 segments displayed **decreasing**, 1 segment displayed **null/flat** and 2 segments displayed **no clear** trends in categories by numbers and,
- 1 segment displayed **decreasing** and 4 segments displayed **no clear** trends in categories by GT,
- 2 segments displayed **decreasing**, 2 segments displayed **no clear** and 1 segment displayed an **increasing** trend in category by kW.

Area OFR

There was 1 fleet segment in 2021, which was active. The weight of landings was provided by 1 vessel. No economic data were 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 provided by the MS and thus, VUR₂₂₀ is not 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.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017–2021 and according to the criteria in the Commission guidelines, the majority 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 and VUR values. Trends in CR/BER are deteriorating for the fleet segments DTS VL1824 and PG VL1012 and for RoFTA of all fleet segments. Segments TM VL1218, TM VL1824, DTS VL1824 and TM VL2440 indicate some potential imbalance according to the SHI value for 2021. Improving, flat and no clear trends in SHI values are apparent for the segments TM VL2440, TM VL1824 and DTS VL1824 respectively.

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.

					<div><div>■ in balance</div><div>■ out of balance</div><div>■ borderline</div><div>■ insufficiently profitable</div><div>■ improving</div><div>■ deteriorating</div><div>■ Null/flat trend</div><div>■ no clear trend</div></div>																											
					Status 2021 according to thresholds and criteria in the 2014 Guidelines												Trends 2017-2021															
SR	FT	VL	Fleet segment	No of vessels	Biological		Economic					Activity					Inactive		Biological		Economic					Activity					Inactive	
					SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	KW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	KW			
NAO	DFN	VL1218	POL NAO DFN1218 *	10																												
NAO	DFN	VL1824	POL NAO DFN1218 *	2																												
NAO	HOK	VL1218	POL NAO DFN1218 *	7																												
NAO	HOK	VL1824	POL NAO DFN1218 *	2																												
NAO	DTS	VL1012	POL NAO DTS1218 *	4																												
NAO	DTS	VL1218	POL NAO DTS1218 *	18																												
NAO	DTS	VL1824	POL NAO DTS1824 *	9																												
NAO	DTS	VL2440	POL NAO DTS1824 *	1																												
NAO	DTS	VL40XX	POL NAO DTS40XX	1																												
NAO	FPO	VL2440	POL NAO FPO2440	1																												
NAO	PG	VL0010	POL NAO PG 0010	525																												
NAO	PG	VL1012	POL NAO PG 1012	125																												
NAO	PMP	VL1012	POL NAO TM 1218 *	2																												
NAO	PMP	VL1218	POL NAO TM 1218 *	3																												
NAO	TM	VL1218	POL NAO TM 1218 *	8																												
NAO	TM	VL1824	POL NAO TM 1824	45																												
NAO	TM	VL2440	POL NAO TM 2440	44																												
NAO	TM	VL40XX	POL NAO TM 40XX	1																												
OFR	TM	VL40XX	POL OFR TM 40XX	1																												
NAO	INACTIV	VL0010	POL NAO INA0010	8																												
NAO	INACTIV	VL1012	POL NAO INA1012	2																												
NAO	INACTIV	VL1218	POL NAO INA1218	4																												
NAO	INACTIV	VL1824	POL NAO INA1824	4																												
NAO	INACTIV	VL2440	POL NAO INA2440	1																												
POL Total				828																												

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison Indicator values computed by the EWG 23-13 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. Due to confidentiality issues, and limited availability of indicators for the distant-water fleet segment, no comparison of indicator values could be undertaken.

Sustainable harvest indicator (SHI)

In the Fleet Report submitted by Poland SHI is presented for the period 2020–2022.

SHI values reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 are similar (i.e., all the 4 fleet segments out of balance). The MS annual fleet report includes a further two fleet segments, which according to their SHI values may be out of balance: DFN VL1218 and DTS VL 1218. However, the EWG considers that the SHI values for these additional fleet segments are not meaningful because according to the criteria in the 2014 Balance Indicator

Guidelines, 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)

In the Fleet Report submitted by Poland SAR is presented for 2020–2022.

The comparison between SAR values reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 was made for 2021 and reveals some discrepancies. In particular, DFN VL1218 was out of balance for EWG 23-13, while the fleet report reported this fleet segment as in balance for SAR. In addition, DTS VL1824 and TM VL1218 were in balance according to SAR values computed by EWG 23-13, while the fleet report indicates these fleet segments to be out of balance.

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 23-13 revealed similar outputs. While 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.

In the Polish annual fleet report, CR/BER values are provided for 8 segments for the years 2020–2022. No comparison with trends estimated by the EWG 23-13 could be undertaken.

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 23-13. Hence no direct comparison was carried out.

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. However, in the Polish annual fleet report ROI values for 8 segments for the years 2020–2022. No comparison with trends estimated by the EWG 23-13 could be undertaken.

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

No discrepancy has been observed in the calculation of VUR between the MS annual fleet report and the ones estimated in the framework of the EWG 23-13.

The outputs in terms of fleet segments status are the same with the exception of fleet segments DTS VL40XX, FPO VL2440 and TM VL40XX for which the MS did not provide indicator values.

The estimates for the EWG 23-13 provides clear deteriorating trend only for the DTS VL1824 and DTS VL2440 segments, whereas for others segments, no clear or null/flat trends were evident.

The Inactive Fleet Indicators

Inactive vessels have been reported as number, GT and kW in the MS annual fleet report. However, a discrepancy has been observed in the indicator between the MS annual fleet report and the ones estimated in the framework of the EWG 23-13. EWG 23-13 notes that this is most likely due to the different method of calculation (Poland presented the indicator as a proportion of inactive vessels of the fleet segment instead of the total fleet). Nevertheless, the outputs in terms of fleet segments status are the same between EWG 23-13 and MS report.

In the Polish annual fleet report Inactive Fleet Indicator values for 4 segments for the period 2020–2022 are provided without any indication of trends. No comparison with trends estimated by the EWG 23-13 could be undertaken.

Assessment of fleet report

The fleet report submitted in 2023 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 were found for 1 segment, and for SAR for many segments by EWG 22-15. Also, provided RoFTA, fleet report ROI although values were equal. Both issues have not been properly addressed in 2023 MS report.

Structural overcapacity and profitability

The fleet report submitted by 31 May 2023 identifies overcapacity for 8 segments. The MS was structurally set the biological, economic or technical indicators values above/below levels corresponding to indication of imbalance or balance. Relevant remedial actions provided. In the report presents the estimates of the long-term profitability by fleet segments based on ROI and CR/BER values.

Overview of action plans.

In the fleet report, Poland has concluded that structural overcapacity exists in eight of the fishing fleet segments as was the case in the report for 2021. Accordingly, a revised action plan based on the action plan submitted with the report for 2021 is provided. The revised action plan specifies actions to be taken separately for specific fleet segments.

EWG 23-13 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 23-13 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 2023. The updated numbers of vessels, which are foreseeing for permanent cessation, was provided in the report. The targets and tools defined clearly and remain as in 2022 report.

Number of vessels

All 827 vessels targeted by action plan, where 213 vessels are foreseeing for permanent cessation.

3.4.18 Portugal (PRT)

Overview of indicator findings

There were 76 fleet segments in 2021, of which 60 were active. Of the 60 active segments, landings and economic data were provided aggregated by 53 fleet segments.

Area 27

There were 72 fleet segments operating in Area 27 in 2021, of which 56 were active. Of the 56 active segments, landings and economic data were provided aggregated by 50 fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2021, landings in value have been provided aggregated in 50 fleet segments and SHI indicator values were available for 44.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for 34 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 36.78% of the total value of the landings in 2021 provided by MS, and were as follows:

- 10 fleet segments may be in balance with their fishing opportunities,
- 0 fleet segment may be out of balance with their fishing opportunities.

Trends could be calculated for 9 segments:

- 0 fleet segment displayed an **increasing** (deteriorating) trend,
- 3 fleet segments displayed a **decreasing** (improving) trend,
- 7 fleet segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 50 fleet segments in 2021.

- 45 fleet segments may be in balance with their fishing opportunities;
- 5 fleet segments may be out of balance with their fishing opportunities:
 - 2 fleet segments 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	29	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. 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	39	4	1	

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

RoI was not calculated.

RoFTA was calculated for 50 segments:

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

Trends could be calculated for 50 segments:

- 25 segments displayed an **increasing** trend,
- 25 segments displayed a **decreasing** trend.

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

CR/BER was calculated for 50 segments:

- 45 segments were in balance with their fishing opportunities,
- 5 segments were out of balance with their fishing opportunities.

Trends could be calculated for 50 segments:

- 11 segments displayed an **increasing** trend,
- 27 segments displayed a **decreasing** trend,
- 12 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, VUR₂₂₀ is not analysed here.

VUR was calculated for all 56 segments*:

- 41 segments were in balance with their fishing opportunities,
- 15 segments were out of balance with their fishing opportunities.

Trends could be calculated for 55 segments:

- 1 segment displayed an **increasing** trend,
- 3 segments displayed a **decreasing** trend,
- 51 segments displayed **no clear** trend.

*The VUR value calculated for an aggregated segment (cluster) is applied to all the fleet segments in the cluster.

The Inactive Fleet Indicators

In 2021, 16 fleet segments with 6 vessel length segments had inactive vessels (VL0010, VL1012, VL1218, VL1824, VL2440 and VL40XX). Data were provided for the mainland (NGI) Madeira (P2) and Azores (P3) fleets. The mainland fleet contained inactive vessels in the VL40XX segment.

The Portuguese inactive fleet accounted for 54.5% of the total number of vessels, 21.6% of the total GT and 24.6% of the total kW. At the national level, inactive vessels accounted for more than 20% of the fleet in all 3 categories (#, GT and kW), and thus, out of balance. Apart from the increasing (deteriorating) trend of VL0010, the other length segments displayed no clear general trends. More than 80% of the inactive vessels are in the VL0010 segment in the mainland fleet.

OFR

There were 3 fleet segments operating in OFR in 2021, of which all 3 were active. Landings and economic data were provided aggregated by 2 fleet segments.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2021, 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 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.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 3 fleet segments in 2021.

- 2 fleet segments may be in balance with their fishing opportunities;
- 1 fleet segment may be out of balance with their fishing opportunities:
 - 1 fleet segment with 5 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		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	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 out of balance with their fishing opportunities.

Trends could be calculated for 2 segments. Both segments displayed a **decreasing** trend.

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

CR/BER was calculated for 2 segments:

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

Trends could be calculated for 2 segments. Both segments displayed a **decreasing** trend.

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

VUR was calculated for 3 segments:

- 3 segments were in balance with their fishing opportunities.

Trends could be calculated for 2 segments:

- 2 segments displayed **no clear** trend.

The Inactive Fleet Indicators

There is no inactive fleet segment in Portuguese fleet in OFR.

Synthesis of indicators and trends

For NAO area, based on the STECF indicator estimates for the economic indicators, most fleet segments in the Portuguese fishery are in balance. A general conclusion about the balance or imbalance of the biological indicators with regard to the Portuguese fleet is not possible, due to the low number of available and meaningful values for SHI and SAR. A meaningful SHI value is available for only 37% of the total landings from the Portuguese fleet in NAO area.

For OFR area, based on indicator values for 2021 and trends over 2017-2021 and according to the criteria in the Commission Guidelines, an overview of the indicators presents two OFR fleet segments out of balance for available economic indicators while the biological indicators are in balance.

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 and seems to be in balance on the different indicators.

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.

*Note: 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.*

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicators

Indicator values computed by the EWG 23-13 and those in the fleet report submitted by 31 May 2023 are compared in Annex II to this report.

The number of vessels differs between the data used by the WG and the results presented in the MS report (3496 active vessels against 3442). This may account for some of the differences observed in the following indicator comparisons

Sustainable harvest indicator (SHI)

In the Member State report, SHI-values have been presented for the DTS, PS, PGP and HOK (swordfish) Mainland segments, the Madeiran fleet segments and the Azores HOK VL2440 fleet segment.

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.

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

Stocks at Risk Indicator (SAR)

In the Portuguese annual fleet report the information has been provided subdivided into the mainland fleet, the Azores and the Madeiran fleets. SAR-values have been calculated for the Madeiran fleet segments only. For the Azores fleet, only *Beryx* spp. are considered as stock at high biological risk. Nevertheless, this group of species did not account for more than 10% of the total catch in any of the segments of the Azores fleet in 2022.

SAR values were provided for 5 Madeiran fleets segments by the Member State, but for these fleet segments, EWG didn't find any SAR. However, the EWG identified SARs for 5 mainland fleet segments and 1 outermost region segment.

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 2019-2022 for 50 segments. There were 53 segments estimated by the EWG 23-13 (3 segments more than in the MS Fleet report: MBS FPO2440 NGI, NAO DTS40xx and NAO HOK1824 P2).

A comparison between indicator values in MS Fleet report and data estimated by EWG 23-13 showed small discrepancies in values, but these differences have no effect on the balance assessment.

The values were calculated for the years 2019-2022 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 2019-2022 for 50 segments. There were 53 segments estimated by the EWG 23-13 (3 segments more than in the MS Fleet report: MBS FPO2440 NGI, NAO DTS40xx and NAO HOK1824 P2).

A comparison between indicator values in MS Fleet report and data estimated by EWG 23-13 showed important discrepancies in values in all segments: there is a factor of 100 difference between the values calculated by the MS and those of the EWG 23-13. However, these differences have an effect on the balance assessment for only one fleet segment (with a ROFTA value of -0.53 according to the EWG and 0.02 according to the MS report).

The values were calculated for the years 2019-2022 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 the reference years 2019-2022 for 50 segments. The VUR was based on maximum observed days at sea in each fleet segment. Hence VUR200 is not considered here.

Discrepancies are detected for nearly all segments that could be compared between the EWG 23-13 and the MS Fleet Report. EWG 23-13 note that the maximum days at sea used in the MS fleet report is different to those used by the EWG and that the number of vessels per segment is different between the two data sources.

The estimates for the EWG 23-13 did not provide a clear trend for most fleets. In the MS fleet Report, the values were calculated for the years 2019-2022 but the trends were not interpreted.

The Inactive Fleet Indicators

Inactive vessels have been reported in the Portuguese fleet report as number, GT and kW for years 2019 to 2022. The numbers presented in the fleet report were different to those computed by the EWG, but these differences have no effect on the balance assessment. The reason for the discrepancies is unknown.

All the fleet segments were in balance except the vessel length category VL0010: the inactive vessels less than 10 meters represent 45% of the total number of vessels in the fleet.

The values were provided for the years 2019-2022 but the trends were not interpreted.

Assessment of fleet report

The fleet report submitted in 2023 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 indicates that in 2022, 4 237 vessels (more than 50% of the vessels in the fleet) did not carry out any activity. A process of decommissioning vessels that have been inactive for a long period of time is ongoing. It is expected to run over the next year and affect around 20% of the inactive fleet.

The values of the vessel use indicator were unsatisfactory 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.

The MS reports that the VUR is not the most appropriate indicator for assessing vessel activity and it is not possible to draw reliable conclusions on overcapacity in the fleet using the VUR.

In the fleet report, biological sustainability indicators were calculated only for the main species fished by Portugal and covered by an ICES assessment. This is explained by the large variety of species present in Portuguese waters and the difficulty of carrying out stock assessments. Thus, SHI-values have been calculated only for the DTS, PS, PGP and HOK Mainland segments, the Madeiran fleet segments and the Azores HOK VL2440 fleet segment. When available, the SHI indicator showed that the segments were in balance with their fishing opportunities.

Moreover, EWG found the table for the mainland segments difficult to read. It would be preferable that the format presented for Madeiran fleet be applied.

According to the economic indicators, most fleet segments performed well. Six segments have presented low or negative returns in recent years and have not generated sufficient revenue to cover operating and capital costs: MGOVL1012, MGPVL1824 (Madeira) and HOKVL2440 and HOKVL40XX operating in mainland Portugal and in external waters (Madeira and outside the EU).

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 Portuguese fleet is more or less in balance with its fishing opportunities in the case of all fleet segments.

However, analysis of the vessel use, biological and economic indicators for the MGP VL1824 Madeiran may signal the need for an adjustment to be made to the segment in the future. It should therefore be monitored very closely.

Finally, analysis of the vessel use and economic indicators for the fleet operating with hooks, as well as the fact that catch restrictions have been imposed for swordfish as well as deep-sea species, suggest there is a need to consider adjusting the capacity of that fleet and to continue with the already planned adjustment.

Discrepancies in previous fleet reports

Unlike the fleet report for 2021 (submitted in 2022), the Portuguese report for 2022 (submitted in 2023) presented SHI values for the majority of the Mainland, Madeira and Azores segments. SAR was always only provided for the Madeiran fleets and are different from those calculated by the EWG.

CR/BER, ROFTA and VUR showed discrepancies in values as was reported in the EWG 22-15 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 fleet report also estimates the economic results of the fleet segments for 2022. 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 report 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 23-13 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 specific out-of-balance fleets 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 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. This will cover around 40 vessels which have a quota to fish swordfish (northern stock).

Number of vessels.

The action plan submitted by the MS concerns a total of 56 vessels:

- permanent cessation: 16 vessels
- temporary cessation: 40 vessels

The fleet capacity will be adjusted by 16 vessels, which will result in a capacity reduction of around 1 330 GT in terms of gross tonnage and 3 800 kW in terms of propulsion power.

3.4.19 Romania (ROU)

Overview of indicator findings

Area 37

There were 10 fleet segments in 2021, of which 6 were active. Of the 6 active segments, landings data were provided for all 6 segments while economic data was provided for 3 fleet segments.

Sustainable harvest indicator (SHI)

Out of 6 fleet segments active in 2021, landings in value and SHI values have been provided for all 6 segments.

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 that fleet segment.

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 97.43% of the total value of the landings in 2021 provided by MS. The SHI values show that:

- 5 fleet segments may be out of balance with their fishing opportunities.

Stocks at Risk Indicator (SAR)

SAR indicator was available for all the 6 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 6 fleet segments may 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			4	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		2	3

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

RoI was calculated for 3 segments:

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

Trends were calculated for the 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 3 segments:

- All 3 segments were *in balance* with their fishing opportunities.

Trends were calculated for 3 segments:

- 1 segment displayed an **increasing** trend,
- 2 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 6 segments:

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

Trends for the 6 segments were as follows:

- 3 segments displayed an **increasing** trend,
- 3 segments displayed **no clear** trend.

The Inactive Fleet Indicators

In 2020, 4 vessel length segments had inactive vessels (VL0006, VL0612, VL1218 and VL2440).

