ISSN 2467-0715

European Commission

Scientific, Technical and Economic Committee for Fisheries (STECF) – Social Data in EU fisheries 1: further development of the social analysis toolbox (NFPs, indicators)

(STECF-26-02)

Final report pending publication numbers for webpage release

Ballesteros, M., Kraan, M. & Doerner, H. (eds.)

2026

Joint Research Centre

EUR 28359 EN

This document is a publication by the Joint Research Centre (JRC), the European Commission's science and knowledge service. It aims to provide evidence-based scientific support to the European policymaking process. The contents of this publication do not necessarily reflect the position or opinion of the European Commission. Neither the European Commission nor any person acting on behalf of the Commission is responsible for the use that might be made of this publication. For information on the methodology and quality underlying the data used in this publication for which the source is neither Eurostat nor other Commission services, users should contact the referenced source. The designations employed and the presentation of material on the maps do not imply the expression of any opinion whatsoever on the part of the European Union concerning the legal status of any country, territory, city or area or of its authorities, or concerning the delimitation of its frontiers or boundaries.

Contact information
Name: STECF secretariat
Address: Unit D.02 Ocean and Water, Via Enrico Fermi 2749, 21027 Ispra VA, Italy
Email: jrc-stecf-secretariat@ec.europa.eu
Tel.: +39 0332 789343

The Joint Research Centre: EU Science Hub
https://joint-research-centre.ec.europa.eu

JRC145884

Luxembourg: Publications Office of the European Union, 2026

© European Union, 2026

The reuse policy of the European Commission documents is implemented by the Commission Decision 2011/833/EU of 12 December 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39). Unless otherwise noted, the reuse of this document is authorised under the Creative Commons Attribution 4.0 International (CC BY 4.0) licence (https://creativecommons.org/licenses/by/4.0/). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.

For any use or reproduction of photos or other material that is not owned by the European Union permission must be sought directly from the copyright holders.

How to cite this report: European Commission, Joint Research Centre, , *Scientific Technical and Economic Committee for Fisheries (STECF) – Social data in EU fisheries 1: further development of the social analyses toolbox (NFPs, indicators) (STECF-26-02), Ballesteros, M., Kraan, Doerner, H. (editors), Publications Office of the European Union, Luxembourg, 2026.*

CONTENTS

Abstract ……..4

STECF Report on EWG 26-02 5

Request to STECF 5

STECF comments 5

STECF conclusions 8

References 10

Contact details of STECF members 10

Expert Working Group EWG 26-02 15

1. Introduction 16

1.1 Terms of Reference for EWG-26-02 16

2. ToR 1. National fisheries Profiles 19

3. ToR 2. Fisheries Community Profiles 31

3.1. Provide an inventory of the number of FCPs 31

3.2. Community Profiles in the OMRs 42

4. ToR 3 Social indicators 67

4.1. Methodological approach 67

4.2. Potential Additions to the Indicator Set 68

Advancing in the operationalization of indicators 69

4.2. Systematic approach to social indicators 71

4.3. Focused analysis of indicators for Generational Renewal 72

3.4. Focused analysis of indicators for Training 76

5. ToR 4. Annual Social report 84

5.1. ASOR 2025 84

5.2. ASOR 2025: Data Transmission and Monitoring Tool (DTMT) process 85

5.3. ASOR 2025. Indicators used: caveats, missing indicators. 85

5.4. ASOR 2025. Balance capacity indicators 89

5.5. Upload and document the data issues identified by EWG 25-13 in the DTMT, following DTMT guidelines 89

5.6. Prepare for the next iteration of the ASOR (EWG 26-16) 89

6. Contact details of EWG-26-02 participants 97

7. References 100

List of figures 101

List of Tables 102

Annexes 104

Annex 1. Abbreviations 104

Annex 2. Outermost Regions (OMR) Regional Fisheries Profiles. 111

Annex 3. Guidelines for Interviews on Generational Renewal in European Fisheries. 114

Topic 1: Social Perception, Identity, and Entry Pathways 114

Topic 2: Employment, stability, and voice 114
Topic 3: Operational issues, risk, and well-Being 115
Topic 4: Economic Viability and Financial issues 115
Topic 5: Governance 115
List of Background Documents 116

Authors

STECF advice:

BALLESTEROS, Marta; BASTARDIE, Francois; CASEY, John; COLAÇO, Ana; CUENDE DE FRANCISCO, Elsa; DÖRING, Ralf; DROUINEAU, Hilaire; GRATI, Fabio; GRIFFITHS, Christopher; HIDALGO, Manuel; IBAIBARRIAGA, Leire; JACKSON, Emmet; JARDIM, Ernesto; JUNG, Armelle; LIGAS, Alessandro; LUCCHETTI, Alessandro; MANNINI, Alessandro; MOORE, Claire; MOTOVA-SURMAVA, Arina; NIMMEGEERS, Sofie; NORD, Jenny; PINTO, Cecilia; PRELLEZO, Raúl; RAID, Tiit; RUSSO, Tommaso; SABATELLA, Evelina Carmen; SAVINA-ROLLAND, Marie; SPEDICATO, Maria Teresa; STEINS, Nathalie; STRANSKY, Christoph; TSERPES, George; ULRICH, Clara; URI-ARTE, Andres; UUSITALO, Laura; VALENTINSSON, Daniel.

EWG-26-02 report:

BALLESTEROS, Marta; KRAAN, Marloes; ARIAS, Milena; ADVIC, Edvard; BARZ, Fanny; CANO, Susana; CEPIĆ, Dražen; COZZOLINO, Maria; DANATSKOS, Christos; DAVIDJUKA, Irina; FRANGOUDES, Katia; KOVSARS, Maksims; LE GRAND, Christelle; NICHEVA, Simona; NTAVOU, Stavroula; PASCUAL-FERNANDEZ, José; PITA, Cristina; SINTORI, Alexandra; SVELS, Kristina; TZOURAMANI, Irene; VAN DER VALK, Olga; ZHELEV, Kolyo.

Abstract

Commission Decision of 25 February 2016 setting up a Scientific, Technical and Economic Committee for Fisheries, C(2016) 1084, OJ C 74, 26.2.2016, p. 4–10. The Commission may consult the group on any matter relating to marine and fisheries biology, fishing gear technology, fisheries economics, fisheries governance, ecosystem effects of fisheries, aquaculture or similar disciplines.

This report addresses four specific areas related to the operationalization of the social dimension: the Finish and Maltese National Fisheries Profiles assessment, Fisheries Community Profiles, social indicators and the development and next steps of the Annual Social Report (ASOR EWG 25-13).

STECF Report on EWG 26-02

Request to STECF

STECF is requested to evaluate the findings of the STECF Expert Working Group meeting and make any appropriate comments and recommendations.

STECF comments

EWG 26-02 met in Ispra (Italy) from 15 to 19 June 2026, with the participation of 22 social science experts. STECF considers that the EWG adequately addressed the ToRs and provides the following specific comments on those ToRs covered by the EWG 26-02:

1. ToR 1 - National Fisheries Profiles (NFPs)

National Fisheries Profiles (NFP) provide a comprehensive overview of the fisheries sector by Member State, emphasising the social dimension. They are considered a key tool to understand the wider social context of fisheries (STECF EWG 24-05) and are available online (https://oceans-and-fisheries. (https://oceans-and-fisheries.ec.europa.eu/science-observation-and-data/scientific-advice-and-data-collection/national-fisheries-profiles_en).

STECF notes that the EWG reviewed the results of two *ad hoc* contracts commissioned to evaluate the extent to which the two new National Fisheries Profiles (NFPs) are fit for purpose. The two new NFPs for Malta and Finland both show scope for improvement but are in general fit for purpose and allow for cross-comparison with existing NFPs. Both NFPs benefited from harmonised EU data sources while also incorporating national and region-specific information, providing a balance between comparability and country-specific analysis. Publication of the new NFPs will increase the number of available NFPs to 19.

STECF also notes that the NFPs provide unique and valuable information and knowledge to contextualise social data, often dispersed across many sources or not available elsewhere. However, while a template has been incrementally developed and endorsed by STECF (PLEN 23-01 and PLEN 24-02), further standardization is still needed; both in terms of updating existing NFPs to the latest standard, as well as in conciseness of the presented information which varies significantly between the NFPs.

STECF observes that the EWG proposes a further refinement of the existing template by: (i) including a list of standardised tables and figures, (ii) providing guidance on the expected length of NFPs, proportionate to the size of the Member State or complexity of fleets, and (iii) improving the coverage of wellbeing, living conditions and the cultural dimensions of fisheries. STECF also notes that while the NFP template was endorsed by STECF, the NFC are currently neither endorsed nor published as an STECF product.

STECF acknowledges the EWG's suggestion to update the NFPs every three years, in alignment with the social variables data call, and that adequate resources should be allocated to support the update process.

STECF observes that the EWG considers the review process established for NFPs (EWG 25-13) to be effective and should be continued through a recurring ToR to ensure that the profiles remain fit for purpose and aligned with the evolving framework for social data analysis. In this context, STECF notes that the NFPs necessarily cover wider aspects than purely social data, and quality control would benefit from more extended peer-review that includes expertise from multiple scientific disciplines.

STECF takes notes of the proposal made by the EWG 24-05 and the STECF remarks (PLEN 23-01 and 24-02) regarding providing a web-based version of the NFP and considers that a web-based summary of the NFP PDF version would enhance accessibility, usability, and wider dissemination, and allows content to be tailored to different target audiences, thereby maximizing the benefits of the NFPs.

2. ToR 2 - Fisheries Community Profiles (FCPs)

Fisheries Community Profiles (FCPs) are used in concert with NFPs (STECF 22-14 and STECF 24-05) providing a deeper understanding of social dimensions and supplying data, information and knowledge at smaller scales. Community profiles allow to capture the relative societal importance of fisheries and specific structural and functional features that might get diluted in the general NFPs.

STECF notes that FCPs can support social impact assessments at the sub-national level. Unlike the NFPs, to date, there has been no coordinated initiative from the European Commission to systematically produce FCPs, and most work on this element of the social analysis tool has been carried out without dedicated funding. The total number of FCPs has now reached six (three for France, one for Greece and two for Netherlands).

As part of the EWG 26-02' ToRs on FCPs, the development of FCPs in the EU Outermost Regions (ORs) was further explored. STECF acknowledges the joint work with EWG 26-06 on ORs to develop an approach to complement fishing possibilities and capacity balance analysis based on biological, economic and technical variables with social indicators. STECF notes that for the ORs the development of Regional Profiles as well as community of practice (Kraan et al., 2024) profiles for tuna fisheries, the only relevant migratory species for fisheries in these regions, could be an operational approach towards community-level analysis.

STECF observes that, from both conceptual and methodological perspectives, the FCPs could be extended to cover aquaculture and processing sectors where these are relevant to local fisheries communities. It further notes that the FCP template (STECF 20-14 and STECF 24-05) can be used to develop profiles for communities that rely solely on aquaculture or seafood processing.

3. ToR 3 - Social Indicators

STECF observes that EWG 26-02 assessed the full list of potential social indicators from previous EWGs on Social Data (STECF 22-14, 23-17 and 24-05) as well as those available from a systematic literature review by ICES WG Social (ICES, 2024) and FAO (Himes-Cornell et al., 2026) based on data availability, ease of data collection, integration into routine monitoring, and comparability across Member States. Based on this assessment, EWG 26-02 proposed a typology that classifies indicators according to their operational readiness and identifies pathways for further development, including standardized survey templates and interview guidelines to support data collection.

STECF notes that focused analyses were conducted on (i) generational renewal and (ii) training and education, to support the development of a roadmap for integrating suitable indicators into future EU social data collection exercises. For generational renewal, nine relevant indicators were identified: three can be calculated immediately, four are partially calculable using existing data, and two require pilot studies and harmonised definitions before becoming operational. For training and education, indicators were assessed based on their relevance, testing status, data availability, and implementation challenges. STECF notes progress in the identification of policy-relevant indicators that can be supported by existing data sources. It further notes that future work by the EWG Social Data in Fisheries could contribute to the operationalisation of selected indicators and the development of supporting methodologies, such as survey questionnaires and interview guidelines.

4. ToR 4 - Annual Social Report (ASOR)

STECF observes that EWG 26-02 reviewed the process leading to the production of the first ASOR, and identified 15 points of improvement, with a particular focus on resources (time, expertise), data and process, to inform the preparation of the second ASOR. STECF takes note of the proposal to use the next EWG meeting of the year in which social data are analysed be held as a dedicated in-person meeting, rather than an online one, in order to prepare and review the data. STECF also notes that the inclusion of social variables in the March 2026 update of the DTMT guidance document will contribute to smoother processes and workflows during data collection and analysis. In addition, the process review identified data issues affecting social variables from previous data calls (2017), thereby contributing to improvements in data quality.

STECF notes that EWG 26-02 reported a total of nine initial social fleet data issues that may have impacted the quality and robustness of the analysis in the ASOR, all of which were documented in the Data Transmission Monitoring Tool (DTMT). Among these, STECF observes inconsistencies in employment data between the social and the economic data calls.

STECF notes that, in addition to the basic demographic indicators collected through the social data call, a range of relevant social variables is available from other data sources across the EU. These include information on wages and unpaid labour, particularly in the small-scale fisheries sector; social security cover-

age for vessel owners and crew on EU fishing vessels; compliance with international standards, including ILO Convention C188 and the IMO STCW 1978 and STCW-F conventions on seafarer training and certification; and accidents at sea. STECF acknowledges EWG 26-02's suggestion to allocate sufficient time at the EWG and resources to fully exploit these additional data sources and enhance the insights they can provide in the preparation of the second ASOR.

STECF observes that both EWG 26-02 and EWG Outermost Regions 2026-06 consider the contextual analysis of balance capacity indicators to provide a valuable basis to integrate data, information and knowledge from the biological, ecological, technological, economic and social dimensions. STECF acknowledges that the methodological approach jointly developed with EWG 26-06 for the ORs (see also TOR 5.4 of this plenary report) illustrates how these indicators can be complemented by contextual social information to improve the interpretation of fleet balance outcomes.

STECF notes that EWG 26-02 explored a range of topics and their policy relevance in preparation for the second ASOR (EWG 26-16). These included generational renewal, training and education, technical measures, the further development of social data for the aquaculture and processing sectors, social impact assessments, and the role of fisheries in coastal communities across the EU. STECF acknowledges EWG 26-02's finding that there is currently no immediate advisory need requiring a substantial expansion of social analysis for the aquaculture and processing sectors.

STECF notes that EWG 26-02 identified generational renewal, including training and education, as the most relevant topic for further analysis in the next EWG. The first ASOR has already identified a range of factors affecting generational renewal in the fisheries sector, providing a strong basis for a more structured analysis of their relative importance and interactions. This work is particularly relevant in light of concerns highlighted in the CFP evaluation regarding an ageing workforce, barriers to labour market entry, and declining sector attractiveness (European Commission, 2026). Further analysis would help distinguish between challenges that are specific to fisheries and those shared with other economic sectors, thereby supporting more targeted policy responses. STECF takes note of EWG 26-02's consideration that training and education should form a central component of this work, given their key role in attracting and retaining new entrants and the ongoing policy discussions on fishers' training and certification at EU level. Furthermore, the EWG highlights the need for inclusion of both quantitative and qualitative social science perspectives in developing further work on generational renewal. STECF takes note of the proposals to guide the preparations of this work, including interviews, a stakeholder meeting, an assessment of Member States' initiatives in support of generational renewal as well as benchmarking against other sectors.

STECF conclusions

STECF endorses the outcomes of EWG 26-02, including the results of the two *ad hoc* contracts, and concludes that all ToRs were appropriately addressed.

STECF concludes that further progress was made in the development of the social analysis toolkit. Two new NFPs were completed, and additional four FCPs were produced. Furthermore, in collaboration with EWG 26-06 an exploratory approach was developed to link social indicators with the existing biological, economic, technical indicators, in order to provide contextual information for the interpretation of the balance status of the fleet segments in the Outermost Regions. This would give Member States an opportunity to provide additional illustrations of the situation of their fleet segments, including small-scale fisheries. STECF emphasises though that these additional social indicators are not considered as alternative indicators to technical, biological and economic ones and do not form part of the fleet balance calculation. In addition, a typology that classifies social indicators according to their operational readiness, as well as specific social indicators for (i) generational renewal and (ii) training and education is now available.

STECF underlines that the NFPs are an important element of the social analysis toolkit and agrees with the EWG 26-02 that the next steps forward are to further refine and standardize the NFPs. STECF also proposes that further formalisation of the update and publication process is desirable, taking into account the following considerations: (i) review of proposed changes to the current template; (ii) alignment of updates with the triennial social variables data call; (iii) review and update of the NFP by a dedicated, multidisciplinary expert working group, assisted by ad hoc contracts; (iv) publication of the NFPs as a STECF product.

STECF highlights that the exploratory approach for linking social indicators in the balance capacity analysis for the ORs marks a pathway forward for future work in the ORs and European sea basins. STECF concludes that community-of -practice profiles could be developed to provide additional elements interpretation of the context faced by the fleet segments assessed being out of balance with their fishing opportunities. For this, information already in the present fleet balance reports can be used.

STECF concludes that the FCP template with some minor adaptations can be used for the development of aquaculture and fish processing pilots.

STECF concludes that EWG 26-02's work on a roadmap for integrating suitable indicators into future EU social data collection exercises, including the use of standardised surveys and interview guides, should be continued.

STECF supports the proposal by EWG 26-02 to focus the next meeting (EWG 26-16) on further analysis of generational renewal, including training and education. STECF further concludes that in EWG 26-16 involvement of both quantitative and qualitative social science expertise is required to assess labour market entry, retention, and workforce renewal in the fisheries sector.

References

European Commission (2026). Commission staff working document: Evaluation of Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy (SWD(2026) 120 final). European Commission. https://ec.europa.eu/transparency/documents-register/detail?ref=SWD(2026)120&lang=en

Himes-Cornell et al. 2026. A sustainability conceptual classification system to support socio-economic indicator design and evaluation in fisheries and aquaculture. Preprint. FAO.

ICES, 2024. Working Group on Social Indicators (WGSOCIAL; outputs from 2023 meeting). ICES Scientific Reports, 6(40). Copenhagen: International Council for the Exploration of the Sea. https://doi.org/10.17895/ices.pub.25611624

Kraan, M., Himes-Cornell, A., Pedreschi, D., Motova, A., Hamon, K. G., Pita, C., Ballesteros, M., Barz, F., Fonseca, T., Garcia-De-Vinuesa, A., Guitierrez, A., Jackson, E., Lam, M. E., Norman, K., Seixas, S., & Steins, N. A. (2025). Putting fishing communities on the map in ICES regions. ICES Journal of Marine Science, https://doi.org/10.1093/icesjms/fsaf10

Contact details of STECF members

Information on EWG participant's affiliations is displayed for information only. In any case, Members of the STECF, invited experts, and JRC experts shall act independently. In the context of the STECF work, the committee members and other experts do not represent the institutions/bodies they are affiliated to in their daily jobs.

