THE EU COMMON FISHERIES POLICY EXPERIENCE AND OUTLOOK

Conference in honor of late Professor Árni Vilhjálmsson

University of Iceland
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OVERVIEW

European fisheries and the CFP

What are the problems that the CFP is meant to solve?

How has the CFP succeeded in solving them?

What is the outlook for the CFP?

Concluding remarks

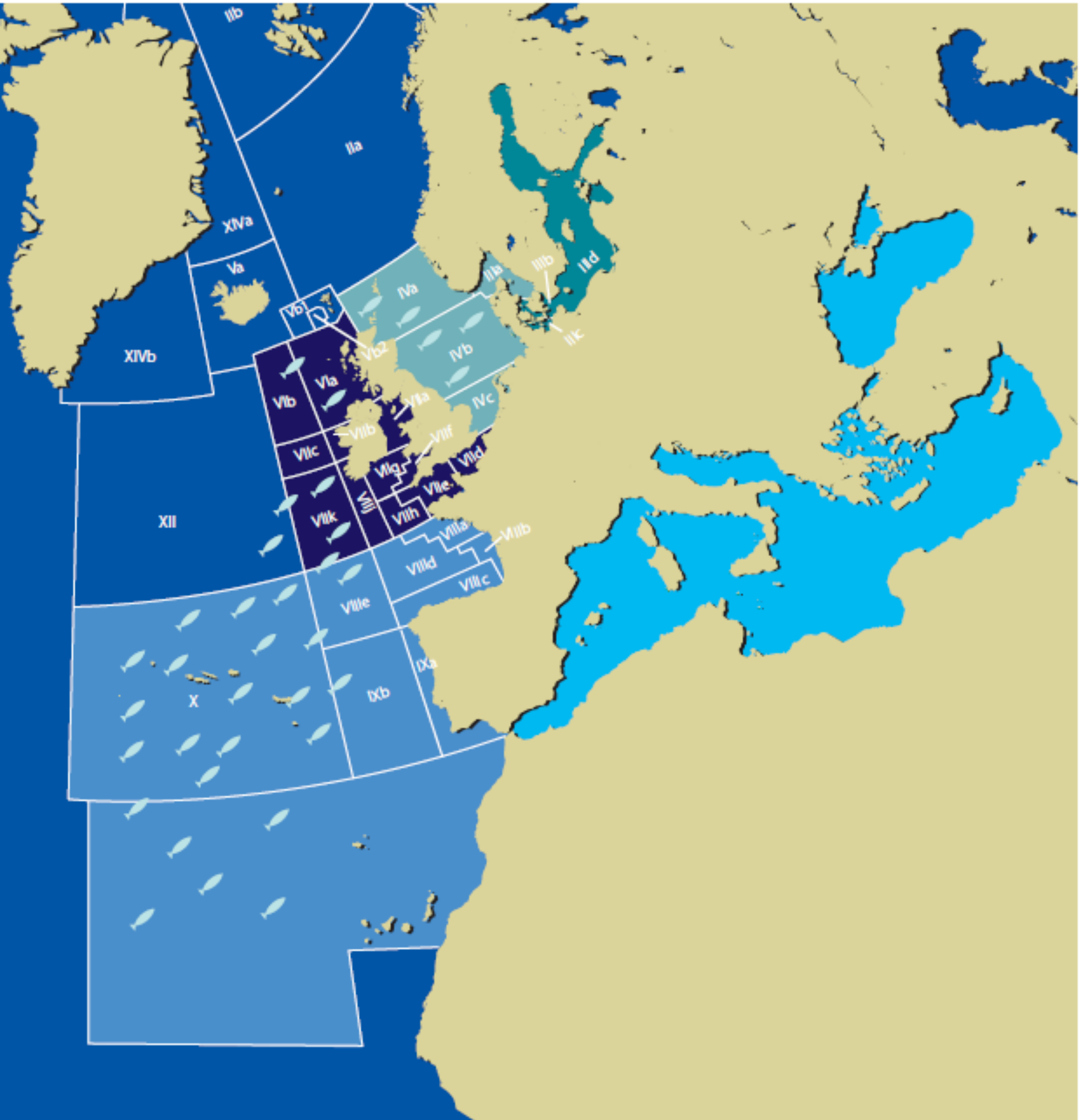
DIFFICULT TO GENERALIZE

Many fisheries and stocks

Roughly 82 000 fishing vessels

1,69 million GT

FISHING AREAS IN THE EU



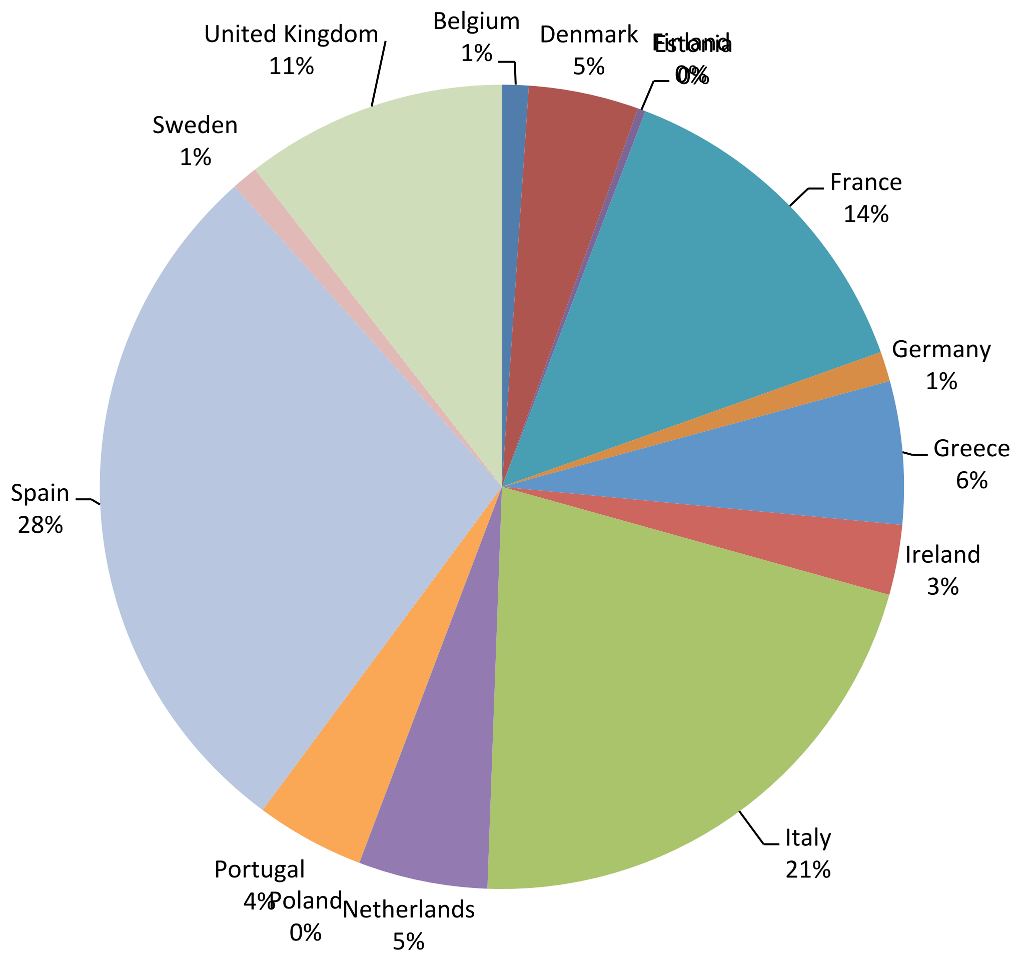
Baltic RAC
Mediterranean RAC
North Sea RAC
North-western Waters RAC
South-western Waters RAC
Pelagic Stocks RAC
High-sea RAC

Source: EC

EU 2011	No vessels	%	Small-scale	%	Large-scale	%	Long-distance	%
Belgium	**89**	*0,1%*			**89**	*0,3%*		
Bulgaria	**1.010**	*1,6%*	**926**	*2,6%*	**84**	*0,3%*		
Denmark	**2.663**	*4,2%*	**1.094**	*3,0%*	**1.569**	*5,7%*		
Estonia	**934**	*1,5%*	**876**	*2,4%*	**57**	*0,2%*	**1**	
