JRC Scientific and Technical Reports

Scientific, Technical and Economic Committee for Fisheries (STECF)

Report of the Working Group (SGECA 10-01) on the discussion of methodologies, indicators and format of the 2010 Annual Economic Report (AER)

Subgroup on Economic Affairs (SGECA) of the Scientific, Technical and Economic Committee for Fisheries (STECF)

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Edited by John Anderson & Jordi Guillen

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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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COMMISSION STAFF WORKING DOCUMENT

METHODOLOGIES, INDICATORS AND FORMAT OF THE 2010 AER (SGECA 10-01)

SUBGROUP ON ECONOMIC AFFAIRS (SGECA) OF THE SCIENTIFIC, TECHNICAL AND ECONOMIC COMMITTEE FOR FISHERIES (STECF)

STECF OPINION EXPRESSED DURING THE PLENARY MEETING (PLEN-10-01)

26-30 APRIL 2010, NORWICH

1. INTRODUCTION

STECF is requested to review the report of the SGECA meeting on METHODOLOGIES, INDICATORS AND FORMAT OF THE 2010 AER (Copenhagen), evaluate the findings and make any appropriate comments and recommendations.

The purpose of the meeting is to discuss and seek agreement on the content, indicators, methodologies and format of the 2010 Annual Economic Report (AER). The latest (DCF) data call requirements and how they affect the contents of the AER should also be clarified. New economic and transversal variables are for the first time available under the DCF, so there is an opportunity to include new indicators and variables in the report and also modify the current ones if necessary. This could imply significant changes to some or all chapters of the report. Therefore, proposals for improved contents and the overall structure should be discussed. In addition, the DG MARE focal point for the AER will provide an indication of the economic policy advice needs related to the AER, so that the information contained in the report can be appropriately designed with the end users in mind.

Under the DCF, economic data is now requested at the supra-region level (Area 27, Area 37 and Other Fishing Regions). It is therefore not straight forward to obtain the desired regional level for the economic data relating to Area 27 (North Sea and Eastern Arctic, Baltic Sea and North Atlantic). An agreement on the methodology to perform the regional analysis should be reached. JRC will present possible methodologies.

The 2010 AER will contain data relating to the years 2002-2008. To improve the relevance and timeliness of the report, the EIAA model will be used to project 2009 and 2010 economic performance for important fleet segments. Specifications of the model, the fleets to be estimated, the analytical outputs and structure of the chapter require agreement. Discussions will include input from Hans Frost and Jesper Andersen of FOI.

Taking into account all of these issues and potential modifications, proposals for a better structure and format for the 2010 AER should be agreed.

2. TERMS OF REFERENCE

1. Establish appropriate economic indicators and contents of all chapters to be included in the 2010 Annual Economic Report, taking into the account the availability of new data collected under the DCF.

2. Establish an appropriate method to undertake regional analyses to be included in the next AER, taking into account previous work undertaken by the JRC and STECF comments relating to previous regional work. This discussion could also include allocation of economic data to metiers, time permitting.

3. Discuss and assess proposals for a special chapter on future economic performance projections of selected fleet segments using the EIAA model

4. Discuss and assess proposals for a better overall structure and format of the 2010 and future AER

3. STECF COMMENTS AND CONCLUSIONS

STECF Observations

STECF notes that the introduction of the new DCF and the consequent collection and reporting of new economic variables has highlighted methodological issues related to calculating capital values which require further attention.

In particular, it is not known whether capital value data for years before 2008 (under the DCR) include only the capital value of vessels or the value of vessels and the value of fishing rights. Therefore, it is inappropriate to present time series of capital value data for 2006 to 2008, when the 2008 capital value should include only the value of vessels. Further work is required to establish whether the time series data is consistent. This should be clarified by each MS. STECF recommends that in instances where insufficient information is available to assess this problem, time series data on capital values are not presented in the report.

Given the uncertainties surrounding Member States' capital value data, STECF once again urges the Commission to organise a workshop for national data correspondents and experts on how to calculate the various capital cost and capital value parameters requested under the DCF. It is imperative that this workshop takes place before the next call for economic data so that Member States have enough time to prepare. STECF also recommends that issues related to the capital calculations are considered as a high priority in the TOR of the SGECA 10-03 meeting which will take place in Salerno in September.

STECF notes the improvements to the overall structure and format of the report that was decided during SGECA 10-01. In particular the national chapters, regional and fish price chapters are all well structured and contain more information than in the past. In addition, the inclusion of new sections on the report production process and quality indicators will help improve the completeness of the report and provide users with more information on these important factors than in the past.

On the EIAA model outputs, it is important to point out that the model is used for projections and not forecasts. The difference is that in a projection only one variable is changed exogenously at a time. In this case it is the TAC variable. In contrast, a forecast aims to provide the best estimate of the economic performance in the future, taking into account all possible future changes for example in prices of inputs and outputs. Hence forecasts are more demanding as they require estimation of functions forecasting the future development. On the other hand, forecasts also conceal the effects of each variable on the economic performance.

On the fish price chapter, STECF notes that SGECA has presents valuable information and STECF considers it important that the price and market analyses continue.

STECF considers the information presented in the AER valuable and useful and that this AER represents substantial improvements over the previous edition. When the issue of MS failing to supply data on time is solved, STECF suggests that the next priority is to improve qualitative analysis and conclusions.

STECF stresses the need to produce estimates, using forecasting techniques, for the year following the calculation year (i.e. the year most recently ended) in order to improve the relevance of the report. STECF recommends that SGECA 10-03 should explore the possibility of requesting some effort, landings, prices and capacity data for the year following the calculation year in the next call for economic data. STECF recommends that the EIAA model be slightly amended to produce the estimates and then projections could be produced for the following 2 years. For 2011 this would mean that an estimate of outcomes could be made for the year 2010, with projections for 2011 and 2012. If this is to be done, the model should be slightly modified and price information for 2010 should be available in accordance with the call for data made by JRC.

In addition, STECF recognises that the EIAA model is only effective at producing economic performance projections for fleet segments whose catch composition is made up of more than 50% of TAC species. STECF also recommends that further modelling should be developed in order to allow projections for fleet segments whose target species are not subject to TACs.

STECF therefore endorses the SGECA 10-01 report.

ANNEX I

SGECA-10-01: METHODOLOGIES, INDICATORS AND FORMAT OF THE 2010 AER

Copenhagen, 8-11th February 2010

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

4. INTRODUCTION

The purpose of the meeting is to discuss and seek agreement on the content, indicators, methodologies and format of the 2010 Annual Economic Report (AER). The latest (DCF) data call requirements and how they affect the contents of the AER should also be clarified. New economic and transversal variables are for the first time available under the DCF, so there is an opportunity to include new indicators and variables in the report and also modify the current ones if necessary. This could imply significant changes to some or all chapters of the report. Therefore, proposals for improved contents and the overall structure should be discussed. In addition, the DG MARE focal point for the AER will provide an indication of the economic policy advice needs related to the AER, so that the information contained in the report can be appropriately designed with the end users in mind.

Under the DCF, economic data is now requested at the supra-region level (Area 27, Area 37 and Other Fishing Regions). It is therefore not straight forward to obtain the desired regional level for the economic data relating to Area 27 (North Sea and Eastern Arctic, Baltic Sea and North Atlantic). An agreement on the methodology to perform the regional analysis should be reached. JRC will present possible methodologies.

The 2010 AER will contain data relating to the years 2002-2008. To improve the relevance and timeliness of the report, the EIAA model will be used to project 2009 and 2010 economic performance for important fleet segments. Specifications of the model, the fleets to be estimated, the analytical outputs and structure of the chapter require agreement. Discussions will include input from Hans Frost and Jesper Andersen of FOI.

Taking into account all of these issues and potential modifications, proposals for a better structure and format for the 2010 AER should be agreed.

5. TERMS OF REFERENCE

1. Establish appropriate economic indicators and contents of all chapters to be included in the 2010 Annual Economic Report, taking into the account the availability of new data collected under the DCF.

2. Establish an appropriate method to undertake regional analyses to be included in the next AER, taking into account previous work undertaken by the JRC and STECF comments relating to previous regional work. This discussion could also include allocation of economic data to metiers, time permitting.

3. Discuss and assess proposals for a special chapter on future economic performance projections of selected fleet segments using the EIAA model

4. Discuss and assess proposals for a better overall structure and format of the 2010 and future AER

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7. ToR 1.