Name	Affiliation[1]	Email
Ballesteros, Marta	Spanish Institute of Oceanography (IEO-CSIC), Center of Vigo, Subida a Radio Faro 50-55, Vigo, Spain.	marta.ballesteros@ieo.csic.es
Bastardie, François	Technical University of Denmark, National Institute of Aquatic Resources (DTU-AQUA), Kemitorvet, 2800 Kgs. Lyngby, Denmark	fba@aqua.dtu.dk
Casey, John	Independent consultant	blindlemoncasey@gmail.com

Name	Affiliation[1]	Email
Colaço, Ana	University of the Azores, Institute of Marine Sciences - OKEANOS. Rua Professor Doutor Frederico Machado 4, 9900-140 Horta, Portugal	maria.aa.colaco@uac.pt
Cuende de Francisco, Elsa	AZTI (Member of the Basque Research and Technology Alliance). Marine Research Unit. Center of Sukarrieta, Bizkaia, Spain.	ecuende@azti.es
Döring, Ralf	Thünen Institute [TI-SF] Federal Research Institute for Rural Areas, Forestry and Fisheries, Institute of Sea Fisheries, Economic analyses unit Herwigstrasse 31, D-27572 Bremerhaven, Germany	ralf.doering@thuenen.de
Drouineau, Hilaire	INRAE, UR EABX, 50 avenue de Verdun, 33612 Cestas Cedex, France	hilaire.drouineau@inrae.fr
Grati, Fabio	National Research Council (CNR) – Institute for Biological Resources and Marine Biotechnologies (IRBIM), L.go Fiera della Pesca, 2, 60125, Ancona, Italy	fabio.grati@cnr.it
Griffiths, Christopher	Swedish University of Agricultural Sciences (SLU), Department of Aquatic Resources, Turistgatan 5, SE-45330, Lysekil, Sweden	christopher.griffiths@slu.se
Hidalgo, Manuel	Spanish Institute of Oceanography (IEO, CSIC), Balearic Oceanographic Center (COB), Palma, 07015, Spain	jm.hidalgo@ieo.csic.es
Ibaibarriaga, Leire	AZTI. Marine Research Unit. Txatxarramendi Ugartea z/g. E-48395 Sukarrieta, Bizkaia. Spain.	libaibarriaga@azti.es

Name	Affiliation[1]	Email
Jackson, Emmet	Bord Iascaigh Mhara (BIM), Ireland's Seafood Development Agency.	Emmet.jackson@bim.ie
Jardim, Ernesto	Independent expert	ernesto.jardim@gmail.com
Jung, Armelle	DRDH, Technopôle Brest-Iroise, BLP 15 rue Dumont d'Urville, Plouzane, France	armelle.jung@desre-quinsetdeshommes.org
Lucchetti, Alessandro	National Research Council (CNR) – Institute for Biological Resources and Marine Biotechnologies (IRBIM), Largo Fiera della Pesca, 2, 60125, Ancona, Italy	alessandro.lucchetti@cnr.it
Mannini, Alessandro	CNR IRBIM Ancona, Largo Fiera della Pesca, 260125 Ancona ITALY	alessandro.mannini@irbim.cnr.it
Moore, Claire	Marine Institute, Renville, Galway, Ireland	claire.moore@marine.ie
Motova -Surmava, Arina	Sea Fish Industry Authority, 18 Logie Mill, Logie Green Road, Edinburgh EH7 4HS, UK	arina.motova@seafish.co.uk
Nimmegeers, Sofie	Flanders research institute for agriculture, fisheries and food, Belgium	Sofie.Nimmegeers@ilvo.vlaanderen.be
Nord, Jenny (vice-chair)	Swedish Agency for Marine and Water management	jenny.nord@havochvatten.se
Pinto, Cecilia	Università di Genova, DISTAV - Dipartimento di Scienze della Terra, dell'Ambiente e della Vita, Corso Europa 26, 16132 Genova, Italy	cecilia.pinto@edu.unige.it
Prellezo, Raúl (chair)	AZTI -Unidad de Investigación Marina, Txatxarramendi Ugartea z/g 48395 Sukarrieta (Bizkaia), Spain	rprellezo@azti.es

Name	Affiliation[1]	Email
Raid, Tiit	Estonian Marine Institute, University of Tartu. Mäealuse 14, Tallinn, EE-126, Estonia	tiit.raid@gmail.com
Russo, Tommaso	University of Rome Tor Vergata, via della Ricerca Scientifica snc, 00133 Rome, Italy	Tommaso.Russo@Uniroma2.it
Sabatella, Evelina Carmen	National Research Council (CNR) – Institute for Research on Population and Social Policies (IRPPS), Corso S. Vincenzo Ferreri, 12, 84084 Fisciano, Salerno, Italy.	evelinacarmen.sabatella@cnr.it
Savina-Rolland, Marie	Ifremer, 8 rue François Toullec. 56100 Lorient	Marie.Savina.Rolland@ifremer.fr
Spedicato, Maria Teresa	Fondazione COISPA. Via dei trulli 18-20. 70126 Bari, Italy	spedicato@fondazionecoispa.org
Steins, Nathalie	Wageningen Marine Research. Korringaweg 7. 4401 NT Yerseke. The Netherlands	nathalie.steins@wur.nl
Stransky, Christoph	Thünen Institute [TI-SF] Federal Research Institute for Rural Areas, Forestry and Fisheries, Institute of Sea Fisheries, Herwigstrasse 31, D-27572 Bremerhaven, Germany	christoph.stransky@thuenen.de
Tserpes, George	Hellenic Center for Marine Research (HCMR), Thalassokosmos, 71500 Gournes Pediados, Crete, Greece	gtserpes@hcmr.gr
Ulrich, Clara	IFREMER, Rue de l'Ile d'Yeu, 44311 Nantes, France.	Clara.Ulrich@ifremer.fr
Uriarte, Andres	Independent expert	auriartes@hotmail.com

Name	Affiliation[1]	Email
Uusitalo, Laura	Natural Resources Institute Finland (Luke), Finland	laura.uusitalo@luke.fi (secondary: laura.uusitalo@iki.fi)
Valentinsson, Daniel	Swedish University of Agricultural Sciences (SLU), Department of Aquatic Resources, Turistgatan 5, SE-45330, Lysekil, Sweden	daniel.valentinsson@slu.se

EXPERT WORKING GROUP EWG 26-02

REPORT TO THE STECF

SOCIAL DATA IN EU FISHERIES 1: FURTHER DEVELOPMENT OF THE SOCIAL ANALYSIS TOOLBOX (NFPS, INDICATORS)

15 JUNE – 19 JUNE 2026

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

1. INTRODUCTION

The STECF EWG 26-02 met during 15 June–19 June 2026 in ISPRA. The meeting opened at 09:00 on 15 June and was adjourned at 16:00 on 19 June 2026.

1.1 Terms of Reference for EWG-26-02

1.1.1 Background and general objectives provided by the Commission

One of the objectives of the Common Fisheries Policy[1] (the CFP Regulation) is to promote social sustainability. The current legal framework refers to labour conditions, health and safety, as well as to job creation and training, social inclusion and a fair standard of living. Fisheries throughout Europe have undergone major structural changes, leading to important social consequences for both individual fishers as well as for fishing communities. In a number of fishing communities and regions of the EU, the social importance of the fisheries sector outweighs its direct economic contribution.

The collection of data for calculating the social indicators for **the EU fishing fleet, aquaculture and fish processing industry** is required under the Data Collection Framework (Regulation (EU) 2017/1004 on the establishment of a Union framework for the collection, management and use of data in the fisheries sector and support for scientific advice regarding the CFP). The multiannual program for data collection (Decisions (EU) 2021/1167 and 2021/1168) specifies social variables[2] to be collected every three years from 2018 onwards:

- Employment by gender
- Full Time Employment (FTE) by gender
- Unpaid labour by gender
- Employment by age
- Employment by education level
- Employment by nationality
- Employment by employment status
- Total FTE National

[1] Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013

[2] For definitions and methodology of existing indicators, see https://datacollection.jrc.ec.europa.eu/documents/d/dcf/eumap_guidance_social

Until 2025, this data was called separately for the EU fishing fleet, EU aquaculture sector, and EU fish processing industry. In 2025, a joint data call took place in August-September.

Seven STECF Expert Working Groups (EWG) on social data in fisheries have taken place (19-03, 20-14, 22-14, 23-17, 24-05, 25-02, 25-13). Each one built on the work on the previous EWG resulting in the development of a social analysis toolbox which includes National Fisheries Profile, Community Profiles, social indicators and Annual Social Report (ASOR).

To date:

- **The first dedicated social report (ASOR) was published in April 2026.**
- 19 National Fisheries Profiles (BE, BG, CY, DK, EE, ES, FR, HR, IE, **FI**, IT, **MT**, NL, PT, SE, SI, EL, DE, LV) have been produced and 8 have been peer-reviewed.
- EWG 24-05 proposed a list of 38 new social indicators, including 12 that would be immediately collectable by national authorities. Building on these findings, 6 Member States plan to test the collection of new social indicators in their National Work Plans (BE, HR, EL, FI, ES, SE).
- Several initiatives are ongoing to complete community profiles (NL, ES, FR, among others).

1.1.2 Workflow and outputs of the EWG

The STECF EWG 26-02 is requested to:

ToR 1 – National Fisheries Profiles

Analyse the 2 new National Fisheries Profiles prepared by experts through ad hoc contracts MT, FI) and identify:

i. To what extent the current NFPs are fit for purpose
ii. Discuss the way forward (collection all NFPs, updates, availability)
iii. Whether the sources of data enable subsequent publication of the NFPs

ToR 2 – Fisheries Community Profiles

a. Provide an inventory of the number of CPs

b. Following the advice provided in STECF PLEN 24-01 and STECF PLEN 25-02, and in collaboration with EWG OR, explore how fisheries community profiles

in the outermost regions could support the interpretation of fleet balance indicator results. In particular, identify and select fisheries communities in the OR for future profiling, taking into account fleet segments identified as imbalanced. A joint team from both EWG should propose a preliminary list of fisheries communities in the OR where further community-level profiling would help better understand the implications of fleet balance outcomes.

ToR 3 – Social Indicators

Report on a route to advance the collection and/or use of social indicators, discussing ways to proceed assessing routes via the DCF (i.e. pilots, different definitions of existing indicators, …) and via other sources.

ToR 4 – Annual Social Report

a) Debrief on the production of the first ASOR, providing key lessons learnt from the production of the first ASOR and suggested next steps
    i. In terms of process, including DTMT process
    ii. In terms of indicators used: caveats, missing indicators
    iii. In term of links with other processes: balance capacity
b) Upload and document the data issues identified by EWG 25-13 in the DTMT, following DTMT guidelines
c) Prepare for the next iteration of the ASOR (EWG 26-16)
    i. Identification of special topic and data to be used for it
    ii. Identification of specific expertise needed (if relevant)
    iii. Identification of any preparatory work needed

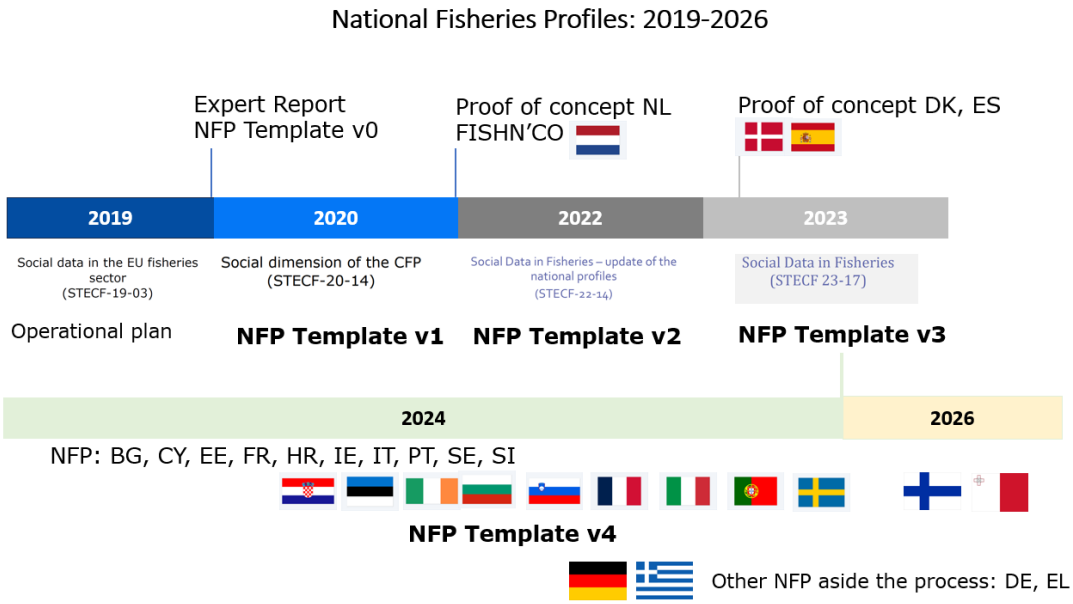
2. ToR 1. National fisheries Profiles

National fisheries profiles (NFPs) provide a comprehensive social analysis of fisheries at Member State level. They are an essential tool to understand the wider context of fisheries, help interpret social variables and allow for comparisons with other Member States (MSs) and sea basins. NFPs present existing quantitative and qualitative data on the historical background and specific national contexts of the fisheries sector, emphasizing the most salient social, cultural, economic, institutional, and legal aspects of fisheries in each country, as well as current key trends and changes in the seafood sector.

The process for the design and development of National Fisheries Profiles (NFPs) started in 2019 (see figure 2.1).

EWG 26-02 analysed the two new NFPs, for Finland and Malta, to see if they are fit for purpose (Figure 1). The methodological approach was set and detailed in EWG 23-17 and EWG 24-05 (Table 1). A NFP is considered fit for purpose if it adheres to the mandatory reporting template and provides a standardized, evidence-based characterization of the fisheries sector, encompassing its structural, economic, social, cultural, institutional, and legal dimensions, thereby supporting the contextualization of social indicators, assessment of well-being and living conditions, analysis of temporal trends and sectoral challenges, identification of social disparities, and allows for comparison across fisheries and Member States.

Figure 1. Summary of the development of National Fisheries Profiles.



Source: National Fisheries profiles submitted by Member States.

2.1. Fitness-for-Purpose Assessment: National Fisheries Profiles for Finland and Malta

This section provides the results of the fit-for-purpose assessment of the two last submitted National Fisheries Profiles by Finland and Malta. The NFPs were developed based on the NFP template v4. (Table 1). Compared with earlier versions, the table now includes a PESTLE analysis and additional explanatory text.

Table 1. NFP Template v4.

Chapter	Subheading	Description
A. Executive Summary	Main Findings	The executive Summary shall give a concise and comparable overview on the Fisheries in MS. In contrast to the whole NFP, it focuses on comparable data but will therefore miss out on contextual details. This needs to be kept in mind. - Precise Guidelines / questions that can lead to cross comparison 1. General information on fisheries sector structure (in SHORT) - Information on relevant fleet sectors/segments: number of registered vessels, number of people employed (FTE), Age category and gender of people employed in fisheries - No of harbours - Accessible fishing grounds / basins with most important species 2. Governance System: - List (impact of) most important management tools - Marine Spatial Planning: Main (foreseen) social and economic impacts on fisheries after MSP 3. Social, cultural and economic aspects of fisheries - Listing of (most important) fisheries communities and why (only use keywords: heritage, economic, infrastructure, tourism, community based around fishing, etc….) - Important, or already researched, or under researched topics related to fisheries communities (keywords/topic sentences) - Main tool of social security in MS - meaning of other sectors using the same resource (space for aquaculture and OWF and fish for recreational fishing) and potential conflicts 4. Trends / Challenges - Most important trends and current issues (social!) (max. 2 each - (if available) Future vision/trends on fisheries
B. Methods and Data		Reflection on data limitations, data quality, process and methodological approach.
1. General description of the society		- Common indicators already existing and harmonized across EU (EUROSTAT, National Statistical Institutes; e.g. population, unemployment rate, migratory balance, average household size, fertility rates, GDP/GVA)
2. Fisheries sector structure	2.1. General overview	Setting the scene - general fisheries information, mainly descriptive. Specifically addresses employment
	2.2. Summary of fleets	Fleet, fishing practices and fishing systems.
	2.3. Geographic areas	General short introduction of the basin(s), not specific about harbours (follows later in fisheries community)
	2.4. Processing, trade	

Chapter	Subheading	Description
	and markets	
	2.5. Fisheries innovation	
3. Governance system	3.1. Responsible authorities	
	3.2. National organizations	Include: producer organizations (which form, how many, organizational processes), other national organizations, relevant stakeholder groups
	3.3. Management instruments	How is the CFP "lived" in the MS? How is the attitude towards it, how is compliance? Government support to fisheries,
	3.4. Marine Spatial Planning	
	3.5. Fighting IUU fishing	Focus on social knowledge (e.g., about compliance) available evidence (e.g. improve/worsen), institutional devices (e.g. positive/negative incentives)
	3.6. Landing Obligation	focus on social knowledge (e.g., about compliance) available evidence (e.g. economic and social impacts assessments), social innovations.
4. Social, cultural and economic aspects of fisheries	4.1. Fisheries in the national societal context	Adding social context, discussing the insights from sections 2-3 through a social lens
	4.2. Social security systems and other social benefits.	Describe the self-employment system (and what that means) and the social security system (for both crew and owners) Describe other social benefits (fund for training, social workers system, etc.
	4.3. Education and training	
	4.4.Fisheries communities	A) Fisheries communities - placed based approach: harbours/geographical areas according to (i) number of vessels, (ii) landings B) Livelihood C) Case Studies that exist on social aspects such as tradition, cultural heritage, sense of place, identity, etc.
5. Current trends, issues and development	5.1. PESTLE	Apply the PESTLE framework and present results
	5.2. Others	Other trends, challenges and opportunities that did not result in PESTLE
	5.3. Future research questions	
6. References		
7. Additional information		Same Annex for everyone - e.g. description of the CFP -> for all profiles

Source: National Fisheries profiles submitted by Finland and Malta.

Table 2. Template v4. for the Assessment of National Fisheries Profiles for Finland and Malta.

QUESTIONS	FINLAND	MALTA
Q1. Adresses all the items of the NFP template (see sheet 2)	Partially	Yes
Q2. Provides a brief outline of fisheries role in society:	Yes	Yes
- structure	Yes	Yes
- economic role	Yes	Yes
- social role	Yes	Yes
- cultural role	Partially	Yes
Q3. Provide social data and knowledge on the social state of the fisheries	Yes	Yes
Q4. provide insights to contextualize social data	Yes	Yes
Q5. provide a brief description of some salient social, institutional and legal elements	Yes	Yes
Q6. provide a deeper socio-economic understanding of how and to what extent fisheries play a role in the Member State at different scales	Yes	Yes
Q7. enable comparison of social variables to identify imbalances in society, addressing questions of well-being and living conditions	Yes	Yes
Q8. enable (if repeated on X year time) for analysis of trends and challenges	Yes	Yes
Q9. allow for comparison of fisheries sectors among Member States, for instance to measure the effects of the Common Fisheries Policy Note other subgroups look at cross-comparison specifically	Yes	Yes

Source: National Fisheries profiles submitted by Finland and Malta.

EWG 26-02 noted that both FI and MT NFPs presented a thorough overview of fisheries' social context in the member state and are considered to be fit for purpose. The reports, together with the published NFPs (National fisheries profiles - Oceans and fisheries - European Commission), vary greatly in length and in detail, indicating a need for further standardization and reduction in length and additional data (e.g. a reduced number of more structured tables and figures).

The assessed NFPs met most of the specified requirements, with some areas for improvement:

Finland

- The Finnish NFP partially followed the template v.4 (see Table 1), because the executive summary lacked quantitative data.
- The cultural role of the fishing sector could also have been further developed.

Malta

- The Maltese NFP was disproportionately long, given the scale of the country's fisheries sector.
- Several sections contained duplicative content; however, the text was otherwise detailed and well written.
- The EWG recommends the NFP undergoes review to reduce the amount of non-fisheries-related socio-economic information (approximately 60 pages of the introduction).

NFP fitness for purpose: main conclusions

- The two recently submitted NFPs are considered largely fit for purpose, although there is scope for improvement.

- NFPs provide the flexibility to highlight relevant context dependent aspects. The Finnish section 3.7 "Water Ownership, Property and User Rights" emphasises the division of water ownership (between private and public ownership) in Finland and its implications for the fisheries sector and fisheries management. The Finnish NFP also nicely describes how the aquaculture sector is linked to fisheries.
- The potential improvements are addressed and described above. However, a full review of the Maltese NFP was demanding to be carried out within the limited time available during the EWG meeting.
- Both NFPs could have benefited from external review by a relevant expert.
- Consideration could be given to providing indicative guidance on the expected length of NFPs to promote consistency and readability. Such guidance could be applied proportionately, taking into account factors such as the size of the Member State, the presence of Outermost Regions requiring additional contextual information (see ToR 2), and the scale and complexity of the national fishing fleet. This would help ensure that profiles remain sufficiently comprehensive while avoiding unnecessary detail that may reduce readability.
- Supplementary comments were received during plenary debates. The EWG 26-02 proposed that authors of the NFPs be invited to participate in a separate workshop to to review the assessment findings and exchange views of potential improvement with respect to content and revision (e.g. within an appropriate academic forum).

Conclusions

- The process set for reviewing NFPs (EWG 25-13) is functional: All NFPs (including updated NFPs) will need to pass the subsequent EWG Social. This will be a fixed, recurring TOR, where they are looked at to see if they are fit for purpose.
- Experts considered the need for the existing template (v4.) to undergo further refinement. A short guideline pertaining to the need to capture wellbeing and living conditions, can be added in the section 4 (e.g. sections on social security or fishing communities). Another suggested addition is a new sub-section “4.5 Fisheries cultural aspects, traditions, heritage and identity”. In addition, point 4.4. C) “Case Studies that exist on social aspects such as tradition, cultural heritage, sense of place, identity, etc.” should be moved under the suggested 4.5. As this aspect is

missing in v4., but it is still assessed in table X. Q2 “cultural role”, EWG suggests the adjustment of table X to the most recent version of the template (i.e. v4).

- In addition to the template, a list of standardised tables and figures could be provided for NFPs future updates.

2.2. The way forward: collection of all NFPs, updates, availability

The EWG discussed the future development of National Fisheries Profiles (NFPs). Securing authors for the remaining NFPs, Poland, Romania and Lithuania, was seen as a priority. The EWG noted that the difficulty in finding authors for the NFPs reflects the limited number of social scientists working on fisheries and the need for capacity building in this field. The EWG observed that consideration could be given at the EU level to measures that support the development and retention of expertise in marine and fisheries social sciences in within academic institutions and marine labs.

Regarding updates, the EWG distinguished between two types of NFP updates: (i) content related corrections and amendments, and (ii) periodic comprehensive updates reflecting newly available data and developments in the fisheries sector.

With regard to (minor) corrections, the EWG considered that NFPs should be possible to update on an ongoing basis, according to the needs, either by the original authors and / or by the EWG, following comments and observations received from stakeholders via the NFPs webpage and the link for feedback by DG MARE.

EWG considered whether formal stakeholder feedback should be sought and concluded that existing mechanisms already provide opportunities for feedback (i.e. there is a response box on the website of the NFPs; there are stakeholder platforms and recurrent interactions between ACs and the Commission). It was noted that accessibility could be further enhanced by translating the NFPs to the official languages of the respective countries. The EWG also considered that engagement with stakeholders during the preparation of NFPs may improve the completeness and accuracy of the information presented. Such engagement should distinguish clearly between evidence-based information gathering (including data and documented initiatives) and stakeholder perceptions and opinions. Off course the latter can also be gathered via social science methods in a systematic way and included, yet in most MS there will be no time for such undertaking.

As an example, the Belgian stakeholders pointed to various initiatives that have been carried out to foster the participation of women in the fisheries sector that were not reflected in the NFP and could have been considered for inclusion where supported by appropriate evidence.

