

## Technical Study

### MSP as a tool to support Blue Growth

#### Roundtable discussion paper: Fishing, 11/12 October 2017

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# Fishing

## 1 Introduction

### Overall size of the sector and industry structure

Mature  Growing  Emerging



**Figure 1: Modified Blue-Hub Mapping Fishing Activities (MFA) Tool Image**

The three main types of fishing activity are<sup>1</sup>: Small-scale coastal fleet (SSF) with vessels less than 12 meters<sup>2</sup> (which suffers from a lack of a uniform and straightforward definition); Large-scale fleet (LSF) with vessels more than 12 meters; and Distant-water fleet (DWF) with vessels over 24 meters operating, not only operate in EU outermost regions, but in third countries and high seas as well<sup>3</sup>. In 2016, there were around 84,133 vessels as EU fishing fleet of which 78% were active<sup>4</sup>. Out of these active vessels, almost 74% were small-scale, 26% large-scale and less than 1% were distant water vessels. On the same hand, many small boats, especially those artisanal /traditional or subsistence ones without engine, are not registered, what makes the tracking of their activity hard, while recreational fishing constitutes a



**Figure 2: MS data submissions under the DCF 2016 Fleet Economic (MARE/A3/AC(2016)).**

### Fisheries Value Chain



(with \* those steps with marine spatial implications)

<sup>1</sup> SSF - Includes all vessels under 12m using static gears and not using towed gear. According to the Data Collection Framework (DCF) gear definitions these include: 'drift and/or fixed netters', 'pots and/or traps', 'hooks', 'passive gears only', 'other passive gears', 'polyvalent passive gears only', 'active and passive gears'. LSF - Includes all vessels over 12 meters using static gears and all vessels using towed gears. According to the DCF gear definitions these include: 'dredgers', 'demersal trawlers and/or demersal seiners', 'other active gears', 'polyvalent active gears only', 'purse seiners', 'beam trawlers', 'pelagic trawlers'. DWF - Includes EU registered vessels over 24 meters operating in 'other fishing regions' including EU outermost regions. As for the SSCF, Regulation (EU) No 508/2014 on EMFF in Article 3(14) provides for a definition of "small-scale coastal fishing" which "means fishing carried out by fishing vessels of an overall length of less than 12 metres and not using towed fishing gear as listed in Table 3 of Annex I to Commission Regulation (EC) No 26/2004" [fishing feet register].

<sup>2</sup> [https://ec.europa.eu/fisheries/sites/fisheries/files/docs/publications/2016-small-scale-coastal-fleet\\_en.pdf](https://ec.europa.eu/fisheries/sites/fisheries/files/docs/publications/2016-small-scale-coastal-fleet_en.pdf)

<sup>3</sup> The Long Distant Advisory Council provides that "its territorial scope includes all the waters of the seas and oceans not subjected to the jurisdiction of the European Union (i.e., that they lie outside the Exclusive Economic Zone of the Member States of the EU).

<sup>4</sup> 2016 EU Community Fleet Register (CFR)

considerable social and economic activity at European level with a total expenditure believed to exceed 25 billion euros a year and the number of sea anglers is estimated to be 8-10 million in Europe<sup>5</sup>.

Time horizons			Spatial characteristics		
Seasonal	Yes		Place based	Yes & No	Place based while fishing effort and non-place based while shipping.
Planning horizon	2025 (around 5 to 10 years)		Linear	No	
Development time	5 months	Average time to build a 15m fishing vessel	Distance to shore	It varies depending on fishing gear, (i.e. commercial, coastal. etc.) and fished specie's biological and environmental characteristics.	
Lifetime of installation	3 years	Licensing for recreational fisheries	Water depth	It varies depending on fishing gear and fished specie's biological and environmental characteristics.	
	5-10 years	Licensing for commercial/industrial fisheries	Moving	Yes & No	See place based explanation.
Land Sea interaction 			Yes & No	Yes for coastal fisheries and No for open-water fisheries.	

