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**REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND  
THE COUNCIL**

**First report on the implementation of the Multiannual Plan for the fisheries exploiting  
demersal stocks in the Western Mediterranean Sea**

{SWD(2024) 195 final}

## CONCLUSIONS

Since the multiannual management plan for the fisheries exploiting demersal stocks in the Western Mediterranean Sea (the ‘plan’) was adopted<sup>1</sup>, a fully-fledged EU framework has developed that involves control mechanisms at vessel and Member State level. During the five-year transition period<sup>2</sup>, fishing pressure has fallen and there have been positive effects in most fisheries. In 2020, only 5% of demersal stocks (1 in 20) had a fishing mortality close to the maximum sustainable yield (Fmsy). Today, 28% of analytically assessed stocks have a fishing mortality at Fmsy and 57% are recovering rapidly towards Fmsy. The improvements were achieved by actively involving stakeholders in the regionalisation process to increase stock biomass, which is the fishers’ economic base. However, certain stocks such as European hake and one stock of Norway lobster remain severely overfished, in an overall context of many years of overfishing and environmental change.

The **stakeholders and Member States** consulted praised the **increased communication** between stakeholders and with scientists since the plan was adopted. However, they voiced differing opinions about the plan. Member States embraced how the plan has given rise to a new culture for Mediterranean fisheries. They supported the coordinated management framework, leading to better harmonisation and a level playing field. However, the Mediterranean Advisory Council (MedAC) finds it premature to evaluate the plan results. The fishing industry asks to freeze the trawling effort regime for socio-economic reasons and to postpone the deadline for achieving the Fmsy objective referred to in Article 4(1) of the plan to 2030. By contrast, non-governmental organisations (NGOs) called for further implementation of the plan and action to improve gear selectivity, control and monitoring.

The **Commission** considers that the plan has proven to be a **beneficial framework to implement the common fisheries policy**<sup>3</sup> and to achieve Fmsy by 1 January 2025 at the latest. Over a five-year transition period, the plan has achieved better fisheries control, for example by keeping annual authorised vessel lists and by adopting conservation measures such as efficient closure areas. The plan also provides for a range of flexibility measures to help the sector transition to more sustainable practices, such as effort transfers and alternative closure areas. With continued implementation after 2025, the plan can build on the stakeholders’ successful adaptation to the EU framework and its rules creating a level playing field and transparency.

The plan made it easier to agree on fishing opportunities, providing a clear objective by 1 January 2025, both for the Commission to follow in its proposal and for the Council to follow in its decision making. The plan achieved a 40% reduction in trawling effort between 2020 and 2024. In 2022, it developed and expanded the decision on fishing opportunities to include complementary measures in the form of a ceiling on allocations to longliners to limit fishing

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<sup>1</sup> Regulation (EU) 2019/1022 of the European Parliament and of the Council of 20 June 2019 establishing a multiannual plan for the fisheries exploiting demersal stocks in the western Mediterranean Sea and amending Regulation (EU) No 508/2014 (OJ L 172, 26.6.2019, p. 1).

<sup>2</sup> As per article 4(1) of the plan

<sup>3</sup> Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy (OJ L 354, 28.12.2013, p. 22).

mortality on hake spawners and catch limits for two shrimp species to speed up their recovery. In addition, a unique mechanism has been brought in since 2022 to give additional flexibility, rewarding trawlers with additional fishing days if they adopt efficient closure areas to protect juvenile fish or use more selective gear. The plan also includes measures to reduce fishing during the spawning season with temporary closure areas.

With this combination of measures, the plan has made it possible to keep all demersal fisheries open, albeit at reduced levels, while helping stocks recover. Most demersal stocks are now on the path to recovery. Some stocks, like **red mullet in the Gulf of Lion**, have fully rebuilt and are now at sustainable levels in terms of both fishing mortality and biomass, after the Council adopted lower fishing opportunities and Member States adopted large closure areas.

The plan's positive results are that it has been possible to **transition to healthy fish stocks by taking complementary action and incentives to speed up stock recovery and the sector's transition to sustainability**. As the plan's transition period ends and the sector recovers from the significant challenges of the COVID-19 and fuel crises, the management plan is bearing fruit. Most stocks are fished close to Fmsy or are rapidly recovering. In Member States that improved the balance between capacity and fishing opportunities, fleet segments have become more profitable.

However, mixed trends in demersal stocks and the profitability of these fisheries also results from delays and limited ownership by Member States such as increase in catches of juvenile fish, structural overcapacity, increase of twin trawler use<sup>4</sup> as well as shortcomings in control and enforcement in some Member States. **The Commission is of the view that the imbalance between fishing opportunities and fleet capacity has undermined the positive impacts of the plan and delayed stocks' recovery at a severe cost to fishers' livelihood.** Nevertheless, the Commission acknowledges the ongoing effort of the fishing sector and stakeholders to reduce pressure on fish stocks based on scientific advice. The Commission has frequently encouraged Member States to collect quality data and to ensure scientists from the three Member States concerned (Spain, France, and Italy) are involved in providing scientific input to the plan.