Finland	**3.365**	*5,3%*	**1.589**	*4,4%*	**1.776**	*6,5%*		
France	**6.004**	*9,4%*	**4.300**	*12,0%*	**1.684**	*6,2%*	**20**	*5,4%*
Germany	**1.664**	*2,6%*	**883**	*2,5%*	**779**	*2,8%*	**2**	*0,5%*
Ireland	**2.162**	*3,4%*	**788**	*2,2%*	**1.374**	*5,0%*		
Italy	**14.715**	*23,1%*	**8.875**	*24,7%*	**5.824**	*21,3%*	**16**	*4,3%*
Latvia	**319**	*0,5%*	**245**	*0,7%*	**74**	*0,3%*		
Lithuania	**171**	*0,3%*	**60**	*0,2%*	**103**	*0,4%*	**8**	*2,2%*
Malta	**1.087**	*1,7%*	**532**	*1,5%*	**555**	*2,0%*		
Netherlands	**738**	*1,2%*	**199**	*0,6%*	**539**	*2,0%*		
Poland	**805**	*1,3%*	**526**	*1,5%*	**276**	*1,0%*	**3**	*0,8%*
Portugal	**8.557**	*13,4%*	**4.004**	*11,1%*	**4.524**	*16,5%*	**29**	*7,9%*
Rumenia	**488**	*0,8%*	**197**	*0,5%*	**291**	*1,1%*		
Slovenia	**186**	*0,3%*	**62**	*0,2%*	**124**	*0,5%*		
Spain	**10.892**	*17,1%*	**6.830**	*19,0%*	**3.772**	*13,8%*	**290**	*78,6%*
Sweden	**1.359**	*2,1%*	**761**	*2,1%*	**598**	*2,2%*		
UK	**6.467**	*10,2%*	**3.198**	*8,9%*	**3.269**	*11,9%*		
EU total	**63.675**		**35.945**		**27.361**		**369**	