The Romanian inactive fleet accounted for 20.2% of the total number of vessels, 14.2% of the total GT and 14.0% of the total kW. At the national level, inactive vessels accounted for less than 20% of the fleet in 2 categories (GT and kW), and are thus indicated to be *in balance* and displaying **increasing** (deteriorating) trends. In terms of number, the fleet was found to be *out of balance* and displayed **increasing** (deteriorating) trends.

The segment with the highest level of inactivity was the VL0612 segment with 15.6% of the number of vessels, 2.7% of the GT and 1.9% of the kW and displayed **increasing** (deteriorating) trends for all 3 categories.

Synthesis of indicators and trends

Based on economic indicator values for 2021 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, the fleet segments appear to be out of balance with fishing opportunities in terms of SHI, with trends showing an improving situation, and in balance in terms of SAR. Based on the technical indicators, the majority of fleet segments appear to be out of balance with fishing opportunities. VUR values indicate an imbalance in fishing opportunities. The MS explains this is due to the seasonal nature of the (small-scale) fisheries and the implementation of closed seasons.

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.

					<div><div></div> in balance</div>	<div><div></div> out of balance</div>	<div><div></div> borderline</div>	<div><div></div> insufficiently profitable</div>	<div><div></div> improving</div>	<div><div></div> deteriorating</div>	<div><div></div> Null/flat trend</div>	<div><div></div> no clear trend</div>																								
					Status 2021 according to thresholds and criteria in the 2014 Guidelines										Trends 2017-2021																					
					Biological			Economic					Activity				Inactive				Biological			Economic					Activity				Inactive			
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW							
MBS	PG	VL0006	ROU MBS PG 0006 NGI L *	9																																
MBS	PG	VL0612	ROU MBS PG 0612 NGI A *	69																																
MBS	PMP	VL0612	ROU MBS PG 0612 NGI A *	30																																
MBS	PMP	VL1218	ROU MBS PMP 1218 NGI A *	18																																
MBS	PMP	VL1824	ROU MBS PMP 1218 NGI A *	3																																
MBS	PMP	VL2440	ROU MBS PMP 2440 NGI A *	1																																
MBS	INACTIV	VL0006	ROU MBS INA0006 NGI L	4																																
MBS	INACTIV	VL0612	ROU MBS INA0612 NGI L	26																																
MBS	INACTIV	VL1218	ROU MBS INA1218 NGI L	2																																
MBS	INACTIV	VL2440	ROU MBS INA2440 NGI L	1																																
ROU Total				163																																

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicators

A comparison Indicator values computed by the EWG 23-13 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 5 segments appear as imbalanced (PG 0-6m, PG 6-12m, PMP 6-12m, PMP 12-18m and PMP 18-24). This is in line with the EWG 23-13 outcome for those fleet segments.

Indicator trends were not provided in the fleet report. No comparison 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 23-13 estimated SAR values for all fleet segments, where all were indicated to be in balance.

Indicator trends were not provided in the fleet report. No comparison 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 6 segments while EWG 23-13 has returned 6 segments grouped in 3 clusters. Because the fleet segments found by the EWG were clustered and the segments found by the MS were not, values for this indicator could not be compared.

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

In the MS fleet report, the ROI has been provided for 6 segments while EWG 23-13 has returned 6 segments grouped in 3 clusters. In the MS fleet report, the RoFTA has not 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 not be compared.

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 2016-2021. Major discrepancies have been observed in the calculation of VUR between the MS annual fleet report and the ones estimated in the framework of the EWG 23-13 for two segments (PMP VL1824 and PMP VL2440). It is noted that these fleet segments consisted of only 3 and 1 vessels, respectively. Such discrepancies affected the assessment of the balance/imbalance of PMP1824. The EWG 23-13 indicator values suggest that the PMP1824 fleet segment is in balance whereas fleet report indicates that it is out of balance.

The trends between the MS annual fleet report and EWG 23-13 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 2016-2020 and the value for 2021.

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 is in line with the Commission guidelines (COM (2014)545).

Romania uses different method to calculate trends, leading to differences in findings between the EWG and MS.

For the economic indicators, the data provided to EWG 23-13 clustered 6 fleet segments into 3 clusters, whereas the data in the fleet report was available for all 6 fleet segments individually. Due to this discrepancy, the economic indicators could not be compared.

In the fleet report for 2023, fleet segments were assigned either high or low activity. The EWG notes that this option is designed to divide existing fleet segments into high and low activity segments, but should not be used to rename existing fleet segments.

Discrepancies in previous fleet reports

In the fleet report submitted in 2022, the EWG 22-15 noted that apart from one fleet segment, no SHI values were presented. This has been addressed by the MS and SHI values are now given for all segments.

Structural overcapacity and profitability

The MS fleet report identifies the capacity per fleet segment, noting overcapacity for PMP0612. The fleet report ascribes this under-use and overcapacity to the Covid pandemic. Based on the VUR values provided by the MS, overcapacity could also be noted for other fleet segments, namely PMP1218, PMP1824, PG0612 and PG0006 (VUR < 0.7 for 3 or more years).

The fleet report also identifies the profitability of each fleet segment in the short and long-term, and finds that PMP0612 is not profitable based on the CR/BER, which is below the long-term interest rate but not out of balance. For this segment, ROI is in balance, suggesting profitability. The other assessed fleet segment 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 2022. Because all fleet segments appear to be in balance with their fishing opportunities based on the economic indicators, no action plan specifically addressing economical imbalance seems needed.

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 14 fleet segments in 2021, of which 10 were active. Of the active segments, landings and economic data were provided aggregated for 3 clusters (aggregated fleet segments). Data from 1 fleet segment were not provided for reasons of confidentiality. There were 137 vessels in the fleet of which only 72 were active.

Sustainable harvest indicator (SHI)

Out of 4 aggregated segments in 2021, SHI indicator values were unavailable for all.

According to the criteria in the 2014 Balance Indicator Guidelines, the SHI indicator values for the 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 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 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			3	

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		1		

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:

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

Trends were calculated for 3 segments:

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

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

VUR was calculated for 10 active fleet segments and VUR₂₂₀ for a further 3:

- All 10 VUR segments were out of balance with their fishing opportunities.

No trends were calculated for the 10 VUR segments.

- All 3 VUR₂₂₀ segments were out of balance with their fishing opportunities.

Trends were calculated for the 3 VUR₂₂₀ segments:

- All 3 segments displayed no clear trend.

The Inactive Fleet Indicators

In 2021, 4 vessel length segments had inactive vessels (VL0006, VL0612, VL1218 and VL1824). The Slovenian inactive fleet accounted for 47.5% of the total number of vessels, 48.4% of the total GT and 39.8% of the total kW.

At the national level, inactive vessels accounted for more than 20% (Numbers, GT and kW) and are thus out of balance,

In terms of numbers:

- All 4 segments were in balance.

Trends were calculated for numbers in 3 segments:

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

In terms of GT:

- All 4 segments were in balance.

Trends could be calculated for all 4 segments:

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

Measured by kW:

- 3 segments were in balance,
- 1 segment was out of balance.

Trends could be calculated for all 4 segments:

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

The segments with the highest level of inactivity were the VL0006 segment with 24.8% of the number of vessels, the VL1824 segment with 17.1% and VL0612 segment with 20.7% of the kW.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over 2017-2021, according to the criteria in the Commission guidelines, EWG 23-13 found that the majority of fleet segments for which results are presented appear to be in balance with fishing opportunities when looking at the economic indicators, but not when looking at the technical indicators. Regarding biological indicators, SHI indicator values cannot be used meaningfully to assess the balance or imbalance and 1 stock at risk was found in 1 fleet segment.

The few indicator values available are similar to those given in the Member States' fleet report submitted in 2022, but the conclusions on whether fleet segments are in or out of balance with fishing opportunities differ in some cases. The MS argues that the indicators alone are not suitable for assessing the balance, particularly not for a small-sized fleet such as in Slovenia.

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.

						<div> ■ in balance ■ out of balance ■ borderline ■ insufficiently profitable ■ improving ■ deteriorating ■ Null/flat trend ■ no clear trend </div>													
						Status 2021 according to thresholds and criteria in the 2014 Guidelines													
						Biological				Economic				Activity		Inactive			
SR	FT	VL	Fleet segment	No of vessels		SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	
MBS	DFN	VL0006	SVN MBS DFN0006 NGI *	20															
MBS	FPO	VL0006	SVN MBS DFN0006 NGI *	2															
MBS	HOK	VL0006	SVN MBS DFN0006 NGI *	2															
MBS	PMP	VL0006	SVN MBS DFN0006 NGI *	1															
MBS	DFN	VL0612	SVN MBS DFN0612 NGI *	22															
MBS	DFN	VL1218	SVN MBS DFN0612 NGI *	3															
MBS	HOK	VL0612	SVN MBS DFN0612 NGI *	10															
MBS	PMP	VL0612	SVN MBS DFN0612 NGI *	3															
MBS	DTS	VL0612	SVN MBS DTS1218 NGI *	3															
MBS	DTS	VL1218	SVN MBS DTS1218 NGI *	6															
MBS	INACTIV	VL0006	SVN MBS INA0006 NGI	34															
MBS	INACTIV	VL0612	SVN MBS INA0612 NGI	24															
MBS	INACTIV	VL1218	SVN MBS INA1218 NGI	6															
MBS	INACTIV	VL1824	SVN MBS INA1824 NGI	1															
SVN Total					137														

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

A comparison Indicator values computed by the EWG 23-13 and those in the fleet report are given in Annex II. Points of note for each indicator are listed below. MS has calculated technical, biological and economic indicators for DFN and DTS segments. The MS fleet report states that considering the MS's reservations regarding the use of the indicators, these are not calculated for the FPO, HOK, PGP and PMP segments, since they would show a distorted picture on the balance of these segments owing to the extremely low landed quantities.

Sustainable harvest indicator (SHI)

Slovenia did not present any values for the SHI in the fleet report. Hence, no comparison could be made. The reason given in the fleet report was that a meaningful SHI value could not be computed for any of its fleet segments because less than 40% of their landings value comprised stocks for which estimates of F/F_{MSY} were available. None of its fleet segments had more than 40%. Also, EWG 23-13 could not compute a meaningful value for the SHI for any fleet segment.

Indicator trends were not explicitly commented on in the MS fleet report, but a time series from 2016 is available for 7 fleet segments in terms of percentage landings value of assessed stocks. As the EWG 23-13 could not compute a meaningful estimate SHI for any fleet segment (<40%) trend comparisons with the fleet report for 2021 continued to be impossible.

Stocks at Risk Indicator (SAR)

EWG 23-13 calculated SAR for 3 aggregated fleet segments. The MS annual fleet report provided SAR values for five fleet segments, but based on an adjusted formula and other criteria compared to the Commission guidelines COM(2014)545. SAR outputs for the 3 fleet segments are shown in EWG 23-13 as 2 in balance and 1 out of balance while the MS fleet report shows 3 in balance. The difference may be attributed to the use of the non-standard formula used for calculating SAR rather than that provided in the guidelines.

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

The long-term viability analysis of CR/BER was computed by EWG 23-13 for 3 aggregated fleet segments. MS reported short-term profitability for two clusters (aggregated fleet segments: DFN 0612 and DTS 1218) and one fleet segment (DFN 0006). The MS report states that "Due to the provisions on personal data in accordance with the General Data Protection Regulation, 2 vessels from the DFN VL1218 segment were joined with the vessels in the DFN VL0612 segment for the calculation of the indicator, therefore the two segments share the same indicator value." Also "3 vessels from the DTS VL0612 segment were joined with the vessels in the DTS VL1218 segment for the calculation of the indicator; therefore, the two segments share the same indicator value."

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

For 3 aggregated fleet segments the RoFTA was calculated by EWG 23-13. The comparison with RoFTA reported in the MS annual fleet report revealed similar outputs between clustered segments. MS reported RoFTA for two clusters (DFN 1218 and DTS 1218).

The MS reports that owing to the provisions on personal data in accordance with the General Data Protection Regulation, 2 vessels from the DFN VL1218 segment were clustered with the vessels in the DFN VL0612 segment for the calculation of the indicator, therefore the two segments share the same indicator value. For the same reason, 3 vessels from the DTS VL0612 segment were joined with the vessels in the DTS VL1218 segment for the calculation of the indicator; therefore, the two segments share the same indicator value.

No discrepancy was found in the indicator for the aggregated fleet segments. Indicator trends were not explicitly commented on in the MS fleet report.

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

The VUR was calculated by EWG 23-13 for 13 fleet segments. The VUR was also reported for the same fleet segments in the MS fleet report.

No VURs or VUR₂₂₀s were reported for 2022. This is the same discrepancy noted in the EWG 22-15 report.

The Inactive Fleet Indicators

The comparison between the inactive fleet indicator reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed the same outputs for all segments.

Indicator trends were not explicitly commented in the MS fleet report, but time series from 2015 were available for the 4 inactive segments and for the entire Slovenia national inactive fleet. EWG 23-13 trends and MS fleet report trends showed a similar pattern for all inactive segments.

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 2023 provides indicator values separately by fleet segment based on DCF information and for the majority of segments the indicators specified in the Commission guidelines (COM (2014) 545).

The MS continues not to follow the Guidelines when computing a value for the SAR.

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. Slovenia argues that action plans based on the indicators may lead to inappropriate actions and that plans for fleet segments at the level of the region (Northern Adriatic / GSA 17) should be developed. In view of the above observations it is apparent that the fleet report submitted by Slovenia is not entirely in line with the Commission guidelines COM(2014)545.

The current Slovenian management system is considered by the MS to be effective in implementing a balance between fishing opportunities and capacity.

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 only in balance in VUR, CR/BER, ROFTA and the unreported EDI.

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 compared to other MS, notably Italy and Croatia, exploiting the same stocks. Therefore, Slovenia argues, the contribution of the Slovenian fisheries sector to achieving MSY can only be proportional to the actual size and impact of the Slovenian fishing fleets.

3.4.21 Spain (ESP)

Overview of indicator findings

There were 103 fleet segments in 2021, of which 84 were active. Of the 84 active segments, landings data were provided for 84 fleet segments and economic data aggregated by 58 fleet segments. Results are presented by main supra-region below.

Area 27

There were 59 fleet segments in 2021, of which 49 were active. Of the 49 active segments, landings data were provided for 49 fleet segments and economic data were available for 32 aggregated fleet segments.

Sustainable harvest indicator (SHI)

Out of 49 active fleet segments in 2021, SHI indicator values were available for 46.

According to the criteria in the 2014 Commission guidelines, the SHI indicator values for 31 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 15 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 55.07% of the total value of the landings in 2021 provided by MS, and were as follows:

- 5 fleet segments may not be in balance with their fishing opportunities,
- 10 fleet segments may be in balance with their fishing opportunities.

Trends were available for the 13 fleet segments:

- 7 fleet segments displayed a **decreasing** (improving) trend,

- 5 segments displayed **no clear** trend,
- 1 fleet segment displayed an **increasing** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 49 fleet segments in 2021. According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 32 fleet segments may be in balance with their fishing opportunities,
- 17 fleet segments may be out of balance with their fishing opportunities.
 - 2 fleet segment with 5 stocks-at-risk may not be in balance with their fishing opportunities,
 - 1 fleet segment with 3 stocks-at-risk may not be in balance with their fishing opportunities,
 - 6 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.

Proportion of NOS	0-25%	25-50%	50-75%	75-100%
N of fleet segments	18	10	1	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	40	5		1

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

RoFTA was calculated for 32 segments:

- 18 segments were *in balance* with their fishing opportunities
- 12 segments were *out of balance* with their fishing opportunities,
- 2 segments were found to be *insufficiently profitable*.

Trends could be calculated for 26 segments:

- 4 segments displayed an **increasing** trend,
- 22 segments displayed a **decreasing** trend.

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

CR/BER was calculated for 32 segments:

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

Trends could be calculated for 26 segments:

- 5 segments displayed an **increasing** trend,
- 21 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 the 49 segments*:

- 34 segments were *in balance* with their fishing opportunities,
- 15 segments were *out of balance* with their fishing opportunities,

Trends could be calculated for 44 segments:

- 2 segments displayed an **increasing** trend,
- 4 segments displayed a **decreasing** trend,
- 24 segments displayed **no clear** trend,
- 14 segments displayed a **null/flat** trend.

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

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.

					Status 2021 according to thresholds and criteria in the 2014 Guidelines															Trends 2017-2021														
					Biological		Economic					Activity		Inactive		Biological		Economic					Activity		Inactive									
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₀	#	GT	kW					
NAO	DFN	VL0010	ESP NAO DFN1012 NGI *	1																														
NAO	DFN	VL1012	ESP NAO DFN1012 NGI *	111																														
NAO	DFN	VL1218	ESP NAO DFN1218 NGI	146																														
NAO	DFN	VL1824	ESP NAO DFN1824 NGI *	19																														
NAO	DFN	VL2440	ESP NAO DFN1824 NGI *	2																														
NAO	DRB	VL0010	ESP NAO DRB0010 NGI	1340																														
NAO	DRB	VL1012	ESP NAO DRB1012 NGI	17																														
NAO	DRB	VL1218	ESP NAO DRB1218 NGI	87																														
NAO	DTS	VL1012	ESP NAO DTS1218 NGI *	6																														
NAO	DTS	VL1218	ESP NAO DTS1218 NGI *	57																														
NAO	DTS	VL1824	ESP NAO DTS1824 NGI	72																														
NAO	DTS	VL2440	ESP NAO DTS2440 NGI	92																														
NAO	DTS	VL40XX	ESP NAO DTS40XX NGI	12																														
NAO	FPO	VL1012	ESP NAO FPO1012 IC *	10																														
NAO	FPO	VL1218	ESP NAO FPO1012 IC *	3																														
NAO	FPO	VL1012	ESP NAO FPO1012 NGI	46																														
NAO	FPO	VL1218	ESP NAO FPO1218 NGI	42																														
NAO	HOK	VL0010	ESP NAO HOK1012 IC *	8																														
NAO	HOK	VL1012	ESP NAO HOK1012 IC *	37																														
NAO	HOK	VL0010	ESP NAO HOK1012 NGI *	3																														
NAO	HOK	VL1012	ESP NAO HOK1012 NGI *	74																														
NAO	HOK	VL1218	ESP NAO HOK1218 IC	34																														
NAO	HOK	VL0010	ESP NAO HOK1218 MA *	7																														
NAO	HOK	VL1012	ESP NAO HOK1218 MA *	8																														
NAO	HOK	VL1218	ESP NAO HOK1218 MA *	4																														
NAO	HOK	VL1824	ESP NAO HOK1218 MA *	2																														
NAO	HOK	VL1218	ESP NAO HOK1218 NGI	77																														
NAO	HOK	VL1824	ESP NAO HOK1824 NGI	32																														
NAO	HOK	VL1824	ESP NAO HOK2440 IC *	6																														
NAO	HOK	VL2440	ESP NAO HOK2440 IC *	16																														
NAO	HOK	VL1218	ESP NAO HOK2440 LLD *	2																														
NAO	HOK	VL1824	ESP NAO HOK2440 LLD *	6																														
NAO	HOK	VL2440	ESP NAO HOK2440 LLD *	22																														
NAO	HOK	VL2440	ESP NAO HOK2440 NGI	24																														
NAO	PGP	VL1824	ESP NAO PGP2440 NGI *	4																														
NAO	PGP	VL2440	ESP NAO PGP2440 NGI *	55																														
NAO	PMP	VL0010	ESP NAO PMP0010 IC *	441																														
NAO	PMP	VL1012	ESP NAO PMP0010 IC *	4																														
NAO	PMP	VL1218	ESP NAO PMP0010 IC *	1																														
NAO	PMP	VL0010	ESP NAO PMP0010 NGI	2128																														
NAO	PMP	VL1012	ESP NAO PMP1012 NGI	58																														
NAO	PMP	VL1218	ESP NAO PMP1218 NGI	27																														
NAO	PS	VL0010	ESP NAO PS 1012 NGI *	1																														
NAO	PS	VL1012	ESP NAO PS 1012 NGI *	17																														
NAO	PS	VL1012	ESP NAO PS 1218 IC *	1																														
NAO	PS	VL1218	ESP NAO PS 1218 IC *	10																														
NAO	PS	VL1218	ESP NAO PS 1218 NGI	94																														
NAO	PS	VL1824	ESP NAO PS 1824 NGI	99																														
NAO	PS	VL2440	ESP NAO PS 2440 NGI	79																														
NAO	INACTIV	VL0010	ESP NAO INA0010 IC	137																														
NAO	INACTIV	VL0010	ESP NAO INA0010 NGI	663																														
NAO	INACTIV	VL1012	ESP NAO INA1012 IC *	10																														
NAO	INACTIV	VL1218	ESP NAO INA1012 IC *	5																														
NAO	INACTIV	VL1824	ESP NAO INA1012 IC *	1																														
NAO	INACTIV	VL2440	ESP NAO INA1012 IC *	1																														
NAO	INACTIV	VL1012	ESP NAO INA1012 NGI	19																														
NAO	INACTIV	VL1218	ESP NAO INA1218 NGI	36																														
NAO	INACTIV	VL1824	ESP NAO INA2440 NGI *	9																														
NAO	INACTIV	VL2440	ESP NAO INA2440 NGI *	13																														

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Area 37

There were 32 fleet segments in 2021, 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 2021, SHI indicator values were available for 23.