Discuss and assess proposals for new indicators and contents of all chapters of the 2010 AER, taking into the account the availability of new DCF data.

7.1 National chapters

JRC gave an overview of the contents of a typical national chapter from the 2009 report, highlighting various strengths (i.e. comprehensiveness and well structured) and weaknesses (i.e. repetitive in nature and missing data in tables). Group Members were asked to share their opinions on the national chapters, which were similar to the issues outlined by the JRC. JRC then presented a proposal for a new draft national chapter template for the 2010 report. This template can be found in appendix A. The template was split into the following sections: 1) Fleet structure, 2) Fishing activity, 3) Economic Performance (all at national level), and 4) Outlook for 2009 and 2010.

It was agreed that qualitative references should be made in the relevant sections on management measures and policy decisions that affect fleets and the subsequent business decisions they make. JRC agreed to provide a basic text template to ensure experts consider to the most appropriate information to include.

Following discussions and input from DG MARE, the group decided to include more detailed information at fleet segment level, without necessarily following the same format as the ´fleets of special interest´ sections in the previous report. Therefore, in addition to the sections mentioned above, there would be a separate heading for fleet segment level information, and within this section there would be a table giving key performance indicators for 2008 for all fleet segments belonging to the Member State in question. This would include fuel consumption per vessel and per day at sea indicators. Experts would also provide qualitative comments on fleet segment specific issues i.e. impact of management plans, long distance fleets, fleets of social/cultural importance, those affected by changes in regulatory framework, etc. For a maximum of two of the fleet segments mentioned, key trends (i.e. capacity, economic performance, activity etc) in terms of average performance per vessel would also be presented in graphical format. These fleet segments should be of special interest and their selection should be made by either the national correspondent or the expert working on that chapter and the availability of data should be taken into account in the selection process.

The group also agreed that the National chapters should include a comparison of vessel numbers reported in the data call with the number on the EU fleet register at national level. If there is a significant difference it should be explained in the text, along with possible reasons. JRC will carry out these checks prior to the SGECA meeting, and will provide the experts with the necessary information to give comments. SGECA 10-01 agreed that it would make sense to wait for the outcome of the data call before defining a threshold for the difference

between what has been submitted to the JRC and what is on the fleet register. As Commission Decision 949/2008 is much clearer on the definition of the fleet population, there is optimism that differences will be smaller than before. In any case, comments on discrepancies should be limited to 2008 data only. (See Appendix C for extract of vessel numbers from EU fleet register for each Member State in 2008).

There was agreement that regional effort and landings data should not be included in the national chapters.

The group discussed the most appropriate effort indicators to include in the national chapters and the fact that various new forms of effort data were being requested in the data call. The group agreed that for simplicity, the main indicator for effort would be days at sea, however, the group recognises that this indicator is not equally meaningful for all segments, in particular static gears, and also if days at sea data are not based on logbooks, their usefulness is quite limited. JRC suggested that once the data call has been closed, an evaluation of the other effort data collected will take place, and depending on data quality, this information could be used to calculate CPUE indicators at the fleet segments level in the national chapters.

The inclusion of the latest TAC information for key species relating to the National fleet for 2010 was also discussed, since changes in the TACs can explain changing income trends in many cases. This should, however, be limited to the most important species/fishing grounds and where the most severe changes in TACs have occurred. The group agreed that TAC information for 2010 could be included in the outlook section, and that the experts should be specifically asked to work on this. Further, any knowledge of 2009 and 2010 price trends should be mentioned if known by the expert, in addition to the likely economic impact of changing fuel prices in 2009 and 2010.

Overall, the group agreed that there is no need for fundamental adjustments to the national chapters, and that the changes suggested will enhance the usefulness and readability of the report. It was agreed that experts should focus on avoiding repetition, and the new structure reduces the potential for this. The group endorsed the template for the national chapter in this format.

7.2 EU Overview chapter

JRC presented the EU overview chapter from the 2009 AER. The lack of data for some important countries was highlighted, and the impact that missing data had on the production of an accurate EU overview was discussed. It was stressed by the DG MARE focal point that the newly introduced DCF legislation enables the Commission to take action in the form of financial penalties if a Member State fails to comply fully with data calls that are based on the DCF, and therefore there is a greater likelihood of improved coverage for 2008 data compared to previous years. In addition, the group was informed that DG MARE and the Commission uses the EU overview chapter to evaluate how well the EU fleet is performing overall, and that the information reported should therefore be of the highest quality.

There followed a discussion on possible ways to improve the content of the EU overview chapter. In particular, the group considered whether to retain or remove each indicator, potential new indicators for inclusion, and what format the indicators should take.

Presentation of information: The group agreed that this chapter should be structured using the same headings as agreed for the national chapters i.e. 1) EU fleet structure, 2) EU fleet fishing activity, 3) EU fleet economic performance, and 4) Assessment for 2009 and 2010. There should be two summary tables containing the main capacity and performance indicators for 2008 at EU and Member State level. One table will report indicator totals and the other table will report average per vessel indicators, with each row presenting data on each MS and the final row giving the sum (or average) at EU level, providing a good 'snapshot' of the situation by country for the latest year (see Appendix B for an example).

In terms of time series trends, line graphs would be used to show the trend in key indicators in the relevant sections of the chapter. However, instead of including separate trend graphs for old and new Member States (as presented in the 2009 report), it was agreed that the relative contributions of the new Member States (in terms of fleet size, income etc) was not overly significant. Therefore it would be unnecessary to split time series trends between the old and new Member States going forward. For sake of clarity and to avoid misinterpretation of the trends, the entrance year of the Member States should be indicated by including a dotted line or something similar in the graph in question.

Fleet capacity: The potential for discrepancies between capacity data uploaded during the data call and the EU fleet register capacity data were discussed. It was suggested that the new requirements of the DCF could solve this discrepancy (i.e**.** because all vessels, not just active vessels, should be reported), however JRC pointed out that inactive vessels were also requested in previous data calls based on the DCR, and therefore this was not the main reason why significant discrepancies were apparent for some Member States in the 2009 report. Checks between the differing data sources will be carried out by the JRC as part of the normal data coverage and quality checking procedures (see Appendix C for extract of vessel numbers from EU fleet register for each Member State in 2008). There was agreement that any significant discrepancies between the two data sources at country level and overall EU level would be highlighted in the appropriate sections of the report. The group also agreed that it is necessary to highlight the number of both active and inactive vessels in the '2008 overview' table so that the correct calculation of 'average per vessel' indicators could be made by the user, as required.

Socio-economic information: the importance of including specific socio-economic indicators in the EU overview chapter was highlighted by the DG-MARE representative. The number of people employed in the fishery sector, as well as FTE and average remuneration of fishermen are deemed necessary for a socio-economic evaluation at EU level. It was agreed to include these indicators in the main indicator table already discussed, and, in addition, there should also be a separate table presenting time series data on average crew wages in each of the Member States, in addition to the overall EU average wage. For the sake of homogeneity with

previous years, 2008 will have two columns in the table, as the DCF asks for data on both crew remuneration (also collected within the DCR) and for imputed value of unpaid labour (new information).

Comparisons with the minimum salary and/or the average wage in similar sectors (i.e. farming) were also discussed. Experts agreed that only the average wage of the fishery sector would be included in the chapter; however a bar graph with the EU and each MS average wage on the X-axis and the average wage on the y-axis should also be included.

Fishing enterprises: Experts agreed that the EU overview chapter would present new information collected under the DCF for 2008 concerning the number of fishing enterprises/units. Given that DCF asks for number of enterprises by size category (a. one owned vessel; b. 2-5 owned vessels and c. > 5 owned vessels) experts agreed that a pie chart would be more user friendly format for the reader.

Landings: In relation to landings volumes, the group agreed that experts will check the consistency of landings datasets with other Commission sources before deciding on whether to include volume of landings in order to ensure consistency and improve the quality of the report.

Effort: The group discussed whether to include different types of fuel use indicators in the EU overview. Some experts suggested the use of fuel efficiency indicators. However, the final decision was to include only fuel consumption at EU level, and report more detailed indicators in either the national chapters or in the data appendices. The group discussed the suitability of including data on both days at sea and fishing days. Taking into account that a) data on fishing days is requested under the DCF and hence it will be available only for 2008 and b) for many fishing segments the difference between the two variables is negligible, experts decided the 2010 AER will include a trend graph only for days at sea, with a brief mention on 2008 fishing days in the text. This also applies to the national chapters.