The plan contains specific support from EU funds<sup>5</sup> that had not been used in full to support the sector's transition to more sustainable practices. The **socio-economic development** of the fleets under the plan has been limited since 2020 due to the COVID-19 pandemic and increasing fuel prices. But the value of landings of some species increased, and stakeholders have reported higher profitability since 2022. However, the environmental situation, including consequences from climate change, depleted hake stocks and the general economic situation are expected to have had a higher negative impact on the fleet's profitability than the measures in the plan. In

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<sup>4</sup> Whose catch per unit effort is higher than otter trawls

<sup>5</sup> Regulation (EU) 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Maritime and Fisheries Fund and repealing Council Regulations (EC) No 2328/2003, (EC) No 861/2006, (EC) No 1198/2006 and (EC) No 791/2007 and Regulation (EU) No 1255/2011 of the European Parliament and of the Council (OJ L 149, 20.5.2014, p. 1) and Regulation (EU) 2021/1139 of the European Parliament and of the Council of 7 July 2021 establishing the European Maritime, Fisheries and Aquaculture Fund and amending Regulation (EU) 2017/1004 (OJ L 247, 13.7.2021, p. 1).

this context, the plan's objective to **secure sustainable fishing, higher fish density and bigger fish** is the best way to improve fleet performance and thus strengthen the economics of the sector.

Changes to the Western Mediterranean environment and its demersal stocks are the result of long-term trends that will take time to fully reverse<sup>6</sup>. For many years, Mediterranean fisheries have faced an imbalance between fishing opportunities and fishing capacity. This has resulted in certain stocks, such as hake and blue and red shrimp, being highly overexploited and at low biomass. Although the plan has reduced fishing pressure and provided greater predictability to stakeholders since its beginning, the prevalence of other environmental factors such as warming waters could further increase in the coming years. For hake stocks, scientists are looking at the impact on species' reproduction of ocean heatwaves, changes to nutrient supply and upper ocean stratification with higher surface temperatures and salinity levels.

The Commission considers that the difficult, yet sustainable, decisions taken by the Council for the Western Mediterranean stocks were made possible because the plan was in place. The plan has ensured that today all fisheries are either managed in line with Fmsy, are rapidly recovering to reach Fmsy or that measures from 2025 onwards can be put in place to bring them rapidly to Fmsy. The Commission therefore concludes that the plan provides a **stable long-term instrument to implement the common fisheries policy in the Western Mediterranean Sea**. It provides greater certainty, transparency and predictability and it creates the basis for the long-term profitability of the fishing industry and ancillary sectors.

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<sup>6</sup> See FAO. 2023. *The State of Mediterranean and Black Sea Fisheries 2023 – Special edition*. General Fisheries Commission for the Mediterranean. Rome and “The 2023 Mediterranean Quality Status Report and a Renewed Ecosystem Approach Policy in the Mediterranean”

## 1. INTRODUCTION

In 2019, the European Parliament and the Council adopted the multiannual management plan for fisheries exploiting demersal stocks in the Western Mediterranean Sea<sup>7</sup>. Article 17(2) of the plan requires the Commission to report every three years to the co-legislators on the results and impact of the plan on the stocks and the fisheries exploiting them. This report gives a first overview of the progress achieved under the plan.

The plan's objectives are to: contribute to achieving the objectives of the common fisheries policy (CFP)<sup>8</sup>; restore and maintain fish stocks above sustainable levels; contribute to eliminating discards and implementing the landing obligation; an ecosystem-based approach and minimise fishing impact on vulnerable habitats and protected species.

The plan covers the targeted species of hake, red mullet, Norway lobster, deep-water rose shrimp, blue and red shrimp, giant red shrimp, and by-catch species of demersal mixed fisheries. Target species account for about 20% of all catches in the Western Mediterranean Sea.<sup>9</sup>

The plan has clear rules for setting fishing opportunities to achieve and maintain fishing mortality at maximum sustainable yield (Fmsy) for stocks with a scientific assessment. The plan was first applied for the 2020 fishing season, starting a five-year transition period linked to the specific socio-economic features of the fleets. During this transition period, target fishing mortality based on best available scientific advice provided a path to achieve Fmsy by 1 January 2025 at the latest. As of 2025, the fishing opportunities must be set by the Council on the basis of a science-based range of fishing mortality values, in line with Fmsy. The plan also contains specific rules to empower the Commission to adopt delegated acts, notably on the landing obligation.

Since 2020, the Council fishing opportunities regulations have set annual effort limits for trawlers. Since 2022, the regulations also include an effort ceiling for longliners, maximum catch limits for two shrimp species and a mechanism rewarding sustainable practices.

## 2. DEVELOPMENTS IN RELEVANT AREAS

This first report is based on a targeted stakeholder consultation<sup>10</sup>, on the latest Scientific, Technical and Economic Committee for Fisheries (STECF) reports for the relevant stocks in the Western Mediterranean Sea<sup>11</sup>, STECF analyses on the landing obligation<sup>12</sup>, and information held

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<sup>7</sup> Regulation (EU) 2019/1022 of the European Parliament and of the Council of 20 June 2019 establishing a multiannual plan for the fisheries exploiting demersal stocks in the western Mediterranean Sea and amending Regulation (EU) No 508/2014 (OJ L 172, 26.6.2019, p. 1).