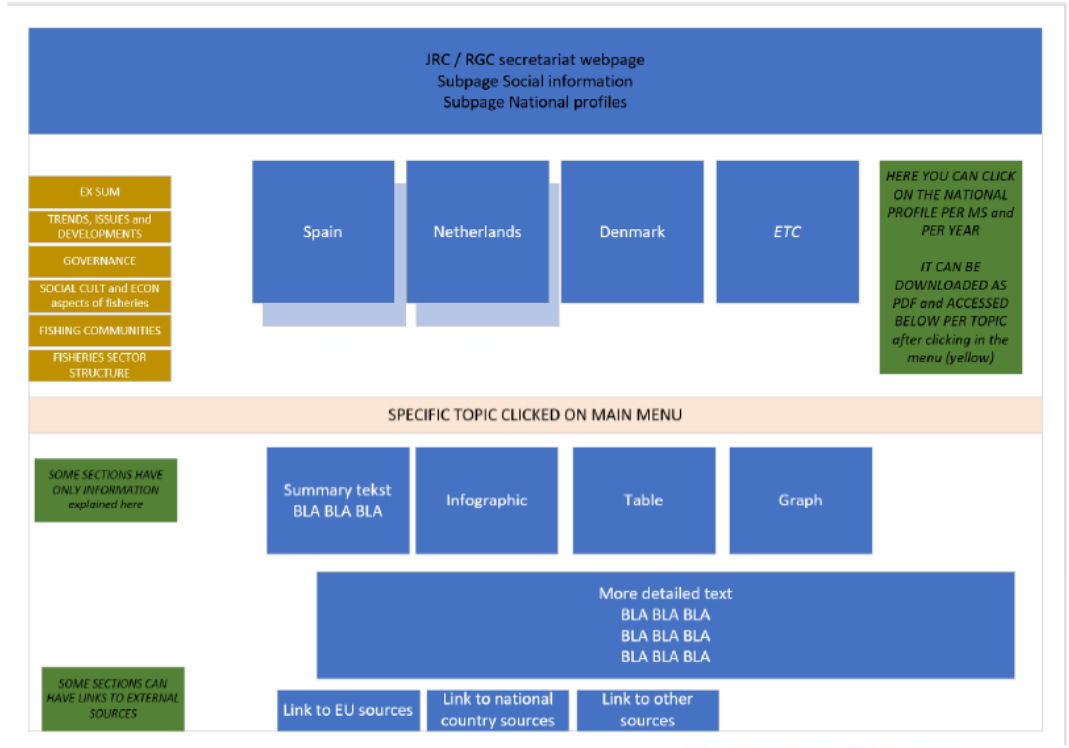
Regarding comprehensive updates, the EWG proposed that NFPs be updated every three years, in line with the social variables data call for fisheries. Where possible, updates should be undertaken by the authors of the previous NFPs; however, where this is not feasible, new experts should be identified. Given the substantial time and effort required for comprehensive updates, the EWG noted that adequate resources should be made available, including through future expert *ad hoc* contracts where appropriate.

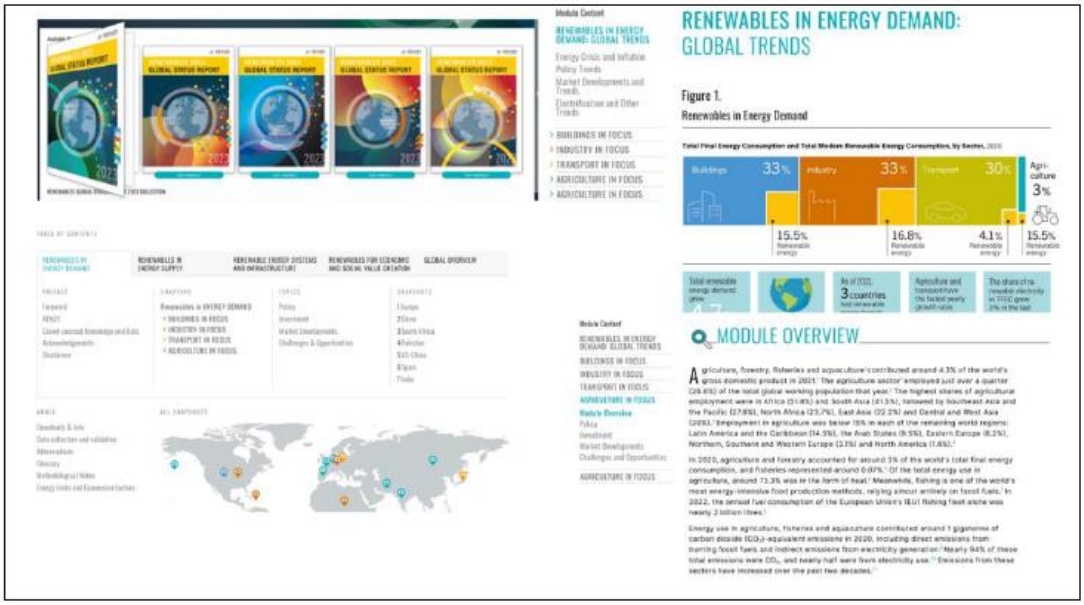
To improve accessibility and transparency, updates to the NFPs should be published on a DG MARE website indicating the new version number, alongside the previous published versions (see National fisheries profiles - Oceans and fisheries - European Commission). This is consistent with recommendations from previous EWG reports that NFPs should be treated as living documents and updated periodically to reflect new information, emerging trends, and evolving reporting needs.

The EWG recalled the recommendation from the previous report (EWG 25-02) that future NFP updates should not require a formal peer-review process prior to submission. Given the challenges associated with identifying peer reviewers, the EWG discussed the possibility of experts providing peer-to-peer feedback during the drafting process or in ad hoc meetings for this purpose. This would complement the recommendation from the previous report that all new and updated NFPs should be assessed by the subsequent STECF EWG Social Data on Fisheries through a recurring "fit-for-purpose" review to ensure their continued relevance and usability.

The EWG also discussed strengthening the links between National Fisheries Profiles (NFPs) and Fisheries Community Profiles (FCPs) to improve coherence across the social data toolbox and enhance the contextual interpretation of social indicators and reporting outputs. For instance, it would be nice should the FCPs available for a MS are linked to in the NFP and on the NFP webpage, to improve findability. Finally, the suggestion to develop the NFPs from static PDFs to dynamic web-based profiles was reiterated, as these will increase usability, comparability and eases updating. A detailed design and operationalization of the Website is available in EWG 23-17 (see figure 2)

Figure 2. Draft Layout of the webpage hosting the NFPs as web-based documents and illustrative example of a web presenting reports and content (quantitative and qualitative).





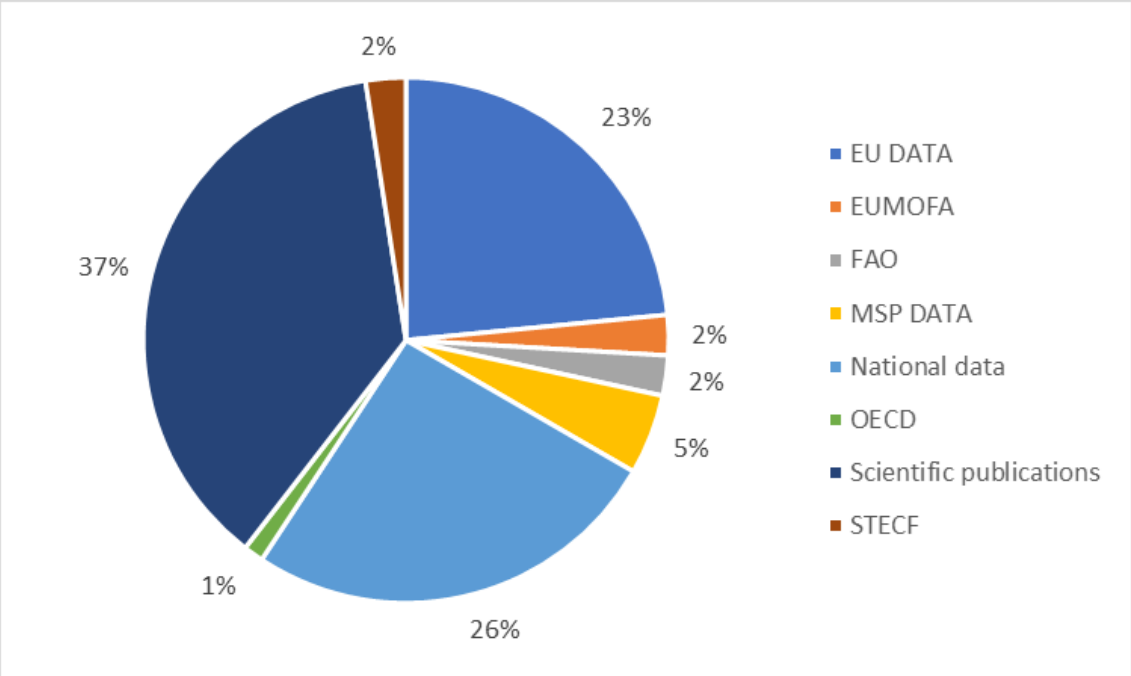
Source: EWG 23-17.

2.3. Sources and accessibility of data enabling subsequent publication of NFPs.

The analysis of the sources used in the last two NFPs should be viewed in the context of the template provided for their preparation (ToR1a), the limited drafting time frame, and the need to rely on comparable data sources such as STECF, EUMOFA, and OECD. The final selection of sources is also influenced by data availability, accessibility, and quality. When assessing existing sources or identifying new data needs, it is important to consider the specific characteristics of the fisheries sector and the governance system in each Member State. As a result, some countries may have highly developed systems for monitoring issues such as accidents at sea or quota allocation, while such systems may be less relevant or unnecessary in others.

The last two NFPs draw on a wide range of data sources, combining official national statistics, EU-level datasets, and scientific evidence to provide a comprehensive assessment of the fisheries sector (see Figure X). Key sources include fisheries, economic and social data from national authorities, EU data collection frameworks, trade statistics, and market information. These are complemented by scientific publications, reports from international and regional fisheries bodies, and other relevant literature. The use of multiple data sources helps ensure a robust analysis of the sector and its socio-economic characteristics.

Figure 3. Comparative analysis of data sources in the NFPs.



Source: NFPs for Finland and Malta.

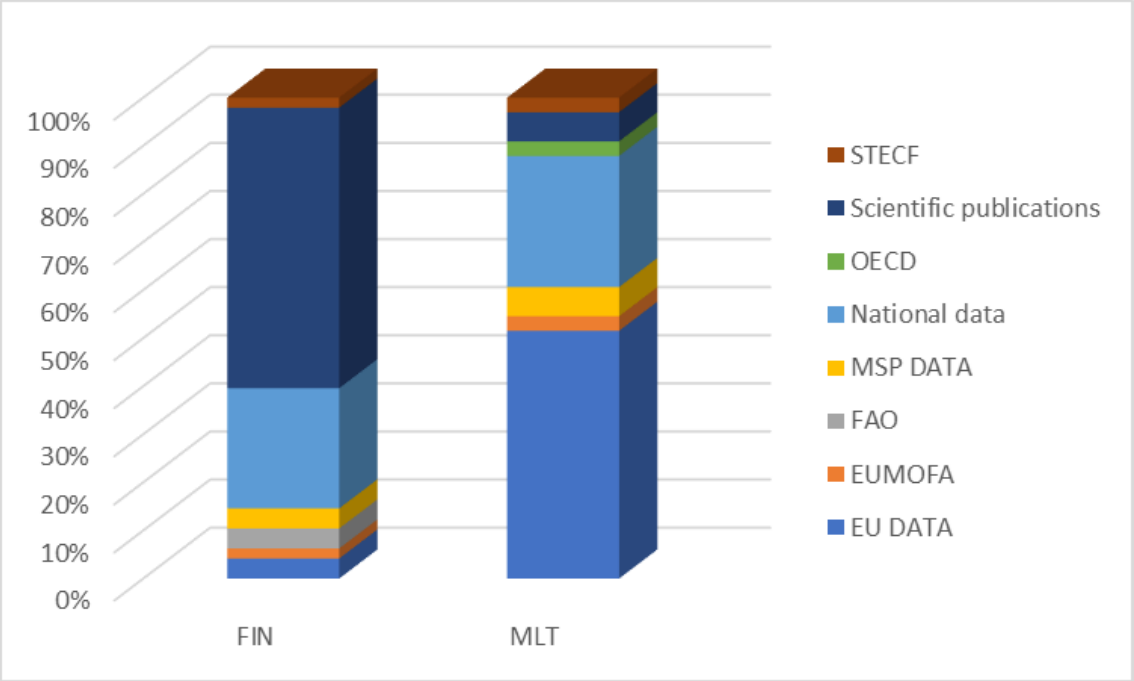
The data sources used to create the tables, figures, and charts in the two NFPs were examined by experts at STECF EWG 26-02. The sources used in both NFPs comprise a combination of national, European, and scientific data sources. Scientific publications represent the largest share of referenced sources (37%), followed by national data provided by fisheries administrations and other governmental bodies (26%) and data collected under EU data collection frameworks (23%). Additional sources include maritime spatial planning (MSP) data (5%), while EUMOFA, FAO, and STECF each account for 2% of the sources used, and OECD data for 1%.

The analysis of Finland and Malta illustrates how the use of data sources can vary considerably between Member States located in different European regions.

EWG 26-02 maintained the approach adopted by EWG 24-05 regarding the assessment of data sources used in the NFPs. The analysis of the two reviewed NFPs highlights notable differences in the source composition, reflecting national circumstances, data availability, and analytical approaches. Finland relied predominantly on scientific publications (58%), complemented by national data (25%), whereas Malta made extensive use of EU data sources (52%) alongside national data (27%). This demonstrates that while national data remain an important component of the NFPs, authors may draw on different combinations of sources depending on the characteristics of their fisheries sector and the information available. Also the authors' social science background, experience and knowledge about the fisheries sector are other factors influencing the use of sources.

As noted by EWG 24-05, some information classified as national data originates from nationally produced reports and documents that follow common EU guidance and reporting requirements. Consequently, much of the underlying information is harmonised across Member States and remains suitable for comparative analyses. In addition, NFPs often include original analyses and data elaborations prepared by the authors. Although these specific outputs may not be available in other documents, they are generally based on datasets that exist across Member States, allowing similar analyses to be produced elsewhere and supporting comparability.

Figure 4. Comparative analysis of data sources used in the last two NFPs.



Data source: NFPs. Note: the label "EU data" indicates data sources like studies financed by the European Commission and information from the European statistics.

The reviewed NFPs also draw on data and information from EU and international sources, including EU data collection systems, EUMOFA, STECF, OECD and FAO. EWG 26-02 reaffirmed the approach adopted by EWG 24-05 and produced the same set of figures and indicators to ensure consistency and comparability with the analyses previously carried out for other Member States. This approach facilitates cross-country comparisons while maintaining a harmonised analytical framework across all reviewed NFPs.

The assessment of data sources identified several good practices that could be promoted in future revisions of the NFPs. These include clearly specifying the nature of the source under figures and tables (e.g. indicating whether it is an author's elaboration or based on expert judgement), distinguishing original analyses from underlying datasets, and placing extensive supporting tables in annexes to improve readability. The use of harmonised and publicly available sources was also recognised as beneficial for ensuring comparability across Member States.

Conclusions on the analysis of data sources and accessibility enabling subsequent publication

- No confidentiality issues were identified in the Finnish and Maltese NFPs that would prevent their publication.
- Both NFPs benefited from harmonised EU data sources while also incorporating national and region-specific information, providing a balance between comparability and country-specific analysis.

2.4. Key elements of the NFPs that may be useful for the next Annual Social report.

According to the STECF EWG (22-14), NFPs provide essential context for understanding the social dimensions of fisheries across EU Member States. Their main purposes are to:

- Provide social, institutional, legal, and historical context for national fisheries sectors.
- Support the interpretation of social indicators and other data collected under the Data Collection Framework (DCF).
- Enable comparisons between fisheries sectors across Member States and sea basins.
- Facilitate the identification of trends and changes in fisheries over time through periodic updates.
- Support social impact assessments and evidence-based fisheries management.
- Serve as a reference document for researchers, policymakers, and other stakeholders interested in the social aspects of fisheries.

In conclusion, ASOR is used for the purpose of comparative, cross-national insights, while NFPs complement quantitative social indicators by providing qualitative information necessary for understanding national specificities and contextualising observed developments in the fisheries sector. In STECF 26-02, it was found that the NFPs were useful to verify that the “greying” of the fisheries workforce was a declining trend for the fisheries sectors in various Member States. Furthermore, NFPs helped to contextualize potential drivers of this trend and the urge to study generational change of the industry. The demographic data in ASOR in this case was well complemented with the NFPs which supported these data interpretation since the “greying” of the workforce could be complemented by drivers that were reported in the NFPs. More of these synergies should be looked at in the future updates of NFPs. Additions to the NFP’s template (v4.) to implement the ASOR-NFPs relation correspond to the following collected social data:

- In **Chapter 1**, on General Description of the Society, provide data on the age distribution of the member states’ population if possible, using the same age categories (segments) as in the ASOR, as well as the other social indicators as gender, nationality, education level of the population, and unemployment rates (see also ToR 3).
- When new social indicators are developed (see section ToR 3) it will be important to ensure consistency between these indicators and the NFP,

in order to maintain coherence and comparability across reporting outputs.

- In **Subheading 2.5** on Fisheries Innovations, provide information on social and in particular institutional innovations or any initiatives (from national or local governments, NGOs or CSOs) that are taking place to revert undesired trends in the fisheries sector, for example: changes in national legislation on fisheries sectors' labour conditions, especially for youngsters, or any other initiative to facilitate the increase of youngsters entering the fishing capture sector; initiatives to increase the number of women participation in fisheries; opening or closure of educational and training institutions for fisheries; ratification of international conventions in relation to the fisheries sector, etc.

3. ToR 2. Fisheries Community Profiles

3.1. Provide an inventory of the number of FCPs

The heterogeneity and richness of fisheries communities across the EU is well known. EWG 24-05 was requested to provide a partial list of communities from selected countries as a starting point for launching the Community Profiles. Therefore, EWG 24-05 provided a list 15, 30, 60 and 96 communities where FCPs can be written based on three criteria: i) policy relevance (capability to illustrate an answer to specific policy questions, such MPA, wind farms….); ii) plurality (representation of different fleets, fishing métiers..); and iii) contrast (inclusion of both resilient communities and those at risk of decline). The EWG reiterates the need to develop FCPs as a tool to better understand the social dimension of the CFP. In particular, FCPs can support any social impact assessment of change (policy, shocks) at the sub-national level.
EWG 24-05 provided a list of priorities in terms of FCP based on its ToR 2a. To date there has been no coordinated initiative from the European Commission to systematically produce FCPs. Nonetheless, several FCPs have been completed and additional profiles are planned across member states under various projects and initiatives (see tables 3 and 4 below).

Table 3. Fisheries Community Profiles available.

Netherlands – Urk	Pulskens and van Hoof (2024). Fisheries Community Profile Urk: A first exercise. Wageningen University & Research report: C089/24 https://doi.org/10.18174/680697
Netherlands – Arnemuiden	Pulskens and van Hoof (2024). Fisheries Community Profile Arnemuiden: A first exercise. Wageningen University &

	Research report: C086/24 https://doi.org/10.18174/680542
France – Boulogne-Sur-Mer, Le Guilvinec, Bayonne	Katia Frangoudes & Christelle Le Grand (2024)Fishing communities profiles-France: Boulogne-Sur-Mer, Le Guilvinec and Bayonne, in Marloes Kraan *et al.* SEAWISE H2020, https://doi.org/10.11583/DTU.26236598
Greece North and Central Ionian Sea	Angelos Liontakis (2024) Fishing communities profiles Greece: North and Central Ionian Sea, in Marloes Kraan *et al.*, SEAWISE H2020, https://doi.org/10.11583/DTU.26236598

Source: NFPs submitted by Member States.

Table 4. Planned community profiles

Germany	Heiligenhafen
Ireland	Six FCP are planned to be written. Suggested locations are based on contrasting socio-economic and geographic settings: Killybegs, Castletownbere, Inis Mor (Aran Islands), Dingle, Howth and Dunmore East
Spain - Galicia	Muros
Portugal - Azores	*To be defined*
Portugal - Madeira	Fuzeta
Netherlands	Yerseke

Source: NFPs submitted by Member States.

In responding to the ToR regarding Outermost Regions (shared with EWG 26-02) two additional profiles have been considered:

- The Regional Fisheries Profiles are a new tool developed in response to ToR2b. These profiles will provide a general context for fishing activities in the different ORs. They will follow the National Fisheries Profile template adapted to the regional context and should be provided as annexes to the National Fisheries.
- Community of Practice fishing Profile: A community-of-practice profile should be developed for specific fleets as for example fleets targeting

tuna. The FCP template will be adapted for the realisation of these type of Profiles

In addition to the template for FCPs (available in EWG 24-05), an interview guideline has been developed to support their implementation(see annex I). It was further suggested that some community profiles that have been written previously (i.e. those produced in Sweden in 2007) could be updated, thereby allowing also for some trend analysis over time.
EWG 26-02 reiterates the importance that the fisheries community profiles are developed by (teams of) people with a mixed skill set including expertise qualitative social science research methods as well as quantitative data analysis. Improving the accessibility and visibility of FCPs, is considered essential. One option would be to compile and maintain links to FCPs on the NFP pages hosted by the EU. Alternatively, a centralized platform linking to all FCPs could be hosted by national institutes. For instance, in France there is a plan to map all fishing harbours in the country to start linking to available quantitative indicators (following the example of NOAA[3][1]). This site could be a host to FCPs. Likewise the IEO offered a platform to serve as a repository for FCPs.

Reflections on the use of FCPs for Aquaculture and Processing sectors

In efforts to operationalize the social dimension of the CFP, EWG 26-02 reflected on the applicability of FCPs to cover aquaculture and processing sectors. The FCP template was developed primarily with the fishing fleet in mind. However, the definition explicitly references 'ancillary industries in aquatic food value chains' — an opening that conceptually encompasses aquaculture and fish processing. This section examines whether and how this opening can be operationalized, using the Greek aquaculture and processing sectors, drawing on the Greek National Fisheries Profile (2023) as the primary evidence base.

Greece presents a particularly relevant case for this examination for several reasons:

- Greece has the largest fishing fleet in the EU (19.5% of total EU vessels) and a small-scale, harbour-based fleet structure that aligns well with the place-based FCP logic
- Greece is simultaneously one of the EU's leading aquaculture producers, that employed 4 455 FTEs in 2023 and with a production valued at €772.6 million in 2023— yet aquaculture operations are geographically concentrated and structurally very different from the fleet
- The fish processing sector is documented in the National Profile, employed 2 170 FTEs in 2023 and provides an important link between the fleet and the value chain
- Spatial interactions and conflicts between fishing grounds and aquaculture expansion zones are emerging as a governance challenge that integrated community profiles could help to evidence and address.

