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A A T O T
2017 – Belgium

**‘Sustainable balance between fishing
capacity and fishing opportunities’**

31.5.2018

**Article 22 of Regulation (EU) No 1380/2013 of the European
Parliament and of the Council of 11 December 2013 on the
Common Fisheries Policy**

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A) Conclusion

In 2017 the capacity of the Belgian fleet fell by 0 kW and 143 GT, resulting in a total decrease of 34 % in kW terms and 44 % in GT terms compared with the 2003 reference level. Fishing capacity is thus well below the reference levels (Table 4.1). There were 71 fishing vessels at the end of 2017 – one fewer than in 2016.

In 2017, the current reporting year, a single method was used to calculate indicators in accordance with the Commission's recommendations and guidelines (following the comprehensive changes made in 2016).

The 2008-2018 summary contained 14 possible fleet segments (Table 7.1). On the basis of the number of segments in 2017, together with the minimum time series of three years and the number of vessels to be contained in each fleet segment, the indicators were calculated for the following four segments, on their own or in combination with the allocated fishing technology:

| Fishing tech. | Length cat. |
|---------------|-------------|
| DTS | VL2440 |
| PMP | VL1824 |
| TBB | VL1824 |
| TBB | VL2440 |

The segments TBB18-24 and TBB24-40 are of particular relevance as regards the classifying of segments as 'in balance or imbalance' (ref. Ares(2015)462923 - 02/10/2015 and Ares(2016)5818532 - 07/10/2016).

Although the indicators for fleet segments DTS24-40 and PMP18-24 are set out in this report, the corresponding results will have to be interpreted with reservations because the segments are so small and diverse.

Where the amount of data relating to a fleet segment is limited, the absolute values of a number of indicators and the associated criteria can result in an unfavourable interpretation for the fleet balance in that segment. If, however, the standard calculations are seen in the light of the characteristics and trends within the Belgian fleet segments, it becomes clearer that the applicable final assessment is 'in balance'. On the basis of the full range of indicators, it may therefore be concluded that TBB18-24 and TBB24-40, the significant fleet segments, are **in balance** with the fishing opportunities.

B) Overview

1. Is there a balance between fleet capacity and fishing opportunities?
Yes, in balance. Stable in 2017.
2. Size of the fleet:
71 fishing vessels: 13 712 GT and 45 051 kW.
3. Largest segments, main species and volumes landed:
 - Largest segments:
 - TBB 24-40 (formerly part of the large fleet segment, large beam trawlers)
 - TBB 18-24 (formerly part of the small fleet segment, beam trawl method)
 - DTS 24-40 (formerly part of the large fleet segment, large 'others')
 - PMP 18-24 (formerly part of the small fleet segment, small 'others')
 - Main species:
 - sole (2 147 tonnes)
 - plaice (7 579 tonnes)

See Section 2.1 for details.
4. Number of changes in fleet capacity:
14. See Table 4.1 for details.
5. Changes in stocks or fishing opportunities over the last year:
None.
6. Plans to reduce fishing effort over the last year:
None.
7. Entry/exit matched over the last year?
Yes, fleet below reference levels and entry/exit requirements complied with at vessel level (Section 4.C).
8. Plans to improve fleet management?
As the main fleet segments were in balance in the 2017 reporting year, the measures 'support to young fishermen' and 'engine replacements' have now been cleared under the EMFF. The sole action plan in VIId (sole, English Channel East, sol-eche) has also been implemented. The EMFF accordingly complies with all the *ex ante* conditions.
For the SHI, and more specifically the F/F_{msy} for sole in VIIf.g in the current reporting year, the minimum landing length of 25 cm is being maintained in accordance with the 2016 action plan for sole in VIId.
9. Balance indicators applied?
Yes.
Key indicators:
Technical (three, out of operation, VUW 220 and VUW observed), biological (two, SHI and SAR), economic (two, ROFTA-LTIR and CR/BER).

C) Analysis of the balance between fleet capacity and fishing opportunities

The analysis of fleet capacity and fishing opportunities indicates that there was little unused capacity and few unused fishing opportunities in 2017 and that both were in balance.

- Could the fishing opportunities be used with a smaller fleet?

No.

Belgium's fishing activities are dominated by mixed demersal fishing for sole and plaice. A characteristic feature of the activities is that they aim to utilise 100 % of target species while the utilisation of by-catches is not dependent on the effort specific to them. Beam trawl fleets are particularly stable in terms of annual effort and fishing pressure exerted in relation to annual fishing opportunities. In 2017 efforts continued to be made to further the sustainable development of fishing activities by means of improved selectivity, energy efficiency, etc. Moreover, following consultation between the Government and producer organisations (POs), fishing activities are managed so as to be spread evenly over the year. This is necessary in order to ensure that supply and marketing are stable. As in previous years, the Government checks that this is the case when approving the POs' production and marketing plans.

Although it targets two species, sole and plaice, the Belgian fleet, which is equipped for flatfish fishing, exerts uniform fishing pressure on the various components of the demersal ecosystem, partly by spreading the pressure over the various fishing grounds. Compared with other types of fishing, beam trawling exerts much less pressure on spatial or temporal aggregations/patterns. Such aggregations or specific components are avoided because the Belgian quota system seeks to allocate fishing quotas in a mixed package in which individual transactions between fishermen are prohibited. All those factors play a part in the sustainable management of beam trawling. The negative impact of the beam trawl disturbing the seabed has decreased in recent years as a result of changes made to gear (lighter chains, rolling beam heads, sunwing, etc.) depending on the areas fished.