<sup>8</sup> Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy (OJ L 354, 28.12.2013, p. 22).

<sup>9</sup> Stock assessments in the Western Mediterranean Sea (STECF 23-09).

<sup>10</sup> The stakeholders consulted were the Western Mediterranean Sea Member States group (PescaMed), the Mediterranean Advisory Council and its members. The questionnaire and replies can be found in Commission staff working document SWD(2024)195 accompanying this report.

<sup>11</sup> Available under STECF EWG 23-09 and STECF EWG 23-11, [STECF - European Commission \(europa.eu\)](https://ec.europa.eu/fisheries/stecf/).

<sup>12</sup> Evaluation of Joint Recommendations on the landing obligation and on Technical Measures Regulation (STECF-23-04 & 23-06).

by the Commission. The report focuses on developments during four full years of implementation in the following areas: fishing levels and complementary measures; socio-economic aspects; landing obligation and minimising unwanted catches; minimising fishing impact on vulnerable habitats and protected species and lastly; regional cooperation.

## **2.1. FISHING LEVELS AND COMPLEMENTARY MEASURES FOR MIXED FISHERIES**

### **- STATE OF THE STOCKS**

For the 20 years before the plan entered into force, fish biomass decreased while both fishing pressure and fleet capacity remained at high levels<sup>13</sup>. Since 2019, STECF has developed assessments for 20 demersal stocks in the Western Mediterranean Sea, showing a decrease in fishing mortality and significant progress for over half of the stocks. This improvement was made possible thanks to the efforts made by Member States and stakeholders to improve data collection and manage the fish stocks well.

The latest STECF assessment shows that four stocks out of 20 are being fished close or at Fmsy while eight data-rich stocks show signs of a rapid recovery and two stocks (hake and Norway lobster in Spanish waters) remain severely overfished<sup>14</sup>. In addition, it issued precautionary advice for only five stocks and one is ICES-category 5 advice for which data are only available on landings or catch data have only a short time-series<sup>15</sup>. Of the 10 overfished stocks, seven are late in the transition to Fmsy by 2025 and three are transitioning rapidly to Fmsy. For the six stocks not assessed analytically, there is no reference point to evaluate stock status against Fmsy.

The plan has seen positive effects<sup>16</sup> for several fisheries resulting in healthier stocks. However, in terms of stock biomass, STECF estimates it has not yet seen an equivalent increase as fishing mortality decreases. STECF considers that biomass levels of hake, a long-lived species, will remain below the precautionary level in the medium-term even with no fishing at all. STECF assesses that catches of hake in Spanish and French waters have increased, thus remaining at low level of biomass, likely since the plan adoption below a limit reference point below which reproductive capacity can fall ( $B_{lim}$ ). STECF considers that the increased use of twin-trawlers and the increased level of catches of juvenile hake are hampering the chances of stock recovery. Hake biomass being very low, it could be a choke species for the effort regime. For the two hake stocks, both below  $B_{lim}$ , the 2023 STECF analyses advised very high reductions in fishing mortality to rebuild hake stocks to safe levels.

### **- RULES GOVERNING THE SETTING OF FISHING OPPORTUNITIES**

Since 2019, the plan has been in its transition period. Fishing opportunities are set on the basis of Article 7 of the plan for a maximum allowable fishing effort for trawlers, supplemented with technical or conservation measures to achieve Fmsy by 1 January 2025, at the latest. During the

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<sup>13</sup> STECF 75th Plenary report (STECF-PLN-24-01).

<sup>14</sup> Stock assessments in the Western Mediterranean Sea (STECF-23-09).

<sup>15</sup> ICES, 2022, Advice on fishing opportunities, Report of the ICES Advisory Committee, 2022. ICES Advice 2022, Section 1.1.1. <https://doi.org/10.17895/ices.advice.19928060>.

<sup>16</sup> Detailed STECF analyses on the state of the stocks are provided in Commission staff working document SWD(2024)195 accompanying this report.

transition period, the setting of fishing opportunities for stocks with an analytical assessment does not use a range of values around Fmsy. The Commission's objective was to propose fishing opportunities based on best available scientific advice ensuring that fishing mortality values reach Fmsy by 1 January 2025, at the latest. As the plan implementation progressed, the Commission has encouraged data collection and data sharing between the MedAC and STECF to further develop socio-economic models and management scenarios.

As an analytical assessment is only possible for data-rich stocks, the precautionary basis had to be followed for data-poor stocks. Thanks to progress in data collection and scientific modelling, STECF was able to calculate conservation reference points for some stocks and further develop socio-economic assessments, thus better charting the transition path to achieve Fmsy. However, in 2022, sufficient data was not made available by all Member States due to organisational delays of at-sea surveys, resulting in an increase to six data-poor stocks.