3 [1] https://www.fisheries.noaa.gov/resource/tool-app/community-social-vulnerability-indicators-tool

Table 5. Fisheries Community Profiles template: assessment of applicability for Aquaculture and Processing.

Table of contents	Applicability to Aquaculture	Degree of applicability	Applicability to Fish Processing	Degree of applicability
People & Places — Geography/history	Aquaculture sites are place-based but communities may differ from site location because company administration and scientific staff is in central areas while labor force is located near farms.	partially	Processing units are located near auction houses in urban centres, but also in few cases in remote areas away from the coastline. The first case includes companies mainly with freezing activity while the second case, traditionally are specialized in fish preservation (canning, smoking etc.)	partially
People & Places — Demographics	Age, gender, education of aquaculture workforce can be profiled (DCF Social data)	partially	The DCF social data provide a broader range of information across all social categories compared to other activities. The gender balance is better in processing than in fishing.	highly
People & Places — Current economy	General description of community overall (not aquaculture specific), main industries (tourism, service, vacation homes, etc.), overall outlook (recession, booming etc.)	Applicable	General description of community overall (not fish processing specific), main industries (tourism, service, vacation homes, etc.), overall outlook (recession, booming etc.)	Applicable
Institutional Landscape — Government	Ministry of Rural Development and Food	Applicable	Ministry of Rural Development and Food	Applicable
Institutional Landscape — Institutional (POs, co-ops)	The Greek aquaculture sector is characterised by strong producer organisation structures. The Hellenic Aquaculture Producers Organisation (HAPO) represents approximately 80% of national aquaculture production, while additional smaller	Applicable	There are no specific processing POs identified in Greek profile. Yet there are coops.	Limited

	producer organisations operate at the species level, representing sectors such as mussel and trout farming.			
Involvement in Fisheries — Employment	The employment segments include gender, age, education, nationality and employment status. The reported social data also includes working hours and Full Time Equivalent numbers (FTEs).	Applicable	The employment segments include gender, age, education, nationality and employment status. The reported social data also includes working hours and Full Time Equivalent numbers (FTEs).	Applicable
Involvement in Fisheries — Location	Current location of aquaculture units and future expansion areas (POAY-Areas of Organized Development of Aquaculture). See figure 1. Rental aquaculture (trout, mussles).	Applicable	Location of processing companies.	Applicable
Involvement in Fisheries — Commercial metrics	Production volume and value, turnover, production costs, species farmed, number of enterprises can replace fishing metrics.	Applicable	Production volume and value, turnover, production costs, number of enterprises and raw material sources (fleet, aquaculture) can replace landings metrics	Applicable
Involvement in Fisheries — Ancillary industries	Feed suppliers, equipment, veterinary services, packaging and transport are aquaculture ancillaries. Large companies produce their own fry, fish feed and basic equipment in their own facilities which operate with additional staff. Also, few aquaculture companies demonstrate fish processing facilities.	Applicable	Transport, supply chain, retail, food service linkages to restaurants, hotels, catering companies, and other food service establishments.	Limited/adaptable
Governance — Law and Policy	Aquaculture licensing, spatial concessions, and working regulations; environmental permits are a distinct governance layer	Applicable	Food safety, processing hygiene, labelling and working regulations	Applicable

Cultural Attributes related to fisheries	While marine finfish aquaculture (primarily seabass and seabream) is a relatively modern industry and is not generally associated with long-standing maritime cultural traditions, mussel and trout farming have stronger cultural and historical roots in several regions of Greece. Mussel cultivation has become an integral part of the social and economic identity of communities in areas such as the Thermaikos Gulf, where it supports local employment, family businesses, and community traditions.	Limited	Not applicable in current form: processing is an industrial activity without equivalent cultural heritage dimension	
Contribution to SDG	Aquaculture's role in SDG1, 2, 3, 8, 12, 13, 14 *	Applicable	Local fish processing role in processing SDG1, 2, 3, 8, 12, 13*	
Future — Trends, Constraints/Opportunities	Spatial expansion/climate impacts/ feed sustainability	Applicable	market consolidation (more reliable supply chains, lower unit costs, stronger compliance, higher returns for the remaining firms), changes in consumer behaviour, automation in production/rise of raw material costs	Applicable

Source: NFPs submitted by Member States.

* **SDG 1 (No Poverty).** Multiple sources frame aquaculture as a sector poor households can enter with relatively low capital and skill thresholds compared to other forms of farming, and as a source of wage employment for landless or asset-poor populations along the supply chain.

SDG 2 (Zero Hunger). This is the least contested link. Aquaculture now supplies roughly half the world's aquatic food, and unlike capture fisheries it can expand production to meet rising demand rather than being constrained by wild stock limits. More farmed fish means more affordable protein.

SDG 3 (Good Health and Well-being). Fish is rich in protein, omega-3 fatty acids, and micronutrients that are harder to obtain from staple crops, and several reviews tie this directly to health outcomes. Fish can be a lower-emissions protein substitute for some land-based meats.

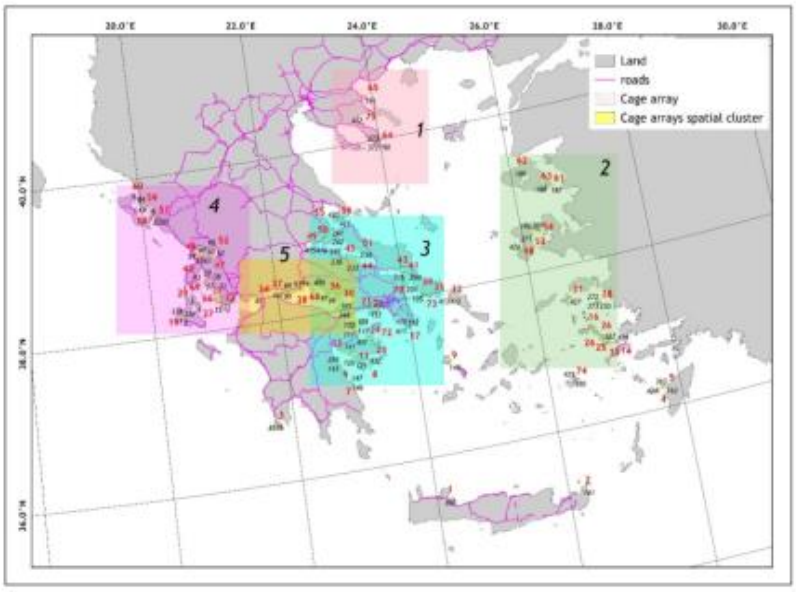
SDG 8 (Decent Work and Economic Growth). Aquaculture is one of the fastest-growing food production sectors globally, and that this growth translates into jobs across a wide skill range, from hatchery technicians to logistics staff to routine site labour.

SDG 12 (Responsible Consumption and Production). With efficient feed use, waste reduction, and local processing, aquaculture can demonstrate responsible consumption and production.

SDG 13 (Climate Action). Responsibly managed aquaculture can be climate-resilient and comparatively low-carbon, not that it is automatically climate-positive.

SDG 14 (Life Below Water). Aquaculture can relieve pressure on wild fish stocks by substituting farmed production for capture fishing, supporting sea conservation targets. The aquaculture rule frameworks help to prevent any harm to SDG 14 through habitat conversion, nutrient pollution, or escapes of farmed species.

Figure 5. Mapping of the cage arrays' location and cage arrays' spatial cluster of Greek marine fish farms. Higher black nr (1-5) mark the sites with an aggregation of cage arrays, red nrs show the cage arrays' spatial clusters (1-75) and lower black nrs the cage arrays (1-433) (Source: Katselis et al 2022).



Applying Fisheries Community Profiles (EWG 24-05 and EWG25-02) including aquaculture and fish processing.

1. **Impact on communities by aquaculture and fish processing activities.**

- The fleet, aquaculture and processing sectors do not only differ in how many people they employ — they also differ fundamentally in the skills required. The Greek National Fisheries Profile documents that 65% of fishers have a low educational level and only 4% have a high education level. Aquaculture and, to a lesser extent, processing require an entirely different occupational structure: according to 2023 DCF data, more than 65% of aquaculture workers belong to the medium and high education categories. For example, aquaculture hatchery and nursery facilities require specialised roles such as hatchery managers, broodstock specialists, larval rearing technicians, and water quality technicians, whose typical educational and training requirements include a university degree in environmental science, food science, logistics, or business administration. Fish processing shows a similar pattern, with more than 60% of its workforce in medium or high education categories; the specialised roles in processing required, include filleting/cutting line supervisors, freezing and cold-chain technicians, smoking/curing specialists, canning line technicians, and quality control/HACCP officers. This entails vocational training for line technicians and a food technology or food safety degree for QC/HACCP roles.

    i. Demographic effect: The fishing fleet workforce is heavily concentrated in the 40–64 age band, with almost no workers in the 15–24 category, whereas a hatchery or processing plant may be quietly reversing the community's age profile in a way the fleet alone cannot.

ii. Social effect: Specialist workers do not typically integrate into the same community as fishing families; in most cases they form a parallel population within the same geographic area, with different housing demand, different consumption patterns, and a different relationship to local cultural identity than the fishing households the FCP framework is built to describe.

iii. Housing and service effect: Specialist in-migration creates different demand for housing types (owner-occupied, rented, seasonal) and for local services than the existing fishing population generates.

- The aquaculture and fish processing sector provides vital, year-round employment in remote and coastal areas. Unlike seasonal capture fisheries, farming requires continuous daily maintenance (feeding, water quality monitoring), making it a stable, permanent economic driver that helps curb rural-to-urban migration.

  i. Continuous operations: Fish farming (e.g., in recirculating aquaculture systems or open pens) requires steady, year-round labour, and associated processing plants operate consistently to meet global seafood demand.

  ii.Diverse job opportunities: The sector supports multiple specialised roles, including aquaculture technicians, fish health managers, and processing plant operators.

  iii.Economic stability: Because the industry creates permanent jobs, it stimulates ancillary local services such as logistics, equipment maintenance, and supply-chain support.

2. SWOT analysis of expanding the scope of a fisheries community profile to include aquaculture and processing

I. Strengths

a) FCP template already explicitly mentions 'ancillary industries in aquatic food value chains' — aquaculture and processing are conceptually pre-included
b) Greece's existing National Fisheries Profile (2023) already documents aquaculture GVA, processing employment, import/export data and inter-industry linkages, providing a ready data baseline
c) High geographic co-location of fleet, aquaculture and processing in identifiable harbour communities (e.g. Thermaikos, Kalymnos, Evoikos) makes place-based profiling feasible
d) Strong scientific infrastructure (FRI, HCMR,AGRERI,) capable of supplying sector-specific data for expanded profiles
e) Greece's dominant aquaculture exports (gilthead seabream, European seabass) are well-documented

II. Weaknesses

a) FCP template was designed exclusively around the fishing fleet: all metrics (métier, fishing grounds, vessel age, days at sea) are fleet-specific and have no direct aquaculture or processing equivalents
b) Aquaculture and processing have fundamentally different community attachment: specialized workforce might not live in the coastal community

c) Very few processing units are located in fishing communities specifically — the National Profile notes they cluster near urban centres, not ports
d) No standardised definition of 'aquaculture community' or 'processing community' exists at EU level to anchor the FCP methodology
e) Greek aquaculture is dominated by a small number of large companies (HAPO: 23 members = 80% of production)
f) Cultural heritage and generational identity ('growing up as a fisher') central to the FCP definition has no equivalent narrative for aquaculture or freezing activity processing sector.

III. Opportunities

a) Greece's 11 fish auction sites already function as natural hubs connecting fleet, processing and wholesale — ideal anchor points for expanded community profiles
b) EU EMFAF 2021-2027 explicitly funds blue economy diversification and coastal community development, creating a policy rationale for integrated sector profiling
c) An integrated perspective of the three sectors in an FCP sheds more light on the role of women. These are documented as critical in both small-scale fisheries and processing (Kalymnos Sea Food cooperative).
d) STECF EWG Social Data process is evolving — a Greece-specific proposal for expanded FCPs could shape EU-level methodology development for Mediterranean member states.

IV. Threats

a) Processing industry data (STECF processing report) is at national level with no harbour or community disaggregation available
b) Risk of double-counting economic contribution if fleet, aquaculture and processing are profiled together without clear value chain boundaries
c) Capacity constraints: preparing expanded FCPs requires substantially more data collection and analytical effort as well as contextual understanding of three sectors than fleet-only profiles, if no additional EU funding is available.

FCP for Aquaculture and Fish Processing: Data Collection Approach

Step 1 — Scope the community and decide depth of survey: define which aquaculture sites and processing units belong to the community using a km range based functional-cluster rule

Step 2 — Build the farms/factories/site licences inventory.

Step 3 — Collect Primary Data

Domain	Method
Aquaculture employment & demographics	Structured employer interview at licensed sites; cross-check headcount with local e-EFKA office
Aquaculture spatial/governance	GIS digitisation of cage arrays/impact zones; PO governance interview
Processing employment & supply chain	Employer interview, ask raw-material sourcing share (if fleet/aquaculture/import)

Step 4 — Map the Spatial and Economic Interaction.: Classify if there is conflict, synergy or neutral interaction between any of the three sectors.

Areas of Particular Relevance for Integrated FCPs

Based on the overlap between high fisheries dependency (FDI) areas and documented aquaculture activity, the following communities are the most relevant for integrated FCPs that address spatial interaction:

- Gulf of Kavala in northeastern Greece

  A major hub for the Greek fishing industry, features a distinct contrast between its small-scale artisanal fleets and its large-scale commercial fisheries. Demonstrates also mussel longline aquaculture activity with 9 active units and three fish processing enterprises.
- Amvrakikos Gulf in northwestern Greece.

  A highly productive and ecologically sensitive area (20 brackish lagoons), sustaining centuries-old traditional lagoon fisheries and intensive finfish/mussel aquaculture. Traditionally, the low-intensity trap fisheries target migrating species like flathead grey mullet, gilthead seabream, and European eels using centuries-old methods. Outside the lagoons, small-scale professional fishers operating in the open gulf use set nets (trammel and gill nets). The gulf also features a mix of traditional lagoon aquaculture, intensive finfish cage culture (producing Mediterranean staples like sea bass and sea bream), and mussel long-line farming.

- Thermaikos Gulf.

  The epicenter of the Greek mussel industry, accounting for almost 90% of Greece’s total mussel harvest, compiled by small scale, family run operations. Furthermore, in the area, there are active small- and large-scale fisheries, that utilize a variety of selective gears, primarily trammel nets, gillnets, and set/drifting longlines. Also, more than 40 small scale processing unit, almost exclusively of mussel deshelling activity, operate in the area.

Conclusion

The analysis demonstrates that extending Fisheries Community Profiles (FCPs) to include aquaculture and fish processing is both conceptually justified, especially for communities where aquaculture and processing activities take place, and methodologically achievable. Although many fisheries-specific indicators cannot be directly transferred because of differences in workforce characteristics, spatial organisation, governance and cultural identity, substantial common ground exists in employment, economic performance, governance, sustainable development and local value-chain linkages. Greece, combining the EU's largest fishing fleet with a leading aquaculture sector and a well-established processing industry, offers an ideal environment for developing and testing an integrated approach. The findings support a phased implementation within the STECF EWG Social Data process, whereby existing FCPs are supplemented with structured aquaculture and fish processing annexes in relevant communities and validated through pilot profiles in areas such as the Gulf of Kavala,

the Amvrakikos Gulf and the Thermaikos Gulf. This pragmatic approach would preserve the strengths of the current FCP methodology while providing the evidence needed to refine indicators, define functional community boundaries and progressively develop a more comprehensive representation of Europe's aquatic food-producing communities.

3.2. **Community Profiles in the OMRs**

Following the advice provided in STECF PLEN 24-01 and PLEN 25-02 on fisheries communities' profiles, and in collaboration with EWG Outermost Regions (OMR) and EWG Social Data, explore how fisheries community profiles in the outermost regions could support the understanding of fleet balance indicator results. In particular, identify and select fisheries communities in the OMR for future profiling, taking into account fleet segments identified as imbalanced. A joint team from both EWG should propose a preliminary list of fisheries communities in the OMR where further community-level profiling would help better understand the implications of fleet balance outcomes.

Objectives

Following the advice provided in STECF PLEN 24-01, STECF EWG 25-02 and STECF PLEN 25-01:
The EWG 26-06 was requested to explore how fisheries community profiles in the Outermost Regions could support the understanding of fleet balance indicator results. In particular, identify and select fisheries communities in the Outermost Regions for future profiling, taking into account fleet segments identified as imbalanced. the EWG 26-02 was requested to explore, in collaboration with EWG 26-06 Outermost Regions, how fisheries community profiles in the Outermost Regions could support the interpretation of fleet balance indicator results. Identify and select fisheries communities in the Outermost Regions for future profiling, taking into account fleet segments identified as imbalanced.

Context

Fishing activity in OMR plays a relevant role in supporting local coastal communities (Pascual Fernandez, 1991; Frangoudes et al., 2024). Remoteness defines resource accessibility, market conditions and interactions with other activities, particularly tourism, that significantly affect the fleet performance. For instance, social data may help understand whether low VUR reflects genuine overcapacity or adaptive fishers' behaviour part-time related to fishing, seasonality, weather constraints, topography, infrastructure limitations, the use of two vessels in the productive unit due to seasonal fishing strategies and metiers, supplementary household activity or the maintenance of fishing as a cultural and subsistence activity.

From the joint team from both EWGs, initially the expected result was a preliminary list of fisheries communities in the OMR where further community-level profiling

would help better understand the implications of fleet balance outcomes, following debates on selection criteria for fisheries communities reported in STECF EWG 24-05, in particular, to identify and select fisheries communities in the OMR for future profiling, taking into account fleet segments identified as imbalanced.
National Fisheries Profiles (NFP) are structured analytical tools designed to provide a comprehensive overview of the fisheries sector at Member State level, depicting the national structure of fishing fleet(s) and integrating social, cultural and economic dimensions, including trends, developments and key social issues. Their primary objective is to support the analysis of the social impacts of fisheries management measures and to inform evidence-based policy and decision-making, with a particular emphasis on the social dimension of fisheries.
At present, 17 NFPs are available, including those for France, Portugal and Spain, which include the OMR (National Fisheries Profiles: https://oceans-and-fisheries.ec.europa.eu/science-observation-and-data/scientific-advice-and-data-collection/national-fisheries-profiles_en).
Fisheries Community Profiles (FCPs), in turn, build on this framework at a more local and place-based scale: they are grounded in the concept of fisheries communities as settlements around fishing harbours where fisheries generate social and economic benefits, enable generational continuity through shared norms and inter-generational links, and sustain cultural heritage, ways of life and a sense of belonging. FCPs are intended to complement NFPs by adding community-level detail and by supporting the assessment of the social impacts of fisheries policies, management measures, and broader socio-economic or political changes.

Key discussion points concerned

A. The appropriate level of analysis, i.e. whether ORs profiles should be community place-based profiles, regional profiles (e.g. Martinique, Madeira, Azores, Guadeloupe) or activity-based (e.g. communities of practice) were discussed. The joint subgroup (EWG 26-06 and EWG 26-02) agreed to start by adopting a regional approach, followed by several community-of-practice fisheries profiles, e.g. for the tuna fleets). These fleets are clearly differentiated from the rest of the fleets, particularly in the larger length segments. For FS targeting tuna-like species, their activity is related to stocks that are managed by ICCAT/IOTC, several of them are under quota and some under specific quota for each boat (e.g., BFT in the Canary Islands).

After a preliminary discussion and given the available data collected under the DCF, the joint working group agreed to adopt a Regional approach that therefore may ensure access to harmonised and sufficiently detailed datasets, while remaining operationally feasible. The Regional Profile is intended as a simplified version of the National Fisheries Profile, resulting in template to be filled in for:

1. Martinique
2. Guadeloupe
3. Guyana
4. Mayotte
5. La Réunion
6. Saint Martin

7. Madeira archipelago
8. Azores archipelago
9. Canary Islands

The decision was based on the following considerations:

- National Fisheries profiles are already available for the MS to which ORs pertain (France, Spain, Portugal)
- Fisheries Communities Profiles are currently not developed for all the targeted communities
- From the AER, Balance Capacity[4], ASOR, the biological, economic, technical and social data are available by fleet segment or clustered segment, and by Region, enabling to merge information as requested by the ToR.

These regional profiles will provide general context for fishing activities within their respective OMRs. They will be prepared using the National Fisheries Profile template (v4, as detailed in EWG 24-05) adapted as necessary to the regional context, and will be included as annexes to the National Fisheries Profiles for France, Spain and Portugal. A maximum length of 20 pages per profile is recommended. The annexes should be sufficiently comprehensive to be read and understood as standalone documents. A draft structure for the Regional Fisheries Profile is presented in annex I.
B. What is most appropriate methodology to correlate out-of-balance biological, technical and economic indicators with possible social indicators in the ORs.
The joint subgroup (EWG 26-06 and EWG 26-02) agreed to prepare a comprehensive table with relevant quantitative and qualitative information per ORs Region and per fleet segment.

C. Selection of the OMR to be used as “Pilot” for regional profiling
The joint subgroup (EWG 26-06 and EWG 26-02) agreed to design a table that combines available data from the ORs fleet segments, including biological, economic and social variables gathered through the DCF. Table 3.2 provides a systematic overview and helps contextualize the outputs of the balance indicators. The socio-demographic characteristics of the participants, including age, gender, education, nationality, and employment status (total and percentages).