Apart from the majority of landings made by these beam trawl segments, there is only limited commercial fishing using other fishing methods. The vessels in question fish for certain quota components outside the scope of balanced beam trawling. Greater variability here presents a higher risk to economic viability.

Although Belgium's (small) fisheries sector is, as has repeatedly been stated, below subsistence level, the sector is doing everything it can to develop as necessary to make the systematic transition to overall sustainability. Although the vessels are somewhat longer, the problems of fleet renewal, investment in family businesses, crew shortages, etc., are more widespread (which is similar to the situation with small-scale coastal fishing boats). Moreover, every effort must be made to find viable solutions in order to fully implement the landing obligation. This still remains problematic and particularly risky in these highly mixed fisheries despite the lessons gradually learned over previous years. Lastly, Brexit is causing a great deal of uncertainty in the sectors and requires particular attention.

- Is this likely to improve the financial situation of the fleet?

Economic results will depend primarily on the fishing opportunities: the available quotas combined with fish and fuel prices. The full introduction of the landing obligation and the prospect of Brexit are making it too difficult to carry out more in-depth analysis. The economic results have not only developed very positively in recent years. They also took a huge leap forward in 2017.

- Is F too high in relation to the F_{target} ?

No.

- Is the catch too high in relation to biomass?

No, given that quota utilisation is closely monitored.

- CPUE – MSY?

MSY.

- Dependency on government support?

Yes.

Over the past year Belgian vessel owners have submitted few applications for aid under the EMFF, partly because of the restrictions imposed by the fund and partly because of the uncertainties resulting from increasing implementation of the landing obligation and Brexit. It is regrettable that no funding is available to replace the outdated fleet with new, environmentally and economically sustainable fishing vessels. In the longer term, it is essential that such funding is provided in order to ensure that the sector is balanced and performs well.

- Can economic performance withstand fluctuations in costs (e.g. oil prices)?

No.

The major Belgian fleet segments use beam trawls, meaning that fuel costs are (and will remain) significant, despite considerable innovation and investment in reducing them as far as possible. In any case, rising gas oil prices have a direct and very negative impact on the sector's profitability. Similar energy-efficiency actions, such as engine replacement under the EFF, are no longer practicable under the EMFF. This is in stark contrast to the absolute need and the objectives of both economic performance and reduced environmental impact. Those objectives are still as critical, but the impetus of actions which stimulate or expedite change has completely disappeared or is no longer possible in the context of Belgium. Nevertheless, the objectives are at the heart of the CFP.

- Can fleets withstand short-term catch limits?

To some extent.

In addition to the administrative transition from the CFP to the Fmsy principle, the main current and future challenges are the landing obligation and Brexit. After a gradual introduction in order to adapt the existing systems, the implementation of the obligation is now entering a crucial phase. A number of stocks accounting for a large volume of the catch composition will be introduced in 2018-2020. These include, in particular, the choke species: species which do not determine the type of fishing activity but which do present a high risk of seriously and problematically preventing or even stopping the overall activity.

The toolbox measures which have for years been proposed to limit this effect have been found to be very difficult to administer and in some cases even impracticable. This real divergence between the legislative framework and good practice will have to be addressed soon if it is not to lead to undesirable situations.

D) Amendments to the fleet report compared with previous years

The structure of the report is similar to last year (revised thoroughly and accepted).

SEC I A

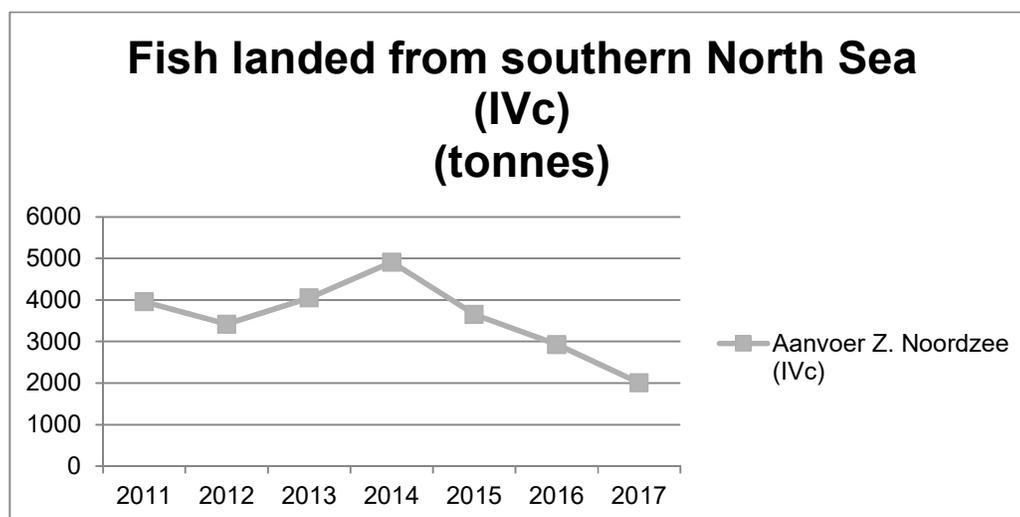
2.1 DESCRIPTION OF THE BELGIAN FLEETS

Belgium's fishing activities consist mainly of beam trawling for sole and plaice (see Table 2.1). It also engages in shrimp fishing, otter trawling, Nephrops fishing and the remaining group 'other fishing' (consisting of static-gear, dredge and seine fishing). Most fish is landed from the North Sea (IVb,c, 46 %), the English Channel (VIIde, 35 %), the Celtic Sea (VIIfg, 14 %), the Irish Sea (VIIa, 1 %) and the Bay of Biscay (VIIIab, 2 %). Landings from other areas are negligible (1 %). These percentages are very stable and do not change much from year to year.