The stakeholders consulted praised the improved communication since 2019 but expressed differing opinions on fishing opportunities and the plan's ambitions. National administrations appreciated the facilitated process to set fishing opportunities, underlining the importance of analytical stock assessments and non-fishery-related factors. MedAC highlighted the efforts made by the fleets as the plan started during the COVID-19 and fuel crises, which exacerbated the socio-economic difficulties for fleets. MedAC appreciated the chance to observe certain STECF meetings and to provide information and discuss stock assessments and management scenarios with the scientists, but repeatedly asked to freeze the measures and postpone the deadline for achieving the Fmsy objective referred to in Article 4(1) of the plan to 2030 out of socio-economic reasons. By contrast, NGOs asked for fishing opportunities to be linked to improvements in gear selectivity and better control (e.g. by having VMS on all vessels).

#### **- FISHING EFFORT REGIMES, CATCH LIMITS & COMPENSATION MECHANISM**

The plan was rolled out over four rounds of fishing opportunities (2020-2023). The fishing effort regime for trawlers was at the core of the plan's success. Following scientific advice and the legal obligation in Article 7(3), the number of trawling days has been gradually reduced by 40% of the 2015-2017 baseline number. This led to a progressive adaptation of the fleets and a familiarisation of the sector with EU-standard monitoring.

In 2022, the Commission proposed complementary measures as a package approach, based on the best available scientific advice. The approach combined measures for trawlers, for longliners impacting hake spawner mortality and catch limits to kick off the recovery of blue and red shrimp as well as giant red shrimp stocks. In 2022, the Fishing Opportunities Regulation<sup>17</sup> set a compensation mechanism rewarding with additional trawling days the vessels that meet criteria (efficient closure areas during spawning periods or adopting more selective gear to reduce catches of juveniles)<sup>18</sup>. STECF evaluated the criteria and how the compensation mechanism has

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<sup>17</sup> Council Regulation (EU) 2022/110 of 27 January 2022 fixing for 2022 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Mediterranean and Black Seas (OJ L 21, 31/01/2022, p. 165).

<sup>18</sup> Tables detailing the use of the compensation mechanism since 2022 can be found in Commission staff working document SWD(2024)195 accompanying this report.

been implemented<sup>19</sup>. In 2022, the compensation mechanism was implemented for most of the fleet in one Member State and for vessels in some harbours in another Member State. In 2023, however, although all three Member States requested additional days under the compensation mechanism, some Member States did not use the additional days.

Since 2022, the package approach integrated in the fishing opportunities has achieved an efficient reduction in fishing mortality while minimising socio-economic impacts. The Commission considers the plan made it easier to agree on and integrate the three CFP pillars (environmental, social and economic) in decisions on fishing opportunities. The plan provides a clear management direction to guide both the Commission's proposals and the Council's decision-making leading to annual regulations governing fishing opportunities. Since 2019, decisions have been consistent and in line with the CFP objectives. They are producing results, as up to 55% of the stocks are expected to recover by 2025 and hake stocks are on the path to recovery.

- **MONITORING DEVELOPMENT & OBLIGATION OF MEMBER STATES**

The first years of the plan have seen the adoption in Spain, Italy and France of a harmonised monitoring system with monthly notifications and a range of flexible management measures (Articles 9 and 10). The Commission services have developed a technical network via monthly coordination meetings between the three national administrations. This built a common understanding of the measures contained in the plan, the scientific results and helped foster a new management culture. **Overall, the three Member States have reported thoroughly on most aspects of implementing the plan.** Over the first few years, they achieved good compliance and enforcement of the main measures, such as annual updates of authorised lists of vessels, monthly notifications and allocations of fishing days and closure areas. The plan also covers the fishing day duration for trawlers and fisheries closures. There were three fisheries closures by the Commission in 2022, three by a Member State in 2021 and two in 2023 by the same Member State. Finally, thorough monitoring of trawling activities ensured that the allocated fishing opportunities were not exceeded since the plan entered into force.

However, the Commission identified several shortcomings at national level. It discussed with Member State authorities how to improve national monitoring and enforcement processes, such as revoking the national derogation allowing freezer trawlers to exceed the trawling time limits set under the plan<sup>20</sup>. On fleet capacity (Articles 9(7) and 9(9) of the plan), the Commission has regularly asked Member States to address the imbalance between their fleet capacity and fishing opportunities<sup>21</sup>. The Commission clearly communicated the successful examples of increased

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<sup>19</sup> STECF 72nd Plenary report (STECF-PLEN-23-01).

<sup>20</sup> More details on the monitoring and enforcement processes under the plan are provided in Commission staff working document SWD(2024)195 accompanying this report.

<sup>21</sup> Communication from the Commission to the European Parliament and the Council, *Towards more sustainable fishing in the EU: state of play and orientations for 2023*, SWD/2022/157 final.

Communication from the Commission to the European Parliament and the Council, *Sustainable fishing in the EU: state of play and orientations for 2024*, SWD/2023/172 final.



annual activity and profitability by vessel in the Member States with fleets in balance and targeting sustainably managed stocks.