[4] Annual fleet report on sustainable balance between fishing capacity and fishing opportunities https://oceans-and-fisheries.ec.europa.eu/fisheries-management/fishing-fleet-capacities/fleet-capacity-reports-2024_en

Table 6. Design of the template of biological, economical technical and social indicators combined.

REGION	Fleet segments	TOTAL Number of vessels	Segment included in the clusters	Fleet segments analysed	Number of vessels in the selected fleet	Days at sea	Biological, technical and economic Indicators	Indicators Trends (2018-2023)	
				out of balance			out of balance	Economic Indicators	Biologicial and Technical Indicators
		N						CER/BER, ROFTA, ROI, NP margin,	VUR, SIH, EDI, SAR2025

Social indicators (to be complete by Social Group)																			Interpration (please provide interpration if any)
Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status			
N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%	

Source: Own elaboration.

Methodology

1. Identification and choices of the out of balance fleets in the ORs

Based on the Balance Capacity Report (STECF EWG 25-12), fleet segments were identified as potentially out of balance according to their economic indicators (CR/BER, ROI, ROFTA and NP margin, NVA/FTE) and biological (SAR_{2025}, SHI) and technical indicator (VUR). [For definitions see Commission Guidelines COM(2014) 545 final and COM(2025) 798 final].
EWG 26-06 identified 41 fleet segments as potentially out of balance (Annex 5.XX). Due to some clustered segment fleets, the economic and social analysis has been carried out on 35 fleet segments.

2. OMR fleets structure analysis

Building on data from AER (STECF EWG 25-07 Annual Economic Report on the EU Fishing Fleet II) data, the STECF EWG 26-06 carried out an analysis on the segments previously identified as presenting potential out of balance indicators, with the aim of assessing the fleet structure by considering the relationship between total employment, full-time equivalent employment (FTE), fishing activity measured in days at sea, and the average age of vessels. Additionally, the following indicators have been elaborated for this analysis:

Crew/FTE (Engaged crew / National FTE): indicator measuring the relationship between the number of engaged crew members and the number of national full-time equivalent jobs (FTE);

Days at sea/FTE: indicator reflecting the number of operational days performed per FTE.

However EWGs consider **FTE/crew and Days at sea/crew** more suitable to reflect labour structure (e.g. the importance of part-time or seasonal work). FTE/crew, for instance directly reflects the average labour intensity per crew member. Days at sea/crew, for operational context. This indicator preserves the relationship between workforce and activity and provides a more meaningful proxy for labour utilisation.

These two indicators should be treated as limited proxies for the underlying phenomena they aim to represent. They provide useful but partial information and may not fully capture relevant complexity. Their selection and use therefore require further discussion, particularly regarding their rationale, limitations, and suitability for the OMR analysis.

3. The EWG 26-02 analysed the following variables for the mentioned fleets segments out of balance according to the Multiannual Program for Data Collection (Decisions (EU) 2021/1167 and 2021/1168) specifications:

- Employment by gender
- Employment by age
- Employment by education level
- Employment by nationality
- Employment by employment status

1- The joint EWG merged the data into a comprehensive table for supporting the interpretation of fleet balance indicators results which constitutes the basis for the OMR “Region Profiles”.

The STECF EWG 26-02 identified limitations of providing information relevant for the social dimension by fleet segments and clustered segments. The clustering is applied by Member States to report sensitive economic and social data.

In the context of the EU Data Collection Framework, the clustering of fishing segments refers to the grouping of vessels with similar technical and operational characteristics into clusters of fleet segments, typically based on predominant fishing gear and vessel length class. Clustering allows data collected from a sample of vessels to be raised and extrapolated to the entire group, thereby reducing sampling effort while maintaining statistical representativeness. It serves as the fundamental unit for the collection, analysis, and reporting of biological, economic, and social data. The approach ensures harmonised reporting across Member States and facilitates the assessment of fleet performance, fishing activity, economic viability, employment, and the impact of fisheries management measures at both national and EU levels.

In some cases, Member States use clustering primarily for data reporting rather than data collection. Under this approach, data are collected at the individual vessel level, through a census covering all vessels in the fleet, but are subsequently aggregated into clusters for reporting purposes. This is particularly important for ensuring compliance with data confidentiality requirements, as some fleet segments contain only a small number of vessels. By combining such segments into larger clusters, Member States can protect the identity and

commercially sensitive information of individual operators while still providing the required data for analysis and reporting.

Effective clustering is essential to ensure that vessels within a segment are sufficiently homogeneous, allowing collected data to accurately reflect the characteristics and performance of the wider fleet segment.

The classification of the OMRs fleets, as shown in the MS Fleet Reports, presents several challenges for integrated analysis (biological, economic and social). For illustrative purposes, one example per OMR is provided, noting that most fleet segments in the OMR are facing similar issues:

- For the Madeira archipelago, the fleet segment PRT NAO HOK0010 P3 includes three distinct métiers – vessels involved in deep-sea fishing for black scabbardfish, vessels targeting tuna, and vessels targeting demersal fish – rendering the social analysis void.
- For the Azores archipelago, the fleet segment PRT NAO HOK0010 P3 includes distinct métiers (e.g., deep-sea fleet, vessels targeting demersal fish and squid) reported for the entire archipelago combined (9 islands). The varied topography of the islands (abrupt seafloor drops, isolated seamounts between some islands) allows the use of very different métiers across islands, making it difficult to analyse the social impact across communities.
- For Martinique, the cluster FRA OFR PGP0010 MQ* is regrouping eight fleet segments having different fishing gears as FPO, HOK, PS or PGO and PGP and different length classes from 0-10 to 18-24m, which means that social data related to this cluster mixes different fishers having different characteristics (fishing gears, targeting species and market channels) and originating from different communities.
- For the Canary Islands, The ESP NAO HOK1012 segment includes 38 vessels (plus 8 VL00-10), yet the dedicated pole-and-line fleet consists of only 2 (in 2023) or 7 (in 2026) vessels. This significant discrepancy suggests that many vessels in this category utilize multiple métiers. Consequently, the variables currently used to evaluate fleet capacity likely suffer from shortcomings. Likewise, the ESP NAO HOK1218 segment comprises 35 vessels, significantly exceeding the pole-and-line tuna fleet census of 9 vessels in 2023. The fact that the pole-and-line fleet cannot be individualised is important because this fleet faces severe economic strain; in recent years, shifting tuna school distributions further into the Atlantic has resulted in major profitability challenges

ANALYSIS OF THE OMR

The following section presents an analysis of the OMRs, combining descriptive economic fleet activity and social variables. Due to the exploratory nature of this exercise, in the case of France the overview of social variables is provided for the 6 OMRs, while the detailed analysis of social variables is provided only for Guadeloupe.

FRANCE OMRs

The following table presents an overview of economic indicators for total French outermost regions and by OMR in 2023, based on the Balance Capacity 2025 report.

In 2023, the French OMR fishing fleet comprised 1 446 vessels registered with the CFR. The fleet employed 2 580 people (1,064 FTEs). Fleet activity generated a revenue of 72. million Euro and a gross value added of 44 million Euro.

Table 7. Overview of economic indicators for the French OMR.

MS	Outermost Region	N. of active vessels	Total jobs	FTE	Days at sea	Weight of landings (Thousand tonnes)	Revenue (Million EUR)	Gross Value Added (Million EUR)
France	**Totals**	**1.446**	**2.580**	**1.064**	**96.534**	**9,34**	**72,23**	**44,32**
	MF - Saint-Martin	13	21	4	297	0,03	0	0
	GP - Guadeloupe	473	803	357	38.731	2,39	22,07	14,45
	MQ - Martinique	597	889	186	22.385	1,24	14,81	10,09
	GF - French Guiana	106	350	222	11.829	1,84	8,7	4,98
	YT - Mayotte	80	194	83	6.180	0,63	3,22	2,29
	RE - Reunion	177	323	211	17.112	3,21	23,43	12,49

Source: STECF Balance Capacity report 2025.

Social variables are available through the Data Collection Framework (DCF), as reported in the French Member state chapter of the ASOR (2025), based on 2023 data. The analysis is structured around key social variables, including total employment, demographic characteristics (age, gender, education level, nationality of fishers, and employment status on board).

The following table presents an overview of social indicators for France total and by fishing activity (small-scale, L12AG, large-scale and distant water fleet) for all French outermost regions total and by fishing activity. In addition, information is summarized for one of the French OMR, Guadeloupe, and within Guadeloupe for one fleet segment - DFN 0010 A- considered to be in imbalance according to the Capacity 2025 report. By looking at the demographics of fishers' population is possible to understand specific features of the workforce.

Table 8. Distribution of the social information of the French fisher' population presented in number for to total fleet, the outermost fleet and an example of one fleet segment in Guadeloupe.

	TOTAL	TOTAL				TOTAL OMR	OMR			TOTAL GP	GP		GUA DFN 0010 A
		SSCF	L12AG	LSF	DWF		SSCF	L12AG	LSF		SSCF	L12AG	
Gender													
female	180	136	22	20	1	37	33		4	18	18		
male	11,445	5,692	1,215	4,130	409	2,543	2,352	46	144	785	739	46	83
Nationality													
NATIONAL	9,730	5,258	1,205	2,861	405	2,032	1,884	46	102	800	754	46	83
EU	780	24	8	745	3	5	2		2	1	1		
EEA	2			2									
NON-EU/EEA	919	352	25	541	1	349	305		44	1	1		
unknown	194	194				194	194						
Age													
≤14													
15-24	1,218	468	173	539	37	90	72	3	16	35	32	3	2
25-39	3,590	1,596	432	1,373	189	483	440	6	37	146	140	6	16
40-64	6,183	3,207	602	2,189	184	1,614	1,488	37	89	568	531	37	60
65+	440	362	31	48		199	193		6	55	55		5
unknown	194	194				194	194						
Education													
high	33	2	1	18	12								
medium	1,712	918	209	541	43	279	253		26	97	97		14
low	7,976	4,261	970	2,393	353	1,770	1,630	43	97	664	621	43	67
unknown	1,903	647	58	1,197	1	531	503	3	25	42	39	3	2
Employment status													
owner	4,055	3,342	472	241		1,605	1,561	43		649	606	43	69
employee	7,369	2,286	765	3908	410	776	625	3	148	149	147	3	14
unknown	200	200		1		46	46			5	5		
FTE per Gender													
female	75	50	8	15	1	15	11		4	9	9		
male	6,600	2,376	499	3,316	409	1,143	993	18	132	350	332	18	67

Source: Own elaboration.

Table 9. Demographics of French fisher population (percent).

	TOTAL	TOTAL				TOTAL OMR	OMR			TOTAL GP	GP		GUA DFN 0010 A
		SSCF	L12AG	LSF	DWF		SSCF	L12AG	LSF		SSCF	L12AG	
Gender													
female	2%	2%	2%	0%	0%	1%	1%	0%	2%	2%	2%	0%	0%
male	98%	98%	98%	100%	100%	99%	99%	100%	98%	98%	98%	100%	100%
Nationality													
NATIONAL	84%	90%	97%	69%	99%	79%	79%	100%	69%	100%	100%	100%	100%
EU	7%	0%	1%	18%	1%	0%	0%	0%	2%	0%	0%	0%	0%
EEA	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
NON-EU/EEA	8%	6%	2%	13%	0%	14%	13%	0%	29%	0%	0%	0%	0%
unknown	2%	3%	0%	0%	0%	8%	8%	0%	0%	0%	0%	0%	0%
Age													
≤14													
15-24	10%	8%	14%	13%	9%	3%	3%	6%	11%	4%	4%	6%	3%
25-39	31%	27%	35%	33%	46%	19%	18%	13%	25%	18%	18%	13%	19%
40-64	53%	55%	49%	53%	45%	63%	62%	81%	60%	71%	70%	81%	72%
65+	4%	6%	2%	1%	0%	8%	8%	0%	4%	7%	7%	0%	6%
unknown	2%	3%	0%	0%	0%	8%	8%	0%	0%	0%	0%	0%	0%
Education													
high	0%	0%	0%	0%	3%	0%	0%	0%	0%	0%	0%	0%	0%
medium	15%	16%	17%	13%	11%	11%	11%	0%	18%	12%	13%	0%	17%
low	69%	73%	78%	58%	86%	69%	68%	94%	66%	83%	82%	94%	81%
unknown	16%	11%	5%	29%	0%	21%	21%	6%	17%	5%	5%	6%	3%
Employment status													
owner	35%	57%	38%	6%	0%	62%	65%	94%	0%	81%	80%	94%	83%
employee	63%	39%	62%	94%	100%	30%	26%	6%	100%	19%	19%	6%	17%
unknown	2%	3%	0%	0%	0%	2%	2%	0%	0%	1%	1%	0%	0%
FTE per Gender													
female	1%	2%	2%	0%	0%	1%	1%	0%	3%	3%	3%	0%	0%
male	99%	98%	98%	100%	100%	99%	99%	100%	97%	97%	97%	100%	100%

Source: Own elaboration.

The characterization of the fishers' workforce at supra region level can be summarized as follows:

Age by supra region: In 2023, fishers aged 40–64 made up 53% of the workforce (6,183 fishers), followed by those aged 25–39 (31%) and under 24 (10%). Overall, 41% of fishers were under 40, ranging from 2% in OMR to 55% in OFR. Between 2020 and 2023, the share of fishers aged 65+ increased. This age group remains particularly important in OMR.

Education by supra region: According to available data, most French fishers, including those in the OMR, appear to have low levels of formal education. However, this result is largely due to difficulties in establishing equivalencies between maritime qualifications and the general education system. This indicator is being reviewed under France's pilot project and is expected to be improved in the next data collection cycle.

Nationality of fishers by supra region: In 2023, of the 11,625 people employed on board French fishing vessels, 9,730 (84%) were French nationals, 780 (7%) were EU citizens, 2 were EEA citizens, and 919 (8%) were from non-EU/EEA countries. The OMR employed 349 of foreign fishers (14% of total employment).

Total employment by gender and by supra region: Women represented 1.5% of the fisheries workforce (180 fishers), compared with 98.5% men. Of all women employed on board, 21% worked in OMR. Most women (88%) worked on vessels under 12 metres in length.

Unpaid labour: France did not provide data on unpaid labour. This is likely because all persons working on board fishing vessels (owners, skippers, and crew) are paid through a share system, while those operating alone on SSCF vessels earn income from vessel profits. Individuals without maritime diplomas are not allowed to work on board, for both legal and safety reasons. For safety reasons, anyone boarding a fishing vessel for purposes other than work must be reported to the district fisheries authorities.

Only spouses or life partners of vessel owners assisting in the family enterprise without remuneration and registered under the collaborative spouse status (Directive 2010/41/EU) should be included in this category.

Under Directive 2010/41/EU, the only individuals who could fall under the category of unpaid labour are spouses or life partners of vessel owners who assist in the family business without remuneration and are registered under collaborative spouse status.

Guadeloupe

At the same as Guadeloupe fleet, segments classified with Low activity (L) indicates a highly fragmented employment structure, with a significant share of part-time. This suggests that crew numbers alone may overstate the actual labour input, as several crew members may correspond to a limited number of full-time equivalent positions. Therefore, high Crew/FTE ratios should be considered when assessing operational efficiency and resource utilisation.

Consequently, a high Crew/FTE ratio should be considered when assessing operational efficiency and resource utilisation. In this context, an imbalance in VUR (Vessel Utilisation Ratio) should not necessarily be interpreted as an underutilisation of resources, as the workforce structure and employment characteristics may influence the relationship between activity levels, available capacity, and effective labour input.

Table 10. Guadeloupe fisheries information at a glance**.**

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
FRA OFR DFN0010 GP A *	VUR	43	19,26	83	67	0,81	6 732	81
FRA OFR DFN0010 GP L *	CR/BER, ROFTA, VUR	53	21,94	84	14	0,17	1 415	17
FRA OFR FPO0010 GP A *	VUR	37	21,54	57	40	0,70	5 101	89
FRA OFR FPO0010 GP L *	CR/BER, ROFTA, VUR	53	24,19	83	13	0,16	1 784	21
FRA OFR HOK0010 GP A *	VUR	41	16,88	62	43	0,69	5 068	82
FRA OFR HOK0010 GP L *	CR/BER, ROFTA, VUR	70	15,34	104	14	0,13	1 801	17
FRA OFR PGP0010 GP A *	VUR	93	16,3	167	132	0,79	13 939	83
FRA OFR PGP0010 GP L *	CR/BER, ROFTA, VUR	67	17,42	117	17	0,15	1 781	15
FRA OFR PS 0010 GP A *	VUR	8	21,88	23	17	0,74	991	43
FRA OFR PS 0010 GP L *	CR/BER, ROFTA, VUR	8	25,88	23	2	0,09	119	5

Source: from AER 2025.

Table 11. Guadeloupe condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

| REGION | Fleet segments | Indicators Trends (2018-2023) | | Social indicators (to be complete by Social Group) | | |

In 2023, the fleet of netters consisted of 42 vessels, scattered throughout the island but mainly on Grande Terre. The vessels are 8 meters long on average, with an average power output of 183 kW; they are 19 years old on average, and each has a crew of 2 people. The main species landed by the fleet are parrotfish (PWT), white spiny lobster (SLC), selar colisou (BIS), dim-becs (JKX), grondeurs (GRX) and strombidae (JTX). The fishers of this fleet are mostly (78%) belonging into the age and more than 65 years. The age indicator is useful to understand and explain better the fishing strategies of the fishers of this fleet.

Few factors explaining vessels low activity:

Several factors may explain the relatively low activity of Guadeloupean fishers. The first factor is related to weather conditions, which frequently force fishers to remain ashore. During these periods of inactivity, they generally devote their time to vessel maintenance and repairs or engage in a secondary occupation. As a result, many fishers turn to seasonal employment to supplement their income, mainly in the tourism and construction sectors. This occupational diversification is facilitated by the fact that, unlike their counterparts in mainland France, Guadeloupean fishers often practiced other professional activities outside the fishing sector before entering the sector.

The structure of the fish market is another factor contributing to the reduction in fishing days. Since the market is primarily local, periods of abundant catches of seasonal species often lead to a decline in prices. To avoid market saturation, fishers may suspend their fishing activities for several days. Such interruptions are frequently encouraged, or even requested, by fish buyers and wholesalers. It should also be noted that many local fishers seek to reduce their dependence on intermediaries and increase the adding value of their catches by selling directly to final consumers. To facilitate this form of marketing, light infrastructure meeting European sanitary standards has been established at several landing sites thanks to EU fisheries fund.

Another factor that may reduce vessel activity is the massive influx of sargassum seaweed along the Atlantic coasts of Guadeloupe. Originating in the tropical Atlantic, these floating algae initially acted as natural fish aggregation devices, particularly for large migratory species. However, when present in excessive quantities, the significantly impede fishing operations by obstructing access to fishing grounds, disrupting fishing activity, causing damage to vessel engines, and adversely affecting the nursery habitats of certain species. As mentioned earlier, the relatively advanced age profile of the fishing population may further contribute to the decline in vessel activity by limiting fishers' capacity to sustain an intensive fishing schedule throughout the year.

Martinique

Table 12. Martinique fisheries information at a glance (for the fleet segment identified out of balance by STECF EWG 25-12).

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
FRA OFR DFN0010 MQ	VUR	69	24,74	95	11	0,12	1 398	15
FRA OFR FPO0010 MQ	VUR	151	26,52	206	25	0,12	3 295	16
FRA OFR HOK0010 MQ	VUR	133	18,92	189	24	0,13	3 829	20
FRA OFR PGP0010 MQ *	VUR	244	26,76	400	126	0,32	13 863	35

Source: from AER 2025. Due to the exploratory nature of this exercise, in the case of France the overview of social variables is provided for the 6 OMRs, while the detailed analysis of social variables is provided only for Guadeloupe.

The DFN, FPO, and PGP segments present some of the highest Crew/FTE ratios, indicating a significant prevalence of family-based employment structures.

The PGP 0010 cluster comprises eight different segments covering a range of vessel sizes. The VUR indicator shows an imbalance, particularly in the smaller vessel size segments. However, as these variables are only available at cluster level rather than at segment level, it has not been possible to perform a more detailed assessment of this indicator for each individual segment.

In this context, an imbalance in VUR (Vessel Utilisation Ratio) should not necessarily be interpreted as an underutilisation of resources, as the workforce structure and employment characteristics may influence the relationship between activity levels, available capacity, and effective labour input.

Table 13. Martinique condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

REGION	Fleet segments	Indicators Trends (2018-2023)		Social indicators (to be complete by Social Group)																	
		Economic Indicators	Biological and Technical Indicators	Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status		
		CER/BER, ROFTA, ROI, NP margin,	VUR, SIH, EDI, SAR2025	N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%
Martinique	FRA OFR DFN0010 MQ	ALL improving	ALL Neutral	95	11	0,12	14,72	15-24			Male	93	98%	Low	72		National	95	100%	Employee	2	2%
								25-39	13	14%	Female	2	0,019543229	Medium	20		EU			Owner	93	98%
								40-64	69	73%				High			EEA			Unknown		
								>=65	13	14%				Unknown	2		non-EU/EEA					
								Unknown									Unknown					
Martinique	FRA OFR FPO0010 MQ	ALL improving	ALL Neutral	206	25	0,12	16,00	15-24	5	2%	Male	199	97%	Low	177		National	206	100%	Employee	13	7%
								25-39	12	6%	Female	7	3%	Medium	19		EU			Owner	192	93%
								40-64	147	71%				High			EEA			Unknown		
								>=65	42	20%				Unknown	10		non-EU/EEA					
								Unknown									Unknown					
Martinique	FRA OFR HOK0010 MQ	ALL improving	ALL Neutral	189	24	0,13	20,26	15-24			Male	184	97%	Low	165		National	189	100%	Employee	13	7%
								25-39	48	25%	Female	5	0,026146207	Medium	20		EU			Owner	176	93%
								40-64	125	66%				High			EEA			Unknown		
								>=65	16	9%				Unknown	5		non-EU/EEA					
								Unknown									Unknown					
Martinique	FRA OFR PGP0010 MQ *			400	126	0,32	34,66	15-24	19	5%	Male	398	100%	Low	328		National	394	99%	Employee	67	17%
								25-39	69	17%	Female	2	0%	Medium	65		EU		0%	Owner	333	83%
								40-64	276	69%				High			EEA		0%	Unknown		
								>=65	36	9%				Unknown	8		non-EU/EEA	6	1%			
		ALL improving	SIH improving, neutral					Unknown									Unknown					
		ALL improving	VUR improving																			
		ALL improving	SIH neutral, VUR+																			

Source: own elaborations.