Economic performance: experts agreed that the economic indicators presented in the 2009 AER would also be included in the 2010 version. In addition, information on capital values, investment and financial position should also be reported, where possible.

Assessment for 2009 and 2010: Experts agreed to keep the Economic outlook section also in the 2010 AER, but rename it ‘Assessment for 2009 and 2010’. The group agreed that experts participating in the production of the AER should have sufficient knowledge to give advice on what happened in 2009 and is/will happen in 2010 in the fishery sector. This section will consist of a summary of the relevant sections from the national chapters, EIAA model results and experts’ knowledge, and TACs.

7.3 EU Fish prices and markets analysis

This chapter was included in the 2009 AER and provides an analysis of the main trends in EU fish prices. In particular, the price evolution of 14 species (and total catch) by fleet segment (mobile or passive), vessel length and region are given.

The 14 species represent the main species in terms of value and volume in the EU fisheries. These species consist of 4 small pelagic, 4 demersal, 2 shellfish, 2 aquaculture and wild species and 2 big pelagic species.

The species analysed are:

European anchovy	(*Engraulis encrasicolus*)	ANE
European pilchard (=Sardine)	(*Sardina pilchardus*)	PIL
Atlantic herring	(*Clupea harengus*)	HER
Atlantic mackerel	(*Scomber scombrus*)	MAC
Atlantic cod	(*Gadus morhua*)	COD
European hake	(*Merluccius merluccius*)	HKE
Anglerfishes (=Monkfish)	(*Lophiidae spp*.)	ANF
Common sole	(*Solea solea*)	SOL
Deep-water rose shrimp	(*Parapenaeus longirostris*)	DPS
Norway lobster	(*Nephrops norvegicus*)	NEP
Turbot	(*Psetta maxima*)	TUR
Atlantic salmon	(*Salmo salar*)	SAL
Atlantic bluefin tuna	(*Thunnus thynnus*)	BFT
Swordfish	(*Xiphias gladius*)	SWO

First, the importance of each species and their main markets was explained.

Then, the fish price evolution 2002-2007 by fishing gear type (mobile or passive gear) was analysed. Passive gear segments receive higher prices than the mobile gear segments. Mobile gears were: Beam trawl (TBB), Demersal trawl and demersal seiner (DTS), Pelagic trawls and seiners (PTS), Dredges (DRB), Polyvalent mobile gears (MGP) and Other mobile gears (MGO). While Passive gears were: Passive gears for vessels smaller than 12 meters (PG), Gears using hooks (HOK), Drift nets and fixed nets (DFN), Pots and traps (FPO), Polyvalent passive gears (PGP), Other passive gears (PGO) and Combining mobile and passive gears (PMP).

Later it investigates the price evolution by vessel length between 2002 and 2007. It could be seen than the smaller vessels receive higher prices, and the prices decrease as the length class increases.

There were 4 different length classes:

- VL0012 vessels less than 12 metres in length
- VL1224vessels between 12 metres and 24 metres in length
- VL2440vessels between 24 metres and 40 metres in length
- VL40XX vessels greater than 40 metres in length

Finally a regional analysis has been done for the 5 regions established according to the Commission Regulation (EC) No 665/2008 of 14 July 2008:

- Baltic Sea (ICES areas III b-d),
- Mediterranean Sea and the Black Sea,
- North Sea (ICES areas IIIa, IV and VIId) and the Eastern Arctic (ICES areas I and II),
- North Atlantic (ICES areas V-XIV and NAFO areas),
- Other fishing regions (comprises all other fishing grounds).

First, it has been discussed on the adequateness of the species chosen for the analysis. The experts believe that there is no need to do further inclusions or deletions from the list of analysed species.

In this sense, with the inclusion of Romania and Bulgaria in the AER 2010, the Black Sea area gains importance. The main two species caught in the area are Turbot and Sprat. Turbot was already in 2009 AER, and it has been decided to continue with Turbot on the analysis and that there was no need to introduce Sprat on it.

It is recognized that the descriptions of the species and markets are not homogeneous and some present a quite short text; due to the lack of experts in that field. Thus, it is recommended to contact experts on this field to attend the meeting and prepare better descriptions.

It was suggested to change the species codes in the tables by the species names, to make it more user-friendly. In this case, it is also stated that there are large tables on the chapter, and it has been agreed that it will be considered to put some of the tables in the annex and put add more graph on the chapter.

This working group recommends the presence of further analysis in this chapter. Moreover, some topics were discussed (Price transmission in the value chain, fuel price transferred to ex-vessel or retail prices and the time periods, among others), but all were denied.

Finally, it was also suggested to draw a table with the landing quantities and values for the species analysed in case they do not significantly diverge from other EU official data sources.

7.4 Other issues

The group agreed that the indicators used throughout the report should be consistent with other sources (Commission regulation 2700/98 on Structural Business Statistics (SBS), used by EUROSTAT, among others).

The group recommended changing the definition 'Gross Cash Flow' to 'EBITDA' or 'Operating Cash flow', as there was consensus that they offer a more accurate definition. In addition, the group recommended that the rest of the economic definitions used in the AER be compared with the Fish Processing Sector report (see definitions in table 1) in order to avoid other conflicting definitions. JRC agreed to carry out this task during the preparation of the next report.

The group also discussed at length how profit / loss should be calculated correctly. Under the DCF, no data is requested on interest payments, and therefore there would be a discrepancy between calculations for 2008 and calculations for previous years, where it is understood that the variable capital cost included both depreciation and interest payments. The group agreed that interest payments should be calculated using the risk free bond rate which can be obtained from the European Central Bank (ECB). This risk free rate should be multiplied by the total amount of invested capital (to give a value for interest payments), and following that, net profit / loss (before tax) can be calculated.

Table 1: Indicator definitions from the latest AER on fishing fleets and Fish processing report

AER on Fishing Fleets: *Cash-flow:* Refers to the Gross Cash-Flow, as defined in the Concerted Action. Income minus all operational costs, excluding capital costs: income – (fuelcost + crewcost + repcost +varcost +fixedcost) *Profit:* Income minus all costs, including capital costs: income – (fuelcost + crewcost + repcost +varcost + fixedcost + capitalcost) *Gross Value Added (GVA)*: Contribution to gross national product (GNP), sum of remuneration of labour (crew) and capital (owner). Income minus all expenses except crew cost: income – (fuelcost + repcost +varcost +fixedcost)
Fish Processing Sector Report: Gross Value Added (GVA): Income minus production costs except labour costs. Shows the value added created by processing the raw material to the raw material itself. Turnover – Production Costs (Excluding Labour Costs) Gross Capital Flow (GCF): Turnover minus all production costs. Measures in which magnitude and in which way capital flows i.e. in to or out of the firm. Income - Production Costs (Including Labour Costs) Net Profit: Income minus all production costs minus depreciation and interest costs. Income – Productions Costs – Fixed Costs Earnings Before Interest and Tax (EBIT): Income minus all production costs minus

depreciation. Income – Production Costs – Depreciation

Return on Investment (ROI): A performance measure used to evaluate the efficiency of an investment. Net Profit / Total Investments

Financial Position: Ratio of own capital and borrowed capital. Measures the firms financial position. Own Capital / Borrowed Capital

8. ToR 2.

Discuss and assess proposals on method for regional analysis (allocation of cost and income data to regions). This discussion could also include allocation of economic data to metiers.

The DG MARE focal point informed the group that the purpose of the regional analysis chapter is to present economic and transversal data relating to each of the four main fishing sea regions in EU waters i.e. the North Atlantic, North Sea, Baltic Sea, Mediterranean and Black Sea. In addition, there should be a further section on 'Other Fishing Regions'. JRC informed the group that data on landings volume and values, fish prices and days at sea would be available at FAO area level 3, while all other economic data collected during the data call would be available at supra region level.

The group agreed that regional analyses for the Mediterranean and Black Sea (supra region 37) and other fishing regions (areas other than supra regions 27 and 37) would be relatively straightforward because income and cost data would be available at supra region level. However, the Baltic Sea, North Sea and North Atlantic sea regions together make up supra region 27, and therefore data on capacity, income and costs would only be available for these areas in a combined sense. Therefore, a method would be required to allocate vessels, income and costs to each sea region so that corresponding estimates of capacity and profitability could be made, assuming this was necessary and or desirable.