Although the North Sea, at 52 %, still tops the list of landing areas, it should be noted that the importance of the southern North Sea (IVc) has in recent years fallen steadily and markedly. This is a concern to the fisheries sector in general and to coastal fisheries in particular. The impact of increased fishing pressure, in particular as a result of the pulse, will have to be further examined.

Table 2.1 Overview of Belgium's main fishing activities in 2017

| Fishing method | Days at sea (%) | Landings (%) | Value (%) |
|-----------------|-----------------|----------------------|-----------------------|
| Beam trawl | 62.4 | 75.0 | 73.3 |
| Otter trawl | 4.4 | 5.9 | 4.2 |
| Dredges | 1.9 | 2.2 | 1.6 |
| Shrimp | 15.1 | 3.6 | 5.7 |
| <i>Nephrops</i> | 11.7 | 8.3 | 11.0 |
| Passive | 2.3 | 0.4 | 0.7 |
| Seine | 2.2 | 4.6 | 3.6 |
| Total | 13 672 | 22 142 tonnes | EUR 88 183 000 |
| Zone | Days at sea (%) | Landings (%) | Value (%) |
| IVb,c | 50.5 | 46.4 | 45.2 |
| VIIId,e | 27.9 | 35.0 | 30.6 |
| VIIIf,g | 15.4 | 13.9 | 17.0 |
| VIIa | 1.4 | 1.4 | 1.1 |
| VIIa,b | 3.7 | 2.2 | 4.5 |



On 31 December 2017 the Belgian fishing fleet consisted of 71 vessels (-1). Broken down by segment, 34 vessels had engine power of more than 221 kW (large fleet segment, LFS) and 37 had engine power of 221 kW or less (small fleet segment, SFS). Detailed information on each segment is provided in Table 2.2. The average age of the fleet was 26 years for the large fleet segment and 33 years for the small fleet segment.

| Segment | | Number |
|----------------|-----------------------|--------|
| SFS (<=221 kW) | Coastal fishing boats | 14 |
| | Eurocutters | 15 |
| | Other | 8 |
| LFS (>221 kW) | Large beam trawlers | 29 |
| | Other | 5 |
| Total | | 71 |

22 142 tonnes of fishery products were landed in 2017 (see Table 2.3). Of those, 16 728 tonnes were landed in the Belgian ports of Zeebrugge, Ostend and Nieuwpoort. The remaining 5 414 tonnes were landed in foreign ports, mainly in the Netherlands. The total value of the landings was EUR 88.2 million, EUR 67.3 million of which was landed in Belgian ports. Landings in foreign ports had a value of EUR 20.9 million. The number of landings and the value of landings decreased significantly, by 9.9 % and 5.5 % respectively, compared with 2016.

| Year | Landings (tonnes) | Development N-1 (%) | Value of landings (EUR) | Development N-1 (%) |
|------|-------------------|---------------------|-------------------------|---------------------|
| 2000 | 26 522 | | 88 672 000 | |
| 2001 | 26 976 | 1.7 | 96 584 000 | 8.9 |
| 2002 | 25 810 | -4.3 | 91 911 000 | -4.8 |
| 2003 | 23 637 | -8.4 | 90 364 000 | -1.7 |
| 2004 | 23 607 | -0.1 | 85 889 000 | -5.0 |
| 2005 | 21 545 | -8.7 | 86 280 000 | 0.5 |
| 2006 | 20 264 | -5.9 | 90 687 000 | 5.1 |
| 2007 | 21 793 | 7.5 | 90 328 000 | -0.4 |
| 2008 | 20 012 | -8.2 | 76 279 000 | -15.6 |
| 2009 | 19 175 | -4.2 | 68 367 000 | -10.4 |
| 2010 | 19 773 | 3.1 | 76 242 000 | 11.5 |
| 2011 | 20 138 | 1.8 | 79 437 000 | 4.2 |
| 2012 | 21 894 | 8.7 | 76 351 000 | -3.9 |
| 2013 | 22 793 | 4.1 | 73 080 000 | -4.3 |
| 2014 | 24 273 | 6.5 | 81 267 000 | 11.2 |
| 2015 | 22 489 | -7.3 | 81 815 000 | 0.7 |
| 2016 | 24 583 | 9.3 | 93 329 000 | 14.1 |
| 2017 | 22 142 | -9.9 | 88 183 000 | -5.5 |

Catches made in the various areas consist predominantly of plaice (*Pleuronectes platessa*) and sole (*Solea solea*) (see Table 2.4). Together they make up 34 % and 10 % respectively of the total volume landed and 17 % and 28 % respectively of the value landed. Other species individually account for 5 % or less of the volume landed.

Table 2.4 Composition of the number of landings and the value of landings by Belgium in 2017