According to the criteria in the 2014 Commission 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 9 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 70.14% of the total value of the landings in 2021 provided by MS, and were as follows:

- 5 fleet segments may not be *in balance* with their fishing opportunities,
- 4 fleet segments may be *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 **no clear** trend,
- 1 fleet segment displayed an **increasing** 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 23-13 notes that the 2021 SAR indicator values indicate:

- 11 fleet segments may be in balance with their fishing opportunities,
- 16 fleet segments may be out of balance with their fishing opportunities.
 - 1 fleet segment with 5 stocks-at-risk may not be in balance with its fishing opportunities,
 - 2 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,
 - 9 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 24 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	1	4	5	12

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	19	3	1	

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

RoFTA was calculated for 20 segments:

- 15 segments were *in balance* with their fishing opportunities,
- 4 segments were *out of balance* with their fishing opportunities,
- 1 segment was found to be *insufficiently profitable*.

Trends could be calculated for 18 segments:

- 9 segments displayed an **increasing** trend,
- 9 segments displayed a **decreasing** trend.

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

CR/BER was calculated for 20 segments:

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

Trends could be calculated for 18 segments:

- 10 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 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 25 segments:

- 5 segments displayed a **decreasing** trend,
- 16 segments displayed **no clear** trend,
- 4 segments displayed a **null/flat** trend.

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

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.

- 2 fleet segments with 2 stocks-at-risk may not be in balance with their fishing opportunities,
- 3 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	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	4	3		

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

RoFTA was calculated for 6 segments:

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

Trends could be calculated for 5 segments:

- 1 segment displayed an **increasing** trend,
- 4 segments displayed a **decreasing** trend.

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

CR/BER was calculated for 6 segments:

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

Trends could be calculated for 5 segments:

- 1 segment displayed an **increasing** trend,
- 3 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, VUR₂₂₀ 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:

- 1 segment displayed an **increasing** trend,
- 2 segments displayed a **decreasing** trend,
- 3 segments displayed **no clear** trend,

Comparison of indicator values

A comparison of indicator values computed by the EWG 23-13 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)

SHI indicator value for 56 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 28 segments, most of the segments indicate similar values for SHI and the resulting assessments regarding the balance of the fleet segments. However, in a few fleet segments (e.g. ESP NAO DFN1824 NGI*, ESP OFR PS 40XX NGI, ESP NAO HOK2440 LLD*, ESP OFR HOK2440 NGI*) the conclusions regarding the balance or imbalance of those fleet segments are contradictory. For two segments (ESP NAO DFN1824 NGI*, ESP OFR PS 40XX NGI) the assessment by EWG23-13 is "out of balance", while the MS fleet report interpretation is "in balance" and for other segments (e.g. ESP NAO HOK2440 LLD*, ESP OFR HOK2440 NGI*) EWG23-13 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 2021. The MS reported at least one SAR for 44 fleet segments, which is a higher number compared to the results of EWG23-13, which identified 38 fleet segments containing at least 1 SAR. The results of EWG23-13 identified in some cases (e.g. ESP OFR HOK40XX LLD, ESP MBS DTS2440 NGI) more SAR in a fleet segment compared to the MS fleet report, but there were more cases (e.g. ESP NAO DFN1218 NGI, ESP MBS PMP0612 NGI, ESP NAO PMP0010 IC *) when the MS fleet report identified more SAR in a fleet segment compared to the results of EWG23-13.

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

No discrepancies were found between the MS annual fleet report and those estimated in the framework of EWG 23-13. However, no comparison could be made for ESP NAO PMP0010 IC * and ESP NAO PS 1218 IC * fleet segment calculated by the EWG 23-13 since these were not listed in the fleet report.

40 fleet segments were indicated to be in balance while 18 were out of balance.

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

ROI data was not reported.

The comparison between RoFTA reported in the MS annual fleet report and those estimated in the framework of EWG 23-13 revealed similar outputs. However, no comparison could be made for ESP NAO PMP0010 IC * and ESP NAO PS 1218 IC * fleet segment calculated by the EWG 23-13 but which was not listed in the fleet report.

37 fleet segments were in balance while 18 were out of balance. 3 segments were found to be *insufficiently profitable*.

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 23-13 revealed similar outputs for most indicator values.

In 4 fleet segments of 84 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 HOK1218 LLD *, ESP NAO FPO1218 NGI and ESP MBS DFN1218 NGI) to be in balance, however the EWG found it to be out of balance.

The Inactive Fleet Indicators

The comparison between Inactive vessels indicator reported in the MS annual fleet report and those estimated in the framework of EWG 23-16 revealed similar outputs for most values.

In two fleet segments (ESP MBS INA0006 NGI and ESP NAO INA0010 IC) of 11 reported, however, the MS report differed from the EWG report as to whether segments were in or out of balance. The MS calculated two segments to be out of balance while the EWG values indicated all segments to be in balance.

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 84 fleet segments in the Spanish fleet in 2021, of which 11 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 11 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.

Discrepancies in previous fleet report

Issues raised by the EWG 22-15 in relation to last year’s fleet report (large discrepancies in the identification of SAR between the MS and EWG 22-15) were addressed in the 2023 fleet report by Spain. There was still a small discrepancy between the MS and EWG 23-13 in the number of fleet segments that are flagged by at least one SAR, but this discrepancy is smaller than reported by the EWG 22-15.

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.

According to this interpretation, structural overcapacity was identified in 11 fleet segments.

The overall economic outlook for the entire Spanish fishing fleet, based on EWG 23-13 estimations, shows positive long-term profitability indicators, albeit with a declining trend although such an assessment is not explicitly addressed in the fleet report. Among the 58 segments for which economic indicators have been assessed in the Spanish fishing fleet, 18 segments exhibit an economic imbalance. These 18 segments account for 23% of all active vessels and contribute to 15% of the Gross Value of Landings for the Spanish fishing fleet. Of the segments exhibiting imbalance in economic indicators, the segment NAO DRB 0010 NGI has the highest number of vessels, representing 15% of all active vessels in the Spanish fishing fleet while accounting for only 1.5% share of the total value of Spanish landings). Regarding landing value, the segment NAO PGP 2440 NGI is prominent, contributing 4.6% to the total landing value of those segments that indicated to be out of balance based on economic indicator values (0.6% of the landed value of all vessels).

Overview of action plan

A new action plan for 2023 to 2025 was presented in the fleet report for 2023 for the fleet segments assessed as not being in balance with their fishing opportunities. The action plan applies to 11 segments. The plan proposes a number of measures to contribute towards improvements in the imbalanced fleet segments.

The action plan indicates appropriate and targeted measures that have been selected for each fleet segment on the basis of the reasons identified as determining factors in its imbalance, which are explained in the fleet report. The objectives of the plan are established for each fleet and focus on:

- lowering the SHI down to values below 1 (= fleet segment being in balance with its fishing opportunities with regards to this biological indicator)
- increase the value of economic indicators (CR/BER ≥ 1 and ROFTA positive and above long-term interest rates (TRP))
- fleet restructuring to allow the stock (mainly Venus clams in the Gulf of Cádiz) to recover and improve the profitability in the fishery
- avoid ("no catches") of shortfin mako shark ("species at risk")

The time frame for the implementation of this plan will be from 2023 to 2025 (with one exception, where measures from the previous plan were included in the new plan, so that the implementation period of this will be from 2022 to 2024).

The planned measures will be based on the activity of selected fleet segments and will include effort reduction, resource recovery and management measures:

- catch limitations and reduction in number of trawling days
- tonnage and engine power reduction
- fishing closure periods
- increase in gear selectivity
- improvement of knowledge and the design of alternative fisheries management strategies.

The objectives are clearly defined (lowering the SHI to < 1 , increasing CR/BER ≥ 1 and ROFTA positive and above TRP, no catches of mako shark) and can therefore be measured and evaluated. There is one exception; "fleet restructuring to allow the stock (mainly Venus clams in the Gulf of Cádiz) to recover and improve the profitability in the fishery". In this case it is not clear how to evaluate whether the objective has been achieved. The timeframe for the measures taken is clearly specified.

Adjustment of targets and tools

The new action plan for 2023 to 2025 is presented in this year's MS fleet report. All 11 segments that were identified as being out of balance with their fishing opportunities are targeted by the measures in the action plan. Five of these 11 segments (MBS DRB0006, MBS DRB0612*, MBS DRB1218, NAOHOK1824 IC, NAOHOK2440*IC) were included in the former action plan (2021 to 2023) and are still considered to be in economic imbalance. The objectives for NAOHOK1824 IC and NAOHOK2440*IC have stayed the same (increase the value of economic indicators (CR/BER ≥ 1 and ROFTA positive and above long-term interest rates (TRP)) and the objective "lowering the SHI to or below 1" was added, but the measures to reach these objectives are unchanged.

For the dredgers in the Mediterranean Sea (MBS DRB0006, MBS DRB0612*, MBS DRB1218), the targets and tools remain unchanged in the new action plan compared to the former action plan.

Two segments fishing with surface longlines (OFR HOK2440 LLD and OFR HOK40XX LLD) were assessed as being in balance by the MS in this year's fleet report. MS decided to include the targets and measures for these segments in the new action plan because these segments were included in the 2022 action plan with measures to be implemented by 2024, continuing the measures set out in the previous plan.

For the demersal trawlers in the Mediterranean Sea (MBS DTS0612, MBS DTS1218, MBS DTS1824, MBS DTS2440), the objective is to lower the SHI to or below 1, reaching this with a reduction in number of trawling days, an increase in selectivity and a reduction in tonnage and engine power.

For the Dredges in North Atlantic (NAODRB1012 and NAODRB1218) the objective is to restructure the fleet to allow the stock (Venus Clam) to recover and improve profitability in the fishery. They intend to achieve these goals by daily catch limits, fishing bans, limits on hours of fishing, temporary and permanent closures, Tonnage and engine power reductions and economic compensation to fishery.

Number of vessels

The total number of fishing vessels in the 11 segments that are assessed as being out of balance with their fishing opportunities and are targeted by the measures in the new action plan is of 725 and the numbers by segment are given in the table below.

Fishing segment	Number of vessels
NAO DRB1012	17
NAO DRB1218	87
MBS DRB0006	6
MBS DRB0612*	22
MBS DRB1218	5
MBS DTS0612	14
MBS DTS1218	140
MBS DTS1824	287
MBS DTS2440	125
NAO HOK1824IC	6
NAO HOK2440IC*	16
Sum	725

3.4.22 Sweden (SWE)

Overview of indicator findings

Area 27

There were 32 fleet segments in 2021, of which 27 were active. Of the 27 active segments, landings data were provided for 26 segments and economic data for 9 aggregate segments in 2021.

Sustainable harvest indicator (SHI)

Out of fleet segments active in 2021, landings in value have been provided aggregated in 26 fleet segments and SHI indicator values were available for 24.

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 17 fleet segments for which the SHI indicator may be considered meaningful to assess balance or imbalance, accounted for 94.00% of the total value of the landings in 2021 provided by MS, and were as follows:

- 10 fleet segments may **not be in balance** with their fishing opportunities;

- 7 fleet segments may be **in balance** with their fishing opportunities.

Trends could be calculated for 16 fleet segments:

- 7 fleet segments displayed an **increasing** (deteriorating) trend,
- 2 fleet segments displayed a **decreasing** (improving) trend,
- 7 fleet segments displayed **no clear** trend.

Stocks at Risk Indicator (SAR)

SAR indicator was available for 26 active fleet segments in 2021.

According to the criteria in the 2014 Balance Indicator Guidelines, EWG 23-13 notes that the 2021 SAR indicator values indicate:

- 9 fleet segments may be **in balance** with their fishing opportunities
- 17 fleet segments may **not be in balance** with their fishing opportunities with
 - 1 fleet segment with 6 stocks-at-risk
 - 4 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	10	10		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	13	5	2	4

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

RoI was not calculated.

RoFTA was calculated for 9 segments:

- 4 segments were **in balance** with their fishing opportunities,
- 5 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:

- 4 segments displayed an **improving** trend,

- 4 segments displayed a **deteriorating** 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, VUR₂₂₀ is not analysed here.

VUR was calculated for 22 segments*:

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

Trends were calculated for 20 segments:

- 3 segments displayed a **deteriorating** trend,
- 17 segments displayed **no clear** trend.

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

The Inactive Fleet Indicators

In 2021, 5 vessel length segments had inactive vessels: VL0008, VL0010, VL0812, VL1012 and VL1218.

The Swedish inactive fleet accounted for 18% of the total number of vessels, 4.2% of the total GT and 7.8% of the total kW. At the national level, inactive vessels accounted for less than 20% of the fleet in vessel number and thus, was **in balance** and displayed a **decreasing** (improving) trend. No trends could be calculated for the aggregated segments.

The segment with the highest level of inactivity were the VL0008 segment with 11% of the number of vessels and 2.36% of the kW.

By vessel length group:

- All segments were **in balance** for all 3 categories (#, GT and kW).

Trends were calculated for 4 segments:

- VL0008 segment displayed a **decreasing** (improving) trend for number of vessels and kW, and **no trend** for GT,
- VL0010 and VL0812 displayed a **decreasing** (improving) trend in all 3 categories,
- VL1218 displayed an **increasing** (deteriorating) trend in all 3 categories.

Synthesis of indicators and trends

Based on indicator values for 2021 and trends over the periods 2017 to 2021 inclusive; according to the criteria in the Commission guidelines, the majority of the active fleet segments appear to be out of balance with fishing opportunities. The economic indicators reported by cluster showed unfavourable results for all segments except for passive gear DFN1012. the technical indicators are unfavourable for all segments except for DTS VL1824. Both biological indicators showed imbalance across most of the fleet segments with SAR out of balance in 17 segments and SHI out of balance in 10 segments, with mostly no clear trends.

These observations cannot be properly compared with the assessment of balance in the Member States' fleet report submitted in 2023, due to mismatches in the fleet segments indicated by MS for economic, technical, and biological indicators (MS presented data for six segments broken down by active/passive gear and by length group) and the indicators computed in the framework of EWG 21-16. EWG 23-13 noted that the Member State concluded that fleet segments which use passive gears are imbalanced, but MS does not interpret it as overcapacity and no action plan was proposed for such 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.

					Status 2021 according to thresholds and criteria in the 2014 Guidelines															Trends 2017-2021														
					Biological			Economic					Activity			Inactive		Biological			Economic					Activity			Inactive					
SR	FT	VL	Fleet segment	No of vessels	SAR	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW	SHI	EDI	CR/BER	RoFTA	RoI	NP margin	NVA/FTE	VUR	VUR ₂₂₀	#	GT	kW					
NAO	DFN	VL0008	SWE NAO DFN0008 NGI *	125																														
NAO	FPO	VL0008	SWE NAO DFN0008 NGI *	138																														
NAO	PGP	VL0008	SWE NAO DFN0008 NGI *	6																														
NAO	DFN	VL0010	SWE NAO DFN0010 NGI *	23																														
NAO	FPO	VL0010	SWE NAO DFN0010 NGI *	185																														
NAO	HOK	VL0010	SWE NAO DFN0010 NGI *	12																														
NAO	PGO	VL0010	SWE NAO DFN0010 NGI *	5																														
NAO	PGP	VL0010	SWE NAO DFN0010 NGI *	7																														
NAO	DFN	VL0812	SWE NAO DFN0812 NGI *	51																														
NAO	FPO	VL0812	SWE NAO DFN0812 NGI *	2																														
NAO	PGP	VL0812	SWE NAO DFN0812 NGI *	1																														
NAO	DFN	VL1012	SWE NAO DFN1012 NGI *	9																														
NAO	DFN	VL1218	SWE NAO DFN1012 NGI *	8																														
NAO	FPO	VL1012	SWE NAO DFN1012 NGI *	37																														
NAO	FPO	VL1218	SWE NAO DFN1012 NGI *	1																														
NAO	HOK	VL1012	SWE NAO DFN1012 NGI *	2																														
NAO	DTS	VL0008	SWE NAO DTS0812 NGI *	1																														
NAO	DTS	VL0812	SWE NAO DTS0812 NGI *	26																														
NAO	PS	VL0812	SWE NAO DTS0812 NGI *	1																														
NAO	TM	VL0812	SWE NAO DTS0812 NGI *	7																														
NAO	DTS	VL1012	SWE NAO DTS1012 NGI *	22																														
NAO	DTS	VL1218	SWE NAO DTS1218 NGI *	63																														
NAO	PS	VL1218	SWE NAO DTS1218 NGI *	1																														
NAO	DTS	VL1824	SWE NAO DTS1824 NGI *	30																														
NAO	TM	VL1824	SWE NAO DTS1824 NGI *	5																														
NAO	DTS	VL2440	SWE NAO DTS2440 NGI *	13																														
NAO	TM	VL2440	SWE NAO DTS2440 NGI *	10																														
NAO	INACTIV	VL0008	SWE NAO INAD0008 NGI *	109																														
NAO	INACTIV	VL0010	SWE NAO INAD0010 NGI *	42																														
NAO	INACTIV	VL0812	SWE NAO INAD0812 NGI *	14																														
NAO	INACTIV	VL1012	SWE NAO INAD1012 NGI *	5																														
NAO	INACTIV	VL1218	SWE NAO INAD1218 NGI *	3																														
SWE Total				964																														

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Comparison of indicator values

In the Swedish report, economic data are available for the segments named "passive gear" or "active gear" by vessel length group in the Baltic and Norths Seas. These data correspond to the economic data reported by cluster by the EWG 23-13 and named DFN and DTS by vessel length group. So, the data were comparable for all 9 clusters: In 2021, 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: SWE NAO DTS0812 NGI*, 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 relate to the period 2009-2020 and are those provided in the report of the EWG 22-15.