The stakeholders welcomed the increased coordination between administrations and the regular meetings with the MedAC working group on the plan. This fostered trust and smooth exchanges between the Commission and all stakeholders. The Commission considers that this enabled the development of the compensation mechanism and other tailored measures to achieve the plan's objectives, taking account of the specific features of the local fisheries. Regarding fleet capacity, MedAC expressed concerns on reducing the number of trawlers given the importance of this sector, which supplies over 80% of Mediterranean fish auctions.

- **FLEXIBLE ARRANGEMENTS TO SUPPORT THE SECTOR'S TRANSITION**

Numerous flexible arrangements have been made to facilitate the sector's transition to more sustainable practices and secure active implementation of management measures. They include, first, transfers of trawling fishing days between fleet segments to avoid both overshooting and underusing fishing effort by trawlers, based on science-based conversion factors. This first flexible measure was used every year since 2020 by one Member State and occasionally by a second Member State. Second, all three Member States used the derogation of trawling day duration up to 18 hours for some fleet segments and flexibility on the fishing trip duration in some harbours for trawlers targeting shrimps in longer and deeper at-sea campaigns. Third, two Member States used a derogation for alternative closure areas for specific geographic constraints to protect juvenile hake in coastal areas.

In addition, the adoption of a compensation mechanism with up to 12 criteria in 2024 to incentivise more sustainable practices was used by one Member State and partly used by another in 2022 and requested by all three Member States in 2023 and 2024. Lastly, in 2023 and 2024, all three Member States requested the option of inter-annual flexibility for stocks under catch limits under Article 4(2) of EU Regulation 847/96 and Article 15(9) of the CFP Regulation and the option to swap catch limits between Member States that are not used by any Member State, despite one Member State underusing its allocations.

- **CLOSURE AREAS**

Article 11 of the plan requires Member States to adopt closure areas to secure the protection of juvenile fish and spawners. Focusing in 2020 on the protection of hake juveniles, the plan required additional closures by 17 July 2021 to protect juveniles and spawners of all demersal stocks, based on the best available scientific advice. As an alternative to the three-month closure for trawlers within six nautical miles of the coasts, two Member States adapted their closure areas as they are in areas deeper than 100 m or where the continental shelf size is limited.

Overall, STECF<sup>22</sup> assessed that the adopted closure areas in two Member States did not achieve the objectives set in the plan: the closure areas adopted by several Member States were not large enough to achieve the target of 20% decrease in juveniles and spawners captures.

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<sup>22</sup> Available under STECF reports EWG 22-01 and EWG 23-01, [STECF - European Commission \(europa.eu\)](https://ec.europa.eu/fisheries/steecf/).

## - RECREATIONAL FISHERIES & MANAGEMENT OF BY-CATCH STOCKS

To factor in all sources of fishing mortality on the species regulated under the plan, the Council can adopt science-based limits for recreational fishers and Member States must take the necessary and proportionate measures for improved data collection (Article 8 of the plan). STECF<sup>23</sup> evaluated the contribution of recreational fisheries to the fishing mortality of the demersal stocks covered by the plan. Based on the information available, STECF concluded that recreational fisheries are likely to have no significant impact. Due to limited data available for STECF to conduct an assessment, Article 12 on the management of by-catch stocks was not implemented.

### **2.2. SUPPORT FROM EU FUNDS & SOCIO-ECONOMIC DEVELOPMENTS**

The plan contains specific articles (Articles 19 and 20) enabling EU funds to be used for temporary and permanent cessations to address the imbalance in fleet capacity. The capacity of fleet segments, especially in one Member State, are still not in balance, as assessed against biological and economic indicators (<sup>24</sup>). The two other Member States have used both temporary and permanent cessations for their trawlers to reduce their capacity and balance fleet segments with available fishing opportunities. Although it has not tackled the imbalance of its Mediterranean fleet segments with their fishing opportunities, the third Member State has used temporary cessations. Sector representatives also expressed an interest in permanent cessations.

In the context of the fuel crisis and the energy transition, **the Commission regrets that the Member States did not draw fully on the EMFF funding available under national operational programmes. In particular, one Member State did not use over 15% (EUR 210 million) of its initial allocation.** As both EMFF and EMFAF support the plan objectives, the Commission considers that Member States should have used more EMFF funding under national operational programmes and more EMFAF funding under national programmes to support the development of more selective fishing, transition to less fuel-intensive practices, improve fisheries control and reduce the socio-economic impact on fishers of the conservation measures adopted. These measures would be in line with the objectives of the Ocean package the Commission adopted in February 2023.

**Positive economic results have been achieved by fleet segments that fish stocks sustainably.** The Commission has repeatedly encouraged Member States to adjust their fleet capacity to the fishing opportunities. In the challenging context of the climate, biodiversity and energy crises, the plan provides tools for more sustainable fishing that can result in higher fish density and bigger fish, more efficient fishing fleet performance and higher profits.