| Species | Landings | | Value | | Species | Landings | | Value | |
|----------------------------------------|------------|------|------------|------|----------------|------------|-----|-----------|-----|
| | Tonne s | % | EUR | % | | Tonne s | % | EUR | % |
| PLAICE | 7 579 | 34.2 | 14 845 000 | 16.8 | ANGLERFI SH | 541 | 2.4 | 5 544 000 | 6.3 |
| SOLE | 2 147 | 9.7 | 24 516 000 | 27.8 | TURBOT | 520 | 2.3 | 5 096 000 | 5.8 |
| GURNARDS | 1 614 | 7.3 | 2 003 000 | 2.3 | MEGRIM | 340 | 1.5 | 704 000 | 0.8 |
| CUTTLEFISH | 1 288 | 5.8 | 6 165 000 | 7.0 | POUTING | 312 | 1.4 | 190 000 | 0.2 |
| SKATES AND RAYS | 1 062 | 4.8 | 2 553 000 | 2.9 | BRILL | 309 | 1.4 | 2 306 000 | 2.6 |
| NORWAY LOBSTER | 1 016 | 4.6 | 7 140 000 | 8.1 | WHITING | 264 | 1.2 | 286 000 | 0.3 |
| SCALLOPS | 829 | 3.7 | 2 513 000 | 2.8 | DAB | 258 | 1.2 | 266 | 0.3 |
| SHRIMP | 743 | 3.4 | 4 953 000 | 5.6 | Other | 1 352 | 6.1 | 3 342 000 | 3.8 |
| COD | 684 | 3.1 | 2 094 000 | 2.4 | | | | | |
| DOGFISH and GREATER SPOTTED DOGFISH | 647 | 2.9 | 321 000 | 0.4 | | | | | |
| LEMON SOLE | 637 | 2.9 | 3 348 000 | 3.8 | | | | | |

2.2 BREAKDOWN OF FISHING ACTIVITIES

The dataset used to calculate the indicators is identical to that provided in response to the call made each year for data for the JRC's annual economic report.

The segmentation of the fleet in accordance with the standard classification is shown in Table 2.5:

| Table 2.5: Composition of Belgian fleet segments | | Year | | | | | | | | | |
|--------------------------------------------------|-------------|------|------|------|------|------|------|------|------|------|------|
| Clustered gear | Length cat. | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
| DTS | VL1012 | 1 | | 1 | 1 | 1 | | 1 | | | |
| DTS | VL1218 | | | | | 2 | 1 | 2 | 1 | 1 | 1 |
| DTS | VL1824 | 1 | 3 | 2 | 4 | 6 | 7 | 8 | 7 | 6 | 6 |
| DTS | VL2440 | 4 | 6 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 6 |
| PMP | VL1012 | | 1 | | | | | | | 1 | 1 |
| PMP | VL1218 | 2 | 2 | 4 | 4 | 1 | 1 | 1 | | | |
| PMP | VL1824 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 1 | 1 |
| PMP | VL1824 | | | 1 | 1 | | 1 | 1 | | 1 | |
| PMP | VL2440 | | 1 | 1 | 1 | 1 | | 1 | 1 | 1 | 1 |
| PMP | VL2440 | | 1 | | | | | | | | |
| TBB | VL1012 | | | | | | 1 | | | | |
| TBB | VL1218 | 5 | 4 | 4 | 4 | 3 | 3 | 3 | 3 | 2 | 2 |
| TBB | VL1824 | 36 | 35 | 36 | 34 | 30 | 25 | 24 | 25 | 22 | 21 |
| TBB | VL2440 | 48 | 40 | 33 | 31 | 31 | 31 | 29 | 29 | 28 | 28 |
| Inactive | VL1012 | | | | | | | | 1 | | |
| Inactive | VL1218 | | 1 | 1 | 1 | 2 | 1 | | 2 | 3 | 1 |
| Inactive | VL1824 | 2 | 2 | | | 2 | 4 | 2 | 1 | 4 | 4 |
| Inactive | VL2440 | 1 | 4 | 1 | 2 | 2 | 1 | 1 | 1 | 1 | 1 |

It is clear from the above that TBB18-24 and TBB24-40 are the only significant fleet segments. In terms of both numbers and diversity, DTS 18-24 and DTS 24-40 are very limiting for any further accurate analysis. Indicators for the latter two segments have nevertheless been provided. The results of those indicators will not, however, affect the final decision on whether or not the Belgian fleet segments are in balance. The segments in question are too marginal and too diverse for it to be possible to reliably assess the indicators concerned.

2.3 DEVELOPMENT OF THE FLEET

The Belgian fleet segments are very stable in their composition except for the smaller segments, which actually form a heterogeneous group of five remaining fishing vessels.

The most worrying development to be observed is the steady fall in the number of vessels. This, combined with other clear trends such as difficulties in recruiting crews, business succession, average age of fishermen/vessels, and the general reduction in capacity of the entire fisheries sector and the wider economy, sends out a clear signal that this primary sector is in need of stimulation and support in order to effectively tackle its current and future challenges.

SEC I B

3.1 OPINION ON PLANS FOR REDUCING THE FISHING EFFORT

The same as in previous reporting years.

3.2 IMPACT OF FISHING EFFORT REDUCTION PLANS ON FISHING CAPACITY

The same as in previous reporting years.

SEC I C

Reference levels and fleet ceiling

The reference levels and fleet ceilings on 31 December 2017 were as follows (see Annex II to Regulation (EU) No 1380/2013):

GT ref = 18 962 GT
kW ref = 51 586 kW

Capacity of the fleet on 31 December 2017

Tonnage: 13 712 GT
Engine power: 45 051 kW

Fleet catch capacity as at 31 December 2017 (13 712 GT and 45 051 kW) was below the reference levels (18 962 GT and 51.586 kW).