A comparison between the indicator values computed by the EWG 23-15 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 22-15 report for 2020.

Therefore, a comparison with values from EWG 23-13 for 2021 was not possible.

Stocks at Risk Indicator (SAR)

In the MS annual fleet report the SAR has been provided according to STECF EWG 22-15 report for 2020.

Therefore, a comparison with values from EWG 23-13 for 2021 is not possible.

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 23-13 revealed similar outputs for all values.

Trends are similar for this indicator.

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 23-13 revealed similar outputs for all values. As for CR/BER, all clusters were comparable.

Trends are similar for this indicator.

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 observed days at sea for each length category and gear group (for 10 segments identified by MS for 2021). Hence VUR220 is not considered here.

A discrepancy has been observed in the calculation of VUR between the MS annual fleet report and that of the estimation of the EWG 23-13 for the year 2021. The status in the EWG 23-13 estimation was "in balance" for SWE NAO DTS2440 NGI* but the MS annual report indicated "out of balance". On the other hand, VUR value for aggregate segment 'Active gear 10-12 m' (corresponding to SWE NAO DTS1012 NGI*) is over threshold and "in balance", but according to the estimation of the EWG 23-13 is under 70% threshold and may be "out of balance".

The difference could be due to different input data and fact that MS presented aggregated data for 10 segments in 2021, while EWG 23-13 calculated VUR for 22 segments according to DCF data provided by MS.

Indicator trends were provided for the period 2020-2022 in the fleet report while the EWG 23-13 comments on the period 2017-2021. No comparison was possible.

The Member State considers low values of vessels use indicator in almost 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 and increased fuel costs.

The Inactive Fleet Indicators

In the MS fleet report the inactive fleet indicator values were presented for two length classes only (<12m and >12m). The EWG was able to compare the values for 2021 by aggregating values according to such length groups and the results were similar.

Assessment of fleet report

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). 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.

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 Member State also considered the social aspects of the small-scale fishery and the related policy objectives. Member State assessed that poor results of economic indicators in some active gear segments (length classes 10-12 metres and 18-24 metres) are most likely due to effects linked to the covid-19 pandemic.

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. MS reported on the results of the permanent cessation of fishing activities.

However, the information presented in the Swedish fleet report for 2022 is insufficient to assess the effects of the Member State's action plan.

A number of management measures are in place in order to curb overcapacity in both the pelagic and demersal fishery, and EWG considers the initiative of the Swedish Agency for Marine and Water Management to propose further improvements to the management system in demersal fisheries will potentially help in this regard.

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 Swedish fleet report is not completely in line with the Commission's Guidelines COM(2014)545.

Discrepancies in previous fleet reports

As commented in EWG 22-15 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 2023 fleet report. Segments were designated as active or passive gear groups and further classified by length group.

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.

The Member State reported on the decrease in its fishing fleet since 2014, which is evident in all segments except the 'Active, 8-12 metres' segment which increased slightly in the period. Low profitability in the passive gear segments is linked to limited exploitation rates (1-3% of total catches in the period 2014-2021), part-time nature of fisheries, and 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 (SWE NAO DFN0008 NGI*, SWE NAO DFN0010 NGI* and SWE NAO DFN0812 NGI*) contributing to more than 90% of the passive gear fleet in term of number of vessels.

Taking into account recent measures to limit overcapacity in the fleet, and continued management approach, there is no overcapacity indicated in the active gears segments, with an exception of SWE NAO DTS1012 NGI * (North Sea), for which both low short-term and long-term profitability with a deteriorating trend is indicated according to results of economic indicators in 2021, which may be due to pandemic-related effects according to Member State.

Overview of action plan

No new or revised action plans were proposed by MS in 2023.

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 2023 in relation to Action Plans already included or identified as on-going in the fleet reports submitted in 2022.

Table 3.5.1 Summary of action plans

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Belgium	2022	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Belgium	2023	No	NA	NA	NA	NA	The MS considered all segments to be in balance. No action plan presented.
Bulgaria	2022	yes	update	yes	yes	yes	The updated action plan (2020) is partly targeted because there is no information about the share of capacity that will be reduced. Two new measures were added to the AP and the information for each fleet segment was updated. However, it is still not clear how the proposed measures will improve the balance of the fleet.
Bulgaria	2022	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.
Cyprus	2022	yes	Update	yes	yes	yes	An action plan has been proposed for the fleet segment DTS VL2440 since the fleet report for the year 2020
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
Croatia	2022	Yes	Updated and Strengthened	Yes	Yes	Yes	The action plan clearly sets out the time frame and the objectives/targets. The direct outcome of the measures in the outcome is not quantifiable.
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.
Denmark	2022	yes	new	yes	yes	yes	Action Plan clear, targeted and limited in time (2022-2023): it provides a detailed plan for Baltic Sea and adjustments to the fleet structure with regard to mitigate the negative effects of Brexit (without precision on this second point). Both terminated by the end of 2023
Denmark	2023	yes	update	yes	yes	yes	The action plan proposed the previous year is still ongoing and ends at the end of 2023.
Estonia	2022	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented
Estonia	2023	no	/	/	/	/	The MS considered all segments to be in balance. No action plan was presented
Finland	2022	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	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.
France	2022	yes	update	yes	yes	yes	An update from the one submitted in 2020. The level of details differs from segment to segment. The EWG could not assess if the actions proposed will influence the balance.
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.
Germany	2022	yes	Update	yes	yes	yes	The updated 2021 action plan proposes specific measures for eight fleet segments which operate in the Baltic Sea region. AP presents a wide range of measures of both a general type applicable for all fleets, as well as specific type to those fleet segments identified as being out of balance. Some of measures are as an ongoing basis from 2015. The measure for permanent cessation of fishing activities is applicable to the 2021-2022 period. In 2022, a provided action plan required the fleet reduce by TM VL2440 segment due to the implementation of a permanent cessation measure.
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.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Greece	2022	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. There is no clear time plan provided by MS.
Greece	2023	no	/	/	/	/	No action plan proposed by MS, justifications are provided in the fleet report
Ireland	2022	No	-	-	-	-	Ireland, based on the the Irish fleet Report 2021 considers that structural imbalance does not exist in any of its fleet segments and no action plans are proposed. The Irish view is that the imbalance identified in some fleets in the report is due to a difference in the rate of interest used in the calculation of the indicators.
Ireland	2023	No	-	-	-	-	Based on the available information, Ireland considers that structural imbalance does not exist in any of its fleet segments and no action plans are proposed,
Italy	2022	Yes	Update	Partly	Partly	Yes	Updated from at least 2017. Objectives are not specifically targeted at the fleet segments that are out of balance. The action plan describes several measures to be taken to reduce fishing mortality. Of these, only temporary closure periods are explicitly described. The other measures are mostly unfinalized and have not been implemented yet.
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.
Latvia	2022	No	-	-	-	-	Ongoing AP provided with 2019 fleet report. MS implemented measure for reducing the capacity in fleet segment TM VL2440 operating in the Baltic Sea through permanent withdrawal from fishing activity of a number of vessels, which were involved in cod fishery in 2014-2018.
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.
Lithuania	2022	No	-	-	-	-	Ongoing AP provided with 2020 fleet report. Timeframe: 2021-2023. Two types of measures targeting fleet segments NAO DFN VL1012 and NAO DTS VL2440 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	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.
Malta	2022	yes	resubmitted	no	no	no	Resubmitted the 2016 action plan. More a statement of intent to improve monitoring. The EWG could not assess if the actions proposed will influence the balance.
Malta	2023	yes	new	no	yes	no	The proposed action plan is largely a statement of intent to improve monitoring activities.
Netherlands	2022	No	-	-	-	-	No rationale for not presenting AP is elaborated in the fleet report.
Netherlands	2023	No	-	-	-	-	No rationale for not presenting AP is elaborated in the fleet report.
Poland	2022	yes	Update	yes	yes	yes	An action plan accompanied with 2020 fleet report was reviewed by MS. An action plan is proposed for eight of the fishing fleet segments which operated in the Baltic Sea region. The action plan includes three main measures which were specified for each segments identified by MS that were out of balance. A time frame is for three to five years without specific dates.
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.
Portugal	2022	yes	new	yes	yes	yes	Action Plan clear, targeted and limited in time (2022-2023): it targets the fleet HOK > 12m
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.

MEMBER STATE	Year*	Action plan presented?	Status	Appropriately targeted?	Timeframe described	Tools described	EWG comments
Romania	2022	yes	update	yes	yes	yes	Action Plan from 2020 and extended to 2027. The AP targets all 6 fleet segments but the objectives are unclear. The lack of relevant information means that the EWG is unable to assess of the potential effects of the proposed measures.
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.
Slovenia	2022	No	-	-	-	-	MS considers that all fleet segments are in balance. The EWG does not concur with the assessment. It appears that socio-economic objectives (employment) may have priority over stock conservation.
Slovenia	2023	No	-	-	-	-	Slovenia considers that MS fishing activity is extremely low and have insignificant impact, but is committed to achieving 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	2022	Yes	Update	Yes	Yes	Yes	Updated from 2021. The objectives are clearly defined and the measures to achieve them are described. The objectives are appropriately targeted to the fleet segments which are not in balance. The AP implies that the targets are to be met by the time the AP expires, but it is not made explicit. Some parts of the AP set for 2021-2023 were met in 2022 and can be considered successful.
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.
Sweden	2022	no	/	/	/	/	AP 2021 is valid until 2023. MS has implemented a measure for reducing overcapacity in fleet targeting cod in the Baltic Sea. MS reported on the progress of AP 2021 implementation in the annual fleet report in 2022.
Sweden	2023	no	/	/	/	/	The action plan submitted by Sweden in 2021 expired in 2022. The MS has implemented permanent cessation of fishing activities aimed at reducing overcapacity in fleet targeting cod in the Baltic Sea. MS reported on the final results of AP 2021 implementation in the annual fleet report 2023.

* 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 the fleet segments concerned?

4 TASK 3- FLEET SEGMENTS IN THE OUTERMOST REGIONS

4.1 Introduction

EWG 23-13 was requested to respond to the following ToR:

"The Expert group is requested to list for the Outermost Regions of France (Réunion, French Guiana, Martinique, Guadeloupe, Saint-Martin and Mayotte), Portugal (Madeira and Azores) and Spain (Canary Islands), those fleet segments that according to the most updated set of data (2019 or later if available) for either the biological, economic or technical indicators in the Commission Guidelines, as computed by the STECF, were indicated to be out of balance with their fishing opportunities. The list should contain information on 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 Expert group is furthermore requested to provide a list of the fleet segments for which information available does not allow to calculate the above indicators and to indicate for which indicators what kind of information was not available."

Since 2019 (STECF 19-13) MS fleets from the OMRs could be distinguished from their mainland fleets by the introduction of geographical indicator (Geo-indicator) in the DCF fleet economic data call. For Spain and France consistent historical data for OMR regions only can be obtained from 2017 (five years of time series). Furthermore, as explained in the sections below, there are shortages of data and information on the fleets and fisheries in the OMRs.

In response to the request to identify fleet segments that are imbalanced according to the biological, economic or technical indicators, the EWG has listed segments where imbalance is indicated by at least one indicator value. However, the EWG notes that the assessment whether a fleet segment is

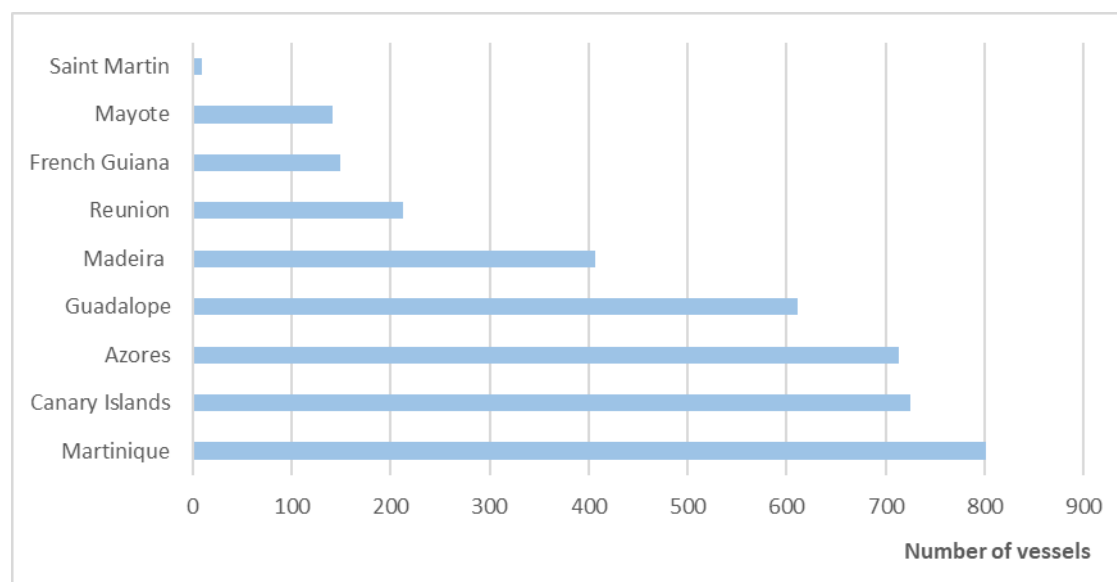
in or out of balance should be made using a combination of indicators and their trends over several years. Hence it cannot be concluded that the fleet segments listed in the sections below are imbalanced, just that the computed value for 2021 for at least one indicator are indicated to be imbalanced according to the criteria in the Commission guidelines.

For the technical indicator Vessel Utilization Ratio EWG 23-13 chose to compute also the VUR_{220} indicator in cases where maximum number of days at sea were not provided by Member States and VUR could not be computed.

An alternative indicator to VUR and VUR_{220} was used by France in its fleet report submitted in 2023. This indicator (VUR_{90}) is described and its utility is discussed in Section 3.4.8 (sub-heading, Vessel Utilization Indicator) of this report. The EWG did not have access to the data required to compute VUR_{90} , so that indicator is not considered in this section of the report.

4.2 OMR fleets at a glance

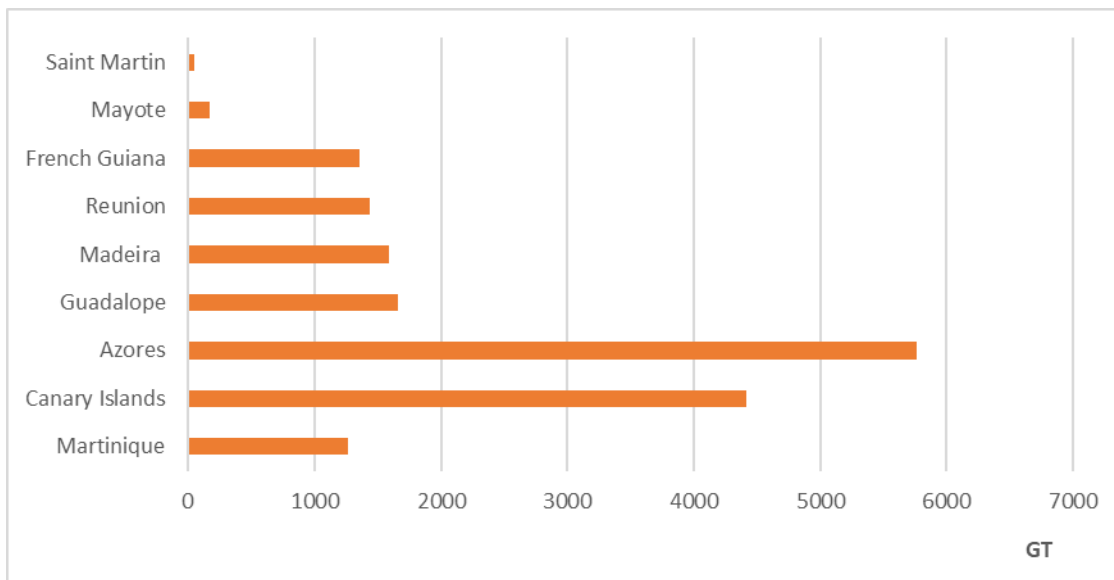
The EU OMR fleet totaled 3 771 vessels in 2021. The French OMR fleet was the most numerous, accounting for 51% of all reported vessels. The Portuguese and Spanish fleets represented 30% and 19% respectively.



Number of vessels for the OMRs

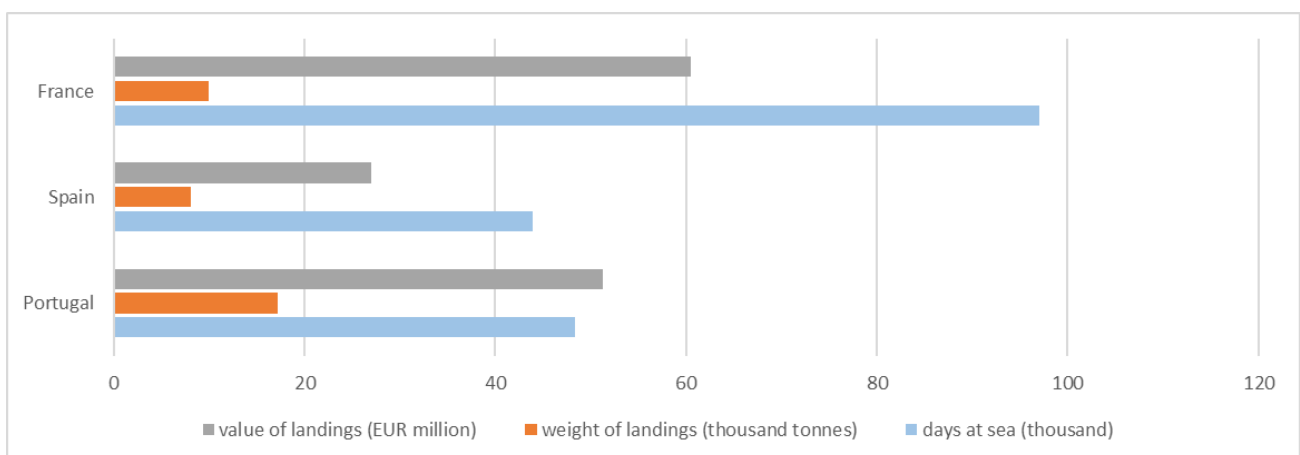
Martinique, with 802 vessels, was the largest OMR fleet (by number), followed by Canary Islands (725), Azores (713), Guadeloupe (611), Madeira (407), La Reunion (212), French Guiana (149), Mayotte (142) and Saint Martin (10).