<sup>5</sup> Jobard, E., Radureau, S., Cave, P., Des Robert, M.L. (2016), Feasibility of measuring socio-economic and environmental impacts of recreational and semi-subsistence fisheries in the EU, European Parliament IP/B/PECH/IC/2015-141 [http://www.europarl.europa.eu/RegData/etudes/STUD/2016/573457/IPOL\\_STU\(2016\)573457\\_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2016/573457/IPOL_STU(2016)573457_EN.pdf)

## 2 Relevance

Status in each Sea Basin (Table 1)<sup>6</sup>

Sea Basin	Presence	Potential	Comments
<a href="#">Atlantic</a>	◆◆◆	➡	Slight increase in distant-water fleet, while small-scale and large-scale fleets remains stable or decreases.
<a href="#">Baltic Sea</a>	◆◆	➡	Slight increase in distant-water fleet, while small-scale and large-scale fleets remains stable.
<a href="#">Black Sea</a>	◆	➡	Fish stocks overfished. Need for better management of fish stocks at basin level.
<a href="#">East Med</a>	◆◆	➡	SSF particularly important as a source of employment in remote coastal areas and as a contributor to the local economy.
<a href="#">North Sea</a>	◆◆◆	➡	Slight increase in distant-water fleet, while small-scale and large-scale fleets remains stable or decreases (less demersal fish stocks landings, ICES Data, 2015).
<a href="#">West Med</a>	◆◆	➡	SSF particularly important as a source of employment in remote coastal areas and as a contributor to the local economy.

Legend: ◆ = low presence    ◆◆ = medium presence    ◆◆◆ = high presence  
 ➡ = none / limited potential    ➡➡ = medium potential    ➡➡➡ = high potential

Status in each EU Country (Table 2)<sup>7 8</sup>

Sea Basin	Country	Presence	Potential	Comments
<a href="#">Atlantic</a>	<a href="#">Ireland</a>	◆◆	➡	The national fleet capacity remains relatively stable with small temporal fluctuations.
<a href="#">Atlantic</a>	<a href="#">Portugal</a>	◆◆	➡	Fleet capacity and economic performance remains relatively stable or decreases.
<a href="#">Atlantic / North Sea</a>	<a href="#">United Kingdom</a>	◆◆◆	➡➡	Overall improvement of the economic performance due to additional quotas (increasing landings), lower fuel costs and higher fish prices. It is a very diverse fleet and future trends may vary amongst fleet type.

<sup>6</sup> Table based on expert judgment and assessment of the sources quoted throughout the document such as i.e. Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2016 Annual Economic Report on the EU Fishing Fleet (STECF-16-11). 2016. Publications Office of the European Union, Luxembourg.

<sup>7</sup> Scientific, Technical and Economic Committee for Fisheries (STECF) - Economic Report of the EU Aquaculture Sector (EWG-16-12); Publications Office of the European Union, Luxembourg

<sup>8</sup> Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2016 Annual Economic Report on the EU Fishing Fleet (STECF-16-11). 2016. Publications Office of the European Union, Luxembourg