French Guiana

Table 14. French Guiana fisheries information at a glance for the fleet segment identified out of balance by STECF EWG 25-12.

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
FRA OFR DFN0010 GF A *	CR/BER, ROFTA, SHI, VUR	19	16,63	56	39	0,70	2 360	42
FRA OFR DFN0010 GF L *	VUR	14	22,29	33	6	0,18	419	13
FRA OFR DFN1012 GF A *	CR/BER, ROFTA SAR,SHI, VUR	53	13,96	182	146	0,80	7 760	43
FRA OFR DFN1012 GF L *	CR/BER, ROFTA,SHI, VUR	14	16	49	13	0,27	638	13

Source: from AER 2025.

Unlike other regions, the fleet is relatively young, particularly DFN1012 segments, with average vessel ages below 16 years. Therefore, the main issue does not appear to be vessel ageing but rather economic and operational constraints.

The Crew/FTE indicator is significantly higher in the Low Activity (L) segments, highlighting a greater prevalence of part-time employment structures within these segments. This suggests that an imbalance in VUR (Vessel Utilisation Ratio) should not necessarily be interpreted as an underutilisation of resources, as the workforce structure and employment characteristics may influence the relationship between activity levels and available capacity

Table 15. French Guiana condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

REGION	Fleet segments	Indicators Trends (2018-2023)		Social indicators (to be complete by Social Group)																
		Economic indicators	Biological and Technical indicators	Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status		
		CER/BER, ROFTA, ROI, NP margin,	VUR, SIH, EDI, SAR2025	N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%
French Guiana	FRA OFR DFN0010 GF A	ALL improving	ALL neutral	56	39	0,70	42,14	15-24	1	3%	Male	56		Low	19		National	6	11%	Employee	53	95%
								25-39	19	34%	Female			Medium			EU		0%	Owner	3	5%
								40-64	32	58%				High			EEA		0%	Unknown		
								>=65	3	5%				Unknown	37		non-EU/EEA	50	89%			
								Unknown									Unknown		0%			
French Guiana	FRA OFR DFN0010 GF L	ALL improving	ALL neutral	33	6	0,18	12,70	15-24			Male	33	100%	Low	5		National	11	33%	Employee	27	83%
								25-39	16	50%	Female			Medium			EU		0%	Owner	5	17%
								40-64	11	33%				High			EEA		0%	Unknown		
								>=65	5	17%				Unknown	27		non-EU/EEA	22	67%			
								Unknown									Unknown		0%			
French Guiana	FRA OFR DFN1012 GF A	CR/BER neutral, NVA/FTE +, improving	ALL neutral	182	146	0,80	42,64	15-24	1	1%	Male	182	100%	Low	56		National	3	2%	Employee	182	100%
								25-39	36	20%	Female			Medium	3		EU		0%	Owner		
								40-64	138	76%				High			EEA		0%	Unknown		
								>=65	7	4%				Unknown	124		non-EU/EEA	179	98%			
								Unknown									Unknown		0%			
French Guiana	FRA OFR DFN1012 GF L	ALL improving	Neutral	49	13	0,27	13,02	15-24	2	5%	Male	49	100%	Low	11		National	4	9%	Employee	49	100%
								25-39	9	18%	Female			Medium			EU		0%	Owner		
								40-64	34	68%				High			EEA		0%	Unknown		
								>=65	4	9%				Unknown	38		non-EU/EEA	45	91%			
								Unknown									Unknown					

Source: own elaborations.

Mayotte

Table 16. Mayotte fisheries information at a glance for the fleet segment identified out of balance by STECF EWG 25-12.

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
FRA OFR HOK0010 YT *	VUR	80	27,43	194	83	0,43	6 180	32

Source: from AER 2025.

Table 17. Mayotte condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

REGION	Fleet segments	Indicators Trends (2018-2023)		Social indicators (to be complete by Social Group)																		
		Economic Indicators	Biological and Technical Indicators	Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status		
		CER/BER, ROFTA, ROI, NP margin,	VUR, SIH, EDI, SAR2025	N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%
								15-24			Male	194	100%	Low			National			Employee		
								25-39			Female			Medium			EU			Owner		
Mayotte	FRA OFR HOK0010 YT *	ALL Improving	ALL Neutral	194	83	0,43	31,86	40-64						High			EEA			Unknown	194	100%
								>=65						Unknown	194		non-EU/EEA					
								Unknown	194	100%							Unknown	194	100%			

Source: own elaborations.

Considering the employment indicator and the number of sea days per FTE, no significant issues have been identified, as the employment ratio remains within the range of 1 and the activity level is relatively high. Furthermore, the vessels involved are not considered to be significantly aged. The fishing activity is strongly influenced by seasonality, environmental conditions and the social role of fisheries.

La Réunion

Table 18. La Réunion fisheries information at a glance for the fleet segment identified out of balance by STECF EWG 25-12.

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
FRA OFR HOK0010 RE *	VUR	134	22,55	155	80	0,52	12 403	80

Source: from AER 2025.

Table 19. La Réunion condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

REGION	Fleet segments	Indicators Trends (2018-2023)		Social indicators (to be complete by Social Group)																		
		Economic Indicators	Biological and Technical Indicators	Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status		
		CER/BER, ROFTA, ROI, NP margin,	VUR, SIH, EDI, SAR2025	N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%
								15-24	8	4%	Male	205	100%	Low	158		National	202	98%	Employee	70	34%
								25-39	76	37%	Female			Medium	30		EU	1	1%	Owner	135	66%
Réunion	FRA OFR HOK0010 RE *	ALL Improving	ALL Neutral	155	80	0,52	80,02	40-64	110	54%				High			EEA		0%	Unknown		
								>=65	10	5%				Unknown	17		non-EU/EEA	2	1%			
								Unknown									Unknown		0%			
								15-24	16	13%	Male	114	97%	Low	81		National	101	86%	Employee	118	100%
								25-39	37	32%	Female	4	3%	Medium	23		EU	2	2%	Owner		
Réunion	FRA OFR HOK1218 RE *	ALL Improving	ALL Neutral	189	24	0,27	20,26	40-64	64	54%				High			EEA		0%	Unknown		
								>=65	1	1%				Unknown	14		non-EU/EEA	14	12%			
								Unknown									Unknown		0%			

Source: own elaborations.

Considering the employment indicator and the number of sea days per FTE, no significant issues have been identified, as the employment ratio remains within the range of 2 and the activity level is relatively high. Furthermore, the vessels involved are not considered to be significantly aged.

Saint Martin

Table 20. Saint Martin fisheries information at a glance for the fleet segment identified out of balance by STECF EWG 25-12.

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
FRA OFR HOK0010 MF *	VUR	13	14,23	21	4	0,19	297	14

Source: from AER 2025.

Table 6.2.1.6.2: Saint Martin condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

REGION	Fleet segments	Indicators Trends (2018-2023)		Social indicators (to be complete by Social Group)																			
		Economic indicators	Biological and Technical indicators	Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status		
		CER/BER, ROFTA, ROI, NP margin,	VUR, SIH, EDI, SAR2025	N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%
Saint Martin	FRA OFR HOK0010 MF *	NA	VUR improving	21	4	0,19	14,14	15-24	2	11%	Male	21	100%	Low	18		National	21	100%	Employee	2	11%
								25-39	2	11%	Female			Medium			EU			Owner	18	89%
								40-64	16	78%				High			EEA			Unknown		
								>=65						Unknown	2		non-EU/EEA					
								Unknown									Unknown					

Source: own elaborations.

Saint Martin has a small fleet segment (HOK0010 MF), with 13 vessels and an average age of 14.2 years. The segment shows VUR imbalance and relatively low activity intensity.

The high Crew/FTE ratio may help explain the imbalance observed in the VUR indicator, as it suggests a significant level of part-time employment, likely associated with family-based labour structures. This indicates that the apparent mismatch in vessel utilisation may be influenced by the specific workforce organisation and should not necessarily be interpreted as a direct underutilisation of resources. In this sense, a regional profile should be developed for a more comprehensive analysis.

Portugal OMR

The following section presents tables and analysis of Portuguese OMR fisheries at a glance and the demographics of the Portuguese fisher population, with the social variables collected under the Data Collection Framework (DCF), as reported in the Portuguese Member State chapter of the ASOR (2026), based on 2023 data.

The analysis is structured around key social variables, including total employment, demographic characteristics (age, gender, education level, nationality of fishers, and employment status on board).

The table provides an overview of the social indicators for Portuguese outermost regions, the Azores and Madeira archipelagos, mainland Portugal, and Portugal. As well as information for the fleet segments HOK VL0010 P2 and HOK VL0010 P3, segments deemed to be out of balance according to the 2023 capacity indicators (7 STECF Reports EWG 25-12 Balance Capacity) for the biological and technical indicators SAR and VUR.

Table 21. Portuguese fisheries information at a glance.

MS	Outermost Region	N. of active vessels	Total jobs	FTE	Days at sea	Weight of landings (Thousand tonnes)	Revenue (Million EUR)	Gross Value Added (Million EUR)
Portugal	**Totals**	**576**	**2.361**	**1.419**	**46.148**	**14,46**	**59,19**	**39,98**
	P2 - Madeira	92	428	351	7.275	4,53	17,93	13,29
	P3 - Azores	484	1.933	1.068	38.873	9,93	41,26	26,69

Source: from AER 2025.

Fisheries employment in the Madeira and Azores OMR

In 2023, the Portuguese fishing fleet (including OMR) employed 12804 fishers. The OMR accounted for 2,371 fishers (18.5%), 431 (3.4%) in the Autonomous Region of Madeira (RAM) and 1940 (15.2%) in the Autonomous Region of the Azores (RAA).

Table 22. Demographics of the Portuguese fisher population.

	Numbers						%					
	Portugal (total)	Mainland	RAM	RAA	RAM HOK VL0010	RAA HOK VL0010	Portugal (total)	Mainland	RAM	RAA	RAM HOK VL0010	RAA HOK VL0010
Employment by Gender												
male	12192	9861	424	1907	105	708	95,2%	94,5%	98,4%	98,3%	98,1%	97,7%
female	612	572	7	33	2	17	4,8%	5,5%	1,6%	1,7%	1,9%	2,3%
Unpaid labor by gender												
male	1020	966	7	47	5	29	87,6%	87,3%	100,0%	92,2%	100,0%	87,9%
female	145	141	0	4	0	4	12,4%	12,7%	0,0%	7,8%	0,0%	12,1%
Employment by age												
15-24	270	253	11	6	3	2	2,1%	2,4%	2,6%	0,3%	2,8%	0,3%
25-39	2446	2084	77	285	15	84	19,1%	20,0%	17,9%	14,7%	14,0%	11,6%
40-64	7305	5963	318	1 024	83	404	57,1%	57,2%	73,8%	52,8%	77,6%	55,7%
65+	1176	984	22	170	6	90	9,2%	9,4%	5,1%	8,8%	5,6%	12,4%
unknown	1607	1149	3	455	0	145	12,6%	11,0%	0,7%	23,5%	0,0%	20,0%
Employment by level of education												
low	10397	8348	396	1653	96	599	81,2%	80,0%	91,9%	85,2%	89,7%	82,6%
medium	1196	1080	29	87	9	48	9,3%	10,4%	6,7%	4,5%	8,4%	6,6%
high	104	89	4	11	2	7	0,8%	0,9%	0,9%	0,6%	1,9%	1,0%
unknown	1107	916	2	189	0	71	8,6%	8,8%	0,5%	9,7%	0,0%	9,8%
Employment by nationality												
national	12338	9982	429	1927	107	721	96,4%	95,7%	99,5%	99,3%	100,0%	99,4%
EU	110	103	0	7	0	0	0,9%	1,0%	0,0%	0,4%	0,0%	0,0%
EEA	0	0	0	0	0	0	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
non-EU/EEA	344	336	2	6	0	4	2,7%	3,2%	0,5%	0,3%	0,0%	0,6%
unknown	12	12	0	0	0	0	0,1%	0,1%	0,0%	0,0%	0,0%	0,0%
Employment by employment status												
employee	0	0	0	0	0	0	0%	0%	0%	0%	0%	0%
owner	825	800	15	10	10	4	6%	8%	3%	1%	9%	1%
unknown	11979	9633	416	1930	97	721	94%	92%	97%	99%	91%	99%

Source: own elaborations.

Total employment by gender: Women represented 4.8% of the fisheries workforce (612 fishers), compared with 95.2% men. The proportion of women is lower in the OMR, represent 1.6% in RAM and 1.7% in RAA of the fisheries workforce.

Unpaid labour by gender: Women represented 12.4.% of unpaid labour (145 fishers), compared with 87.6% men. There are no women in unpaid labour in RAM, and the proportion of women in unpaid labour in RAA is lower, representing 7.8%.

Employment by age group: In 2023, fishers aged 40–64 made up 57.1% of the workforce (7,305 fishers), followed by those aged 25–39 (19.1%), 65+ (9.2%) and under 24 (2.1%). Fishers in RAM are generally older, with fishers aged 40–64 making

up 73.8% of the workforce, followed by those aged 25–39 (17.9%). In RAA the pattern is similar to the national pattern.

Employment by level of education: Most Portuguese fishers (81.2%), including those in the OMR, appear to have a low level of formal education. However, fishers from the OMRs have lower levels of formal education than those in the mainland, especially in RAM, where 91.9% of fishers have low levels of formal education.

Employment by nationality of fishers: In 2023, most people employed onboard Portuguese fishing vessels were nationals (96.4%), including in the OMR. However, these values seem incorrect, as anecdotal evidence shows that foreign workers are indispensable to the Portuguese fishing fleet, and the industry widely recognises that without their contribution, many vessels would cease operations due to a shortage of national labour. For instance, in tuna fleets in the OMRs there is a large number of non-EU/EEA workers. The shortage of national labour is so critical that legislation has recently been passed (Lei 21/2025) authorising the Government to amend Decree Law 166/2019 and change the rules regarding the nationality of crew members onboard vessels, and to allow an increase in the proportion of foreign crew (previously up to 40%). This is evidence that it is unreasonable that 96.4% of those employed onboard Portuguese vessels are nationals.

Fishing population by status on board: It is not possible to report on the variable as most are unknown.

Madeira

Table 23. Madeira fisheries information at a glance.

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
PRT NAO HOK0010 P2	VUR	53	35,3	105	64	0,61	2 034	19
PRT NAO HOK1012 P2	VUR	5	36,8	24	21	0,88	577	24
PRT NAO HOK2440 P2	CR/BER, ROFTA, SAR	6	24,8	71	56	0,79	522	7
PRT NAO MGP1824 P2	CR/BER, ROFTA	3	42,7	30	28	0,93	502	17

Source: from AER 2025.

All segments show a relatively old fleet structure and low Days at sea/FTE. This indicates reduced capacity utilisation and possible operational limitations linked to ageing assets.

One of the problems to interpret this information is the fact that this segment includes 3 different métiers - deep sea fishing for black scabbardfish vessels, tuna vessels, demersal fish vessels (some also catching tuna).

Table 24. Madeira condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

REGION	Fleet segments	Indicators Trends (2018-2023)		Social indicators (to be complete by Social Group)																		
		Economic indicators	Biologicial and Technical indicators	Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status		
		CER/BER, ROFTA, ROI, NP margin,	VUR, SIH, EDI, SAR2025	N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%
Madeira	PRT NAO HOK0010 P2	No trends	No significant trends	105	64	0,61	19,37	15-24	3	3%	Male	103	98%	Low	94	90%	National	105	100%	Employee	0	
								25-39	15	14%	Female	2	2%	Medium	9	9%	EU	0		Owner	10	10%
								40-64	81	77%				High	2	2%	EEA	0		Unknown	95	90%
								>=65	6	6%				Unknown			non-EU/EEA	0				
								Unknown														
Madeira	PRT NAO HOK1012 P2	No trends	No significant trends	24	21	0,88	24,04	15-24	1	4%	Male	23	96%	Low	23	96%	National	24	100%	Employee	0	
								25-39	2	8%	Female	1	4%	Medium	0		EU	0		Owner	2	8%
								40-64	19	79%				High	0		EEA	0		Unknown	22	92%
								>=65	2	8%				Unknown	1	4%	non-EU/EEA	0				
								Unknown														
Madeira	PRT NAO HOK2440 P2	ALL +	EDI improving, neutral	71	56	0,79	7,35	15-24	2	3%	Male	71	100%	Low	65	92%	National	71	100%	Employee	0	
								25-39	19	27%	Female	0		Medium	6	8%	EU	0		Owner	0	
								40-64	47	66%				High	0		EEA	0		Unknown	71	100%
								>=65	2	3%							non-EU/EEA	0				
								Unknown	1	1%												
Madeira	PRT NAO MGP1824 P2	ALL +	ALL neutral	30	28	0,93	16,73	15-24	0		Male	30	100%	Low	28	93%	National	29	97%	Employee	0	
								25-39	2	7%	Female	0		Medium	1	3%	EU	0		Owner	0	
								40-64	22	73%				High	1	3%	EEA	0		Unknown	30	100%
								>=65	6	20%							non-EU/EEA	1	3%			
																	Unknown					

Source: Own elaboration.

Azores

Table 25. Azores fisheries information at a glance.

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
PRT NAO HOK0010 P3	VUR	309	27,3	725	64	0,09	19 512	27
PRT NAO HOK1012 P3	VUR	63	24,7	447	21	0,05	7 408	17
PRT NAO HOK1218 P3	SAR	32	22,7	273	56	0,21	4 121	15
PRT NAO HOK2440 P3 *	CR/BER, ROFTA, SAR	25	25,48	305	28	0,09	2 332	8
PRT NAO PS 1218 P3	CR/BER	3	54,7	43	12	0,28	422	10

Source: from AER 2025.

The Azores fleet segments identified as potentially out of balance are mainly associated with HOK segments (hook fisheries) and include VUR-related imbalance as well as economic indicators for the biggest segment.

The HOK0010 P3 segment represents a major component of the fleet, with 309 active vessels, an average vessel age of 27.3 years, 725 engaged crew members and 265 FTE. The Crew/FTE ratio indicates a relatively high number of workers associated with each full-time equivalent position, which is characteristic of **small-scale and family-based fisheries**. The Days at sea/FTE indicator (73.6) suggests limited operational intensity compared with the available workforce.

One of the problems to interpret these results is the fact that this segment includes different métiers and reporting for the entire archipelago (9 islands). Different topography in the several islands (abrupt seafloor droops, isolated seamounts between some islands) allows for the use of different metiers. Therefore, in this segment deep water fleet, a fleet fishing for squid, etc. are included

Other segments, such as HOK1012, HOK1218 and HOK 2440, show very low Days at sea/FTE values, indicating limited activity levels. However, this does not necessarily imply pure excess capacity, as fishing activity in the Azores is strongly influenced by **seasonality,** environmental conditions and the social role of fisheries.

Table 26. Azores condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

REGION	Fleet segments	Indicators Trends (2018-2023)		Social indicators (to be complete by Social Group)																			
		Economic Indicators	Biological and Technical Indicators	Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status		
		CER/BER, ROFTA, ROI, NP margin,	VUR, SSH, EDI, SAR2025	N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%
Azores	PRT NAO HOK0010 P3	ALL improving	ALL neutral	725	265	0,37	26,91	15-24	2	0%	Male	708	98%	Low	599	83%	National	721	99%	Employee	0	0%
								25-39	84	12%	Female	17	2%	Medium	48	7%	EU	0		Owner	4	1%
								40-64	404	56%				High	7	1%	EEA	0		Unknown	721	99%
								>=65	90	12%				Unknown	71	10%	non-EU/EEA	4	1%			
								Unknown	145	20%												
Azores	PRT NAO HOK1012 P3	ALL improving	SHI +, neutral	447	298	0,67	16,57	15-24	0	0%	Male	443	99%	Low	380	85%	National	447	100%	Employee	0	
								25-39	64	14%	Female	4	1%	Medium	4	1%	EU	0		Owner	4	1%
								40-64	191	43%				High	2	0%	EEA	0		Unknown	443	99%
								>=65	32	7%				Unknown	61	14%	non-EU/EEA	0				
								Unknown	160	36%												
Azores	PRT NAO HOK1218 P3	ALL +	EDI improving, neutral	273	194	0,71	15,10	15-24	2	1%	Male	269	99%	Low	226	83%	National	271	99%	Employee	0	
								25-39	45	16%	Female	5	2%	Medium	16	6%	EU	0		Owner	0	
								40-64	136	50%				High	0		EEA	0		Unknown	273	100%
								>=65	22	8%				Unknown	31	11%	non-EU/EEA	2	1%			
								Unknown	68	25%												
Azores	PRT NAO HOK2440 P3 *	ALL +	EDI improving, neutral	305	219	0,72	7,62	15-24	2	1%	Male	304	100%	Low	284	93%	National	298	98%	Employee	0	
								25-39	61	20%	Female	1	0%	Medium	12	4%	EU	7	2%	Owner	0	
								40-64	210	69%				High	2	1%	EEA	0		Unknown	305	100%
								>=65	13	4%				Unknown	7	2%	non-EU/EEA	0				
		ALL +	EDI improving, neutral					Unknown	19	1%												
Azores	PRT NAO HOK2440 P3 *	ALL +	ALL neutral	12	9	0,75	35,17	15-24	0		Male	12	100%	Low	12	100%	National	12	100%	Employee	0	
								25-39	1	8%	Female	0		Medium	0		EU	0		Owner	0	
								40-64	4	33%				High	0		EEA	0		Unknown	12	100%
								>=65	0								non-EU/EEA	0				
								Unknown	7	58%												

Source: Own elaboration.