| Table 4.1: Changes in fleet capacity during 2017 | Name | Number | Date | GT | kW | Comments |
|---------------------------------------------------------------------------|-----------------|---------------|-------------|---------------|---------------|-----------------|
| Fleet capacity on 31 December 2016 according to the fleet register | | | | 13 855 | 45 051 | |
| Withdrawals without State aid in 2017 | | | | -592 | -2 287 | |
| Z.180 | CORNELIS SENIOR | BEL035681988 | 17.1.2017 | -100 | -221 | |
| O.89 | SANDRA | BEL030891982 | 21.3.2017 | -233 | -1 026 | |
| O.229 | LIBERTY | BEL012291991 | 29.11.2017 | -126 | -221 | |
| O.554 | GODELIEVE | BEL015542000 | 28.11.2017 | -133 | -819 | |
| Withdrawals in 2017 due to loss of fishing vessels | | | | -62 | -221 | |
| Z.582 | ASANNAT | BEL034031961 | 28.11.2017 | -62 | -221 | |

| | | | | | | |
|--------------------------------------------------------------------------|--------------|--------------|------------|---------------|---------------|--|
| Engine power added in 2017 to the licence of lost fishing vessels | | | | 93 | 221 | |
| O.582 | HOMBRE | GBR000C19037 | 29.11.2017 | 93 | 221 | |
| | | | | | | |
| Engine power added in 2017 following consolidation | | | | 0 | 1 026 | |
| Z.60 | BLUE ANGEL | BEL030602001 | 29.11.2017 | | 494 | |
| O.101 | FISTON | BEL011011967 | 29.11.2017 | | 37 | |
| Z.182 | HENNIE | NLD199001509 | 29.11.2017 | | 100 | |
| O.316 | AEGIR | BEL013161987 | 29.11.2017 | | 154 | |
| Z.576 | MARE NOSTRUM | BEL035761999 | 29.11.2017 | | 241 | |
| | | | | | | |
| Capacity added without State aid in 2017 | | | | 418 | 1 261 | |
| Z.41 | ALBERT BOS | BEL035681988 | 17.1.2017 | 100 | 221 | |
| Z.182 | HENNIE | NLD199001509 | 3.4.2017 | 192 | 819 | |
| Z.188 | HILLIE | BEL012291991 | 29.11.2017 | 126 | 221 | |
| | | | | | | |
| Capacity of the fleet on 31 December 2017 | | | | 13 712 | 45 051 | |

For the purpose of comparison with previous years, the above calculation method is provided for information. (It will not be provided next year.)

Capacity of the Belgian fishing fleet

Capacity of the fleet on 1 January 2003: $GT_{03} = 24\ 363$ GT and $kW_{03} = 68\ 304$ kW ⁽¹⁾
 Reference levels on 1 January 2003: $R(GT)_{03} = 23\ 372$ GT and $R(kW)_{03} = 67\ 857$ kW

Capacity added with State aid in 2017: $GT_{100} = 0$ and $kW_{100} = 0$

Tonnage added for safety reasons in 2017: $GT_s = 0$

| Table 4.2: Reference levels calculated on 31 December 2017 in accordance with Regulation (EU) No 1013/2010 | | | | | |
|------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------|---------|------------------|---------|------------------|
| Belgium | | GT | | kW | |
| 1 | Reference level on 1.1.2003 | R(GT)03 | 23 372 | R(kW)03 | 67 857 |
| 2 | Entries of vessels of more than 100 GT financed with public aid | GT100 | 0 | kW100 | 0 |
| 3 | Increases in tonnage GT for reasons of safety | GTS | 117 | | |
| 4 | Exits before 1.1.2007 financed with public aid | GTa1 | 2 935 | kWa | 7 584 |
| 5 | Exits after 1.1.2007 financed with public aid | GTa2 | 2 646 | | 8 363 |
| 6 | Power of engines replaced | | | kWr | 20 361 |
| 7 | Capacity of the fleet on 31.12.2017 | GTt | 13 712 | kWt | 45 051 |
| 8 | Reference level on 31.12.2017 | R(GT)t | 19 034.19 | R(kW)t | 48 284.80 |

Line 8 : $R(GT)t = 1 - 35\% 2 + 3 - 99\% 4 - 96\% 5$ and $R(kW)t = 1 - 35\% 2 - 4 - 5 - 20\% 6$

Not to deduct 991 (GTa1) from GT Reference Level

Not to deduct 447 (kWa) from kW Reference Level

GT Ceiling is higher than GT Reference Level, the GT Ceiling is the GT Reference Level

fishing capacity ceilings.

¹ Fleet capacity as at 1 January 2003, adjusted in fleet register on 28 April 2008.

SEC I D

5.1 SUMMARY OF STRENGTHS AND WEAKNESSES OF THE FLEET MANAGEMENT SYSTEM

The principle that capacity can never increase except for reasons of GT safety, when the reserve between the fleet ceiling and current GT capacity can be used, is integral to all aspects of fleet management. GT safety was not applied in 2017.

There were no other specific changes compared with previous reporting years.

5.2 PLANS TO IMPROVE THE FLEET MANAGEMENT SYSTEM

One of the greatest challenges presented by the landing obligation is to solve the problem of choke species in typical mixed fisheries. During the early years when the obligation was phased in, the Member States focused the efforts of the regional groups on gaining experience by selecting less problematic or lower-risk species, and also the main commercial target species. From 2018, or 2019 at the latest, the Member States will enter the minefield of choke species, the impact of which is far more difficult to estimate and record. Choke species can result in all fishing operations in an area having to be discontinued when one quota has been exhausted, despite the fact that ample quotas remain for other target and by-catch species. Fleets are at risk of being made inoperative on account of the disproportionate number of choke species in the framework of sustainable exploitation to ensure that the fishing opportunities of the fleet segments are balanced.

The problem with current attempts to solve the problem of choke species is that they are, for the most part, partial solutions, many of which create new problems. What the Member States need is clear, pragmatic, global solutions which will be reliable, effective and practicable in both the short and the long term.

5.3 INFORMATION ON THE GENERAL LEVEL OF COMPATIBILITY OF FLEET MANAGEMENT INSTRUMENTS

Fleet capacity or changes to it are always compatible with policies based on a balanced fleet, given that greater sustainability is at the heart of Belgian fisheries policy.