JRC gave an overview of the method used for the regional analysis chapter that was prepared for the 2009 AER, and highlighted alternative methods for conducting regional analyses, as discussed in the STECF Plenary 08-03 report. The method used by the JRC involved:

1. Allocating each Member States income data to each sea region using regional landings value data
2. Allocating each Member States costs to each sea region using regional effort (days at sea) data
3. Gross value added, Cash-flow and Profits were then calculated on the basis of these allocations
4. For the capacity indicators, national employment and fleet capacity data were also allocated to each sea region using the regional effort (days at sea) data

Therefore, to have a regional analysis of economic performance (capacity, income, costs and profits allocations) for each of these regions, capacity, income and cost data need to be allocated to the different regions using an appropriate allocation method.

Other methods highlighted by STECF were:

1. Allocate the entire fleet of each member state to one region
2. Make some large regions, e.g. Med. and Atlantic

3. Only include fleets that are fishing in one region (in essence, exclude from the analysis all vessels/fleets which fish in more than one region)
4. Include fleets fishing in several regions in each of the relevant regional analyses
5. Allocate fleet segments to areas based on expert knowledge
6. Split up the economics of fleets based on information on effort and landings value per region

All of these methods were discussed at length. The group decided that uncertainty surrounding data availability combined with the number of assumptions involved in the 'JRC' methodology and the limited time available could potentially lead to significant errors. The DG MARE focal point informed the group that the outputs contained in this chapter of the report could potentially be used in a political context, and therefore the accuracy of the information presented should be the most important consideration.

The group agreed that the most sensible approach to take would be to report the effort and landings data at the required regional level, as it is already available, while reporting the capacity and economic data at supra region level. By doing this, readers would be able to identify which fishing regions the fleet segments operated in and which regions landings volumes and values were obtained from, in addition to knowing the capacity and economic performance data for those fleet segments.

It was agreed that the tables for each region/supra region should be broken down by gear type. In addition, for each region there should be pie charts that clearly show the distribution of effort and landings by country in that region/supra region. Qualitative information should also be given on different management plans in the regions/supra regions and common issues found in the national chapters that relate to a specific region/supra region should be highlighted. The group further agreed to have a time series graph of days at sea and landings volume and value per region (five regions) in the regional chapter. See Appendix D for an example of the tables to be included in this chapter. This method was subsequently endorsed by the DG MARE focal point.

9. ToR 3

Discuss and assess proposals for EIAA model outputs and chapter contents for future economic performance projections.

FOI (Hans Frost) gave a presentation on the evolution of the EIAA-model (Economic Interpretation of ACFM advice), from the 1999 version to the current date version. Hans informed the group that all development relating to the EIAA model can be found in FOI report no. 2001. The EIAA model can potentially analyse a range of scenarios depending on the type of questions to be addressed:

1. TAC/SSB level and projections for 2009, 2010 and long term
2. Sea days needed to catch the TAC with an existing number of vessels
3. Number of vessels needed to catch the TAC / the technical overcapacity issue

In scenario 2, the model can calculate the number of sea days needed to catch the TACs with the existing fleet structure. Potentially, this could be compared to the available sea days for each fleet segment, but this would be a demanding exercise due to the detailed regulation on effort limitation. Also, because days at sea can be traded, this may also require analysis at individual vessel level.

Overcapacity calculations can be undertaken under option 3. Using the maximum number of potential sea days for each fleet segment, the required number of vessels to fully utilise the quotas can be calculated.

The group agreed that EIAA model results for selected fleet segments would enhance the next AER, and therefore DG MARE would begin the process of setting up an ad-hoc contract with Hans Frost and Jesper Andersen to carry out this work (see Appendix E for ToR).

The group agreed that the economic situation for selected fishing fleets in 2009 and 2010 and sea days needed to catch the TAC given an existing number of vessels should be estimated (Scenarios 1 and 2). In preparing the model, the latest available economic information should be used, i.e. 2008 cost and earnings and catch composition figures, to be supplied by JRC, plus TACs and spawning stock biomasses for 2009 and 2010, if these are available. If not, proxies should be used instead, for instance the latest available SSBs or catches. It was suggested that long term SSBs and TACs would be interesting to apply in order to have an indication of the potential economic performance when stocks recover. However, these data would be difficult to obtain, and therefore it was agreed that long term calculations will not be conducted.

[1] http://www.foi.life.ku.dk/Publikationer/Rapporter/~/media/Foi/docs/Publikationer/Rapporter/Nummererede%20rapporter/2009/Report%20200.ashx

The group agreed that the selected fleet segments shall be subject to at least one of the eight management plans currently in place for EU fish stocks managed by TACs. They should also take an important share of the relevant TAC(s) and provide a significant contribution to the fleets' total revenue. Fleet segments not managed through TACs will not be covered due to the nature of the model. Selection of fleet segments will be a combined action between JRC and DG MARE. This will be carried out as soon as data is available through the economic data call and the necessary quality checks have been carried out (week beginning 1st of March). It is anticipated that some of the fleet segments selected shall belong to the new Member States. Therefore, work should be undertaken to extend the EIAA model to include the new Member States. The total number of fleet segments to be analysed is around 15.

In terms of model configuration, the group agreed that the work should take account of the following STECF plenary 09-01 comments relating to the future application of the EIAA model in the AER report:

"STECF recognizes the effort in the application of the EIAA model. However, the results of projections for 2008 and 2009 presented in the report are not particularly informative or reliable because the model was not configured to take account of recent important developments, such as decommissioning, sudden price changes and policy changes like effort reduction schemes."

And:

"STECF notes that in future the report should present the criteria used to select the fleet segments for which the EIAA model will be applied."

The number of vessels used to produce average performance projections for 2009 and 2010 instigated some debate. FOI experts explained that normally the number of vessels would be set to equal the average for 2006-2008, however, if a fleet for instance has undergone a significant reduction in vessel numbers, the latest available number of vessels may be relevant to use instead. Further, if only the latest number of vessels is used, this could also be a reason for using only the economic (costs and earnings) figures for the latest year (2008). However, if so, any large fluctuations in 2008 would have a significant impact on the resulting projections.

The group also agreed that particular attention should be made to recent variations in fuel prices by use of a fuel price index, so that fuel costs can be predicted more precisely for 2009 and 2010. Also, it was recommended that consideration should be given to fish prices changes, where possible, however the FOI experts explained the resources were not available to undertake a complete analysis of the potential price development in 2010 at the EU level. Unchanged fish prices, thus the 2008 prices, will be used in the model, and this shall be clearly explained in the resulting chapter.

FOI experts agreed to pay particular attention to this issue when configuring the model.

It was agreed that a methodology section on how the EIAA model works should also be provided to accompany the output calculations. The outputs for each fleet segment analysed will be tables and graphs with a short text explaining each outcome. The work shall be submitted to DG MARE and the SGECA 10-02 meeting chair no later than Monday the 22nd of March, so that SGECA experts can provide comments before inclusion in the 2010 AER.

10. ToR 4.

Discuss and assess proposals for a better overall structure and format of the 2010 and future AER's

To establish a proper understanding of the requirements of the report, experts considered who the final users of the 2010 AER were likely to be. The DG MARE focal point informed the group that the AER is distributed by DG MARE the report is distributed to several international bodies such as Eurostat, DG JRC and stakeholders and it has been used in several occasions as an statistically reference for scientific data. The importance of this chapter was stressed by the DG-MARE representative.

The group agreed that the 2010 AER should roughly follow the same format as the 2009 report i.e.

Chapter 1: EU overview

Chapter 2: Member States reports

Chapter 3: Regional analyses

Chapter 4: Fish price analyses

Chapter 5: EIAA model outputs

Appendices: Data tables (Economic and catch data), Methodology section, Data coverage and Quality information, Glossary.

The group agreed that no further special chapters (In addition to the EIAA model) were required for the 2010 AER.

JRC drew the groups' attention to STECF comments on the 2009 AER relating to the lack of data quality information contained within the document, and asked whether the group felt that quality indicators should be included in the next report, assuming they were available. It was suggested that quality indicators need not be included as they were already available from the Member States technical reports, however there was acknowledgement that these reports are hard to read and not easily attainable. It was finally decided to include an appendix containing quality indicators, in response to previous STECF comments.