Spain OMR

In 2023, the OMR Spanish fishing fleet comprised 570 vessels registered with the CFR. The fleet employed 1,569 people (708 FTEs). Fleet activity generated a revenue of 31. million Euro and a gross value added of 16 million Euro.

Table 27. Spanish fisheries information at a glance.

MS	Outermost Region	N. of active vessels	Total jobs	FTE	Days at sea	Weight of landings (Thousand tonnes)	Revenue (Million EUR)	Gross Value Added (Million EUR)
SPAIN	**Totals**	**570**	**1.569**	**708**	**43.385**	**7,92**	**31,48**	**16,43**
	IC - Canaries	570	1.569	708	43.385	7,92	31,48	16,43

Source: from AER 2025.

Canary Island

Table 28. Canary Island fisheries information at a glance.

Fleet segments (out of balance)	Indicators out of balance	N. of active vessels	Average age vessel	Crew	FTE	FTE/Crew	Days at sea	Day at sea/Crew
ESP NAO FPO1012 IC *	CR/BER, ROFTA	13	35,15	44	15	0,34	1 132	26
ESP NAO HOK1012 IC *	CR/BER, ROFTA, VUR	46	38,35	120	43	0,36	2 555	21
ESP NAO HOK1218 IC	CR/BER, ROFTA , SAR, VUR	35	32	213	54	0,25	2 409	11
ESP NAO HOK2440 IC *	CR/BER, ROFTA, SAR	22	29,64	281	237	0,84	2 799	10

Source: from AER 2025.

The Crew/FTE indicator is considered to be relatively high, which may indicate a significant level of part-time and family-related employment. This type of workforce structure can increase personnel costs and potentially have a negative impact on economic profitability, as personnel expenses may be overestimated in relation to the effective operational needs.

It is relevant to mention that in recent years the catches of tuna with pole-and-line, the most relevant métier for all the hook fleets, has been rather low, due to the situation of most tuna species schools away from the Canary Islands, so inaccessible for small-scale or medium-size fleets. This has created profitability and FTE issues, that need to be understood under the interannual variability of the tuna catch cycles.

Additionally, the vessel's age structure appears to be relatively high, which may also contribute to reduced profitability due to potential increases in maintenance requirements, operational inefficiencies, and higher associated costs. These factors should be considered when assessing the overall economic performance of the vessel.

Table 29. Canary Island condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles).

REGION	Fleet segments	Indicators Trends (2018-2023)		Social indicators (to be complete by Social Group)																			
		Economic Indicators	Biological and Technical Indicators	Crew	FTE	FTE/Crew	Days at sea/Crew	Age			Gender			Education Level			Nationality			Status		
		CER/BER, ROFTA, ROI, NP margin,	VUR, SIH, EDI, SAR2025	N	N			Class	N	%	Class	N	%	Class	N	%	Class	N	%	Class	N	%
Canary Islands	ESP.NAO.FPO1012.IC *	ALL +	ALL neutral	44	15	0,34	25,73	15-24	0	0%	Male	44	100%	Low	36	82%	National	43		Employee	33	75%
								25-39	14	32%	Female	0	0	Medium	6	14%	EU	0		Owner	11	25%
								40-64	28	65%				High	1	2%	EEA	0		Unknown	0	0%
		ALL +	VUR lightly decreasing					>=65	1	3%				Unknown	1	2%	non-EU/EEA	0				
								Unknown	0	0%							Unknown	1				
Canary Islands	ESP.NAO.HOK1012.IC *	ALL improving	Neutral, EDI lightly decreasing	120	43	0,36	21,29	15-24	0	0%	Male	111	93%	Low	73	61%	National	103	86%	Employee	81	68%
								25-39	58	48%	Female	9	8%	Medium	38	32%	EU	0	0%	Owner	39	33%
								40-64	54	45%				High	9	8%	EEA	0	0%	Unknown	0	0%
								>=65	9	7%				Unknown	0	0%	non-EU/EEA	17	14%			
		ALL improving	ALL neutral					Unknown	0	0%							Unknown	0	0%			
Canary Islands	ESP.NAO.HOK1218.IC	ALL +	ALL neutral	213	54	0,25	11,31	15-24	0	0%	Male	213	100%	Low	76	36%	National	178	84%	Employee	181	85%
								25-39	41	19%	Female	0	0	Medium	81	38%	EU	0	0%	Owner	32	15%
								40-64	137	64%				High	20	9%	EEA	0	0%	Unknown	0	0%
								>=65	0	0%				Unknown	35	16%	non-EU/EEA	0	0%			
								Unknown	35	16%							Unknown	35	16%			
Canary Islands	ESP.NAO.HOK2440.IC *	ALL +	ALL neutral	281	237	0,84	9,09	15-24	2	1%	Male	255	91%	Low	148	53%	National	159	57%	Employee	280	99%
								25-39	70	25%	Female	27	10%	Medium	92	33%	EU	0	0%	Owner	2	1%
								40-64	207	74%				High	42	15%	EEA	13	5%	Unknown		
		ALL +	EDI improving, VUR lightly decreasing Neutral					>=65	2	1%				Unknown			non-EU/EEA	110	39%			
								Unknown	0	0%							Unknown	0	0%			

Source: Own elaborations.

Social variables

The following section presents a table and analysis of the social variables collected under the Data Collection Framework (DCF), as reported in the Spanish Member state chapter of the ASOR (2025), based on 2023 data. The analysis is structured around key social variables, including total employment and demographic characteristics (age, gender, education level, nationality of fishers, and employment status on board).

The table provides an overview of the social indicators for the Canary Islands outermost regions, versus mainland Spain. Comments were included on some fleet segments deemed to be out of balance according to the 2023 capacity indicators (2025 report) for the biological and technical indicators SAR and VUR.

The primary objective of this information is to assess whether the existing social indicators can be used by the "capacity report", at least partially, to measure the social impacts of fisheries management measures on specific fleet segments, and to explain some of the economic or biological constraints impacting the fleets in outermost regions.

Fisheries employment in the Canary Islands: In 2023, the Spanish fishing fleet (including OMRs) employed 29.965 persons. The Canary Islands accounted for 1569 fishers (approximately 5,24% of the Spanish total).

Total employment by gender: Women represented 5% of the registered workforce in Spain and 6% in the Canary Islands. The figures look very similar, and the increase in women's representation in the Canary Islands is related to the SSCF, where they reach a 7%.

Employment by age group: the percentage of fishers in the age group 40-64 is larger in the Canary Islands (66%) than in Spain (61%). This is mainly related to the LSF segment, where this age group reach 71% in the Canary Islands, vs 63% in Spain. In opposite, the SSCF percentage of this age group in the Canary Islands is 63% versus 66% in Spain. This shows that the LSF in the Canary Islands, mostly related to pole-and-line fishing, faces a generational renewal problem that needs to be analysed in relation to non-national fishers in this fleet (higher than in other segments), and very probably not so old; further evidence could be provided through the Regional Fisheries Profile.

Employment by level of education: Most Spanish fishers show a low level of formal education (65%). However, fishers from the Canary Islands have higher levels of formal education than those in the mainland, as the segment with low level of education comprises 58% of the population. The contrast is especially relevant in the medium level (21% in Spain, 34% in CI) and in high level of education (5% in Spain, 6% in CI). The LSF fleet in the CI show special characteristics, as it shows a 4% of high education in Spain vs 12% in the CI. Some of these in the CI may be related to managers of the fishing enterprise on land, as the percentage of women in this fleet looks higher than the average in Spain. Very probably, the pole-and-line fleet has some influence on this high level of higher education in the CI.

Employment by nationality of fishers: In 2023, most people employed on Spanish fishing vessels were nationals (72%), while in the Canary Islands, the percentage was even higher (87%). These percentages are reduced when considering the LSF, with a 67% of nationals in Spain LSF while a 72% in the CI LSF. It looks like most of these non-nationals are on the larger vessels of the pole-and-line fleet, which underscores the need for a community-of-practice profile for this fleet to better understand its dynamics.

Fishing population by status on board: The percentage of owners in the Canaria fleet looks higher (32%) than in Spain (22%). This is related to the high percentage of the SSF fleet in the Canary Islands.

Table 30. Demographics of the Spanish fisher population.

	TO-TAL	TOTAL				TOTAL OMR (IC)	OMR (IC)		ESP IC PMP 0010
		SSCF	L12AG	LSF	DWF		SSCF	LSF	
Gender									
female	1.392	460	333	457	142	94	68	27	58
male	28.573	7.753	1.923	14.256	4.641	1.475	938	537	783
Nationality						0			
NATIONAL	21.535	7.612	2.148	9.905	1.870	1.369	962	407	816
EU	540	45	3	435	57	13	0	13	0
EEA	0	0	0	0	0	0	0	0	0
NON-EU/EEA	5.907	465	72	3.557	1.814	152	43	110	25
unknown	1.982	92	33	815	1.042	36	1	35	
Age						0			
≤14	0	0	0	0	0	0	0	0	0
15-24	723	195	56	221	251	57	55	2	55
25-39	8.768	2.454	503	4.167	1.643	417	293	124	221
40-64	18.387	5.410	1.668	9.460	1.849	1.036	635	402	552
65+	222	63	9	132	19	24	22	2	12
unknown	1.864	91	20	733	1.021	35	0	35	0
Education						0			
high	1.443	275	56	640	473	88	23	65	12
medium	6.236	1.801	470	3.074	891	530	330	200	286
low	19.485	6.019	1.671	9.626	2.169	912	652	261	543
unknown	2.800	118	58	1.372	1.250	39	1	38	0
Employment status						0			
owner	6.485	4.090	1.305	1.089	0	500	457	43	408
employee	23.480	4.123	950	13.624	4.783	1.070	548	521	434
unknown	0	0	0	0	0	0	0	0	
FTE per Gender						0			

female	675	197	62	294	122	62	34	28	30
male	20.497	3.277	549	11.396	5.275	646	335	311	281

Source: own elaborations.

Tabe 6.2.3.1.4: Demographic of the Spanish fishers workforce (in %).

	TO-TAL	TOTAL				TO-TAL OMR	OMR (IC)		ESP IC PMP 0010
		SSCF	L12AG	LSF	DWF		SSCF	LSF	
Gender									
female	5%	6%	15%	3%	3%	6%	7%	5%	7%
male	95%	94%	85%	97%	97%	94%	93%	95%	93%
Nationality									
NATIONAL	72%	93%	95%	67%	39%	87%	96%	72%	97%
EU	2%	1%	0%	3%	1%	1%	0%	2%	0%
EEA	0%	0%	0%	0%	0%	0%	0%	0%	0%
NON-EU/EEA	20%	6%	3%	24%	38%	10%	4%	19%	3%
unknown	7%	1%	1%	6%	22%	2%	0%	6%	0%
Age						0			
≤14						0			
15-24	2%	2%	2%	2%	5%	4%	6%	0%	7%
25-39	29%	30%	22%	28%	34%	27%	29%	22%	26%
40-64	61%	66%	74%	64%	39%	66%	63%	71%	66%
65+	1%	1%	0%	1%	0%	2%	2%	0%	1%
unknown	6%	1%	1%	5%	21%	2%	0%	6%	0%
Education						0			
high	5%	3%	2%	4%	10%	6%	2%	12%	1%
medium	21%	22%	21%	21%	19%	34%	33%	35%	34%
low	65%	73%	74%	65%	45%	58%	65%	46%	65%
unknown	9%	1%	3%	9%	26%	2%	0%	7%	0%
Employment status									
owner	22%	50%	58%	7%	0%	32%	45%	8%	48%
employee	78%	50%	42%	93%	100%	68%	55%	92%	52%

unknown	0%	0%	0%	0%	0%	0%	0%	0%	0%
FTE per Gender						0			
female	3%	6%	10%	3%	2%	9%	9%	8%	10%
male	97%	94%	90%	97%	98%	91%	91%	92%	90%

Source: own elaborations.

CONCLUSIONS & SUGGESTIONS

Based on the preliminary results obtained across the regions, the following conclusions can be drawn:

- The analysis confirms that in OMR fisheries, imbalance signals—particularly VUR—cannot be interpreted in isolation, as they are strongly influenced by the socio-economic structure of fisheries communities.
- High Crew/FTE ratios observed in several regions indicate a prevalence of part-time and family-based employment structures, which may lead to an overestimation of labour input when using standard economic indicators.
- Low Days at sea/FTE values in several fleet segments suggest limited operational intensity; however, this is often linked to seasonality, environmental conditions and diversified livelihood strategies rather than pure excess capacity.
- In regions characterised by small-scale fisheries, the fishing sector plays a central socio-economic role and contributes to employment stability, cultural continuity and community resilience.
- Differences across regions (e.g. ageing fleets in Madeira, younger fleets but constrained performance in French Guiana, mixed structures in Azores and Canary Islands) highlight the need for context-specific interpretation of balance indicators.
- The integration of social variables significantly improves the interpretation of imbalance signals and supports a more nuanced understanding of fleet performance.
- The economic profitability of the fleet segment is highly linked to the social aspect of the fishery. Then, instead of analysing purely economic indicators, social data could establish, for instance, whether low VUR reflects genuine excess capacity or socially rational behaviour, such as part-time fishing, seasonality, weather constraints, supplementary household activity or the maintenance of fishing as a cultural and subsistence activity.
- FTE/crew is an initial proxy to approximate labour utilisation, while further joint discussion is needed.
- Vessel age: overall, a relationship can be observed between lower average vessel age and higher days at sea/FTE values, suggesting a greater capacity to utilise the associated human resources. Conversely, older fleets show, in

several cases, lower levels of productivity and utilisation. This may reflect operational constraints associated with ageing assets, lower technical efficiency, or reduced capacity to adapt to current operating conditions.

OMR fleets often face additional constraints related to fleet renewal, including: higher investment costs due to geographical remoteness; limited access to shipyards or maintenance facilities and reduced availability of financing opportunities.

- Fishers age: The age-related social variable indicates that the fisheries population across all OMRs is older than the national average population, highlighting the need for targeted policy interventions tailored to the specific demographic challenges of OMRs.
- Limitations of providing information by fleet segment and clustering fleets. Due to the nature of the methodological approach proposed (integrating biological, economic and social variables) and the way that the DCF variables are presented (clustered by segments due to confidentiality issues), the EWGs SOCIAL 26-02 suggests to have access to AER disaggregated data for the elaboration of the Regional Fisheries Profiles and other social analysis by the EWG, based on a confidentiality agreement with the experts and the three Member States involved (FR, PT, ES). The data will be used for analytical purposes only and will not be presented in a disaggregated or individually identifiable format.
- Cautious interpretation of VUR in OR fisheries. EWGs highlight that unfavourable VUR values in ORs—particularly in small-scale fisheries—should not automatically be interpreted as evidence of excess capacity.

Suggestions

1. **Complementing fleet balance assessment with social indicators.** EWGs recommend systematically integrating social indicators within the assessment of fleet balance in ORs, to complement economic, biological and technical indicators.
2. **Use of Regional Profiles as an operational approach**
   Given current data constraints, EWGs consider the Regional Profile approach to be an appropriate and operational first step towards community-level analysis.
3. Development of Community-of-practice profiles, related to tuna fisheries or FAD fisheries, depending on the OMR.
4. **Development of Fisheries Community Profiles**
   EWGs support the development of Fisheries Community Profiles as a complementary tool to National Fisheries Profiles, providing place-based insights into fisheries socio-economic structures. Priority should be giving to prioritising combinations and regions showing persistent multi-indicator imbalances, significant employment impacts, and strong socio-economic dependence on fisheries, for the development of pilot Fisheries Community Profiles and deeper analysis using social data.

5. **Development of additional indicators for a deeper analysis.** EWGs recommend the development of additional indicators to further enhance and deepen the interpretation of the analysis. For instance, to combine the VUR indicator together with the FTE, as well as employment expenditure, could improve the analysis of the imbalance between economic and technical indicators.
6. Consideration of labour structure in economic indicators. Indicators such as Crew/FTE should be systematically considered when interpreting economic performance, in order to account for part-time and informal employment structures.
7. **Further data development under DCF**
   EWGs recommend strengthening the collection of harmonised social data under the DCF, particularly on working conditions,

4. ToR 3 Social indicators

4.1. Methodological approach

The work carried out under TOR 3 aimed to advance the discussion on the development and application of social indicators for fisheries. The objective was not to define an ideal or an exhaustive set of indicators, but rather to assess the extent to which indicators identified in the previous EWG[5], could support the monitoring of the social sustainability across EU Member States and inform the evaluation of policy measures (ex-ante and ex-post). During the review process, particular attention was given to methodological challenges, data availability, and the interpretation of indicators in different Member States contexts.

Review of Potential Indicators

As a first step, the full list of social indicators (see EWG 24-05 and EWG 25-02) was reviewed for systematic evaluation against a set of agreed criteria. EWG 26-02 made use of findings and recommendations from other sources:

- the ISSG online meeting on exploring options for data collection for new social variables[6], where the suitability and feasibility of the indicators were discussed;
- FAO and ICES WGSocial joint effort on social indicators[7];
- experience gained through pilot studies shared during the EWG.

---

5 Ballesteros, M., Kraan, M., Tardy Martorell, M., Virtanen, J. and Guillen, J. (eds), Scientific Technical and Economic Committee for Fisheries (STECF) – Social data in fisheries (STECF-24-05), Publications Office of the European Union, 2024, https://data.europa.eu/doi/10.2760/461821

6 Liontakis, A. and Riechers, M., 2025. ISSG on Exploring options for data collection for new social variables. Regional Coordination Group on Economic Issues (RCG ECON). Available at: https://fisheries-rcg.eu/rcg-econ/.

7 Himes Cornell, Kristin Hoelting, A sustainability conceptual classification system to support socio-economic indicator design and evaluation in fisheries and aquaculture. Preprint sent to the EWG

EWG 26-02 focused on evaluating the availability of data required to produce each indicator, i.e. whether the necessary information was currently available, or could realistically become available with small or limited effort, for a majority of EU Member States. Consideration was given to existing data collection systems, administrative sources and records, national or European statistics, and other relevant datasets. This assessment aimed to identify indicators that could be implemented in a harmonised and sustainable manner while avoiding excessive collection and reporting burdens. Attention was paid to the feasibility of regular data collection and the potential for producing comparable results across Member States. Due to their relevance in the policy agenda, particular attention has been paid to two specific topics: generational renewal and training.

4.2. Potential Additions to the Indicator Set

To complement the existing set of social indicators nine additional indicators or topics could be derived from the ISSG meeting[8] for further consideration. These include a youth representation indicator, measuring the age distribution within the fisheries sector relative to that of the general population, as well as indicators related to community development, social structure, network structure, social cohesion, conflicts among stakeholders, equality, equity and justice, and knowledge exchange and information dissemination. The latter encompasses aspects such as the availability of advisory services, producer organisations, and training opportunities at the national level.

While the primary focus was on social indicators, EWG 26-02acknowledged the importance of adopting a systems perspective and linking social dynamics with broader environmental and economic developments, including declining fish stocks, coastal communities, and ecosystem health. Furthermore, the group noted that the development of Community Profiles could provide valuable contextual information and contribute to the design and interpretation of several of these indicators, particularly those related to community development, social networks, and social cohesion.

The ongoing pilot tests in 7 MS (BE, EL, ES, FI, HR, NL and SE) focus on four priorities (state of play, dependency, generational renewal and assessment of management measures) and provide useful insights about the feasibility and opportunity of informing social indictors by including new variables. In addition, during EWG 26-02 Portugal reported on the development of a new pilot study on generational renewal.

Findings from the pilot studies of Greece and Netherlands, generated significant outcomes regarding the suitability and applicability of the tested social indicators led. In general, the tested social indicators are relevant and provide useful insight into various social aspects of the fisheries sector. However, the results highlight several important challenges and limitations related to clarity, data availability, and methodological divergence which need to be highlighted and addressed prior to wider implementation.

---

[8] Liontakis, A. and Riechers, M., 2025. ISSG on Exploring options for data collection for new social variables. Regional Coordination Group on Economic Issues (RCG ECON). Available at: https://fisheries-rcg.eu/rcg-econ/.

Advancing in the operationalization of indicators

An assessment was undertaken to examine the operational readiness of the indicators listed in EWG 24-05 table 4.3. This review focused on two aspects: (i) Indicators, that have not yet been tested and require further conceptual clarification and operational definition; (ii) Indicators for which data availability is currently limited or expected to remain so in the near future.

(i) Indicators requiring further development

The list of social indicators presented below and reported in the EWG 24-05 table 4.3 represents a valuable foundation for advancing social monitoring. However, they will benefit from additional conceptual refinement and methodological development before they can be applied consistently across EU Member states.

- Social position I
- Social position II
- Number of fishers (crew) under SER /working under written contract
- Number of fishers working for a cooperative under agreement
- Number of contracts with social security and working conditions specification
- Number of fishers with no social security
- Fatalities & Injuries
- Medical certificates
- Time away from home/Work mode of vessel
- Time away from home/Satisfaction with time at sea
- Deprivation index
- Happiness index
- Job satisfaction index
- Legal burden (quantitative, qualitative)
- Legitimacy
- Reduced potential for recruitment of fishers
- Entrants no longer in fishing insurance schemes

(ii) Indicators with limited data availability (including indicators from the previous list:

- Social Position I
- Social Position II
- Number of fishers working for a cooperative under agreement
- Number of contracts with social security and working conditions specification
- Number of fishers with contracts through employment agencies

- Number of fishers with no social security
- Time away from home / Number of trips
- Legal Burden (Qualitative)
- Legitimacy
- Social support
- Institutional change

The data required to calculate these indicators are not collected under the existing fisheries data collection framework and are generally not readily available without further studies and operationalization.