Source: EU Fleet Register

TOTAL VALUE OF CATCHES IN EU : **7,7 BN USD** (2009)



[Iceland & Norway: 2,6 bn USD]

Source: OECD

BUT: FISHING IS A SMALL INDUSTRY IN THE EU CONTEXT

Less than 1% of GDP

Somewhere around 140 000 fishers

Locally (politically) important –
Regional issues

The EU Market for Fish

World´s largest importer and exporter of fish by volume (3rd largest importer, 2nd largest exporter)

Exports and imports of fisheries products (2008):

Imports: 45 bn USD
Exports: 26 bn USD

Source: FAO

Food safety issues high on the agenda!

Aquaculture issues high on the agenda!

CFP: EU & Member States

Measures relating to the exercise of jurisdiction over fishing vessels, the right of such vessels to fly the flag and the registration of fishing vessels fall within the competence of the MS, under conditions laid down in EU legislation.

Source: *OECD Review of fisheries 2011.*

Responsibility for a number of policy areas, which are not directly related to the conservation and management of fishery resources, e.g. research, technological development and development co-operation is share by the EU and MS.

The TAC is divided between MS based on "relative stability principle" at the EU level.

CFP – Areas of action

- Sustainability
- Enforcement
- Fleet/Capacity
- Funding and technical support
- International role
- Fair price to producers
- Aquaculture development
- Science/research & data collection

AIMS OF THE REFORMED CFP

"The aim of the reformed policy is to end overfishing and make fishing sustainable environmentally, economically and socially. The reforms aim to support sustainable growth of the fishing sector, create job opportunities in coastal areas and ultimately provide EU citizens with a healthy and sustainable supply of fish."

(Maria Damanaki, European Commissioner for Fisheries and Maritime Affairs)

THE AIMS REFLECT THE PROBLEMS

The main challenges (EU´s Green paper on the CFP, 2009):

- Overfishing
- Overcapacity
- Heavy subsidies
- Low economic resilience
-Decline in the volume of fish caught

- "The current CFP has not worked well enough to prevent those problems."

SOME NUMBERS

95% of Mediterranean stocks are overfished

Source: STECF

47% of Atlantic stocks are overfished

Source: STECF

Subsidies amounted to around 3.3 bn euros in 2009 which (equal to almost 50% of catch values)

Source: Oceana

Additional problem is the lack of recent reliable data

Source: STECF

Recent study (2012): Over the past nine years fisheries minister have decided quotas on average 45% higher than the recommended scientific advice

Source: WWF

But all is not bleak…

Recent figures show improvements regarding *fishing mortality*, especially in the Atlantic fisheries

Similarily, some positive signs regarding *economic performance* of many European fisheries

2008-2012

Number of vessels:	- 7%
GT:	- 12%
kW:	- 9%

What we know:

- We know how to solve many of these problems…
- European fisheries have some of the necessary ingredients

Monitoring & surveillance

Scientific knowledge

Judicial systems

Some reform proposals

- Ecosystem based management
- Marine protected areas
- Measures to reduce overcapacity
- Discard ban
- Preservation/strenthening of small scale fisheries
- New fund (EMFF)
  - help fishermen in the transition to sustainable fishing
  - support coastal communities in diversifying their economies
  - Finance projects that create new jobs and improve quality of life along European coasts
  - make it easier to access financing
- Regionalization/bottom-up approach
- Transferable fishing concessions

Will these reforms deliver?

Ecosystem based management & Marine protected areas=> Beneficial effects on stocks

Measures to reduce overcapacity and EMFF fund => Depends on implentation

Strenthening of small-scale fishermen => Will hardly increase economic efficiency nor safeguard stocks

Regionalization/bottom-up management => Greatest hope of success

REGIONALIZATION & BOTTOM-UP

Turning away from top-down approaches

Member states, RACs and other stakeholders will have a bigger say

The success of this different approach relies on the implementation by different Member states

INTERESTINGLY ENOUGH (for institutional economists at least) – A MULTITUDE OF FISHERIES MANAGEMENT SYSTEMS EXIST IN EU

Success stories are mostly from "locally" managed fisheries

In fact, most of them property rights based in one form or another (Denmark, Sweden, Netherlands, ...)

Concluding remarks

The current CFP has failed on most fronts – is under revision

The problems facing EU fisheries are ´old classics´

Many different fisheries & EU countries have different priorities

Increased regionalization and flexibility in choosing management measures. Member states may choose to save or sacrifice their fisheries

TAC´s will still be decided at a European level (based on relative stability principles)