JRC informed the group that they had contacted DG MARE to propose reducing the number of pages contained in the Annual Economic Report by making all the data contained in the appendices (see 2009 report) available on the JRC data collection website. By doing this, all data that was submitted during the data call would be available for users to download in Excel format. The group was informed by the DG MARE focal point that this proposal was being considered, however, he stressed that it was important to provide as much disaggregated data as possible in the appendices of the report as some users may not be comfortable with accessing the data online. Consequently, the group agreed to keep the data appendices in the same format as the 2009 report, and JRC and DG MARE would together review the situation following the submission of the draft report.

JRC suggested the inclusion of a specific section (likely to be in the appendices) that would focus on the report production process, such as the collection of the data in the Members States, the data uploading and quality checking procedures, and the processes followed by the SGECA working group in preparation of the first draft. This proposal was accepted by the working group with the understanding that JRC would produce this section.

The use of colours and font type in the report was discussed, in addition to whether there would be printed copies of the 2010 report. The DG MARE focal point confirmed that printed copies would again be required. JRC suggested the inclusion of colours in graphical outputs would enhance the presentation of the report. The group agreed that this should be looked into further by the JRC. Some experts suggested adopting a less formal font style in the final printed version (i.e. changing from Times New Roman to Ariel). There was no agreement reached in this issue.

Appendix A: Draft national chapter template

1. National Overview

1.1 Fleet structure (Vessels, Fishing Enterprises, Employment)

This section provides an overview of the structure of the *'country'* fishing fleet and describes some key structural trends in recent years.

Text

In 2008 the *'country'* fishing fleet consisted of x registered vessels. Combined registered tonnage of x and total power of x, see figure 1. The overall average age of vessels was xxx in 2008, see figure 2.

Describe the trends in vessel numbers, kW, GT and age of fleet between 2002 and 2008.

Discuss trends, factors affecting change in these indicators. If significant discrepancies with DCF data and fleet register data, please comment.

Figure 1: Country fleet capacity trends 02-08

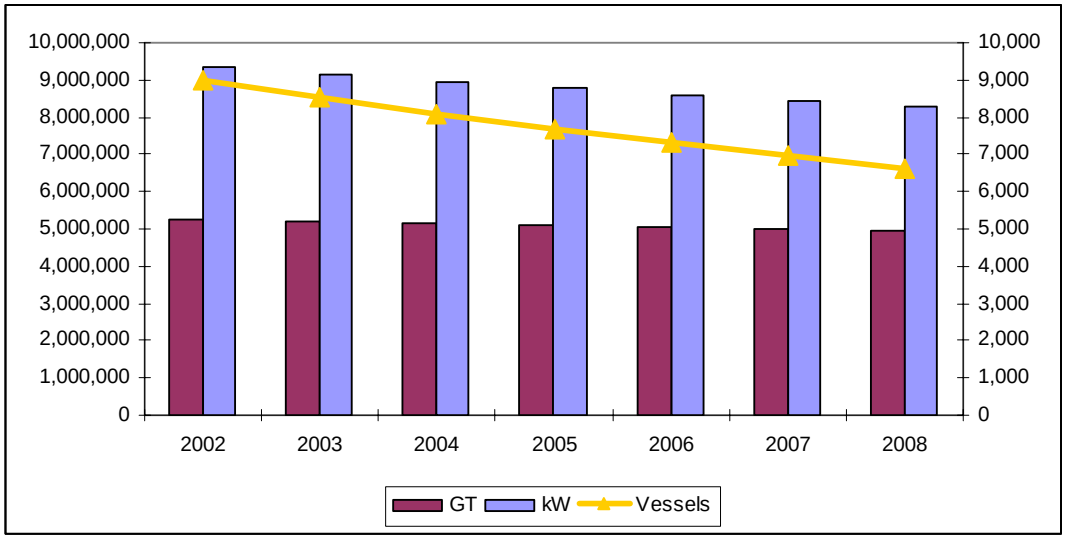
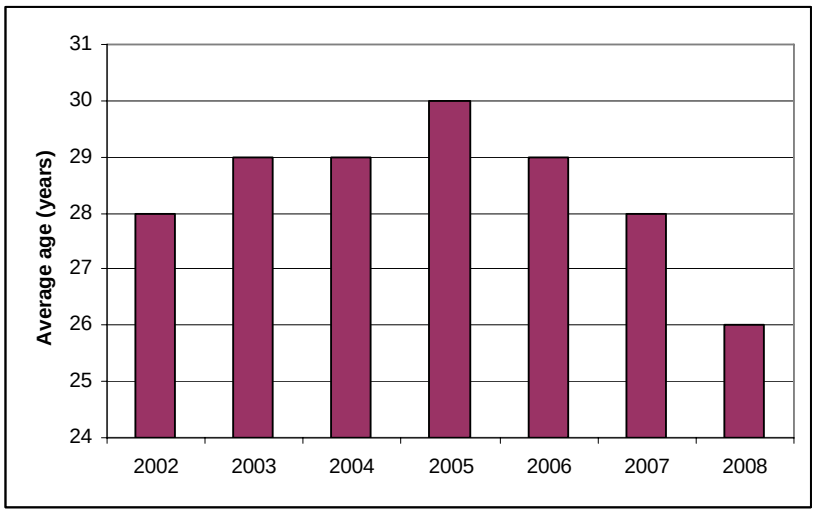


Figure 2: Average age trend of 'Country' national fleet 2002-2008

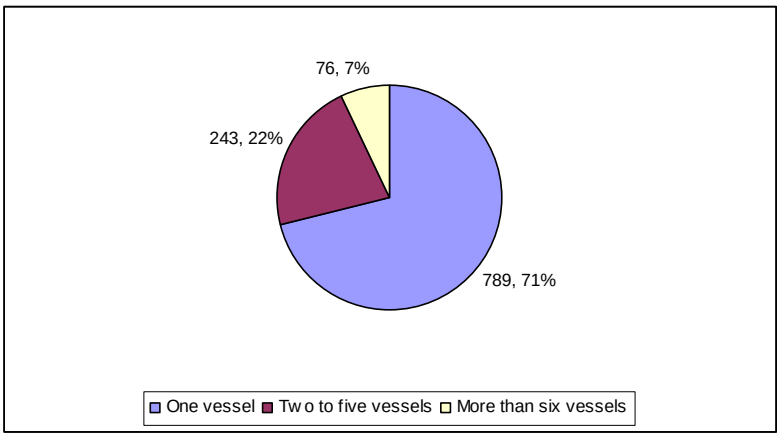


Text

The total number of fishing enterprises in 'Country' was xxx in 2008. The vast majority of fishing enterprises owned a single vessel (e.g.), see figure 3.

Comment on fishing enterprise structure.

Figure 3: Graphical representation of fishing enterprise categories in 2008

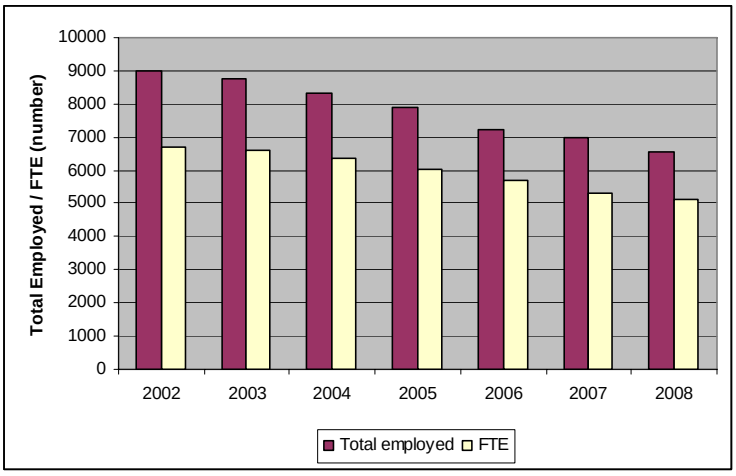


Total employment and FTEs was xxx and yyy in the 'Country' national fleet in 2008, see figure 4.

Describe the trends in employment and FTE between 2002 and 2008.

Discuss trends, factors affecting change in these indicators.

Figure 4: Trend in 'Country' total employed and FTEs between 2002 and 2008.



1.2 Fishing activity (Effort, Fuel consumption, Landings volumes)

This section provides an overview of the fishing activity carried out by the *'country'* fishing fleet and describes some key trends in recent years.