About 93% of the vessels in OMR belong to the small-scale coastal fleet (SSCF).



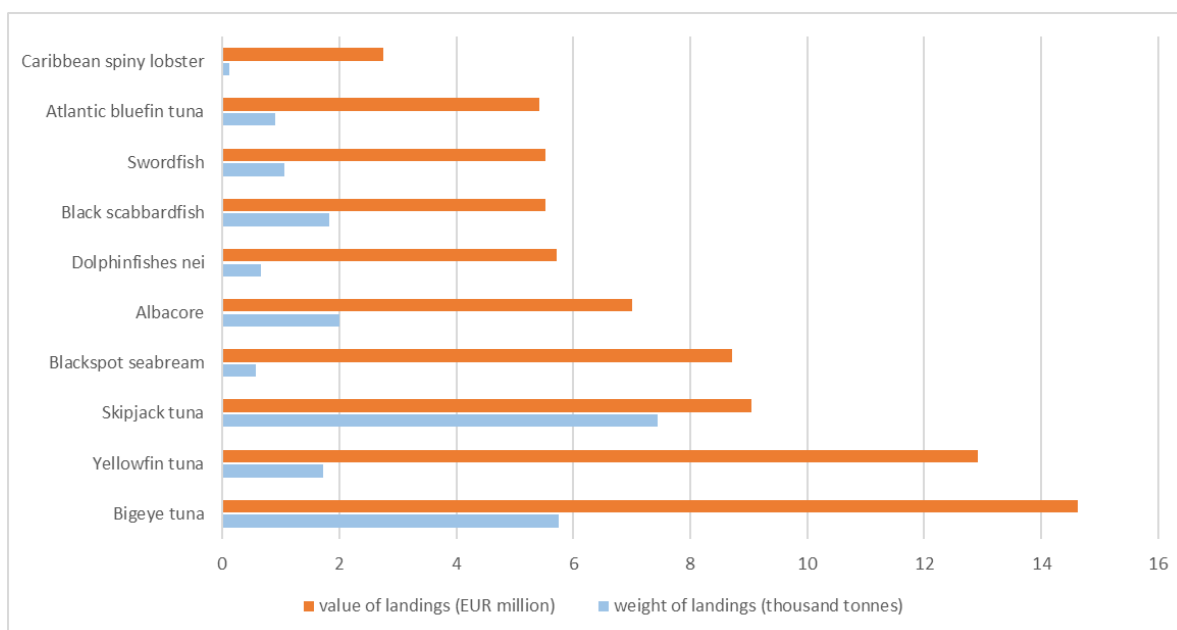
Gross tonnage (GT) of the OMRs

If one compares the number of vessels with GT it can be concluded that Martinique is mainly composed by small scale fleet (20% in number of vessels and 6% in GT). In the opposite direction Azores, Canary Islands and French Guiana reveals to have fleet segments with bigger vessels with 33% and 26% and 9% of the total tonnage respectively.



OMR Effort

The OMR fleet spent 189 thousand days at sea in 2021, to land approximately 35 thousand tons of seafood, valued in EUR 139 million.



Most representative species

Tuna and other large pelagic species represent a major part of the landings with Bigeye tuna, Yellowfin tuna, Skipjack tuna the largest components by value of landings, followed by Blackspot(=red) seabream, Albacore, Common dolphinfish and Black scabbardfish.

The Azores, Canary Islands and Guadeloupe fleets were the most important in terms of landing value (with landed value of 28.1%, 19.4% and 14.1% respectively), followed by Reunion (11.0%), Martinique (9.0%), Madeira (7.9%), French Guyana (4.5%) and Mayotte (4.4%)

The 2023 Annual Economic Report (STECF 23-07) will provide more details on the OMR fleets and their economic performance.

4.3 French Outermost Regions

The data provided for the five French OMRs (Saint Martin did not present any fleet segment), uses the geographical indicator to distinguish the OMR fleets and the balance indicators associated with those fleets. The EWG 23-13 was able to compute indicator values for most of the balance indicators and assess their status according to the criteria in COM (2014) 545 (see Table 4.3.1).

Table 4.3.1 - List of Fleet Segments in French Outermost Regions and status with respect to available balance indicators computed by the EWG for the year 2021. The status of each indicator is shown with respect to the criteria given in the Commission Guidelines (COM (2014)545).

Out of balance (■), in balance (■) with no information (■)

OMR	Fleet segment	FT	VL	NO of vessels	Status 2021 according to thresholds and criteria in the 2014 Guidelines					
					Biological		Economic		Vessel use	
					SAR	SHI	CR/BER	RoFTA	VUR	VUR ₂₂₀
French Guiana	FRA OFR DFN0010 GF A *	DFN	VL0010	32	■	■	■	■	■	■
	FRA OFR DFN1012 GF A *	DFN	VL1012	57	■	■	■	■	■	■
	FRA OFR DTS1824 GF A	DTS	VL1824	7	■	■	■	■	■	■
Guadeloupe	FRA OFR DFN0010 GP A	DFN	VL0010	71	■	■	■	■	■	■
	FRA OFR FPO0010 GP A	FPO	VL0010	105	■	■	■	■	■	■
	FRA OFR HOK0010 GP A	HOK	VL0010	124	■	■	■	■	■	■
	FRA OFR PGP0010 GP A *	PGP	VL0010	167	■	■	■	■	■	■
		PGO	VL0010	9	■	■	■	■	■	■
	FRA OFR PGP1012 GP A *	HOK	VL1012	8	■	■	■	■	■	■
		FPO	VL1012	3	■	■	■	■	■	■
		PGP	VL1012	3	■	■	■	■	■	■
		DFN	VL1012	2	■	■	■	■	■	■
	FRA OFR PS 0010 GP A	PS	VL0010	23	■	■	■	■	■	■
Martinique	FRA OFR DFN0010 MQ A	DFN	VL0010	56	■	■	■	■	■	■
	FRA OFR FPO0010 MQ A	FPO	VL0010	165	■	■	■	■	■	■
	FRA OFR HOK0010 MQ A	HOK	VL0010	133	■	■	■	■	■	■
	FRA OFR PGP0010 MQ A *	PGP	VL0010	181	■	■	■	■	■	■
		PGO	VL0010	19	■	■	■	■	■	■
		HOK	VL1012	11	■	■	■	■	■	■
		PS	VL0010	2	■	■	■	■	■	■
		DFN	VL1012	1	■	■	■	■	■	■
		FPO	VL1218	1	■	■	■	■	■	■
		FPO	VL1824	1	■	■	■	■	■	■
		HOK	VL1218	1	■	■	■	■	■	■
Reunion	FRA OFR HOK0010 RE A *	HOK	VL0010	129	■	■	■	■	■	■
		PGP	VL0010	4	■	■	■	■	■	■
		HOK	VL1012	3	■	■	■	■	■	■
		PGO	VL0010	2	■	■	■	■	■	■
		DFN	VL0010	1	■	■	■	■	■	■
	FRA OFR HOK1218 RE A *	HOK	VL1218	15	■	■	■	■	■	■
	FRA OFR HOK1218 RE A *	HOK	VL1824	4	■	■	■	■	■	■
Mayotte	FRA OFR HOK0010 YT A *	HOK	VL0010	83	■	■	■	■	■	■
	FRA OFR HOK0010 YT A *	DFN	VL0010	8	■	■	■	■	■	■

Note: 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.

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

Note that for VUR₂₂₀, the indicator values are uninformative because most segments are small-scale and it is highly unlikely they would achieve a maximum of 220 days at sea.

94% of segments provided SAR information for 2021, and 12 segments are out of balance (38% of the total assessed fleet segments).

Like the SAR indicator, VUR is available for almost all fleet segments. Segments FRA OFR HOK1218 MQ and FRA OFR DFN VL0010 RE each contain only one vessel so no information was provided.

Unlike the SAR SHI and VUR indicators, values for VUR₂₂₀ and economic indicators are given only for clustered fleet segments and as in the EWG 22-15 report, RoFTA and CR/BER were not available for the DTS 1824 GF segment. Also in the EWG 22-15 report, economic data was not available for segment PGO0010 MQ A and in this report (EWG 23-13) that segment is included in the clustered segment PGP0010 MQ A*.

Main stocks on which fleet segments rely by region.

For each OMR and for those segments that are indicated to be out of balance, a list of the fish stocks on which segments rely are described in the following sub-sections.

In each of the following OMR sections, two sets of data are tabulated:

An upper table, listing for each imbalanced segment, (i) the segment name, (ii) the indicator used to identify the imbalance according to COM (2014) 545, (iii) the ranked value of the landings of the main species caught by the segment by sea area.

A lower table listing for the SAR indicator, (i) the species contributing to the perceived imbalance in the segment according to the indicator concerned over the most recent 5 years and for other indicators (ii) the indicator values over the most recent 5 years.

FRENCH GUIANA

2 segments were studied: FRA OFR DFN0010 GF A * and FRA OFR DTS1824 GF A.

Segment - FRA OFR DFN0010 GF A *

Imbalance indicators – SAR

Species/area	41.1.1	31	Total	%
Acoupa weakfish	559 492 €	231 726 €	791 218 €	32.3
Crucifix sea catfish	272 298 €	67 539 €	339 837 €	13.9
Green weakfish	321 146 €	16 837 €	337 983 €	13.8
Atlantic goliath grouper	81 245 €	194 092 €	275 337 €	11.2
Smalltooth weakfish	46 281 €	47 584 €	93 865 €	10.6

Most representative species in value of landings

SAR

Fleet segment	2017	2018	2019	2020	2021
DFN VL0010	eet.atl	eet.atl	eet.atl yna.wca	eet.atl yna.wca	eet.atl yna.wca

*eet = Atlantic goliath grouper , yna = Acoupa weakfish

In 2021 the SAR indicates imbalance for this fleet segment due to catches of Atlantic goliath grouper representing 11.2% of the total landing value of the fleet segment.

Segment - FRA OFR DFN1012 GF A *

Imbalance indicators – SAR

Species/area	31	41.1.1	Total	%
Acoupa weakfish	1 353 787 €	478 193 €	1 831 980 €	50.3
Green weakfish	408 074 €	508 738 €	916 812 €	25.2

SAR

Fleet segment	2017	2018	2019	2020	2021
DFN VL1012			yna.wca	yna.wca	yna.wca

*yna = Acoupa weakfish

In 2021 the SAR indicates imbalance for this fleet segment due to catches of Acoupa weakfish representing 50.3% of the total landing value of the fleet segment.

FRA OFR DTS1824 GF A

Imbalance indicators – VUR

Species/area	31	41.1	Total	%
Penaeus shrimps nei	351 381 €	19 373 €	370 754 €	93.3

	2017	2018	2019	2020	2021
VUR	0.42	0.46	0.38	0.52	0.49

Historical indicators for the last five years

GUADELOUPE

5 imbalance clusters were studied: FRA OFR DFN0010 GP A, FRA OFR FPO0010 GP A, FRA OFR HOK0010 GP A, FRA OFR PGP0010 GP A * and FRA OFR PGP1012 GP A *.

Segment - FRA OFR DFN0010 GP A

Imbalance indicator – Rofta, CR/BER

Species/area	31	%
Parrotfishes nei	865 817 €	40.9
Caribbean spiny lobster	382 277 €	18.1
Halfbeaks nei	184 998 €	8.7
Conch shells nei	143 269 €	6.8
Grunts, sweetlips nei	138 969 €	6.6

Most representative species in value of landings

	2017	2018	2019	2020	2021
CR/BER	0.92	1.02	0.90	0.89	0.94
Rofta	-3.56	-0.69	-4.81	-4.76	-4.56

Historical indicators for the last five years

Segment - FRA OFR FPO0010 GP A

Imbalance indicators – Rofta, CR/BER

Species/area	31	%
Caribbean spiny lobster	473 195 €	19.0
Groupers, seabasses nei	277 509 €	11.2
Snappers, jobfishes nei	275 434 €	11.1
Parrotfishes nei	266 578 €	10.7
Grunts, sweetlips nei	179 900 €	7.2
Squirrelfishes nei	145 106 €	5.8
Filefishes, leatherjackets nei	144 173 €	5.8
Goatfishes, red mullets nei	112 629 €	4.5

Most representative species in value of landings

	2017	2018	2019	2020	2021
CR/BER	0.71	0.86	0.65	0.85	0.74
Rofta	-13.55	-7.33	-17.71	-7.75	-14.47

Historical indicators for the last five years

Segment - FRA OFR HOK0010 GP A

Imbalance indicators – SAR

Species/area	31	%
Dolphinfishes nei	2 306 562 €	37.8
Yellowfin tuna	2 252 455 €	36.9
Snappers, jobfishes nei	333 340 €	5.5

Most representative species in value of landings

SAR

Fleet segment	2017	2018	2019	2020	2021
HOK VL0010	bum.31	bum.31	bum.31	bum.31	bum.31

*bum.31 = Blue marlin FAO area 31

In 2021 SAR indicates imbalance for this fleet segment due to catches of blue marlin which represents 1.5% of the total landing value of the fleet segment.

Segment - FRA OFR PGP0010 GP A

Imbalance indicators – SAR

Species/area	31	%
Caribbean spiny lobster	473 195 €	19.0
Groupers, seabasses nei	277 509 €	11.2
Snappers, jobfishes nei	275 434 €	11.1
Parrotfishes nei	266 578 €	10.7
Grunts, sweetlips nei	179 900 €	7.2
Squirrelfishes nei	145 106 €	5.8
Filefishes, leatherjackets nei	144 173 €	5.8
Goatfishes, red mullets nei	112 629 €	4.5

Most representative species in value of landings

SAR

Fleet segment	2017	2018	2019	2020	2021
PGO VL0010					lcx.31-41
PGP VL0010	lcx.31-41/bum.31	bum.31	bum.31	lcx.31-41	lcx.31-41

*bum.31 = Blue marlin FAO area 31, bum.31-41 = Blue marlin FAO area 31-41, lcx.31-41 = Hogfish

In 2021 SAR indicates imbalance for this fleet segment due to catches of Hogfish which represents 0.23% for PGO and 0.01% for PGP of the total landing value of the fleet segment.

Segment - FRA OFR PGP1012 GP A*

Imbalance indicators – Rofta, CR/BER

Species/area	31	%
Yellowfin tuna	90 349 €	25.2
Dolphinfishes nei	78 791 €	22.0
Parrotfishes nei	25 774 €	7.2
Caribbean spiny lobster	25 183 €	7.0
Snappers, jobfishes nei	23 734 €	6.6
Grunts, sweetlips nei	16 946 €	4.7
Queen snapper	13 971 €	3.9

Most representative species in value of landings

	2017	2018	2019	2020	2021
CR/BER	0.72	0.40	0.99	2.87	0.59
Rofta	-5.43	-12.27	-1.34	33.74	-11.71

Historical indicators for the last five years

Since 2017, this fleet is considered as imbalanced regarding economic indicators.

MARTINIQUE

The fleet in this region comprises 11 fleet segments (4 clustered). Imbalance were found for all fleet segments. For the clustered FRA OFR PGP0010 MQ A *, the biological SAR indicator was only found for some of the composed fleet segments.

Segment - FRA OFR DFN0010 MQ A

Imbalance indicators – Rofta, CR/BER

Species/area	31	%
Grunts, sweetlips nei	55 422 €	17.3
Halfbeaks nei	46 572 €	14.6
Marine fishes nei	44 807 €	14.0
Mojarras, etc. nei	40 920 €	12.8
Carangids nei	28 738 €	9.0
Snappers, jobfishes nei	18 285 €	5.7
Caribbean spiny lobster	12 147 €	3.8

Most representative species in value of landings

	2017	2018	2019	2020	2021
CR/BER	0.92	1.02	0.90	0.89	0.94
Rofta	-3.56	-0.69	-4.81	-4.76	-4.56

Historical indicators for the last five years

Segment - FRA OFR FPO0010 MQ A

Imbalance indicators – Rofta, CR/BER, VUR

Species/area	31	%
Caribbean spiny lobster	458 183 €	35.4
Yellowtail snapper	132 690 €	10.3
Snappers, jobfishes nei	86 770 €	6.7
Carangids nei	86 288 €	6.7
Squirrelfishes nei	82 318 €	6.4
Parrotfishes nei	79 384 €	6.1
Marine fishes nei	77 395 €	6.0

Most representative species in value of landings

	2017	2018	2019	2020	2021
CR/BER	0.71	0.86	0.65	0.85	0.74
Rofta	-13.55	-7.33	-17.71	-7.75	-14.47

Historical indicators for the last five years

Segment - FRA OFR HOK0010 MQ A

Imbalance indicators – SAR

Species/area	31	%
Yellowfin tuna	1 218 547 €	41.9
Dolphinfishes nei	521 532 €	17.9
Blue marlin	413 971 €	14.2
Carangids nei	185 250 €	6.4

Most representative species in value of landings

FRA OFR HOK0010 MQ

SAR

Fleet segment	2017	2018	2019	2020	2021
HOK VL0010	bum.31	bum.31	bum.31	bum.31	bum.31

*bum.31 = Blue marlin FAO area 31

In 2021 SAR indicates imbalance for this fleet segment due to catches of blue marlin which represents 14.2% of the total landing value of the fleet segment.