SEC I E: I F M A I C A E S A D M I S A I E C E D E S E E A F E E M A A E M E

Belgium's VIII^d sole action plan (AP7d-sol) following the Commission's decision to classify the Belgian fisheries segments as 'in imbalance' on the basis of the fleet report submitted in 2016.

The action plan, which was submitted at the end of 2016, contains 10 targeted actions to be taken by Belgium in response to the high F/F_{msy} indicator for sole in VIIId. This unfavourable situation was rectified in 2017. The indicator for sole in VIIId is less than 1.

The action plan has accordingly been implemented and the conditions for balanced fleets have been complied with. Moreover, as the structure of the fleet report has been accepted, the corresponding *ex ante* conditions of the EMFF have also been fulfilled.

As stated in Section 7.3.1, SHI, the minimum landing length of 25 cm is applied to all sole stocks. Belgium proposes using this measure to address the driving factor behind the very slight exceedance of 1 for the SHI in respect of sole in VIIIf,g in accordance with the 2016 action plan for sole in VIIId.

SEC I F: BA A CE I DICA S

7.1 TECHNICAL INDICATORS

7.1.1 Percentage of inactive fishing vessels

Table 7.1 lists all 'possible fleet segments' and the number of fishing vessels they contain.

| Table 7.1: Number inactive | | Year | | | | | | | | | |
|----------------------------|-------------|------------|------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|
| Clustered gear | Length cat. | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
| DTS | VL1012 | 1 | | 1 | 1 | 1 | | 1 | | | |
| DTS | VL1218 | | | | | 2 | 1 | 2 | 1 | 1 | 1 |
| DTS | VL1824 | 1 | 3 | 2 | 4 | 6 | 7 | 8 | 7 | 6 | 6 |
| DTS | VL2440 | 4 | 6 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 6 |
| PMP | VL1012 | | 1 | | | | | | | 1 | 1 |
| PMP | VL1218 | 2 | 2 | 4 | 4 | 1 | 1 | 1 | | | |
| PMP | VL1824 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 1 | 1 |
| PMP | VL1824 | | | 1 | 1 | | 1 | 1 | | 1 | |
| PMP | VL2440 | | 1 | 1 | 1 | 1 | | 1 | 1 | 1 | 1 |
| PMP | VL2440 | | 1 | | | | | | | | |
| TBB | VL1012 | | | | | | 1 | | | | |
| TBB | VL1218 | 5 | 4 | 4 | 4 | 3 | 3 | 3 | 3 | 2 | 2 |
| TBB | VL1824 | 36 | 35 | 36 | 34 | 30 | 25 | 24 | 25 | 22 | 21 |
| TBB | VL2440 | 48 | 40 | 33 | 31 | 31 | 31 | 29 | 29 | 28 | 28 |
| Inactive | VL1012 | | | | | | | | 1 | | |
| Inactive | VL1218 | | 1 | 1 | 1 | 2 | 1 | | 2 | 3 | 1 |
| Inactive | VL1824 | 2 | 2 | | | 2 | 4 | 2 | 1 | 4 | 4 |
| Inactive | VL2440 | 1 | 4 | 1 | 2 | 2 | 1 | 1 | 1 | 1 | 1 |
| Total | | 101 | 101 | 90 | 89 | 87 | 82 | 79 | 78 | 76 | 73 |

The percentage of inactive fishing vessels in each length category is shown in Table 7.2.

| Length cat. | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|-------------|------|------|------|------|------|------|------|------|------|------|
| VL1012 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 1.00 | 0.00 | 0.00 |
| VL1218 | 0.00 | 0.14 | 0.11 | 0.11 | 0.25 | 0.17 | 0.00 | 0.33 | 0.50 | 0.25 |
| VL1824 | 0.05 | 0.05 | 0.00 | 0.00 | 0.05 | 0.11 | 0.06 | 0.03 | 0.12 | 0.13 |
| VL2440 | 0.02 | 0.08 | 0.03 | 0.05 | 0.05 | 0.03 | 0.03 | 0.03 | 0.03 | 0.03 |

In at least one of the past three years, the percentages have been below 20 % except for category VL12-18. As there are now only three or four fishing vessels in length category 12-18, the indicator is not relevant.

The major Belgian fleet segments are generally **in balance** as far as the 'inactive fishing vessels' indicator is concerned.

7.1.2 Days at sea/maximum number of theoretical and observed days at sea

| Table 7.3: Vessel use/average 220 | | VUR 220 | | | | | | | | | |
|------------------------------------------|-----------------------|---------|------|------|------|------|------|------|------|------|------|
| Clustered gear | Clustered length cat. | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
| DTS | VL2440 | 0.93 | 0.94 | 0.91 | 0.88 | 0.72 | 0.85 | 0.73 | 0.79 | 0.92 | 0.86 |
| PMP | VL1824 | 0.73 | 0.60 | 0.64 | 0.51 | 0.58 | 0.59 | 0.73 | 0.44 | 0.67 | 0.83 |
| TBB | VL1824 | 0.77 | 0.77 | 0.76 | 0.70 | 0.76 | 0.72 | 0.74 | 0.69 | 0.78 | 0.75 |
| TBB | VL2440 | 0.96 | 1.01 | 1.05 | 1.09 | 1.07 | 1.11 | 1.18 | 1.14 | 1.17 | 1.12 |

| Table 7.4: Vessel use/maximum observed | | VUR | | | | | | | | | |
|-----------------------------------------------|-----------------------|------|------|------|------|------|------|------|------|------|------|
| Clustered gear | Clustered length cat. | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
| DTS | VL2440 | 0.79 | 0.81 | 0.76 | 0.78 | 0.69 | 0.82 | 0.69 | 0.76 | 0.88 | 0.81 |
| PMP | VL1824 | 0.79 | 0.52 | 0.55 | 0.58 | 0.76 | 0.67 | 0.62 | 0.70 | 0.82 | 0.93 |
| TBB | VL1824 | 0.70 | 0.72 | 0.64 | 0.72 | 0.74 | 0.70 | 0.70 | 0.70 | 0.74 | 0.77 |
| TBB | VL2440 | 0.80 | 0.84 | 0.83 | 0.81 | 0.87 | 0.89 | 0.94 | 0.89 | 0.88 | 0.88 |