<a href="#">Atlantic / West Med</a>	<a href="#">France</a>	◆◆◆	➔	The national fleet capacity will continue to remain stable or slightly decline. The whole French fishing industry is working in the direction of reducing their dependence on fuel for the vessels and other operating costs, as well as improving the selectivity of their fishing gear and product quality.
<a href="#">Atlantic / West Med</a>	<a href="#">Spain</a>	◆◆◆	➔➔➔	The Spanish fleet is the biggest fleet all over the EU in terms of gross tonnage, and the one that carries out fishing activities in more fishing zones. However it is a fleet that it is significantly decreasing. The Spanish Government adopted the so-called "Strategic Plan for Innovation and Technological Development in Fisheries and Aquaculture (2014-2020), whose main objective is to increase competitiveness of Spanish fisheries and aquaculture sectors through innovation and technological development.
<a href="#">Baltic Sea</a>	<a href="#">Estonia</a>	◆	➔➔	The Estonian fleet is expected to increase in vessels and days at sea (especially in passive gears coastal fisheries). However, increasing is possible only according to the entry-exit scheme set out in Article 23 of new basic regulation (1380/2013). Innovation and development in this sector will come by the replacement of old nets (improving resistivity) and an increase in species selectivity mitigating negative impacts mostly on seals.
<a href="#">Baltic Sea</a>	<a href="#">Finland</a>	◆◆	➔	Whilst projections show a significant improvement in the economic performance of the Finnish fleet, it is a sector which will remain stable and dominated by small-scale coastal fisheries exclusive to the Baltic Sea.
<a href="#">Baltic Sea</a>	<a href="#">Latvia</a>	◆	➔	The fishery sector in Latvia depends on economic situation at external markets as well as of the turnover for the fish processing enterprises. This turnover might be affected by geopolitical situations which might trigger Latvian economy.
<a href="#">Baltic Sea</a>	<a href="#">Lithuania</a>	◆	➔➔	Slight increase in distant-water fleet, while small-scale and large-scale fleets remains stable. Fuel prices and the average age of fishers are main barriers to fleet development in Lithuania.
<a href="#">Baltic Sea</a>	<a href="#">Poland</a>	◆◆	➔➔	The Polish fleet is dominated by trawlers, so the fuel price has always a major impact on the overall economic performance. Thus, fuel prices decrease had limited positive effect on the fleet. Since the EU accession (2004) subsidies for fisheries became a substantial part of the Polish fisheries sector incomes. In 2014 however due to termination of EFF (2007-2013) the inflow of money to the fisheries has decreased significantly what affected direct incomes as

				well as funds that used to be available mainly for repairs and investments. It is a market characterized by imported fish and highly dependent on global market prices.
<a href="#">Baltic Sea</a>	<a href="#">Sweden</a>	◆◆	➔	Lower fishing quotas together with lower average fish prices and the high dependence on fuel of a fleet which is mostly dominated by trawlers makes the further development of this sector highly unlikely.
<a href="#">Baltic Sea / North Sea</a>	<a href="#">Denmark</a>	◆◆◆	➔	The national fleet capacity remains relatively stable with small temporal fluctuations.
<a href="#">Baltic Sea / North Sea</a>	<a href="#">Germany</a>	◆◆	➔	German fleet is mostly dominated by trawlers so fuel price has an impact on the overall economic situation. It is a sector which will remain stable with some economic gains due to modernization of on-board equipment and MSC certified fisheries.
<a href="#">Black Sea</a>	<a href="#">Bulgaria</a>	◆	➔	It is a sector who will remain stable with some economic gains due to further capacity and effort reduction <sup>9</sup> .
<a href="#">Black Sea</a>	<a href="#">Romania</a>	◆	➔	It is a sector who will remain stable with some economic gains due to further capacity and effort reduction. Main barriers for development are the poor concentration of ownership and the low level of investments in the sector till present <sup>10</sup> .
<a href="#">East Med</a>	<a href="#">Croatia</a>	◆	➔	The Croatian market is mostly domestic, but with a high influence of the Italian market. Croatian fleet does not operate with in distant-waters nor in outermost regions. Future projections suggest a decrease in Croatian fleet.
<a href="#">East Med</a>	<a href="#">Cyprus</a>	◆	➔	The Cypriot fleet is decreasing after decommissioning schemes.
<a href="#">East Med</a>	<a href="#">Greece</a>	◆	➔	The Greek fleet is the biggest fleet all over the EU in terms of number of fishing vessels. It is a sector which will remain stable.
<a href="#">East Med</a>	<a href="#">Slovenia</a>	◆	➔	It is a sector which will remain stable with some economic gains due to further capacity and effort reduction and lower operating costs. However, the Slovenian fleet remains generally old and poorly equipment. This might make repairing and maintenance costs to outsource gains.