In 2021<sup>25</sup>, the Mediterranean fleet accounted for 57% of all EU vessels and 47% of EU employment in the fisheries sector. It contributed 9% of EU landings in weight and 24% in

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<sup>23</sup> Available under STECF reports EWG 21-01 and EWG 22-01, [STECF - European Commission \(europa.eu\)](https://ec.europa.eu/fisheries/stecf/).

<sup>24</sup> Available under STECF report EWG 23-13 on Balance & Capacity.

<sup>25</sup> Relevant economic data is only available until 2021. See STECF 2023, *Annual Economic Report on the EU Fishing Fleet* (STECF 23-07).

value. Around 31% of the Mediterranean Sea's total landing value comes from the Western Mediterranean subregion (EUR 1.35 billion out of a total of EUR 4.76 billion when the plan was adopted) and around 19% of the Mediterranean fishing fleet operates in the Western Mediterranean Sea<sup>26</sup>. For Italy, about 40% of the landings originated from the Western Mediterranean Sea. For Spain and France, the percentage of landings in weight originating from Mediterranean waters was less than 10%.

In all three Member States, the social impact of fisheries is significant in Western Mediterranean harbours, with small-scale coastal fisheries accounting for 79% of the days at sea and 55% of employment. However, the large-scale fleet has been the main operator in the region and was responsible for catching 84% of landed weight and 72% of the landing value. Landed weight has been decreasing for years, while landed value has increased. In 2021, Spain caught about 19% of landings in the Mediterranean, while Italy caught above 40% and France less than 5%.

In terms of socio-economic performance, even though implementation of the plan started at the time of the COVID-19 pandemic and higher fuel prices, **socio-economic indicators show that the situation improved**: improvements in the fleet segments closer to balance and associated with stocks fished closer to Fmsy. In 2021, overall, the **Western Mediterranean fleet continued to generate profits** even though the consequences of the pandemic and higher fuel prices slowed down the improvement in economic indicators since 2015.

In 2021, revenue generated (income from landings and other incomes) was estimated at over EUR 1.5 billion and EUR 900 million of gross value added (GVA) for the whole Mediterranean Sea, with about 44% stemming from Western Mediterranean harbours: Italy (EUR 721 million of revenue, of which about 40% for Western Mediterranean harbours), Spain (EUR 288 million of revenue) and France (EUR 82 million of revenue). This corresponds to a **4% increase in revenue from the previous year while the net profit margin rose by 16% in 2020-2021**. Spain and Italy saw their revenues increase (Italy by 9% and Spain by 3%) while revenue for France remained close to 2020 levels.

In terms of energy dependency, energy consumption in 2021 (442 million litres) fell by 5% compared to 2020, due to a 16% decrease in the Spanish fleet and a 15% decrease in the French fleet. In 2021, Italy had the highest energy consumption in the region (56%), followed by Spain (17%) while France consumed less than 5% of all energy in the Mediterranean fleet. Effort in days at sea across the region also followed a general downward trend, stabilising between 2013 and 2018 and then falling under the plan between 2019 and 2021.

Employment, measured in terms of full-time equivalents (FTE) varies between the three Member States. Latest figures show Italy with 39% of total employment in the EU Mediterranean fisheries sector, 40% of which in the Western Mediterranean Sea, while Spain has 14% of total employment in the EU Mediterranean fisheries sector, and France has 4%. Employment has fallen over the last 10 years, with the highest relative decrease in the Western Mediterranean Sea seen in France (8%). In addition, the prolonged repercussions of the pandemic continued to

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<sup>26</sup> *The state of Mediterranean and Black Sea fisheries*, General Fisheries Commission for the Mediterranean.

affect economic performance in 2021 due to restrictions and social distancing for part of the year. Average wages per FTE in the large-scale fleet fell by 5% between 2020 and 2021 (estimated at around EUR 18 889 per year) while average wages in the small-scale fleet fell by 14% to EUR 9 059.

Overall, the trends for large-scale and small-scale fleets differ. The **small-scale fleet, despite the decrease in average wages, continued to improve on all economic performance indicators, due to an increase in other income sources**, mainly in Italy, linked to related activities such as fishing tourism and higher landings prices. The small-scale fleet sold products at higher prices than the large-scale fleet thanks to **shorter supply chains and direct sales to end consumers and to restaurants**. By contrast, the large-scale fleet recorded a fall in GVA and gross profit, mainly due to a 4% reduction in the value of landings and a 20% increase in energy costs.

The stakeholders consulted assert a negative correlation between implementation of the plan and socio-economic trends, notably due to the slow recovery of hake and to fuel prices. Some representatives of the sector claim that the plan's major failure is its lack of socio-economic considerations and rigidity in setting fishing opportunities. The sector asks for a more gradual approach to achieve Fmsy in order to adapt to the other challenges faced by the sector (e.g. the pandemic and fuel prices). By contrast, NGOs assert that implementing the plan's measures in a more gradual way would neither benefit the marine resources nor the fishers and would further exacerbate the socio-economic situation. Member States stress the need to adapt the CFP to the specific needs in the Mediterranean and to factor in other human activities and external factors that have an impact on marine ecosystems.