Segment - FRA OFR PGP0010 MQ *

Imbalance indicators – SAR

Species/area	31	%
Yellowfin tuna	1 724 662 €	20.7
Bigeye scad	1 714 611 €	20.5
Dolphinfishes nei	725 328 €	8.7
Blue marlin	565 889 €	6.8
Carangids nei	545 384 €	6.5
Caribbean spiny lobster	458 173 €	5.5
Sea egg	337 330 €	4.0
Marine fishes nei	282 541 €	3.4

Most representative species in value of landings

SAR

Fleet segment	2017	2018	2019	2020	2021
PGP VL0010	bum.31	bum.31	bum.31/lcx.31-41	bum.31	bum.31
FPO VL1218					rpu.31-41
HOK VL1012		bum.31	bum.31	bum.31	bum.31

*bum.31 = Blue marlin FAO area 31, lcx.31-41 = hogfish, rpu.31-41 = vermilion snapper

In 2021 SAR indicates imbalance for this fleet segment due to catches of blue marlin which represents 17.0% for HOK and 7.3 for PGP and Vermilion snapper 5.4% for FPO of the total landing value of the fleet segment.

REUNION

2 imbalanced clusters were studied: FRA OFR HOK0010 RE A* and FRA OFR HOK1218 RE A*.

Segment - FRA OFR HOK0010 RE *

Imbalance indicators – SAR, SHI, VUR

Species/area	51.7	51	Total	%
Yellowfin tuna	2 776 538 €		2 776 538 €	33.9
Swordfish	1 082 812 €		1 082 812 €	13.2
Blue marlin	986 487 €		986 487 €	12.1
Common dolphinfish	932 818 €	60 €	932 878 €	11.4
Albacore	666 243 €	94 €	666 337 €	8.1

Most representative species in value of landings

FS	2017	2018	2019	2020	2021
HOK VL0010	bum.iotc	bum.iotc	bum.iotc	bum.iotc	bum.iotc
HOK VL1012			bum.iotc		bum.iotc

In 2021 SAR indicates imbalance for this fleet segment due to catches of Blue Marlin. representing 12.3% for VL0010 and 11.1% for VL1012 of the total landing value of the fleet segment.

FS	2017	2018	2019	2020	2021
HOK VL0010	1.16	1.12	1.07	1.12	1.14

SHI indicates imbalance for HOK 0010 due to high dependence on Yellowfin tuna F/Fmsy = 1.3;

Blue Marlin F/Fmsy = 1.1; Swordfish F/Fmsy = 0,6

	2017	2018	2019	2020	2021
VUR	0.80	0.57	0.74	0.38	0.53

Historical indicators for the last five years

Segment - FRA OFR HOK1218 RE

Imbalance indicators – SAR, Rofta, CR/BER

Species/area	51.7	51	Total	%
Yellowfin tuna	2 776 538 €		2 776 538 €	33.9
Swordfish	1 082 812 €		1 082 812 €	13.2
Blue marlin	986 487 €		986 487 €	12.1
Common dolphinfish	932 818 €	60 €	932 878 €	11.4
Albacore	666 243 €	94 €	666 337 €	8.1

Most representative species in value of landings

SAR

FS	2017	2018	2019	2020	2021
HOK VL1218	bum.iotc	bum.iotc	bum.iotc	bum.iotc	bum.iotc

*bum.iotc = Blue marlin iotc area

In 2020 SAR indicates imbalance for this fleet segment due to catches of Blue Marlin and Yellowfin tuna. The two species represents 6.4% of the total landing value of the fleet segment.

	2017	2018	2019	2020	2021
CR/BER	-0.08	0.32	-0.22	0.51	0.26
Rofta	-31.01	-19.66	-36.93	-16.67	-27.17

VUR

FS	2017	2018	2019	2020	2021
HOK 1824	0.59	0.85	0.67	0.90	0.63

Historical indicators for the last five years

MAYOTTE

The fleet in this region comprises 1 clustered segment, which were assessed to be out of balance according to at least one balance indicator

Segment - FRA OFR HOK0010 YT A*

Imbalance indicators – Rofta, CR/BER

Species/area	51.6	%
Yellowfin tuna	920 437 €	14.7
Humpback red snapper	523 607 €	8.4
Spotcheek emperor	437 724 €	7.0
Snappers nei	424 485 €	6.8
Skipjack tuna	364 252 €	5.8
Emperors(=Scavengers) nei	363 457 €	5.8
Longface emperor	274 716 €	4.4
Deep-water red snapper	252 246 €	4.0
Two-spot red snapper	242 234 €	3.9
Groupers nei	233 292 €	3.7
Green jobfish	221 816 €	3.5
Scads nei	209 338 €	3.3
Narrow-barred Spanish mackerel	195 593 €	3.1
Barracudas, etc. nei	183 357 €	2.9




Most representative species in value of landings



















































































































FS	2017	2018	2019	2020	2021
CR/BER	0.35	0.83	-0.22	1.40	-1.80
Rofta	-18.12	-4.62	-26.43	7.74	-65.62

4.4 Portuguese Outermost Regions

The data provided for the two Portuguese OMRs, Azores and Madeira, uses the geographical indicator to distinguish the OMR fleets and the balance indicators associated with those fleets. The EWG 23-13 was able to compute indicator values for most of the balance indicators and assess their status according to the criteria in COM (2014) 545 (see Table 4.4.1).

Table 4.4.1 - List of Fleet Segments indicators in Portuguese Outermost Regions in 2021.

Out of balance (), in balance () with no information ()

OMR	Fleet segment	FT	VL	NO of vessels	Status 2021 according to thresholds and criteria in the 2014 Guidelines					
					Biological		Economic		Vessel use	
					SAR	SHI	CR/BER	RoFTA	VUR	VUR ₂₂₀
Madeira	PRT NAO HOK0010 P2 *	HOK	VL0010	48						
		HOK	VL1012	5						
	PRT NAO HOK1218 P2	HOK	VL1218	15						
	PRT NAO HOK1824 P2	HOK	VL1824	3						
	PRT NAO HOK2440 P2	HOK	VL2440	5						
	PRT NAO MGP0010 P2	MGP	VL0010	7						
	PRT NAO MGP1824 P2 *	MGP	VL1824	3						
Azores	PRT NAO DFN0010 P3	DFN	VL0010	29						
	PRT NAO HOK0010 P3	HOK	VL0010	293						
	PRT NAO HOK1012 P3	HOK	VL1012	66						
	PRT NAO HOK1218 P3	HOK	VL1218	31						
	PRT NAO HOK2440 P3 *	HOK	VL2440	19						
		HOK	VL1824	4						
	PRT NAO PGP0010 P3 *	PGP	VL0010	20						
		PGP	VL1012	1						
		PGP	VL1218	1						
	PRT NAO PS 0010 P3	PS	VL0010	17						
	PRT NAO PS 1012 P3 *	PS	VL1012	8						
	PRT NAO PS 1218 P3	PS	VL1218	4						

*Note: 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.*

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

The Portuguese OMR fleet is composed by 19 fleet segments (15 clustered). EWG performed SAR indicators 15 fleet segments (79%). SHI information was available for one fleet segment. For the economic and technical indicators, the MS provide information for all fleet segments.

Main stocks on which fleet segments rely by region.

For each OMR and for those segments that are indicated to be out of balance, a list of the fish stocks on which segments rely are described in the following sub-sections.

In each of the following OMR sections, two sets of data are tabulated:

An upper table, listing for each imbalanced segment, (i) the segment name, (ii) the indicator used to identify the imbalance according to COM (2014) 545, (iii) the ranked value of the landings of the main species caught by the segment by sea area.

A lower table listing for the SAR indicator, (i) the species contributing to the perceived imbalance in the segment according to the indicator concerned over the most recent 5 years and for other indicators (ii) the indicator values over the most recent 5 years.

AZORES

4 imbalanced clusters were identified: PRT NAO DFN0010 P3, PRT NAO HOK0010 P3, PRT NAO HOK1012 P3, and PRT NAO HOK2440 P3.

Segment - PRT NAO DFN0010 P3

Imbalance indicators – VUR

Species/area	27.10.a	%
Parrotfish	428 050 €	56.7
White trevally	33 964 €	4.5
Grey triggerfish	27 506 €	3.6
Yellowmouth barracuda	26 915 €	3.6
Red scorpionfish	24 090 €	3.2
Thicklip grey mullet	20 066 €	2.7
Dusky grouper	19 452 €	2.6

Most representative species in value of landings

	2017	2018	2019	2020	2021
VUR	0.48	0.60	0.64	0.59	0.57

Historical indicators for the last five years

Segment - PRT NAO HOK0010 P3

Imbalance indicators – VUR

Species/area	27.10.a	%
Blackspot seabream	4 679 816 €	40.8
Veined squid	1 005 107 €	8.8
Red porgy	697 658 €	6.1
Alfonsino	642 486 €	5.6
Wreckfish	412 828 €	3.6
Skipjack tuna	403 137 €	3.5
Forkbeard	381 598 €	3.3
Red scorpionfish	353 251 €	3.1
Greater amberjack	261 610 €	2.3

Most representative species in value of landings

	2017	2018	2019	2020	2021
VUR	0.28	0.31	0.30	0.32	0.33

Historical indicators for the last five years

Segment - PRT NAO HOK1012 P3

Imbalance indicators - VUR

Species/area	27.10.a	34.1.2	Total	%
Blackspot seabream	2 267 997 €		2 267 997 €	29.7
Veined squid	952 101 €		952 101 €	12.5
Alfonsino	691 249 €		691 249 €	9.0
Blackbelly rosefish	507 531 €		507 531 €	6.6
Skipjack tuna	455 302 €	4 066 €	459 368 €	6.1
Forkbeard	376 043 €		376 043 €	4.9
Atlantic bluefin tuna	296 422 €	9 765 €	306 187 €	4.0
Wreckfish	287 200 €		287 200 €	3.8

Most representative species in value of landings

	2017	2018	2019	2020	2021
VUR	0.55	0.59	0.66	0.66	0.61

Historical indicators for the last five years

Segment - PRT NAO HOK2440 P3

Imbalance indicators - Rofta

Species/area	27.10.a	34.1.2	Total	%
Skipjack tuna	4 188 846 €		4 188 846 €	35.5
Bigeye tuna	1 379 464 €	2 267 798 €	3 647 262 €	30.9
Albacore		738 927 €	738 927	6.3
Blackspot seabream	676 534 €		676 534 €	5.7

Most representative species in value of landings

	2017	2018	2019	2020	2021
Rofta (%)	11.81	13.46	2.76	-9.61	-0.53

Historical indicators for the last five years

MADEIRA

The fleet in this region comprises 6 segments, 4 of which were assessed to be out of balance according to at least one balance indicator: PRT NAO HOK0010 P2, PRT NAO HOK1824 P2, PRT NAO HOK2440 P2 and PRT NAO MGP1824 P2 *.

Segment - PRT NAO HOK0010 P2 *

Imbalance indicators – VUR

Species/area	34.1.2	%
Black scabbardfish	529 508 €	23.4
Bigeye tuna	482 081 €	21.3
Atlantic bluefin tuna	329 016 €	14.6
Pink dentex	312 011 €	13.8
Red porgy	170 894 €	7.6

Most representative species in value of landings

	2017	2018	2019	2020	2021
VUR	0.24	0.38	0.39	0.35	0.41

Historical indicators for the last five years

Segment - PRT NAO HOK1824 P2

Imbalance indicators – Rofta, CR/BER

Species/area	34.1.2	27.10.a	Total	%
Black scabbardfish	559 821 €		559 821 €	51.4
Bigeye tuna	290 700 €		290 700 €	26.7

Most representative species in value of landings

	2017	2018	2019	2020	2021
Rofta (%)	33.63	-11.12	50.08	49.02	-157.95
CR/BER	2.68	0.59	2.91	3.24	0.22

Historical indicators for the last five years

Segment - PRT NAO HOK2440 P2

Imbalance indicators – Rofta, CR/BER

Species/area	34.1.2	27.10.a	Total	%
Bigeye tuna	871 201 €	41 113 €	912 314 €	44.9
Skipjack tuna	159 689 €	613 343 €	773 032 €	38.1

Most representative species in value of landings

	2017	2018	2019	2020	2021
Rofta (%)	50.72	15.29	5.72	-15.78	-16.33
CR/BER	5.22	1.98	1.21	0.03	0.26

Historical indicators for the last five years

Segment - PRT NAO MGP1824 P2 *

Imbalance indicators – Rofta, CR/BER

Species/area	34.1.2	%
Blue jack mackerel	279 517 €	62.5
Pacific chub mackerel	157 236 €	35.1

Most representative species in value of landings




	2017	2018	2019	2020	2021
Rofta (%)	0.89	20.31	-11.99	-10.23	-10.32
CR/BER	0.98	2.42	0.46	0.6	0.64









































































Historical indicators for the last five years

4.5 Spanish Outermost Regions

The data provided for the Spanish OMR, Canary Islands, uses the geographical indicator to distinguish the OMR fleets and the balance indicators associated with those fleets. (Table 4.5.1)

Table 4.5.1 - List of Fleet Cluster Segments Indicators in Canary Islands. Out of balance. Status is expressed according to the criteria in COM (2014) 545.

() , in balance () with no information ()

OMR	Fleet segment	FT	VL	NO of vessels	Status 2021 according to thresholds and criteria in the 2014 Guidelines					
					Biological		Economic		Vessel use	
					SAR	SHI	CR/BER	RoFTA	VUR	VUR ₂₂₀
Canary Islands	ESP NAO FPO1012 IC *	FPO	VL1012	10						
		FPO	VL1218	3						
	ESP NAO HOK1012 IC *	HOK	VL1012	37						
		HOK	VL0010	8						
	ESP NAO HOK1218 IC	HOK	VL1218	34						
	ESP NAO HOK2440 IC *	HOK	VL2440	16						
		HOK	VL1824	6						
	ESP NAO PMP0010 IC *	PMP	VL0010	441						
		PMP	VL1012	4						
		PMP	VL1218	1						
	ESP NAO PS 1218 IC *	PS	VL1218	10						
		PS	VL1012	1						

*Note: 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.*

Where the indicator for VUR is given, the column for VUR₂₂₀ should be ignored.

SAR, SHI and VUR have been calculated for each segment (13 in total) comprising the 6 clusters, however, CR/BER and RoFTA were calculated just for the 6 clusters to maintain commercial confidentiality.

Main stocks on which fleet segments rely by region.

For each OMR and for those segments that are indicated to be out of balance, a list of the fish stocks on which segments rely are described in the following sub-sections.

In each of the following OMR sections, two sets of data are tabulated:

An upper table, listing for each imbalanced segment, (i) the segment name, (ii) the indicator used to identify the imbalance according to COM (2014) 545, (iii) the ranked value of the landings of the main species caught by the segment by sea area.

A lower table listing for the SAR indicator, (i) the species contributing to the perceived imbalance in the segment according to the indicator concerned over the most recent 5 years and for other indicators (ii) the indicator values over the most recent 5 years.

Segment - ESP NAO FPO1012 IC *

Imbalance indicators – Rofta, CR/BER

Species/area	34.1.2	%
Pink dentex	132 161 €	21.8
Atlantic bluefin tuna	64 657 €	10.6
Albacore	61 577 €	10.1
Parrotfish	49 566 €	8.2
Red porgy	43 314 €	7.1
Narwal shrimp	38 000 €	6.3
Surmullet	25 990 €	4.3
Bigeye tuna	25 857 €	4.3
Common octopus	10 980 €	1.8
European conger	10 262 €	1.7

Most representative species in value of landings

	2018	2019	2020	2021
CR/BER			8.38	-0.27
RoFTA			181.67	-35.24

Historical indicators for the last three years

Segment - ESP NAO HOK1012 IC *

Imbalance indicators – VUR

Species/area	34.1.2	%
Albacore	720 685 €	25.4
Atlantic bluefin tuna	646 854 €	22.8
Bigeye tuna	497 135 €	17.5
Yellowfin tuna	260 900 €	9.2
Skipjack tuna	202 023 €	7.1

Most representative species in value of landings

HOK 1012	2018	2019	2020	2021
VUR	0.54	0.53	0.57	0.53

Historical indicators for the last three years

Segment - ESP NAO HOK1218 IC

Imbalance indicators – Rofta, CR/BER, VUR

Species/area	34.1.2	34.1.3	34.1.3	Total	%
Bigeye tuna	1 774 840 €	3 297 €		1 778 137 €	46.9
Albacore	752 060 €	45 029 €	5 495 €	802 584 €	21.1
Atlantic bluefin tuna	708 952 €			708 952 €	18.7

Most representative species in value of landings

	2018	2019	2020	2021
CR/BER	1.79	5.31	2.64	-1.05
RoFTA	21.95	52.21	81.84	-45.81
VUR	0.65	0.60	0.60	0.53

Historical indicators for the last three years

Segment - ESP NAO HOK2440 IC *

Imbalance indicators –Rofta, CR/BER

Species/area	34.1.2	34.1.1	Total	%
Bigeye tuna	3 373 119 €	3 971 €	3 377 090 €	59.6
Albacore	1 203 259 €	7 481 €	1 210 740 €	24.4

Most representative species in value of landings

HOK 2440	2018	2019	2020	2021
CR/BER	-0.78	0.11	0.44	0.15
RoFTA	-53.25	-44.63	-27.72	-60.79

Historical indicators for the last three years

Segment - ESP NAO PMP0010 IC *

Imbalance indicators – SAR, VUR

Species/area	34.1.2	34.1.1	Total	%
Red porgy	1 478 214 €		1 478 214 €	12.9
Parrotfish	1 471 894 €		1 471 894 €	12.8
Pink dentex	1 278 751 €		1 278 751 €	11.1
Atlantic bluefin tuna	734 243 €	10 240 €	744 483 €	6.5
Albacore	465 041 €		465 041 €	4.0
Greater amberjack	356 753 €		356 753 €	3.1
White trevally	345 328 €		345 328 €	3.0
Scarlet shrimp	150 209 €		150 209 €	2.7
Dusky grouper	291 352 €		291 352 €	2.5
Surmullet	222 333 €		222 333 €	1.9
Splendid alfonsino	219 474 €		219 474 €	1.9
Redbanded seabream	198 428 €		198 428 €	1.7
Grey triggerfish	197 634 €		197 634 €	1.7
Skipjack tuna	197 544 €		197 544 €	1.7
European hake	196 547 €		196 547 €	1.7
Yellowfin tuna	194 240 €		194 240 €	1.7
Narwal shrimp	191 515 €		191 515 €	1.7
Bigeye tuna	161 462 €		161 462 €	1.4
Blacktail comber	148 597 €		148 597 €	1.3

Most representative species in value of landings

SAR

FS	2017	2018	2019	2020	2021
PMP VL0010	sae/ivd.27-34	whm.atl/ivd.27-34/cct.all/sae	sae/cct.all/ivd.27-34	ivd.27-34/sae	ivd.27-34/sae

*sae= Madeiran sardinella, ivd = Wrasses/hogfishes, whm= Atlantic white marlin, cct = Sand tiger shark,

In 2020 SAR indicates imbalance for this fleet segment due to catches of wrasses/hogfishes and Madeiran sardinella. The two species represents 0.93% of the total landing value of the fleet segment.