<sup>9</sup> [National Strategy for Fisheries and Aquaculture, 2014-2020, in Bulgaria](#)

<sup>10</sup> [National Strategy for Fisheries and Aquaculture, 2014-2020, in Romania](#)

<a href="#">East Med / West Med</a>	<a href="#">Italy</a>	◆◆	➔	The Italian fleet is the biggest fleet all over the EU in terms of engine power. However, it is a feel that is decreasing due to lower landing and scrapping measures.
<a href="#">North Sea</a>	<a href="#">Belgium</a>	◆	➔	It is a sector which will remain stable with some economic gains.
<a href="#">North Sea</a>	<a href="#">Netherlands</a>	◆◆◆	➔	It is a sector which will remain stable with some economic gains or decrease if lease prices for quota and new requirements regarding landing obligations impose economic burdens /costs.
<a href="#">West Med</a>	<a href="#">Malta</a>	◆	➔➔➔	The Maltese fishery is a relatively small industry of a typically Mediterranean artisanal type, and is frequently described as a multi-species and multi-gear fishery, with the majority of the fishers switching from one gear to another several times throughout the year. This versatility is expected to create economic improvements for the sector in the future which might allow for further developments.

Legend: ◆ = low presence    ◆◆ = medium presence    ◆◆◆ = high presence  
 ➔ = none /limited potential    ➔➔ = medium potential    ➔➔➔ = high potential

### 3 Status and evolution Analysis

*Disclaimer: This section is pending as to include latest 2017 information.*

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## 4 Spatial Consequences of Future Trends

Historically, fishing (along with shipping) is the sector whose spatial claim has the longest tradition for marine areas. The co-existence of fisheries with other existing or new marine uses will be a key issue to solve observing future trends in the uses of the seas. Having a highly diversified sector (variety of gears types and specific sea uses, fishing species and types of vessels) could be seen as positive for dealing with potential spatial barriers. However, such fragmentation also makes fishers being a weaker party relative to other stakeholders, limiting their ability to influence the process and protect themselves from being pushed aside in a MSP conversation (See [MSP Platform FAQ's page](#) and the [DISPLACE model](#)).

### Relationship with other sectors

The matrix below indicates the potential Fishing Sector compatibility (synergies and conflicts) with other marine sectors. Note: red = potential conflicts; green = potential synergies; grey = not applicable.

		 Shipping & Ports	 Tourism & Recreation	 Oil & Gas Extraction	 Pipelines & Cables	 Fishing	 Aquaculture	 Marine Renewables	 Marine Aggregates	 Conservation
Fisheries	Synergies									
	Conflicts/Risks									

### Recommendations in MSP

Acknowledging the socio-ecological systems that entail fisheries it needs to be highlighted that extensive and broad expertise (in social, economic, environmental and legislative realms) is needed to better integrate fisheries into MSP<sup>11</sup>. MSP processes usually fail to identify those priority areas which are of increased relevance for fisheries (fishing grounds) or for fish species during different life stages (nursery and spawning areas), which brings us to recommend that the spatial dynamics of commercial fish species and fisheries, which are often understood as a major challenge for MSP, need to be brought up into the MSP conversation.

<sup>11</sup> Janßen, H., et al., 2017

The BaltSeaPlan Report 26<sup>12</sup> also highlights the followings for the integration of the fishery sector into MSP:

- Information about fish as crucial part of the marine ecosystem (data are often too coarse, need to know locations important for fish spawning and nursing areas)
- Information on suitable areas for fisheries (fishing effort areas information needed, reporting on those vessels without location systems, data on recreations fisheries)
- Stronger collaboration with stakeholders and fishing associations to develop better strategic plans that would consider the sector's development potential and co-existence with other marine uses.

## 5 Resources / Actors / References

### Actors

Name of Actor	Type of Actor	LINK	Short explanation
Marine Management Organization (MMO)	UK Government Organization	<a href="https://www.gov.uk/government/organisations/marine-management-organisation">https://www.gov.uk/government/organisations/marine-management-organisation</a>	Provides services and information regarding maritime uses in the UK.