The Commission is of the view that the plan has been beneficial and provided added support to the sector during the pandemic and the fuel crisis. The Commission regrets that Member States did not fully use the EU funds available to meet the plan's objectives and to stimulate the sector's transition to a more sustainable and less fuel-dependent economy, which constitute the core objectives of the Ocean package the Commission adopted in February 2023. Mixed trends in fish stocks and fisheries are partly due to causes that pre-dated adoption of the plan. Overcapacity and persistent unsustainable fishing have created real socio-economic harm at severe costs to coastal communities, including fishers that depend on fisheries for their livelihoods. Only sustainable fishing practices and appropriate environmental protection can secure the long-term health of fishing communities.

### **2.3. EXERCISE OF THE DELEGATION**

A further aspect of the process to strengthen regionalisation is the plan's specific provisions (Articles 14, 15, 16 and 18) enabling Member States to submit joint recommendations<sup>27</sup> on issues

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<sup>27</sup> In the context of the regionalisation process, Member States have set up high-level regional groups composed of the Member States' fisheries directors with Commission officials associated, one of them specific to the Western Mediterranean Sea ('PescaMed'). PescaMed's primary goal is to improve coordination and cooperation among its Member States on fisheries management by adopting joint recommendations, compiling scientific support studies and fostering develop cooperation with other key stakeholders in the region.

for which the Commission is empowered to adopt delegated acts. For example, this includes delegated acts on the necessary conservation measures, technical measures and on discard plans.

- **SPECIFIC CONSERVATION MEASURES**

Similar to other EU multiannual management plans, Article 13 aiming at protecting juveniles of marine organisms was not used during the reporting period since its substance was superseded by the more specific Technical Measures Regulation (EU) 2019/1241<sup>28</sup>. However, despite statements by Member States in the December 2020 Agrifish Council, frequent encouragement by the Commission and EU funds available for support, **Member States did not submit joint recommendations to the Commission to implement additional closure areas, increase gear selectivity or set higher minimum conservation reference sizes (MCRS).**

- **LANDING OBLIGATION & DISCARDS**

A key CFP objective is to implement the landing obligation and gradually eliminate discards. Under the plan, the landing obligation applies to species managed by catch limits, such as giant red shrimp and to species with a MCRS, such as hake. Since 2019, the Commission increased coordination with scientists and stakeholders to improve data collection and to support the development by STECF of a standardised approach to exemption requests<sup>29</sup>. The empowerment under Article 14 of the plan has been used four times and the Commission adopted four delegated acts<sup>30</sup> on high survivability and *de minimis* exemptions to the landing obligation.

At EU level, STECF<sup>31</sup> estimates that discard practices are unlikely to have changed much. There is still insufficient quantitative data since the entry into force of the landing obligation in the Mediterranean Sea on 1 January 2019. For the Western Mediterranean Sea, STECF indicated that approaches were proactively developed to improve implementation of the landing obligation via the development of research projects involving local stakeholders. However, **STECF also stated there were indications that the fishing industry's operating practices at sea had not changed, which implied that discards are unlikely to have fallen.** For hake, STECF's latest stock assessment estimated that discards at sea may have increased, but could be considered negligible for red mullet.

The stakeholders consulted share similar views on the ongoing practice of discarding. All respondents agreed in their assessment that the actual levels of discards have remained stable since the landing obligation entered into force in the region in 2019. Nevertheless, the fishing industry has made efforts to understand and implement the landing obligation and to engage with

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<sup>28</sup> Regulation (EU) 2019/1241 of the European Parliament and of the Council of 20 June 2019 on the conservation of fisheries resources and the protection of marine ecosystems through technical measures, amending Council Regulations (EC) No 1967/2006, (EC) No 1224/2009 and Regulations (EU) No 1380/2013, (EU) 2016/1139, (EU) 2018/973, (EU) 2019/472 and (EU) 2019/1022 of the European Parliament and of the Council, and repealing Council Regulations (EC) No 894/97, (EC) No 850/98, (EC) No 2549/2000, (EC) No 254/2002, (EC) No 812/2004 and (EC) No 2187/2005 (OJ L 198, 25/07/2019, p. 105).

<sup>29</sup> STECF 66th Plenary report (STECF-PLN-21-01).

<sup>30</sup> Commission Delegated Regulations (EU) 2020/4, 2021/2066, 2022/2288, 2023/2462.

<sup>31</sup> Evaluation of Joint Recommendations on the landing obligation and on Technical Measures Regulation (STECF-23-04 & 23-06).

research institutes on the topic. All stakeholders confirm that the landing obligation has stimulated scientific research into more selective gears and survivability studies. However, for mixed demersal fisheries, they believe that there will be a limit to the degree of selectivity. The Commission considers that the continuing problem of discards is caused primarily by a lack of control and enforcement by Member State authorities and must be tackled under the EU's fisheries control system.