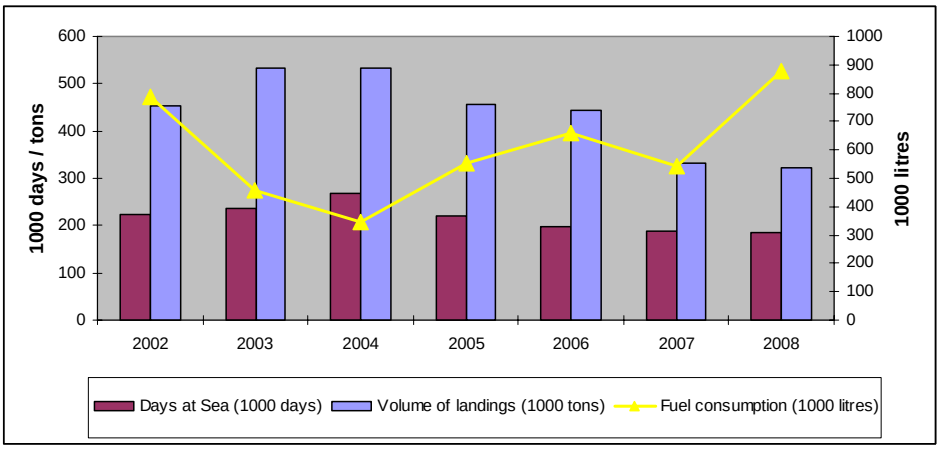
Text

In 2008 the *'country'* fishing fleet spent a total of xxx thousand days at sea, y% of which was actual fishing days. The total volume of landings achieved during those fishing days was xxx million tons of seafood. The total amount of fuel consumed while catching this seafood amounted to a total of xxx million litres, see figure 5.

Describe the trends in days at sea, fuel consumption and volume of landings between 2002 and 2008.

Discuss trends, factors affecting change in these indicators

Figure 5: Total days at sea, fuel consumption and volume of landings by 'country' National fleet 2002-2008



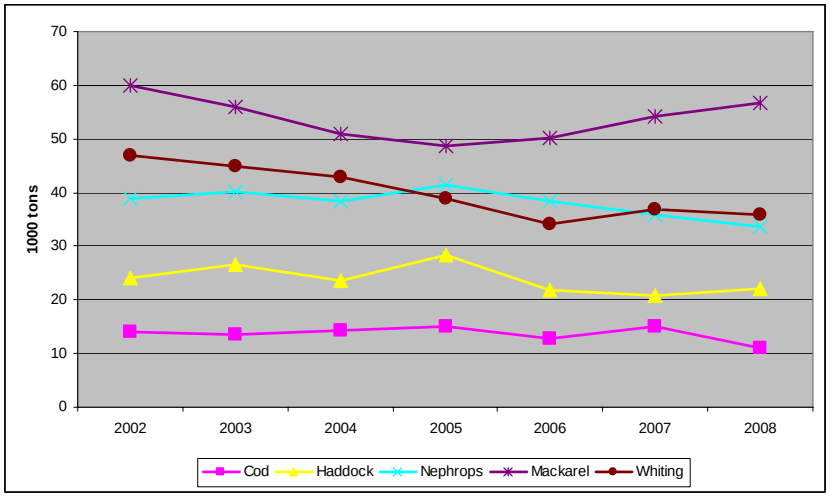
Text

In terms of landings composition, in 2008 ‘species x’ was the most common species landed in terms of tonnage (x thousand tons), followed by species y (y thousand tons) and species z (z thousand tons), see figure 6.

Describe the trends in landings volumes of top species between 2002 and 2008.

Discuss trends, factors affecting change in these indicators.

Figure 6: Volume of landings of top? species between 2002 and 2008.



1.3 Economic Performance (Prices, Income, Expenditure, Profit / Loss, ROI)

This section provides an overview of the economic performance the *‘country’* fishing fleet and describes some key trends in recent years.

1.3.1 Landing values and prices

Text

In terms of landings composition, in 2008 ‘species x’ achieved the highest value of landings (x million), followed by species y (y million) and species z (z million), see figure 7.

Describe the trends in prices and total landings values of top species between 2002 and 2008.

Discuss trends, factors affecting change in these indicators.

Figure 7: Total value of landings of top 5 species landed by 'Country' national fleet.

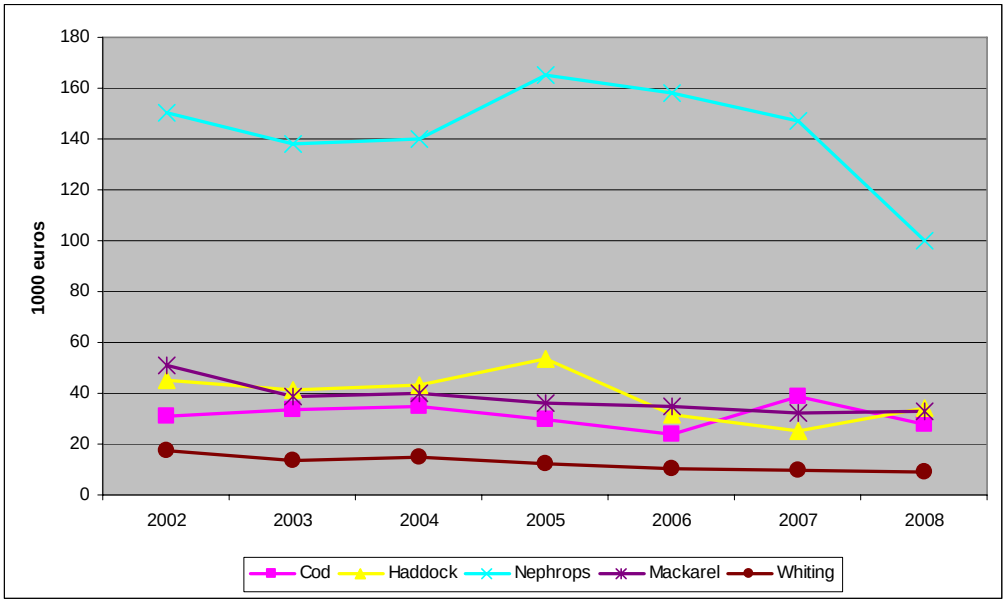
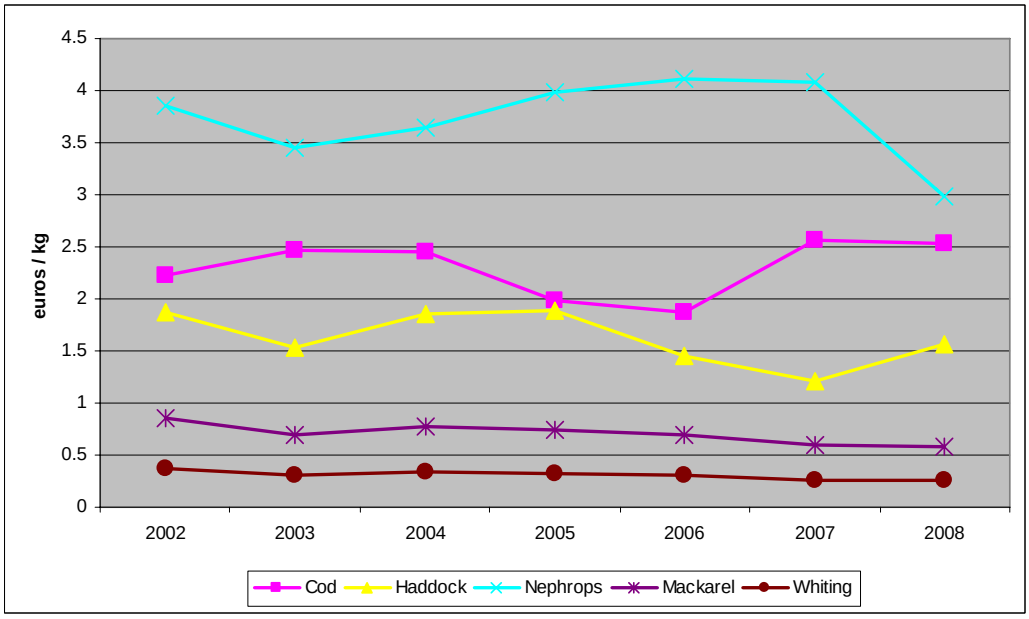


Figure 8: Average price of top 5 species landed in terms of total value or alternatively highest price



1.3.2 Total Income

Text

The total amount of income generated by the 'Country' fishing fleet in 2008 was x million Euros. This consists of y million in landings values, z million, in fishing rights sales, a million in non fishing income, and b million in direct subsidies. See table 1, and figure 9.