The ratio of theoretical use (Table 7.3) to observed use (Table 7.4) in each relevant fleet segment has not been covered by the 70 % criterion for at least one of the past three years.

The Belgian fleet segments are accordingly **in balance** as far as the 'ratio of theoretical to observed use' indicator is concerned.

7.3 BIOLOGICAL INDICATORS

7.3.1 SHI according to F/FMSY

Table 7.5 shows, for each relevant fleet segment, the stocks for which F and Fmsy are available as a percentage of total turnover. It is clear from this that the indicator is below the 40 % limit for fleet segments DTS24-40, PMP18-24 and TBB18-24.

| Fishing tech. | Length cat. | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---------------|-------------|------|------|------|------|------|------|------|------|------|
| DTS | VL2440 | 62 % | 58 % | 52 % | N/A | 35 % | 36 % | 33 % | 30 % | 29 % |
| PMP | VL1824 | 50 % | 44 % | 50 % | N/A | 51 % | 29 % | 38 % | 25 % | 33 % |
| TBB | VL1824 | 65 % | 58 % | 61 % | N/A | 39 % | 50 % | 54 % | 33 % | 32 % |
| TBB | VL2440 | 68 % | 68 % | 64 % | N/A | 61 % | 66 % | 63 % | 62 % | 57 % |

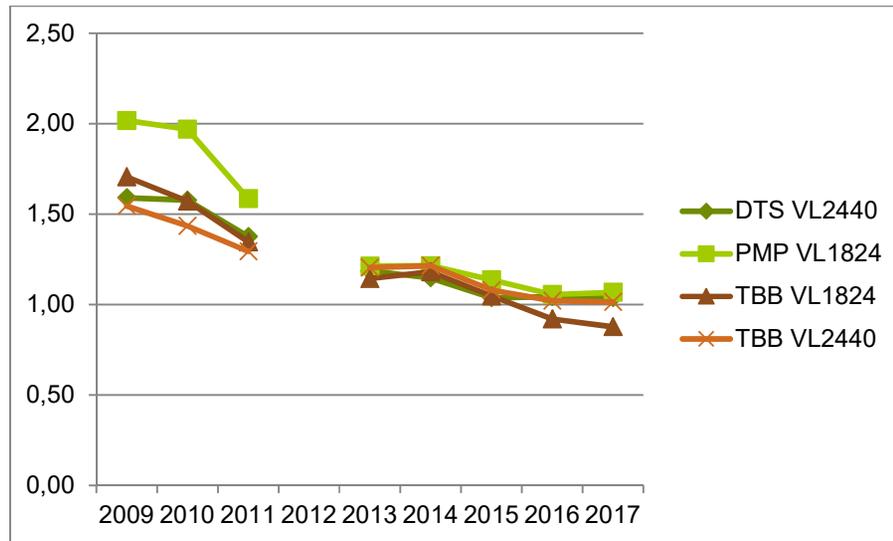
The table shows that the SHI complies with the minimum 40 % criterion only in respect of TBB24-40.

On the basis of the standard SHI calculation method, using only stocks for which F and FMSY have been defined, the values of the indicator are as follows:

| Fishing tech. | Length cat. | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---------------|-------------|------|------|------|------|------|------|------|------|------|
| DTS | VL2440 | 1.59 | 1.58 | 1.37 | N/A | 1.19 | 1.15 | 1.04 | 1.04 | 1.04 |
| PMP | VL1824 | 2.02 | 1.97 | 1.58 | N/A | 1.21 | 1.21 | 1.14 | 1.06 | 1.07 |
| TBB | VL1824 | 1.71 | 1.57 | 1.35 | N/A | 1.14 | 1.18 | 1.05 | 0.92 | 0.88 |
| TBB | VL2440 | 1.55 | 1.44 | 1.29 | N/A | 1.20 | 1.22 | 1.08 | 1.02 | 1.01 |

The highly distorted picture of the SHI for the Belgian fleet segments was previously discussed in the 2016 fleet report. The relationship to 'turnover limited to stocks with F and Fmsy' introduces a very heavy bias in the absolute value of the indicator for the fleet segments concerned as regards the economic dependence of the segments. (If all of the stocks were taken into account, then the indicator would be in the range of from 0.35 to 0.75.)

The trend followed by the indicator *is*, however, representative and shows the result of the efforts made to apply MSY as part of the CFP.



There is a marked decline in all fleet segments.

For the two segments TBB 24-40 and DTS 24-40, the absolute value has been higher than 1 over the past three years. (PMP18-24 is a marginal segment and is accordingly not taken into account.) The determining factor in 2017 that pushed the indicator above 1 was sole in VII f,g (see Table 7.7).

This situation is very similar to the problems with sole in VIId in 2016 (see Table 7.8). That is why Belgium drew up an action plan focused on increasing the minimum landing length for sole from 24 cm to 25 cm.