## **2.4. ECOSYSTEM-BASED APPROACH**

The ecosystem-based approach must be implemented in fisheries management to reduce the negative impacts of fishing on the marine ecosystem (Article 2(3) of the CFP Regulation). The plan also states in Article 3(3) that it must be coherent, in particular to achieve good environmental status under the marine strategy framework directive (MSFD).<sup>32</sup> For decades, marine ecosystems in the Western Mediterranean Sea have faced multiple sources of stress, from overfishing to reduced nutrient availability<sup>33</sup> and changes in the food web as well as the consequences of climate change and pollution<sup>34</sup>. However, a recent study<sup>35</sup> has assessed the region to be in 'good' status and shown that protected areas achieved 'good' or 'high' status with the no-trawl area assessed as effective at 'high' environmental status. The study also concluded that marine protected areas and trawling bans can locally contribute to the attainment of good environmental status and to the fulfilment of the MSFD objectives.

STECF<sup>36</sup> estimated that in 2023, red mullet in the Gulf of Lion (geographical subarea, GSA 7) and red mullet in the Ligurian and Northern Tyrrhenian Seas (GSA 9) were the only target stocks under the plan that met two of the three assessed criteria of descriptor 3 in the MSFD relating to fishing opportunities. Deep-water rose shrimp in GSA 1 and GSAs 5-6-7 and Norway lobster in GSA 9 only met the fishing mortality criterion.

The stakeholders consulted underlined the importance of an ecosystem-based management of fisheries and the contribution of fisheries to achieving good environmental status, noting that non-fishery-related factors play an important role too. Member States consider that the situation of the fish stocks would probably have been worse without the plan. By contrast, MedAC is of

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<sup>32</sup> Directive 2008/56/EC of the European Parliament and of the Council of 17 June 2008 establishing a framework for the community action in the field of marine environmental policy (OJ L164, 25.6.2008, p. 19).

<sup>33</sup> Among others, Feuilletoy G, Fromentin JM, Stemmann L, Demarcq H, Estournel C, Saraux C, Concomitant changes in the environment and small pelagic fish community of the Gulf of Lions, *Progress in Oceanography*, Volume 186, 2020.

<sup>34</sup> See FAO. 2023. The State of Mediterranean and Black Sea Fisheries 2023 – Special edition. General Fisheries Commission for the Mediterranean. Rome, and The 2023 Mediterranean Quality Status Report and a Renewed Ecosystem Approach Policy in the Mediterranean

<sup>35</sup> Fraschetti, S., Fabbri, E., Tamburello, L., Uyarra, M. C., Micheli, F., Sala, E., Pipitone, C., Badalamenti, F., Bevilacqua, S., Boada, J., Cebrian, E., Ceccherelli, G., Chiantore, M., D'Anna, G., Di Franco, A., Farina, S., Giakoumi, S., Gissi, E., Guala, I., Guidetti, P., Katsanevakis, S., Manea, E., Montefalcone, M., Sini, M., Asnaghi, V., Calò, A., Di Lorenzo, M., Garrabou, J., Musco, L., Oprandi, A., Rilov, G., and Borja, A. (2022) An integrated assessment of the Good Environmental Status of Mediterranean Marine Protected Areas. *Journal of Environmental Management* 305: 114370.

<sup>36</sup> Reports STECF EWG 23-09 and STECF PLEN 24-01.

the view that the plan has been counterproductive since it lacks provisions detailing specifically how to implement an ecosystem-based management of fisheries.

## **2.5. REGIONAL COOPERATION**

MedAC was set up in September 2008 and consists of organisations representing fisheries and other interest groups affected by the CFP (e.g. environmental non-governmental organisations, sports and recreational fisheries organisations)<sup>37</sup>. The main aim of MedAC is to provide advice on fisheries management in the Mediterranean Sea and on socio-economic and conservation aspects. MedAC must be consulted on certain matters, notably on Member States' joint recommendations, and their advice is to be taken into account.

Since 2019, MedAC has been extremely active in implementing the plan. A specific working group was created under MedAC to focus on the plan. It issued five pieces of advice and participates as an observer in most STECF meetings on the plan.

MedAC emphasised that since the plan was adopted, the level of communication between regional stakeholders has improved. Member States consider that regional cooperation has developed positively, noting that the preparation of joint recommendations could be improved. The idea of joint recommendations as a regionally tailor-made instrument is well understood, but their preparation often requires time-consuming prior research. The adoption of delegated acts also takes time due to the multiple scientific and administrative steps in the process.

The Commission considers that **Member States could have made greater use of the regionalisation process by submitting joint recommendations for the adoption of conservation measures** referred to in Articles 11 to 13 of the plan and by submitting joint recommendations for exemptions to the landing obligation. They should also have consulted with the Advisory Council and other stakeholders on the longstanding issues influencing the Western Mediterranean Sea. Despite frequent reminders from the Commission, key issues have not been tackled collectively, such as more sustainable management of hake stocks, making significant improvements to gear selectivity, setting higher MCRS or taking broader measures to set up an efficient network of closure areas to protect nurseries and spawning grounds.

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<sup>37</sup> [Med-ac - Consiglio consultivo regionale per il mediterraneo](https://en.med-ac.eu/) <https://en.med-ac.eu/>.