Comment on division of total income.

Describe the trend in total income for national fleet between 2002 and 2008.

Discuss trends, factors affecting change in total income (but avoid repetition with landings and price – if nothing else to say, don't say anything.

Table 1: National 'set of accounts' for 08 (possibly include 06 and 07 as well…) for national fleet… (Income, key expenditure, profit/loss, ROI)

	2006	% of total income	2007	% of total income	2008	% of total income
Income						
Value of Landings	100,000	59.9%	100,000	59.9%	100,000	59.9%
Income from fishing rights	12,000	7.2%	12,000	7.2%	12,000	7.2%
Direct Subsidies	25,000	15.0%	25,000	15.0%	25,000	15.0%
Other Income	30,000	18.0%	30,000	18.0%	30,000	18.0%
Total Income	**167,000**	**100.0%**	**167,000**	**100.0%**	**167,000**	**100.0%**
Expenditure						
Crew wages	35,000	21.0%	35,000	21.0%	35,000	21.0%
Unpaid value of labour	10,000	6.0%	10,000	6.0%	10,000	6.0%
Energy cost	40,000	24.0%	40,000	24.0%	40,000	24.0%
Repair cost	7,000	4.2%	7,000	4.2%	7,000	4.2%
Variable cost	8,000	4.8%	8,000	4.8%	8,000	4.8%
Non variable cost	20,000	12.0%	20,000	12.0%	20,000	12.0%
Fishing rights cost	2,000	1.2%	2,000	1.2%	2,000	1.2%
Total Expenditure	**122,000**	**73.1%**	**122,000**	**73.1%**	**122,000**	**73.1%**
Profitability						
Gross Profit / loss	**45,000**	**26.9%**	**45,000**	**26.9%**	**45,000**	**26.9%**
Depreciation	15,000	9.0%	15,000	9.0%	15,000	9.0%
Interest	7,000	4.2%	7,000	4.2%	7,000	4.2%
Net Profit/loss (1)	**23,000**	**13.8%**	**23,000**	**13.8%**	**23,000**	**13.8%**
Net Profit/loss (2)						
ROI	4%		4%		4%	

1.3.3 Expenditure

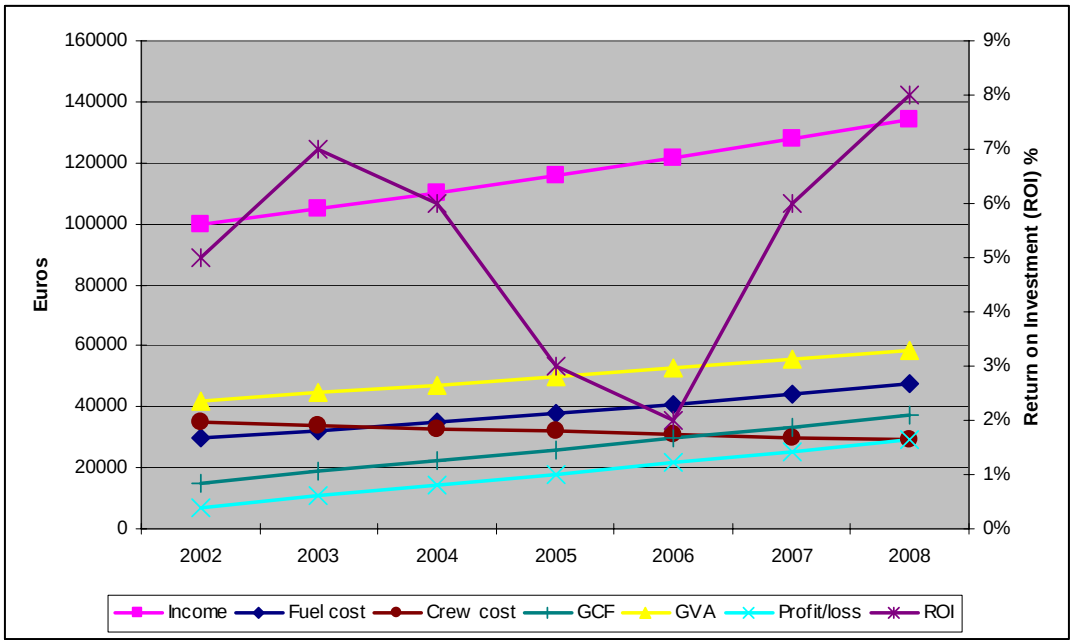
Text

The total amount of expenditure by the 'Country' fishing fleet in 2008 was x million Euros, see table 1.

Describe the trend in total and key costs for national fleet between 2002 and 2008, see table 1 and figure 9

Discuss trends, factors affecting change in total costs and key costs

Figure 9: Time series graph showing Income, Key costs (Crew cost, Fuel Cost), GVA, GCF and Profit / Loss, ROI between 2002 and 2008



1.3.4 Profitability

Text

The total amount of GCF, GVA and profit/loss generated by the 'Country' fishing fleet in 2008 was x million Euros, y million Euros and z million Euros respectively, see table 1 and figure 9.

Also talk about Capital Value and ROI here.

Describe the trend in profitability indicators for national fleet between 2002 and 2008, see table 1 and figure 9

Discuss trends, factors affecting change in profitability indicators.

1.4 Country Fleet Segments

Text

The 'country' fishing fleet consists of x fleet segments. Table 2 provides a breakdown of key performance indicators for all 'Country' fleet segments in 2008.

Table 2 Country fleet composition key indicators (2008 data only)

Fleet segment	Number of vessels	FTE (Or total employed)	Days at Sea	Volume of landings	Value of landings	Direct subsidies	Total Income	Average wage per FTE	GVA	GCF	Current revenue/Break even revenue	Profit / loss 1	Profit / loss 2	Capital Value	ROI	Investments
DTS 12-18																
DTS 18-24																
DTS 24-40																
DTS 40XX																
TBB 12-18																
TBB 18-24																
TBB 24-40																
TBB 40XX																

Text

1) Basic description of specific fleet segments in national fleet in 2008 i.e. a) most important in economic terms (effort, landings, profits, capital value etc) and b) most important in social terms (employment, GVA, wages etc), referring to the data contained in the table.

2) Basic description of where these fleet segments operate i.e. Inshore, EU waters, Long distance fleets etc.

3) Are there any specific issues for fleet segments that are specifically affected by management plans or other changes in the regulatory framework?

4) Two fleet segments will be chosen for each country (by the expert attending the SGECA meeting and the National Correspondent in advance of the meeting. For each fleet segment, 4 graphs will be produced containing key performance indicators, as shown in Figure 10. These graphs will contain the following:

- Trend in fleet segment capacity 2002-2008 (fleet segment totals)

- Trends in fishing effort indicators 2002-2008 (average per vessel) LPUE indicators probably better that what we currently have in here… suggestions?
- Trend in price of main species obtained by vessels in the segment 2002-2008
- Trend in economic performance indicators 2002-2008 (average per vessel)

For each fleet segment, comments should be made in relation to the time series data, i.e. a) the trend in capacity indicators, b) the trend in fishing activity indicators c) the trend in fish prices, d) the trend in economic performance