### Projects

Name	Type of Project	Duration	LINK	Short explanation
BONUS BALTSPEACE	RESEARCH	2015-2018	<a href="https://www.baltspace.eu/">https://www.baltspace.eu/</a>	Screening the fisheries minds in Poland with regard to their attitude and expectations towards MSP
BaltSeaPlan	Research	2009-2012	<a href="http://www.baltseaplan.eu/">http://www.baltseaplan.eu/</a> <a href="http://msp-platform.eu/node/480">http://msp-platform.eu/node/480</a> <a href="http://www.msp-platform.eu/node/14">http://www.msp-platform.eu/node/14</a>	Analyzing the special case of fisheries and MSP - approaches towards integration

<sup>12</sup> [BaltSeaPlan Report No 26 "Fisheries in the MSP context"](#)

SRCSSMBSF	Joint Operational Program "Black Sea 2007-2013" (ENPI CBC)	November 2011 - November 2013	<a href="http://www.rmri.ro/WebPages/SRCSSMBSF/srcssmbsf_meetings.html">http://www.rmri.ro/WebPages/SRCSSMBSF/srcssmbsf_meetings.html</a>	It facilitated the cooperation between Black Sea coastal states in the field of marine ecosystem and fisheries resources management
MARE FRAME	FP7 (EU 7th Framework Programme for Research and Technological Development) KBBE.2013.1.2-08: Innovative insights and tools to integrate the ecosystem-based approach into fisheries advice	January 2014 - December 2017	<a href="http://mareframe-fp7.org/">http://mareframe-fp7.org/</a>	To significantly increase the use of ecosystem-based approach to fisheries management (EAFM) providing advice relating to European fish stocks.
ECOAST	COFASP - ERA-net	March 2016 - December 2018	<a href="http://www.e-coast.eu/wp/">http://www.e-coast.eu/wp/</a> <a href="http://www.msp-platform.eu/projects/ecoast-new-methodologies-ecosystem-approach-spatial-and-temporal-management-fisheries">http://www.msp-platform.eu/projects/ecoast-new-methodologies-ecosystem-approach-spatial-and-temporal-management-fisheries</a>	To identify, develop and test new methodologies for spatial and temporal management of fisheries and aquaculture, impact of fisheries and aquaculture, synergies and conflicts between human activities. Evaluates marine spatial planning in Adriatic Sea, Ionian Sea, Black Sea,

				Tyrrhenian Sea, Baltic Sea, Norwegian fjords and North-East Atlantic coast.
TRASIPESC	Romanian Ministry of Education and - Executive Agency for Higher Education, Research, Development and Innovation Funding	July 2014 - September 2017	<a href="http://www.proiecte-cercetare.ro/TraSiPesc/english/index.html">http://www.proiecte-cercetare.ro/TraSiPesc/english/index.html</a>	The aim is fishery products made in Romania is to penetrate the European market when food safety remains a critical issue.
Plano de Ordenamento do Espaço Marítimo (POEM)	Portuguese Ministry of Environment	2008-2010	<a href="http://www.dgpm.mam.gov.pt/Pages/POEM_PlanoDeOrdenamentoDoEspacoMarinho.aspx">http://www.dgpm.mam.gov.pt/Pages/POEM_PlanoDeOrdenamentoDoEspacoMarinho.aspx</a> <a href="http://msp-platform.eu/practices/plano-de-ordenamento-do-espaco-maritimo-poem">http://msp-platform.eu/practices/plano-de-ordenamento-do-espaco-maritimo-poem</a>	Study setting out the economic, environmental and social importance of Portugal's mainland sea area, showing existing and potential uses and their integrated planning and adaptive management.
Mapping Baltic Fisheries in support of Maritime Spatial Planning - Inside GAP2	Study	2014	<a href="http://gap2.eu/case-studies/case-study-11/">http://gap2.eu/case-studies/case-study-11/</a> <a href="http://www.msp-platform.eu/node/653">http://www.msp-platform.eu/node/653</a>	This case study addresses the integration of the fisheries management into the Maritime Spatial Planning process in the Baltic Sea Region.
GAP2	European Commission FP7 Capacities Programme	January 2011 - January 2016	<a href="http://www.gap2.eu/">http://www.gap2.eu/</a> <a href="http://www.msp-platform.eu/projects/connecting-science-stakeholders-and-policy">http://www.msp-platform.eu/projects/connecting-science-stakeholders-and-policy</a>	The project thus brings scientists, fishermen and policy makers together. How the project does this ranges from funding exchange trips between research and management organisations, to