PMP 0010	2018	2019	2020	2021
VUR	0.31	0.32	0.32	0.31

Historical indicators for the last three years

Segment - ESP NAO PS 1218 IC *

Imbalance indicators – SAR

Species/area	34.1.2	%
Atlantic chub mackerel	908 651 €	48.4
Blue jack mackerel	440 783 €	23.5
Round sardinella	175 368 €	9.3

Most representative species in value of landings

SAR

FS	2017	2018	2019	2020	2021
PS VL1218	saa		sae		sae

* saa = Round Sardinella, sae = Madeiran sardinella

In 2020 SAR indicates imbalance for this fleet segment due to catches of Madeiran sardinella. This specie represents 1.34% of the total landing value of the fleet segment.

4.6 Summary

The table below summarizes the information on balance indicators and their assessment available for each OMR by Member state for the year 2021. 58 fleet segments were considered for biologic indicators (SAR and SHI) and VUR and 37 clustered fleet segments for the economic indicators and VUR₂₂₀, (Saint Martin did not present any fleet segment indicator values).

	Fleet segments (total)		SAR	SHI	VUR	Fleet segments (clustered)		Rofta	CR/BER	VUR ₂₂₀
France	33	Assessed FS	31	7	31	16	Assessed FS	15	15	16
		Imbalance	12	1	3		Imbalance	7	7	15
		% imbalance	39	14	10		% imbalance	47	47	94
Portugal	19	Assessed FS	15	1	19	15	Assessed FS	15	15	15
		Imbalance	0	0	5		Imbalance	4	3	10
		% imbalance	0	0	26		% imbalance	27	20	67
Spain	12	Assessed FS	12	3	12	6	Assessed FS	6	6	6
		Imbalance	2	0	3		Imbalance	3	3	6
		% imbalance	17	0	25		% imbalance	50	50	100
Total	64	Assessed FS	58	11	62	37	Assessed FS	36	36	37
		Imbalance	14	1	11		Imbalance	14	13	31
		% imbalance	24	9	18		% imbalance	39	36	84

There is a significant shortage of relevant data to compute the biological indicator SHI. SAR was available for 58 segments out of 64 (91%); however, the SHI could be computed for only 11, 17% of the 64 fleet segments identified in the OMRs. However, the EWG notes that stock assessment results were provided to the EWG for 18 stocks in the French OMRs that had never been used to compute SHI values. A comparative analysis of the resulting SHI values by including or excluding the additional 18 stocks was undertaken by the EWG. Including the 18 additional stocks meant that a meaningful value for SHI could be computed for one additional fleet segment. The analysis and results are discussed in Section 3.4.8 (sub-heading, SHI indicator comparisons) of this report.

For the French OMRs, the SAR indicator was computed for 31 segments out of 33 and 12 of them were out of balance; and the SHI were computed for 7 segments out of 33 (21%), 1 of them were out of balance.

For Portuguese OMRs, the SAR indicator was computed for 15 out of 19 segments (79%) and no identified segments out of balance, SHI was available for one segment.

For Spanish OMRs, SAR was calculated for 12 segments out of 12, and 2 of them were out of balance SHI was assessed for 3 segments, all of them were in balance.

The main species responsible for the imbalance for fleet segments of France were Blue Marlin. For Spain, the main species responsible of the imbalance were Bigeye tuna and Atlantic Horse Mackerel.

Overseas territory	Fleet segment	Fishing Technique	Vessel Length	SAR				
				eet	yna	bum	lcx	rpu
French Guiana	FRA OFR DFN0010 GF A *	DFN	VL0010	11.23%	32.3%	---	---	---
	FRA OFR DFN1012 GF A *	DFN	VL1012	---	53.0%	---	---	---
Guadeloupe	FRA OFR HOK0010 GP A	HOK	VL0010	---	---	1.54%	---	---
	FRA OFR PGP0010 GP A *	PGO	VL0010	---	---	---	0.23%	---
		PGP	VL0010	---	---	---	0.01%	---
Martinique	FRA OFR HOK0010 MQ A	HOK	VL0010	---	---	14.23%	---	---
	FRA OFR PGP0010 MQ A *	FPO	VL1218	---	---	---	---	5.37%
		HOK	VL1012	---	---	16.95%	---	---
		PGP	VL0010	---	---	7.32%	---	---
Réunion	FRA OFR HOK0010 RE A *	HOK	VL0010	---	---	12.31%	---	---
		HOK	VL1012	---	---	11.08%	---	---
	FRA OFR HOK1218 RE A *	HOK	VL1218	---	---	6.41%	---	---

*eet = Atlantic goliath grouper, yna = Acoupa weakfish, bum.31 = Blue marlin, lcx = hogfish, rpu = vermilion snaper

Overseas territory	Fleet segment	Fishing Technique	Vessel Length	SAR	
				sae	ivd
Canary Islands	ESP NAO PMP0010 IC *	PMP	VL0010	0.36%	0.57%
	ESP NAO PS 1218 IC *	PS	VL1218	1.34%	---

*sae= Madeiran sardinella, ivd = Wrasses/hogfishes

The tables above present the contribution of the SAR species in value of landings for the fleet segments identified as out of balance for France and Spain.

As one can see beside Hogfish considered in SAR for France and Spain, the catches of these species represent less than 1% of the total landing values for the fleet segment.

Structural imbalance in the OMRs

According to 2014 Commission guidelines the economic and biological indicators should be calculated for a period of at least three years to assess balance. A summary of fleet segments in the OMRs that may be considered to be structurally imbalanced is given in Table 4.6.1. Structural imbalance expressed as a proportion (%) of the number of fleet segments by MS are given in Table 4.6.2.

Table 4.6.1 Summary of fleet segments in the OMRs that may be considered to be structurally imbalanced based on three consecutive years of indicator values as specified in the Commission Guidelines COM (2014) 545.

Overseas territory	Fleet segment	Fishing Technique	Vessel Length	Number of vessels	SAR	SHI	CR/BER	RoFTA	VUR
French Guiana	FRA OFR DFN0010 GF A *	DFN	VL0010	32					
	FRA OFR DFN1012 GF A *	DFN	VL1012	57					
	FRA OFR DTS1824 GF A	DTS	VL1824	7					
Guadeloupe	FRA OFR DFN0010 GP A	DFN	VL0010	71					
	FRA OFR FPO0010 GP A	FPO	VL0010	105					
	FRA OFR HOK0010 GP A	HOK	VL0010	124					
	FRA OFR PGP0010 GP A *	PGO	VL0010	9					
		PGP	VL0010	167					
	FRA OFR PGP1012 GP A *	DFN	VL1012	2					
		FPO	VL1012	3					
		HOK	VL1012	8					
		PGP	VL1012	3					
Martinique	FRA OFR DFN0010 MQ A	DFN	VL0010	56					
	FRA OFR FPO0010 MQ A	FPO	VL0010	165					
	FRA OFR HOK0010 MQ A	HOK	VL0010	133					
	FRA OFR PGP0010 MQ A *	FPO	VL1218	1					
		HOK	VL1012	11					
		PGP	VL0010	181					
Réunion	FRA OFR HOK0010 RE A *	HOK	VL0010	129					
		HOK	VL1012	3					
	FRA OFR HOK1218 RE A *	HOK	VL1218	15					
		HOK	VL1824	4					
Mayotte	FRA OFR HOK0010 YT A *	DFN	VL0010	8					
		HOK	VL0010	83					
Azores	PRT NAO DFN0010 P3	DFN	VL0010	29					
	PRT NAO HOK0010 P3	HOK	VL0010	293					
	PRT NAO HOK1012 P3	HOK	VL1012	66					
	PRT NAO HOK2440 P3 *	HOK	VL1824	4					
		HOK	VL2440	19					
	PRT NAO PGP0010 P3 *	PGP	VL0010	20					
Madeira	PRT NAO HOK0010 P2 *	HOK	VL0010	48					
		HOK	VL1012	5					
	PRT NAO HOK1824 P2	HOK	VL1824	3					
	PRT NAO HOK2440 P2	HOK	VL2440	5					
	PRT NAO MGP1824 P2 *	MGP	VL1824	3					

■ In balance in 2021
 ■ no assessed
 ■ out of balance in 2021
 ■ structural imbalance- out of balance for 3 years (2014 guidelines)

Note: 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.

		SAR	SHI	Rofta	CR/BER	VUR
France	Imbalance 2021	36%	3%	44%	44%	9%
	Structural imbalance	24%	3%	31%	31%	3%
Portugal	Imbalance 2021	0%	0%	27%	20%	26%
	Structural imbalance	0%	0%	7%	7%	26%
Spain	Imbalance 2021	17%	0%	50%	50%	25%
	Structural imbalance	8%	0%	17%	17%	25%
Total	Imbalance 2021	22%	2%	38%	36%	17%
	Structural imbalance	14%	2%	20%	20%	29%

Table 4.6.2. Structural imbalance for the indicators according to the Guidelines (imbalance in the last three years) % of the number of fleet segments.

4.6.1 SHI values for Fleets in the French OMRs

The EWG has for many years commented on the shortage of stock assessment information in the OMRs which can be used to compute values for the SHI. For the first time results from new stock assessments conducted by IFREMER were presented to DG MARE via the French authorities and were made available to the group with a view to increasing the proportions of fleet segments' catches accounted for by species for which values of F and F_{MSY} are available thereby increasing the number of fleet segments for which a meaningful SHI value could be computed. The assessments were all performed using the SPICT assessment model which was endorsed by the STECF (STECF PLEN 23-02) as an acceptable model to be used to derive values of F and F_{MSY} , which are essential input values to compute values for the SHI.

To date the EWG and STECF has provided SHI values that were based on results from stock assessments that have been reviewed and published by regional fisheries bodies e.g. ICES, GFCM etc) or the STECF. The assessments carried out by IFREMER have not been independently reviewed and to use them would represent a departure from established practice. Nevertheless, taking into account the considerable efforts of IFREMER to provide new stock assessment results, the EWG 23-13 decided to compute two sets of SHI indicators for fleet segments from the French OMRs.

The results of the alternative SHI values for fleet segments in the French OMRs are compared in Figure 4.6.1.

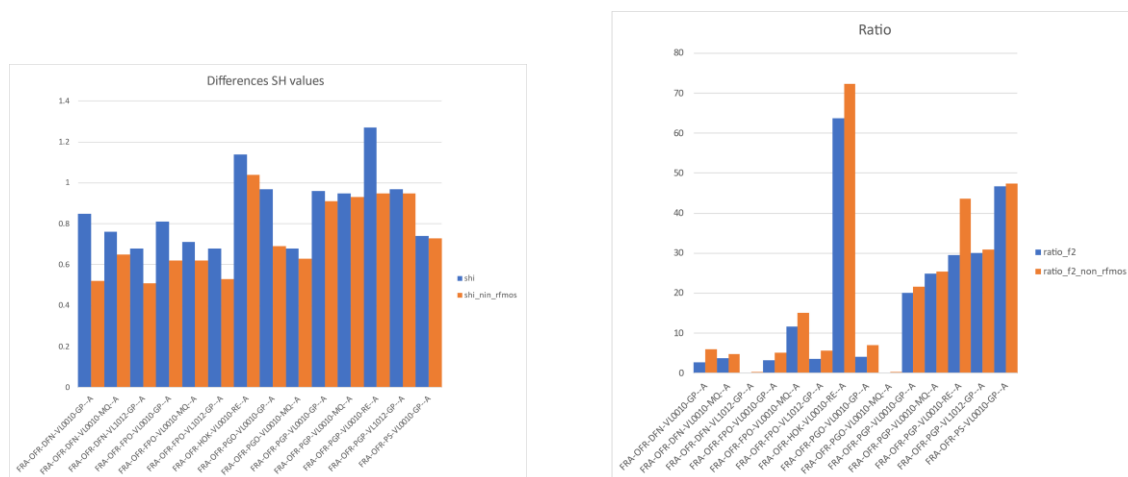


Figure 4.6.1. Comparison of alternative SHI values for fleet segments in the French OMRs (left panel) and proportion of the landings (ratio) of each segment accounted for by stocks used in the SHI calculation (right panel).

Key: blue columns – values without including the 18 additional SPICT stock assessment results
Red columns - values with the 18 additional SPICT stock assessment results

Figure 4.6.1 (left panel) indicates that for all fleet segments concerned, the inclusion of the new SPICT stock assessment results in SHI values that are lower than the values derived without such results. An examination of the proportion of the catches by individual fleet segments that are accounted for by species for which values for F and F_{MSY} are available (Figure 4.6.1- right panel), indicates that the inclusion of the SPICT assessment provides meaningful value for the SHI for 3 fleet segments one more than when the SPICT assessment results are omitted.

4.6.2 Biological Data Requirements

The ability to calculate and the reliability of the biological indicators for each big area is mainly data dependent:

1. We need to urgently increase our knowledge on stocks and improve stock assessments. In particular, information on fishing mortality and reference points for as many stocks as possible is needed, together with stock assessments that are validated by the RFMOs. Outside Area 27 and 37 with ICES and GFCM, TUNA RFMOs are effective in producing estimates for F and F_{MSY} , even if the assessment process, involving many different countries is challenging. Other RFMOs are rather less effective (due to the lack of data or/and of cooperation between the countries to develop a common fisheries policy). Some improvement has been made at the national level (France) but the framework to peer review and validate such assessments in the OMRs is still lacking. Another point to note is the scarcity of reliable catch information, i.e identification and reporting to species/stock level at a sufficiently detailed scale. In Mayotte, for example, in previous years, the highest reported catches were identified as "Marine Fishes nei" (cf. Figure 4.6.1). It seems that data reported in 2023 are now better allocated to species level (Figure 4.6.2).

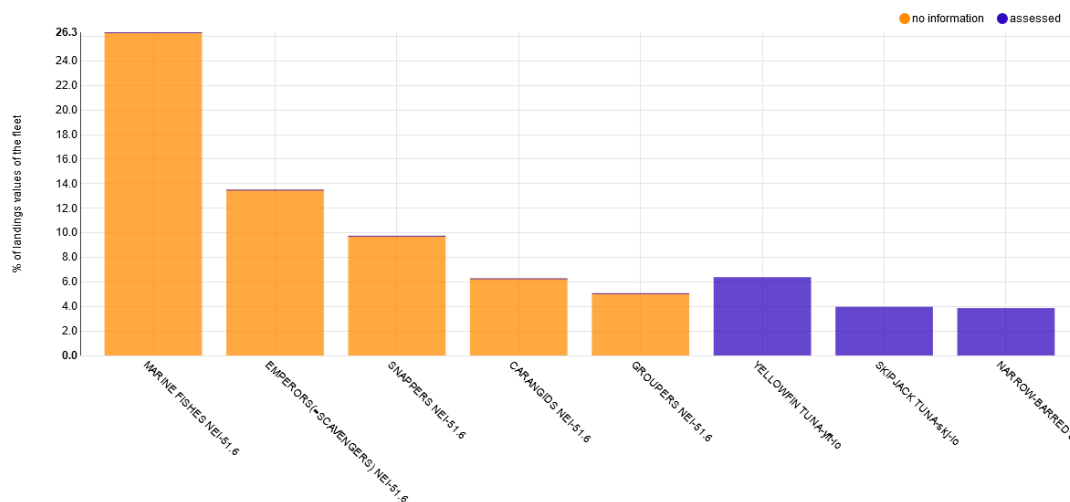


Figure 4.6.1. Lack of species-specific information for Mayotte island as reported in 2022. Many species cannot be linked to stock as they are reported as Nei.

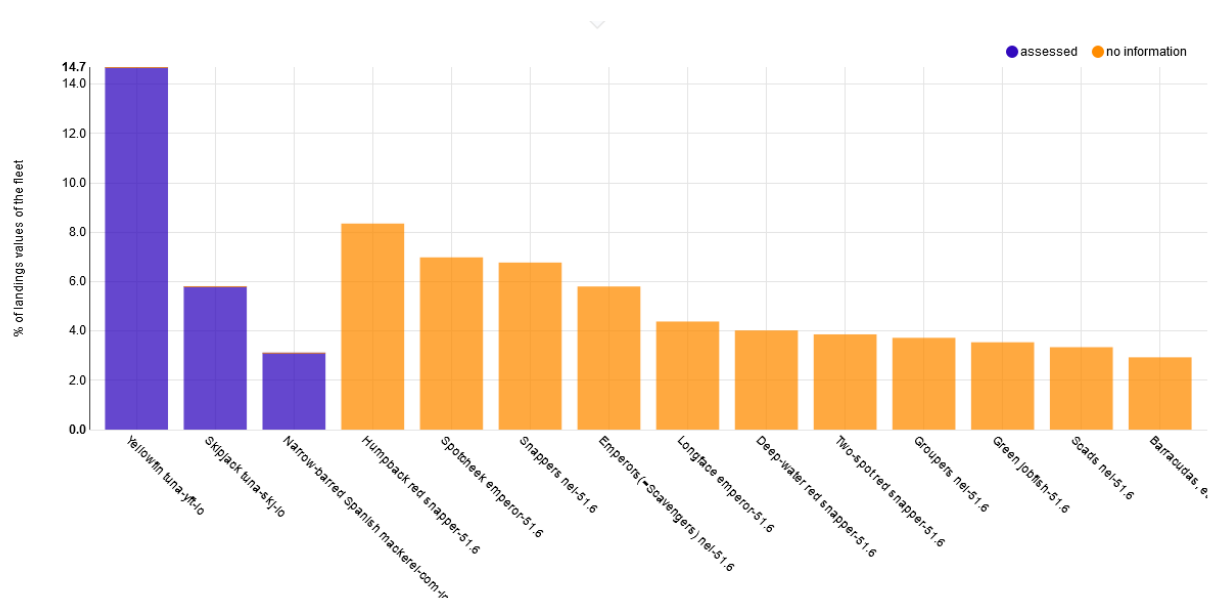


Figure 4.6.2. Improved species-specific reporting of catches for Mayotte island as reported in 2023.

2. In Outermost regions (as for other Long distant RFMO's or Mediterranean case) Blim is not a reference point that is routinely computed during stock assessments. To properly perform SAR calculation, EWG pre meeting also mentioned the need to agree on a proxy value for Blim when not available. The Expert group suggests that a value equivalent to 50% x BMSY could be a good candidate as a proxy for Blim.

If we want to improve and extend information on balance indicators in the OMRs there is a need to:

1. improve Fisheries Information system with properly sampled catches at the specie-specific and geographical scale
2. to provide a workable framework where national stock assessments can be independently reviewed and accepted e.g. via adoption of such assessments by a RFMO.

4.7 Stocks on which fleet segments are reliant – Outermost regions

The stocks on which fleet segments that are indicated to be out of balance are reliant, are given in Table 4.7.1. The same information is also included digitally in ANNEX III to this report.