Figure 10 Country Demersal trawl and seine 12-24m key trends 2002-2008

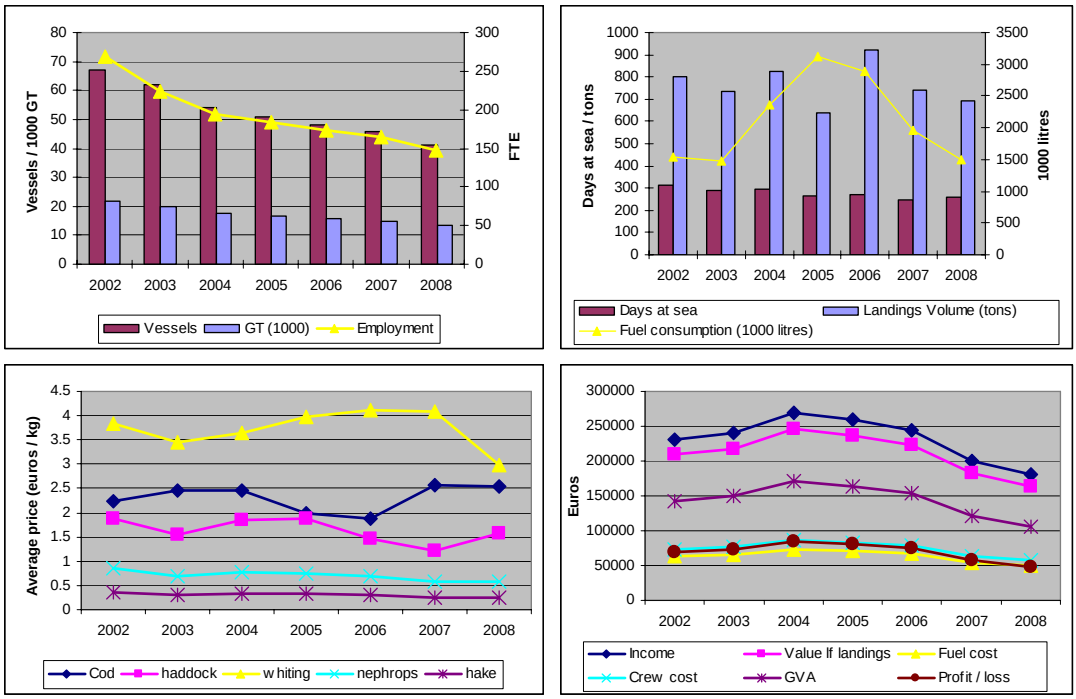
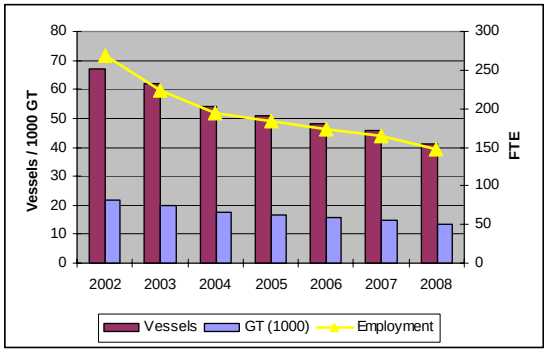
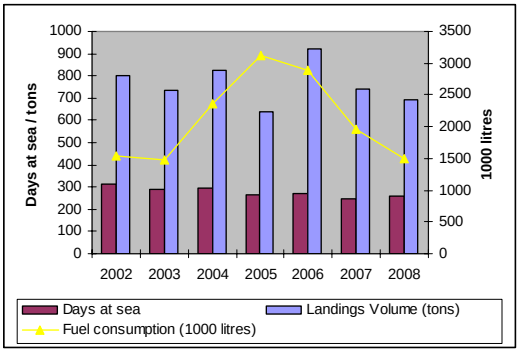
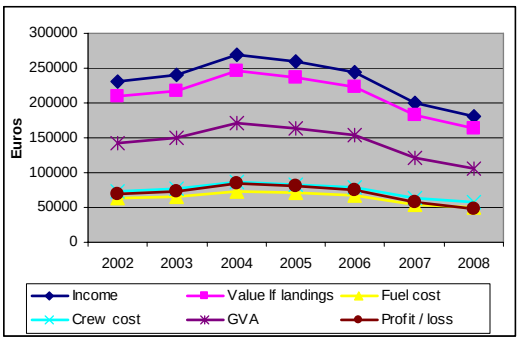


Figure 11 Country Beam trawl 24-40m key trends 2002-2008







1.5 Assessment for Country fishing fleet in 2009 and 2010

In this section, provide qualitative information relating to the national fleet and specific fleet segments on how they will perform in 2009 and 2010. If any quantitative data is available for 2009 and 2010 e.g. landings, capacity data, TACs etc, this can be referred to in the text. The following structure should be used for this section.

1.5.1 Fleet Structure
1.5.2 Fishing Activity
1.5.3 Economic Performance

Appendix B: EU Overview tables

Table x: EU overview table 2008 snapshot (this would be included twice, the second time containing average per vessel data)

	Number of vessels	Number of inactive vessels	Volume of landings	Value of landings	Income	Profit	GVA	Salaries / Wages	Turnover/FTE [a]	Employment	Capital Value
Belgium											
Bulgaria											
Cyprus											
Denmark											
Estonia											
Finland											
France											
Germany											
Greece											
Ireland											
Italy											
Latvia											
Lithuania											
Malta											
Netherlands											
Poland											
Portugal											
Romania (2008)											
Slovenia											
Spain											
Sweden											
United Kingdom											
Total											

Appendix C: EU Fleet register data

Table y: Number of vessels on EU fleet register by Member State in 2008

Country	EU fleet register
Belgium	102

Bulgaria	2545
Cyprus	867
Denmark	2957
Estonia	964
Finland	3162
France	7606
Germany	1872
Greece	17546
Ireland	1952
Italy	13790
Latvia	879
Lithuania	251
Malta	1385
Netherlands	840
Poland	866
Portugal	8630
Romania	438
Slovenia	179
Spain	13003
Sweden	1506
UK	6775

Appendix D: Regional analysis chapter example output

Table z: Example of tabular output for regional analysis chapter

2008	Days at sea				Landings Volume				Landings Value				Other indicators				
	Total	North Sea	Baltic Sea	North Atlantic	Total	North Sea	Baltic Sea	North Atlantic	Total	North Sea	Baltic Sea	North Atlantic	Vessels	FTE	Profit	Capital value	GVA
	Days	Days	Days	Days	Tons	Tons	Tons	Tons	Euros	Euros	Euros	Euros	Number	Number	Euros	Euros	Euros
Danish TBB 12-18																	
Germany TBB 12-18																	
Great Britain TBB 12-18																	
Danish TBB 18-24																	
Great Britain TM 18-24																	

Appendix E: ToR for EIAA model

ToR for EIAA model work in preparation of the 2010 Annual Economic Report (AER)

- Estimate the economic situation for selected fishing fleets in 2009 and 2010. Two scenarios shall be calculated for each selected fleet segment selected:
    - TAC/SSB level and projections for 2009, 2010
    - Sea days needed to catch the TAC with an existing number of vessels
- In preparing the model, the latest available economic information shall be used, i.e. 2008 cost and earnings and catch composition figures, to be supplied by JRC, plus TACs and spawning stock biomasses for 2009 and 2010, if these are available. If not, proxies shall be used instead, for instance the latest available SSBs or catches. Long term calculations will not be conducted.
- The selected fleet segments shall be subject to at least one of the eight management plans currently in place for EU fish stocks managed by TACs. Fleet segments not managed through TACs will not be covered. Selection of the fleet segments will be a combined action between JRC and DG MARE. This will be carried out as soon as data is available (week beginning 1st of March) and the necessary quality checks have been carried out.
- It is anticipated that some of the fleet segments selected shall belong to the new Member States. Therefore, work should be undertaken to extend the EIAA model to include the new Member States.
- The total number of fleet segments to be analysed is 15.
- This work should take account of STECF plenary 09-01 comments relating to the future application of the EIAA model in the AER report. Therefore, the following is required:
    - Give consideration to the number of vessels used to produce estimates for 2009 and 2010. Normally this is set to equal the average for 2006-2008. However, if a fleet for instance has undergone a significant reduction in vessel numbers, the latest available number of vessels may be relevant to use instead.
    - Pay particular attention to recent variations in fuel prices, so that fuel costs can be predicted more precisely for 2009 and 2010
    - Give consideration to Fish prices changes, where possible
- A methodology section on how the EIAA model works shall also be provided to accompany the output calculations.
- The outputs for each fleet segment analysed will be tables and graphs with a short text explaining each outcome.
- The work shall be submitted to DG MARE and the SGECA 10-02 meeting chair no later than Monday the 22nd of March, so that SGECA experts can provide comments before inclusion in the 2010 AER.

ANNEX II DECLARATIONS OF EXPERTS

Declarations of invited experts are published on the STECF web site on https://stecf.jrc.ec.europa.eu/home together with the final report.

European Commission

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Abstract

STECF-SGECA 10-01 convened in Copenhagen during the 8-11th of February 2010 to discuss and seek agreement on the content, indicators, methodologies and format of the 2010 Annual Economic Report (AER). The latest (DCF) data call requirements and how they affect the contents of the AER were also clarified. The availability of new economic and transversal variables are for the first time available under the DCF meant there was an opportunity to include new indicators and variables in the report and also modify the existing ones if necessary, implying significant changes to some or all chapters of the report. Therefore, proposals for improved contents and the overall structure were discussed. In addition, the economic policy advice needs related to the AER were specified, so that the information contained in the report could be appropriately designed with the end users in mind.

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