Although the action plan aimed to improve the situation regarding sole in VIId, Belgium set the increased minimum landing length for all sole stocks covered by its fishing activities. It therefore applies to all areas and all segments/vessels. Although the conditions for fleets in imbalance have been complied with and the action plans have accordingly been implemented, at least as far as sole in VIId is concerned, the initiative will continue to be applied in full to all sole stocks and areas, given that it is now a permanent part of fisheries management.

As the results of the action plan have been good for sole in VIId, this approach will continue to be applied as a measure for furthering the positive developments in SHI. Belgium considers the approach to be proportionate given the current positive developments, the previous favourable results and the very slight exceedance of the SHI indicator (1.01-10.4, taking account of the heavy bias).

| Table 7.7: Details of the SHI indicator for sole in VII f,g | | | | |
|--------------------------------------------------------------------|------------------------|-------------|-------------------------|---------------|
| Year | Stock key label | FMSY | Fishing pressure | FoFMSY |
| 2015 | sol.27.7fg | 0.274 | 0.33014 | 1.205 |
| 2016 | sol.27.7fg | 0.274 | 0.37048 | 1.352 |
| 2017 | sol.27.7fg | 0.274 | 0.37048 | 1.352 |

| Table 7.8: Details of the SHI indicator for sole in VIId | | | | |
|-----------------------------------------------------------------|------------------------|-------------|-------------------------|---------------|
| Year | Stock key label | FMSY | Fishing pressure | FoFMSY |
| 2015 | sol.27.7d | 0.256 | 0.28 | 1.094 |
| 2016 | sol.27.7d | 0.256 | 0.23 | 0.898 |
| 2017 | sol.27.7d | 0.256 | 0.23 | 0.898 |

7.3.2 SAR:

| Fishing tech. | Length cat. | 2008 | 2009 | 2010 | 2011 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---------------|-------------|------|------|------|------|------|------|------|------|------|
| DTS | VL2440 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| PMP | VL1824 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| TBB | VL1824 | 1 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| TBB | VL2440 | 2 | 2 | 3 | 2 | 1 | 1 | 1 | 1 | 1 |

The stocks responsible for this are set out in the following table:

| Fishing tech. | Length cat. | 2008 | 2009 | 2010 | 2011 | 2013 | 2014 | 2015 | 2016 | 2017 |
|---------------|-------------|---------------|---------------|---------------|---------------|-----------|-----------|------------|-----------|-----------|
| DTS | VL2440 | | | | | | | | | |
| PMP | VL1824 | Cod-4c~7d-a1 | | | | | | | | |
| TBB | VL1824 | Plaice-7d-a2 | Plaice -7d-a2 | Plaice -7d-a2 | | | | | | |
| TBB | VL2440 | Plaice -7d-a2 | Plaice -7d-a2 | Whiting-7a-a2 | Whiting-7a-a2 | sol-7a-a2 | sol-7a-a2 | sol-7a-a22 | sol-7a-a2 | sol-7a-a2 |
| | | sol-7a-a2 | sol-7a-a2 | Plaice -7d-a2 | sol-7a-a2a-2 | | | | | |
| | | | | sol-7a-a2 | | | | | | |

The indicator may be negative for fleet segment TBB24-40 in accordance with the criterion SAR > 0 (see Tables 7.9 and 7.10). That is not the case for all of the stocks fished in that segment, particularly as the sole VIIa stock was identified in accordance with the second condition: Member State responsible for > 10 % of the quota.

Irrespective of the status of the indicator based on this criterion, Belgium considers the perception that fleet segment TBB24-40 is in imbalance to be incorrect. The limit of > 0 is the determining factor and an important point to be considered when the guidelines are discussed.

7.4 ECONOMIC INDICATORS

7.4.1 ROFTA (-LTIR):

| Fishing tech. | Length cat. | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------|-------------|--------|--------|--------|---------|--------|--------|--------|--------|-------|
| DTS | VL2440 | -36.84 | -9.70 | -5.36 | -12.42 | -27.23 | -17.90 | -27.16 | 2.60 | 40.41 |
| PMP | VL1824 | 30.06 | -11.16 | -6.57 | -133.50 | 74.45 | 7.55 | 1.40 | -21.85 | -3.63 |
| TBB | VL1824 | -54.65 | -21.58 | -15.92 | -21.70 | -18.67 | -21.42 | -15.69 | -13.11 | 43.93 |
| TBB | VL2440 | -36.09 | -12.75 | -5.33 | 6.73 | -14.68 | -14.53 | 1.34 | 20.97 | 58.62 |

There are no fleet segments in imbalance in accordance with the < 0 criterion. This has been the case at least once over the past three years (see Table 7.11).

7.4.2 Current revenue/break-even revenue (CR/BER):

| Fishing tech. | Length cat. | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------|-------------|-------|-------|------|-------|------|------|------|------|------|
| DTS | VL2440 | -0.17 | 0.64 | 0.84 | 0.70 | 0.37 | 0.50 | 0.04 | 1.17 | 1.94 |
| PMP | VL1824 | 3.79 | 0.45 | 0.76 | -0.18 | 1.82 | 1.53 | 1.18 | 0.21 | 0.90 |
| TBB | VL1824 | -0.42 | -0.06 | 0.39 | 0.11 | 0.12 | 0.04 | 0.51 | 0.62 | 1.92 |
| TBB | VL2440 | 0.09 | 0.61 | 0.87 | 1.25 | 0.63 | 0.66 | 1.07 | 1.66 | 2.11 |

The status of CR/BER is similar to ROFTA-LTIR. There are no fleet segments in imbalance in accordance with the < 1 criterion. This has been the case at least once over the past three years (see Table 7.12).