The fish stocks on which a fleet segment is reliant is 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 stocks for which the indicators cannot be computed are labelled "no information".

Table 4.7.1 Stocks on which fleet segments that are indicated to be out of balance are reliant

fleet_code	major_stocks
ESP-OFR-DTS-VL2440-NGI-NO-	arv_47.1/assessed Deep-water rose shrimp-34.3.1/no information
	Penaeus shrimps nei-34.1.3/no information Striped red shrimp-
	34.3.1/no information Striped red shrimp-34.3.6/no information
	Senegalese hake-34.3.1/no information Scarlet shrimp-34.3.1/no

	information Giant tiger prawn-34.3.1/no information Penaeus shrimps nei-34.3.1/no information Scarlet shrimp-47.1.1/no information
ESP-OFR-DTS-VL40XX-NGI-NO-	Argentine hake-41.3.2/no information Argentine hake-41.3.1/no information Argentine shortfin squid-41.3.1/no information Argentine shortfin squid-41.3.2/no information
ESP-OFR-HOK-VL2440-NGI-LLD-	swo-spac/assessed swo-sa/assessed swo-na/assessed swo-io/assessed Blue shark-34.4.1/no information bsh-io/assessed Blue shark-47.a.0/no information Blue shark-34.3.2/no information
ESP-OFR-HOK-VL40XX-NGI-LLD-	swo-spac/assessed swo-sa/assessed bsh-swpac/assessed
ESP-OFR-PS-VL40XX-NGI-NO-	skj-io/assessed yft-io/assessed yft-atl/assessed skj-ea/assessed
FRA-OFR-DFN-VL0010-GF--A	Acoupa weakfish-41.1.1/no information Green weakfish-41.1.1/no information Crucifix sea catfish-41.1.1/no information YNA.31/no information Jewfish-31/no information Tripletail-41.1.1/no information Smalltooth weakfish-41.1.1/no information
FRA-OFR-DFN-VL1012-GF--A	YNA.31/no information Green weakfish-41.1.1/no information Acoupa weakfish-41.1.1/no information YNV.31/no information
FRA-OFR-FPO-VL1218-MQ--A	SNA.31/no information Southern red snapper-31/no information
FRA-OFR-HOK-VL0010-GP--A	Dolphinfishes nei-31/no information yft-atl/assessed Snappers, jobfishes nei-31/no information
FRA-OFR-HOK-VL0010-MQ--A	yft-atl/assessed Dolphinfishes nei-31/no information Blue marlin - Atlantic/no information Carangids nei-31/no information
FRA-OFR-HOK-VL0010-RE--A	yft-io/assessed Common dolphinfish-51.7/no information bum-io/assessed swo-io/assessed alb-io/no information
FRA-OFR-HOK-VL1012-MQ--A	yft-atl/assessed Dolphinfishes nei-31/no information Blue marlin - Atlantic/no information
FRA-OFR-HOK-VL1012-RE--A	swo-io/assessed yft-io/assessed alb-io/no information
FRA-OFR-HOK-VL1218-RE--A	swo-io/assessed yft-io/assessed alb-io/no information
FRA-OFR-PGO-VL0010-GP--A	Parrotfishes nei-31/no information Conch shells nei-31/no information Caribbean spiny lobster - Puerto Rico/no information Batoid fishes nei-31/no information
FRA-OFR-PGP-VL0010-GP--A	Dolphinfishes nei-31/no information yft-atl/assessed Parrotfishes nei-31/no information Snappers, jobfishes nei-31/no information Caribbean spiny lobster - Puerto Rico/no information Filefishes, leatherjackets nei-31/no information Groupers, seabasses nei-31/no information Conch shells nei-31/no information
FRA-OFR-PGP-VL0010-MQ--A	yft-atl/assessed Bigeye scad-31/no information Dolphinfishes nei-31/no information Blue marlin - Atlantic/no information Carangids nei-31/no information Sea egg-31/no information Caribbean spiny lobster - Puerto Rico/no information Marine fishes nei-31/no information Filefishes, leatherjackets nei-31/no information
FRA-OFR-PS-VL40XX-IWE--A	yft-io/assessed skj-io/assessed yft-atl/assessed
ITA-OFR-PS-VL40XX-IWE--	yft-io/assessed skj-io/assessed

Key * Assessed = stock assessment available: no information = no assessment available

5 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 an Excel workbook and provides separate lists for the North Atlantic (Area 27) the Mediterranean and Black Seas (Area 37).

The workbook name is STECF 23-13 - Annexes - Ia-Ib-Ic-III.xlsx and is available

<https://stecf.jrc.ec.europa.eu/ewg2313>

6 CONTACT DETAILS OF EWG-23-13 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 23-13 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
Mannini, Alessandro	Self employed, Genova, Italy	alesman27kyuss@gmail.com

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
Esther BEUKHOF	Wageningen Marine Research, the Netherlands	esther.beukhof@wur.nl
Cecile BRIGUADEAU	Althea Consultant	cecile@altheaconsultant.com
Suzana CANO	Direção Geral de Recursos Naturais, Segurança e Serviços Marítimos	sfcano@dgrm.mm.gov.pt
Irina DAVIDJUKA	Independent Expert	irina.davidiuk@inbox.lv
Rita FERREIRA	Direção-Geral de Recursos Naturais, Segurança e Serviços Marítimos	rferreira@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	
Ane IRIONDO	AZTI Tecnalia, Spain	airiondo@azti.es
Irina JAKOVLEVA	Fisheries Service under Ministry of Agriculture. Naujoji uosto. Klaipeda. Republic 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
Brendan O' HEA	Marine Institute Rinville, Oranmore Co., Galway, Ireland	brendan.ohea@marine.ie
João RAMOS DO Ó	Direção Geral Recursos Naturais e de Segurança Marítima, Portugal	jramos.do.o@gmail.com
Philip RODGERS	Economic Consultant	phil@erinecon.com
Giuseppe SCARCELLA	National Research Council (CNR) – Institute for Biological Resources and Marine Biotechnologies (IRBIM), Largo Fiera della Pesca, 1 60125 Ancona - Italy	g.scarcella@ismar.cnr.it
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 and Fisheries (MAPA)	mvaliente@mapa.es
Mihaela VELINOVA	Common fisheries policy directorate in the Ministry of agriculture, food and forestry, Sofia, Bulgaria	m.velinova@hotmail.com
Ivana VUKOV	Ministry of Agriculture, Directorate of Fisheries, Unit for Data Collection Programme in Fisheries	ivana.vukov@mps.hr

JRC experts		
Name	Affiliation¹	Email
Michael Gras	DG Joint Research Centre, Via E. Fermi, 2749. 21027 Ispra (Varese) Italy	Michael.GRAS@ec.europa.eu
Jarno VIRTANEN	DG Joint Research Centre, Via E. Fermi, 2749. 21027 Ispra (Varese) Italy	jarno.virtanen@ec.europa.eu

European Commission		
Name	Affiliation¹	Email
Antonios STAMOULIS	DG Mare 99 Rue Joseph II, J99 01/020 B-1049 Brussels/Belgium	Antonios.STAMOULIS@ec.europa.eu
Jarno VIRTANEN	DG JRC, STECF secretariat, Ispra (VA), Italy	jrc-stecf-secretariat@ec.europa.eu

Observers		
Name	Affiliation¹	Email
Tristan BRUNET	French general directorate of fisheries – DGAMPA, France	tristan.brunet@mer.gouv.fr
Natacha CARVALHO	European Environment Agency, Denmark	Natacha.Carvalho@eea.europa.eu
Marzia PIRON	Mediterranean Advisory Council, Italy	segreteria@med-ac.eu

7 LIST OF ANNEXES

Annexes appended to the report

Annex I – Methods of calculating indicators and trends – appended to report.
SHI is OK Sections for SAR and economic indicators need to be checked.

Electronic annexes:

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 II – Indicator Comparison Tables.xlsx
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.jrc.ec.europa.eu/ewg2313>

STECF 23-13 - Annexes - Ia-Ib-Ic-III.xlsx
STECF 23-13 ANNEX II indicator comparison tables.xlsx
STECF 23-13 ANNEX-IV Stocks at risk.xlsx
STECF 23-13 Balance capacity – indicator table.xlsx

8 LIST OF BACKGROUND DOCUMENTS

Background documents are published on the meeting's web site on:
<https://stecf.jrc.ec.europa.eu/ewg2313>

List of background documents:

EWG-23-13 – Doc 1 - Declarations of invited and JRC experts (see also section 6 of this report – List of participants)
<https://stecf.jrc.ec.europa.eu/ewg2313>

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>

Fleet capacity reports for the year 2022 submitted by Member States by 31 May 2023.

https://oceans-and-fisheries.ec.europa.eu/fisheries/rules/fishing-fleet-capacities/fleet-capacity-reports-2022_en

9 ANNEX I - METHODS OF CALCULATING INDICATORS AND TRENDS

A1.1 Sustainable Harvest Indicator (SHI)

According to 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:

$$\frac{\sum_{i=1}^{i=n} V_i \frac{F_i}{F_{msy_i}}}{\sum_{i=1}^{i=n} \sum V_i}$$

In which, F_i is the fishing mortality available for stock i from scientific assessments (e.g. ICES, STECF, GFCM, ICCAT, IOTC, NOAA advice) and V_i is the value of landings from stock i . Data on F_i (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 (2013-2022) was updated based on the most recent assessments available (2022 or 2021 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 simply 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 2020 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.
- EWG 22-15 Prep. Meeting participants noted that the list of F/F_{MSY} ratios in the JRC database includes only the outcomes of the assessment carried out in the framework of STECF meetings. In order to further increase the accuracy of the SHI calculation for the Mediterranean, information on F and F_{MSY} timeseries 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.

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 Expert Group considers 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 to 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.

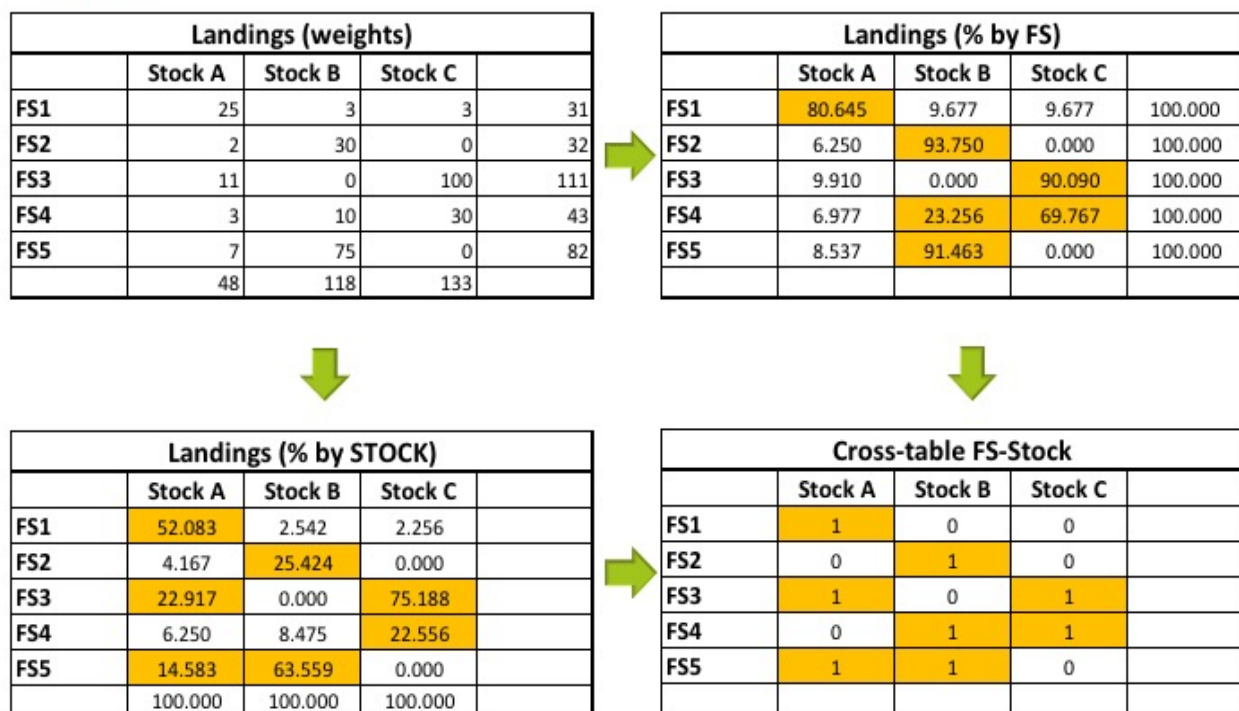


Figure A1.1. Example of pre-processing of landings data for the computation of the SAR indicator

During the preparatory meeting EWG 22-15, 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 (Figures A1.2-A1.3). 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.

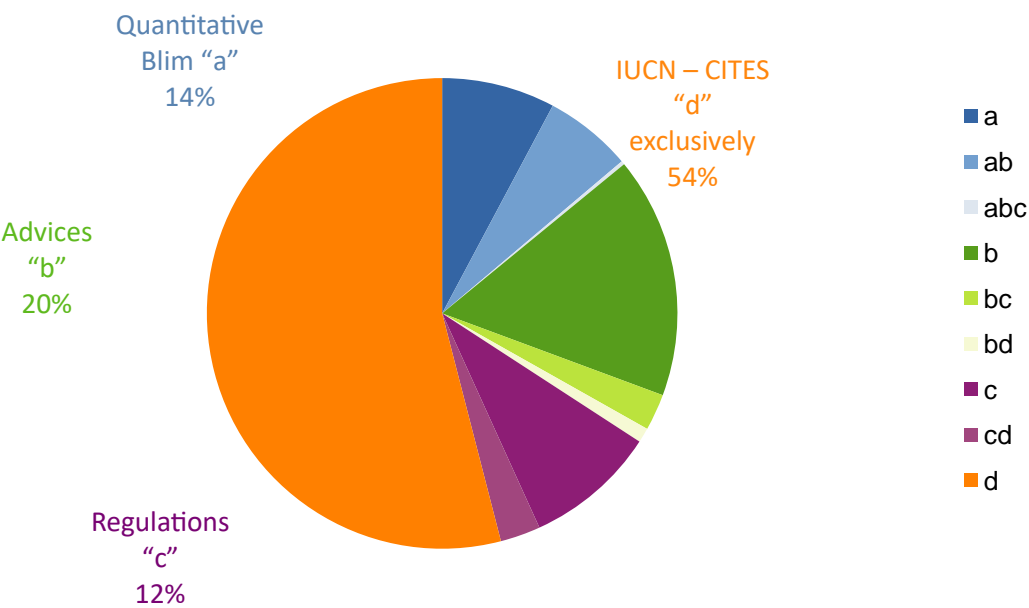


Figure A1.3 - Distribution of SAR per selecting criteria (a to d) in 2022.

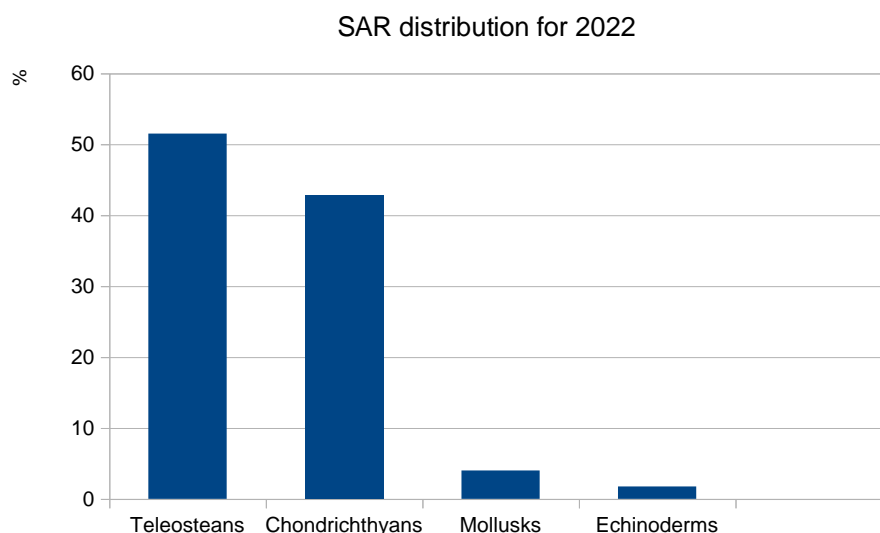


Figure A1.4 - Distribution of SAR per group in 2022 (n=400).

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 23-13 Prep. Meeting and previous Prep. Meeting are outlined below:

- GFCM - Whereas in parallel stock status information for Mediterranean are making easily accessible and the number of stock assessment have increased, more stocks were able to be considered and some new items have been added 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 2022 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 23-13 as well as the EWG 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 represents 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 23-13 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.
- 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.
- A 'State of the Stocks' EWG exercise who be profitable to provide a reference document of the status of all stocks worldwide together with their SAR classification. Such an exercise requires convening a small, dedicated expert group. The current process, where the classification by 2 contracted experts is not ideal.
- 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 23-13. 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.

The organization of the Prep EWG in presence was definitely a great improvement for the quality of the work produced.

A1.3. Return on Investment (RoI) and/or Return on Fixed Tangible Assets (RoFTA)

According to 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 23-13 as:

$$\text{Net profit} / (\text{value of physical capital} + \text{value of quota and other fishing rights})$$

where,

$$\text{Net profit} = (\text{Income from landings} + \text{other income} + \text{income from leasing out quota}) - (\text{crew wage} + \text{unpaid labour} + \text{energy costs} + \text{repair costs} + \text{other variable costs} + \text{other non-variable costs} + \text{lease/rental payments for quota or value of quota} + \text{annual depreciation})$$

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

$$\text{Net profit} / (\text{value of physical capital});$$

where,

$$\text{Net profit} = (\text{income from landings} + \text{other income}) - (\text{crew wage} + \text{unpaid labour} + \text{energy costs} + \text{repair costs} + \text{other variable costs} + \text{other non-variable costs} + \text{annual depreciation})$$

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 23-13 applied the criteria from the 2014 Commission guidelines to comment on whether fleet segments were '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.

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:

$$\text{Current revenue (CR) / Break Even Revenue (BER)}$$

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.

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. If the proportion of inactive vessels is more than 20% (in number or in GT or in kW) within a MS, this could indicate some technical inefficiency.

Indicator Trends

Trends were calculated according to the filters detailed below for the years 2017 – 2021 (Table 3.3.5.1).

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.

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 Utilisation 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 recurrently 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 VUR₂₂₀ per fleet segment based on a reference DAS of 220 days.

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.

10 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.LINK NEEDED

Annex IV is given in electronic form with filename

ANNEX-IV_EWG 23-13 Stocks at risk .xlsx

And is available at (<https://stecf.jrc.ec.europa.eu/ewg2313>)

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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.

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