				engaging with wider society about fisheries management, to coordinating 13 research projects (case studies) centred upon fishers and scientists working together.
The MareFrame Decision Support Framework - MareFrame	Tool	2015	<a href="http://mareframe.mapix.com/">http://mareframe.mapix.com/</a> <a href="http://www.msp-platform.eu/node/103">http://www.msp-platform.eu/node/103</a>	The overall objective is to develop, test and adapt a decision support framework (DSF) that serves, to provide an evidence basis for policy makers and other stakeholders about the trade-off between various management options on a multispecies basis.
International fisheries management plan for Dogger Bank - MASPNOse	DGMARE	2012	<a href="https://www.wageningenur.nl/upload_mm/7/6/2/92fbfd4c-5b01-4e8e-9a82-de877fa6d515_MASPNOSE%20D1.2%20MSP%20in%20case%20studies.pdf">https://www.wageningenur.nl/upload_mm/7/6/2/92fbfd4c-5b01-4e8e-9a82-de877fa6d515_MASPNOSE%20D1.2%20MSP%20in%20case%20studies.pdf</a> <a href="http://www.msp-platform.eu/node/191">http://www.msp-platform.eu/node/191</a>	MASPNOse provided facilitation, support and financial means to allow the complex stakeholder process to take place with the aim of developing a plan for the Dogger Bank that integrated fishing with conservation of 3 Natura SACs. Ultimately, the stakeholders decided "to agree to disagree" and delivered a report with two different points of view.
Guidance of Better Integration of Aquaculture, Fisheries, and other Activities in the Coastal Zone - COEXIST	European Community's Seventh Framework Programme (FP7 2007-2013)	2013	<a href="http://www.coexistproject.eu/images/COEXIST/Guidance_Document/Best%20practices%20guidelines_FINAL.pdf">http://www.coexistproject.eu/images/COEXIST/Guidance_Document/Best%20practices%20guidelines_FINAL.pdf</a> <a href="http://www.msp-platform.eu/node/613">http://www.msp-platform.eu/node/613</a>	The purpose of this guidance document is to promote the better integration of aquaculture, fisheries and other activities in the coastal zone by the identification and application of appropriate spatial management tools. The conclusions drawn and the recommendations in this document are largely based on the experience of applying a set of methods and technical tools to address a number of key questions in spatial management in six COEXIST case studies (Hardangerford, NO; Atlantic Coast, IE; Atlantic Coast, FR; Algarve

				Coast, PT; Adriatic Sea Coast, IT; Coastal North Sea, DE, NL, DK; Baltic Sea, FI)
Making the European Fisheries Ecosystem Plan Operational - MEFEO	EU 7th Framework Programme	August 2008	<a href="https://www.liverpool.ac.uk/mefepo/">https://www.liverpool.ac.uk/mefepo/</a> <a href="http://www.msp-platform.eu/node/144">http://www.msp-platform.eu/node/144</a>	The Atlas provides an overview of the North Western Waters ecosystem, covering issues including physical and chemical features, habitat types, biological features, birds, mammals, Fishery and other human activities. This information is provided in non-technical language and intended to help policy makers, managers and stakeholders in decision making.

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