EWG 26-02 also explored the feasibility of using additional indicators in the social analysis of the EU fisheries sector:

- Fatalities & Injuries
- Number of new entrants in fishing insurance schemes
- Entrants no longer in the vessel register
- Entrants no longer in fishing insurance schemes
- Medical certification

The EWG concluded that these indicators cannot yet be incorporated into the EU-level social analysis due to constraints in data availability and comparability across Member States. While relevant data exist in some Member States, collecting and reporting of data remains inconsistent. In particular, data on occupational accidents, fatalities, and insurance or administrative records is limited in coverage and often unavailable or not linked to fisheries statistics. The EWG noted that the availability, scope, and administrative use of medical certification requirements for fishers may vary considerably across Member States.

Following a discussion of the proposed indicators by the previous EWGs and ISSG Social, under the umbrella of RCG ECON, the EWG 26-02 reviewed the proposed indicators and identified two indicators that were considered too broad to support harmonised data collection across Member States. These indicators are:

- Social support (Quantitative and qualitative):

Different metrics of social capital, relations within community, with work colleagues, social isolation and loneliness,

- Impact of measures from a risk assessment perspective.

These indicators had been discussed, but no common understanding had emerged regarding the variables to be collected or the methodologies to be applied. The EWG agreed that the topics covered by these indicators are relevant for future social data collection. However, concerns were raised regarding their practical implementation and comparability. As currently defined, they lack clear boundaries regarding what should be measured, how it should be measured, and which specific variables would be required to ensure consistency and comparability across countries and over time.

For example, the proposed indicator on Social support combines several different aspects of social capital and social well-being, including relations within communities, interactions with colleagues, social isolation and loneliness. Experts highlighted that these aspects would require different survey questions and measurement approaches and therefore may need to be designed as a composite indicator or index. Without further specification, there is a considerable risk that Member States would interpret and measure the indicator differently, resulting in data that are not directly comparable. The indicator concerning the Impact of measures from a risk assessment perspective was also considered insufficiently defined. The EWG noted that the concept of risk can be interpreted in multiple ways, including economic, social, environmental, occupational, regulatory or governance-related risks. Without a clear definition of the type of risk being assessed and the intended analytical framework, the indicator remains difficult to operationalise and would likely generate heterogeneous interpretations among Member States.

The EWG 26-02 therefore concluded that these indicators are currently not suitable for inclusion in a core set of operational indicators. The EWG 26-02 recommends retaining them in a separate section of indicators requiring further methodological development. This would ensure that the concepts remain visible and can be revisited in future work, while avoiding the introduction of indicators that cannot currently be implemented in a consistent, reliable and comparable manner. The EWG 26-02 further recommends that, should these topics remain of interest, future work should focus on identifying more specific, measurable and policy-relevant proxy indicators that could capture the intended concepts while remaining feasible within existing data collection frameworks.

4.2. Systematic approach to social indicators

Based on the long-term work on social indicators, the ongoing pilot tests in the Member States, the EWG on social indicators is committed to developing a systematic approach to ensure coherence and continuity across its activities. This approach aims to strengthen coordination between the EWG and related initiatives (such as the dashboards using indicators, of the Blue Economy and Ocean Pact initiatives), facilitating the consistent use of indicators and improving the integration of evidence into policy processes. The objective is to support more structured progress tracking and to enhance the capacity of the group to inform decision-making in a timely and coherent manner.

Based on the assessment of indicators undertaken in this EWG, the EWG 26-02 proposes to continue with the operationalisation of social indicators based on the following typology of indicators:

a) indicators that are not yet clearly defined or operationalized in current EWG reports but can be informed by existing literature;
b) quantitative indicators for which data are readily available; these could be considered for potential test studies and, where appropriate, collected through the DCF framework;
c) quantitative indicators requiring additional survey work; in future EWGs, a standardized survey template can be developed, for Member States (MS) to

explore to apply and integrate into their workplans, including an estimation of the costs;
d) indicators requiring qualitative data collection; for these, future EWGs can provide a repository of interview guidelines for MS to use, including an estimation of the costs.

This typology of indicators shows the potential of the indicators to be operationalised, and suggests methods to progress(through standardized survey templates and interview guidelines)twhereby the prioritization can be based on its policy relevance and meaningfulness rather than on the ease of data collection or the availability of existing data.

4.3. Focused analysis of indicators for Generational Renewal

Generational renewal was used as a practical case study to explore how social indicators could support a Social Impact Assessment rather than merely providing descriptive statistics. Following the logic of SIA, the objective is to understand how changes in economic conditions, working conditions, skills requirements and management measures may influence the attractiveness of fisheries and ultimately affect decisions to enter, remain in, or leave the profession. As generational renewal is the result of multiple interacting social processes, no single indicator can adequately describe this phenomenon. Indicators can instead be grouped according to the role they play in explaining the causal pathway leading to generational renewal.

The assessment focused on four main dimensions: (i) the **availability** of data from existing sources, including the Data Collection Framework (DCF), national registries, and Eurostat databases; (ii) the degree of **comparability** across Member States, which is essential for supporting EU-wide analyses; (iii) the **methodological feasibility** of calculating the indicator without requiring extensive additional surveys or data collection efforts; and (iv) the **ability** of the indicator to capture factors that influence the attractiveness of the fisheries sector for younger generations and, ultimately, the continuity of fishing activities across generations.

By applying these criteria, experts adopted a pragmatic and evidence-based approach aimed at identifying indicators that are operational. The selection process recognised that, although a broad range of indicators may theoretically contribute to understanding generational renewal, , priority was given to indicators capable of providing reliable and comparable evidence on the socio-economic conditions and structural factors that shape the sector’s capacity to attract, retain, and renew its workforce.

- **Social status (qualitative)** was recognised as highly relevant for understanding generational renewal, as perceptions of social recognition, prestige, and societal appreciation of the fishing profession can significantly affect young people's willingness to enter and fishers to remain in the sector. This indicator focuses on subjective perceptions of social esteem associated with fisheries

occupations. Nevertheless, its implementation would require further methodological development and the collection of survey-based information to ensure comparability and consistency across Member States.

- **Financial position** was prioritised because income prospects and economic security are major determinants of entry into the fisheries sector. The indicator is considered calculable using DCF data and national income statistics. However, further methodological work is needed to define an appropriate benchmark for comparison with other occupational groups (see ASOR EWG 25-13).
- **Number of fishers (crew) / working under written contracts-Number of fishers working for a cooperative under agreement:** these indicators are related to generational renewal as they reflect working conditions. Data is available only for some member states.
- **Number of contracts with social security and working conditions specification:** The indicator is relevant but no data is available for its estimation.
- **Number of fishers in Trade Unions:** the indicator reflects potential for collective action that may improve working conditions. Data is available for some countries.
- **Number of fishers with no social security or deficient coverage:** The indicator relates to uncertain working conditions and no pension, making the sector unattractive. No data is available.
- **Age of vessel** was selected as a proxy for investment capacity, fleet modernisation, and opportunities for new entrants. The indicator is already available through the DCF and does not present significant methodological challenges.
- **Fatalities and injuries:** the indicator reflects working conditions and physical risks of fishers. Data is available, some underreporting maybe present (see ASOR EWG 25-13).
- **Number of crew on vessels**: the indicator relates to working conditions and therefore to the generational renewal. Data is available through DCF and national legislation (for minimum required crew per vessel).
- **Time away from home (days at sea/number of trips/work mode of vessel/satisfaction with time at sea)** EWG 24-05 discussed the use of as a proxy for working conditions and well-being (see also reflections above). It was retained because work-life balance is a key factor influencing the attractiveness of fishing careers. Although days at sea may not fully reflect time spent away from home in some fisheries, the indicator is available through the DCF and is comparable across Member States.
- **Material well-being:** The indicator reflects the financial security which influences generational renewal. Methodological challenges are connected to this indicator.
- **Job satisfaction:** The indicator is directly related to working conditions and therefore to generational renewal. Data can only be available through surveys.

- **Percentage of sea allocated to other uses/Priority areas for fishing:** This affects the decision to enter the activity. Data available for MS with Marine Spatial Planning (MSP) are available and harmonized trough Emodnet.
- **Restrictions on gear/size and fleet (qualitative and quantitative):** The existence of many restrictions like quotas, licences and technical measures, may affect the decision to enter the activity. Data partially available.
- **Additional income to support fishing continuity/alternative sources of income:** was considered relevant because supplementary income sources can improve household resilience and enhance the long-term viability of fishing activities, thereby supporting intergenerational continuity. The indicator is partly available through the DCF and can be complemented by national surveys.
- **Legal burden (qualitative and quantitative)**: Increased legal burden may cause reluctance to enter the sector. No data is available.
- **Regulatory limitations on pre-entry engagement in the sector:** This reflects legislation in some member states that does not allow children on board, which may influence the decision to engage with the activity. Data available through legal documents.
- **Number of years working as a fisher:** This indicator may capture work experience, work satisfaction, difficulty to change profession and lifestyle (stay-leave dilemma). Available only for vessel owners through DCF.
- **Number of people enrolled and recent graduates of fisheries vocational training** was selected as a direct measure of the potential future workforce. However, in several Member States, enrolment data do not distinguish fisheries-specific training from other maritime programmes. Consequently, data on graduates from fisheries-related programmes were considered the most reliable source.
- **Number of new entrants in the vessel register** was considered an operational indicator that can be readily obtained from national fleet registries. However, it measures the entry of new vessels rather than the entry of new fishers and should therefore be interpreted cautiously and in combination with other indicators.
- **Number of new entrants in fishing insurance schemes:** This was also considered as an indicator related to generational renewal. However, the data is available only at MS level.
- **Youth Representation Index**, defined as the ratio between the share of fisheries workers aged below 40 and the corresponding share in the national population, was identified as a promising indicator for monitoring generational renewal. Although not yet tested, the indicator can be calculated using DCF and Eurostat data and provides a direct measure of the sector's ability to attract and retain young workers.
- **Conflicts-Equality/equity-Justice and Knowledge exchange:** all these indicators are considered relevant and some data can be found in NFP and FCP.

Table 31 summarises the outcome of the expert assessment for indicators related to generational renewal. The table combines three complementary dimensions: (i) the rationale for considering each indicator in the context of generational renewal, (ii) its current level of operational readiness for integration into a Social Impact Assessment framework, and (iii) the methodological and data requirements needed to ensure robust and comparable implementation across Member States. This integrated approach provides both an assessment of the current state of indicator development and a practical roadmap for their incorporation into future EU social data collection exercises.

Table 31. Operational readiness of indicators for assessing generational renewal in EU fisheries.

Indicator	**Relevance for Generational Renewal**	**Operational Readiness**	**Main Requirements for Implementation**
Financial position	Economic security and income prospects influence entry and retention in fisheries.	**Partially calculable**	Requires agreement on a harmonised benchmark (e.g. national average wage, self-employed income, fisheries-related occupations).
Age of vessel	Proxy for investment capacity, modernisation, and opportunities for new entrants.	**Immediately calculable**	Available through DCF and fleet registries; no major methodological challenges identified.
Time away from home (days at sea)	Reflects work-life balance and attractiveness of fisheries careers.	**Immediately calculable**	Available through DCF and comparable across Member States; interpretation should consider (small-scale) fisheries characteristics.
Additional income to support fishing continuity	Indicates household resilience and capacity to sustain fishing activities over time.	**Partially calculable**	Fisheries-related income can be derived from DCF, while complementary income sources require additional surveys or national data collection.
Number of people enrolled and recent graduates of fisheries vocational training	Measures the potential future workforce entering the sector.	**Partially calculable**	Requires harmonised and disaggregated data distinguishing fisheries-specific training from other maritime programmes; graduate data are currently more reliable than enrolment data.
Number of new entrants in the vessel register	Provides information on fleet renewal and potential opportunities for entry into the sector.	**Immediately calculable**	Available from national fleet registries; should be interpreted together with other indicators because it measures vessel entries rather than new fishers.
Youth Representation Index	Direct measure of the sector's ability to attract and retain young workers.	**Partially calculable**	Calculation is feasible using DCF and Eurostat data, but the indicator has not yet been tested and requires methodological validation and piloting.

Social status (quantitative)	The social position of fishers influences the attractiveness of fisheries as a career option.	**Calculable only following pilot studies and harmonised definitions**	Requires harmonised definitions, agreed benchmarks, and comparable data sources across Member States.
Social status (qualitative)	Perceptions of social recognition and prestige affect willingness to enter and remain in the sector.	**Operational only following pilot studies and harmonised definitions**	Requires development of survey methodologies, standardised questionnaires, and harmonised protocols to ensure comparability across Member States.

Source: own elaborations.

3.4. Focused analysis of indicators for Training

Training may improve the professional recognition and perceived status of fishers by formalising skills and qualifications, particularly under mandatory training scenarios. Advanced training schemes could have a stronger effect than basic requirements and effects are likely to emerge gradually and may be more visible for skippers than crew. Data availability is currently limited and would require dedicated surveys or perception studies and interviews.

- Financial position (quantitative)
- Training may improve productivity and career progression, potentially contributing to higher incomes over time. The strongest effects would be expected under advanced training scenarios for skippers. Some economic data are available through DCF for fishers and Eurostat for the general population. Attributing income changes directly to training may be challenging.
- **Number of fishers under SER / written contract:** Mandatory training requirements may encourage greater formalisation of employment relationships and arrangements, especially where qualifications become necessary for employment. Data availability varies between Member States. Special attention maybe required for contracts of foreign workers.
- **Number of fishers working for a cooperative under agreement:** Training programmes may strengthen participation in professional organisations and cooperatives, although the relationship may be indirect and effects limited compared with other indicators. Data availability is currently low.
- **Number of fishers with contracts through employment agencies:** Training and certification requirements may increase the use of formal recruitment channels and employment agencies where qualifications need to be verified. The effect is likely to be modest and dependent on national labour market structures. Data availability is limited.
- **Number of fishers with no social security or deficient coverage:** Standardization and certification of skills through training, may encourage formal employment and improve access to social security systems. Any effect would

likely be indirect and long-term. Data availability varies among Member States and are generally scarce, protected under GDPR and/or would require dedicated surveys.

- **Fatalities and injuries:** This is one of the most directly relevant indicators for assessing training policies. Mandatory basic and advanced training are expected to improve safety awareness, operational practices and risk management, potentially reducing accidents and injuries. Data are available in some Member States, although harmonised coverage is limited and surveys may be required.
- **Mandatory safety training:** This indicator is highly sensitive to all policy scenarios involving training obligations. It directly captures changes in regulatory requirements and training coverage and can serve as a key implementation indicator. Administrative data are generally available, although consistency across Member States may vary.
- **Material well-being:** Enhanced skills and qualifications may improve employment prospects, earnings and long-term economic resilience. Effects are expected to be gradual and strongest under advanced training scenarios. Data availability depends on the underlying methodology and income statistics used.
- **Happiness index:** Improved competence, confidence and career prospects resulting from training may contribute positively to the overall well-being of fishers. However, effects are likely to be indirect and influenced by many other factors, that are not easy to control. Data would require dedicated survey collection.
- **Job satisfaction index:** Training may increase job satisfaction by improving skills, confidence, safety and career advancement opportunities. The indicator is potentially sensitive to all scenarios involving expanded training provision. Data are only obtainable through surveys.
- **Restrictions/gear/size/fleet – quantitative and qualitative:** Training may improve understanding and increase compliance with regulatory requirements. The indicator is indirectly linked to training outcomes. Some data are available through legal and regulatory documentation, but additional surveys and interviews maybe required.
- **Additional income to support fishing continuity/Additional income:** Training and acquiring of skills may support diversification, business management and access to complementary income opportunities, particularly under advanced training scenarios. Some relevant data are available through DCF and surveys.
- **Legal burden – qualitative and quantitative:** Additional training requirements may initially be perceived as an administrative burden and may increase costs and obligations, especially under mandatory schemes. However, harmonisation and mutual recognition of qualifications could reduce burden in some scenarios. Data would need to be collected through stakeholder consultations, interviews and surveys.

- **Number of people enrolled and recent graduates of mandatory safety training:** This is a core indicator for monitoring the implementation and uptake of training policies. Significant increases would be expected under all scenarios involving mandatory training. Data availability depends on national training and certification systems.
- **Number of people enrolled and recent graduates of fisheries vocational training:** This indicator directly measures participation in fisheries-related education and training and is highly relevant across all policy scenarios. Advanced training requirements might contribute to increase enrolment. Data availability varies across Member States.
- **Youth representation index:** Improved training pathways and clearer professional qualifications may make the sector more attractive to younger entrants, supporting generational renewal. Effects are likely to emerge over the medium to long term. Data are available through DCF and Eurostat sources.
- **Equality / equity:** Training requirements may affect groups differently depending on access, costs and geographical availability of courses. Monitoring this indicator can help assess whether training policies create barriers or improve opportunities across fleet segments, demographic groups and geographical locations. Data to support this indicator is not available, but may become available after the training schemes are implemented.
- **Knowledge exchange:** Well-established and effective knowledge exchange systems like advisory systems may facilitate the implementation of training programs, through their existing infrastructure and human capital, but may also be affected by the implementation of advanced and continuing training schemes. Data to support the indicator is not available and surveys or interviews maybe required.

Table 32. Indicators relative to the evaluation of alternative training schemes with partial or full data availability.

Indicator name according to ISSG	Indicator EWG 24-05	Pilot tested y/n	Challenges	Solutions	Availability of data	Training and education of fishers
Financial position/ quantitative	Financial position	Y	Against what national average do we compare (e.g., self-employed; wage average, sea outgoing average) - which data should we use?	Greece: wages & salaries (EUROSTAT), financial position of vessel owners: net income (€)	y	(yes)
Fatalities & Injuries (Quantitative): Number of fatalities and injuries, highlighting the physical risks involved in fishing.	Fatalities & Injuries	N			for some MS, most will have to be surveyed	yes
Mandatory Safety Training (Quantitative): Whether safety training is mandatory and its frequency, ensuring ongoing safety education for crew members.	Mandatory Safety training	n	no challenges (NL)		Yes, for both ship handling crew (pelagic and demersal fleet) and for processing staff (pelagic only).	yes
Additional income to support fishing continuity	Additional income (time allocated to fisheries/total)	y	no challenges for Greece	Greece: it is collected through our sample survey	yes - DCF, if the income is related to fishing, the rest through surveys,	yes

Indicator name according to ISSG	Indicator EWG 24-05	Pilot tested y/n	Challenges	Solutions	Availability of data	Training and education of fishers
					might be in Community profiles	
Number of people enrolled and recent graduates of mandatory safety training	Number of people enrolled and recent graduates of mandatory safety training	y	As of 1-1-2030, fishers by Duch Law are required to have a certificate not older than 5 years. Up to that date, fishers are not required to do a refresher course.	Data available from 6 out of 7 certified institutions. No data available for BS-F training given to adult fishers (one private institute)	depends on MS	yes
Number of people enrolled and recent graduates of fisheries vocational training	Number of people enrolled in fisheries vocational training	y	data on enrolling students do not distinguish maritime training for merchant shipping or fisheries (for MAROF available after year 2).	use the data on graduating/ graduated data given by vocational training institutes, as these data are on a more detailed level for fisheries only, whereas the data on enrolling students do not distinguish maritime training for merchant shipping or fisheries. Public data does not provide enrolling students at fisheries course level.	Depends on MS.	yes

Indicator name according to ISSG	Indicator EWG 24-05	Pilot tested y/n	Challenges	Solutions	Availability of data	Training and education of fishers
				Vocational Training institutes have this data as of year 3 for enrolled and graduating students (NL)		
Youth representation index	Share of fisheries workers aged below 40 / Share of the national population aged below 40; values below 1 indicate under-representation of young people in the fisheries sector, values equal to 1 indicate proportional representation, and values above 1 indicate over-representation relative to the general population.	n			yes -DCF & Eurostat	yes
Equality / equity	e.g., how are subsidies distributed amongst small	n			Experts	yes

Indicator name according to ISSG	Indicator EWG 24-05	Pilot tested y/n	Challenges	Solutions	Availability of data	Training and education of fishers
	scale and large scale fisheries?					
knowledge exchange	available professional advisory system at national level	n			NFP	yes

Source: own elaborations.

Based on the assessment, a relatively small number of indicators appear both relevant for understanding training and sufficiently supported by existing or potentially accessible data sources. In particular, indicators such as mandatory safety training, number of people enrolled in and graduating from mandatory safety training, number of people enrolled in and graduating from fisheries vocational training, fatalities and injuries, financial position, additional income to support fishing continuity, and the youth representation index

While some methodological and comparability challenges remain, these indicators are either already available through administrative records, DCF, Eurostat, or national training systems, or could be collected with relatively limited additional effort. In contrast, indicators related to social status, happiness, job satisfaction, equality, and knowledge exchange are conceptually relevant but currently suffer from limited data availability and would require dedicated surveys or qualitative research.

Conclusions

- Social indicators to support EU fisheries advice should be developed through a pragmatic, phased approach, focusing on indicators that are relevant, measurable, and sustainable for regular monitoring across Member States. EWG26-02 highlights the need to avoid the risk of measuring only what is readily measurable rather than what is most relevant for informing policy and integrated that risk in the following steps.
- Indicators have different levels of maturity: some are already operational using existing data, while others require clearer definitions, methodological refinement, or additional data collection.
- Data availability alone is insufficient: indicators must also be conceptually sound, methodologically robust and comparable across MS.
- Key challenges include: lack of harmonised definitions and benchmarks; differences in interpretation across fisheries and Member States; limited fisheries-specific administrative data; absence of standardised methods for qualitative and perception-based indicators; some indicators remain too broad for consistent EU-level monitoring.
- Next Social EWGs with a ToR on indicators can further operationalise indicators, develop methodologies (survey questionnaires, and interview guidelines) before submitting them to RCG ECON for review and, if applicable, endorsement.
- The ongoing test studies on social indicators will provide critical outputs for the indicators debate and the integration on the National Work Plans.

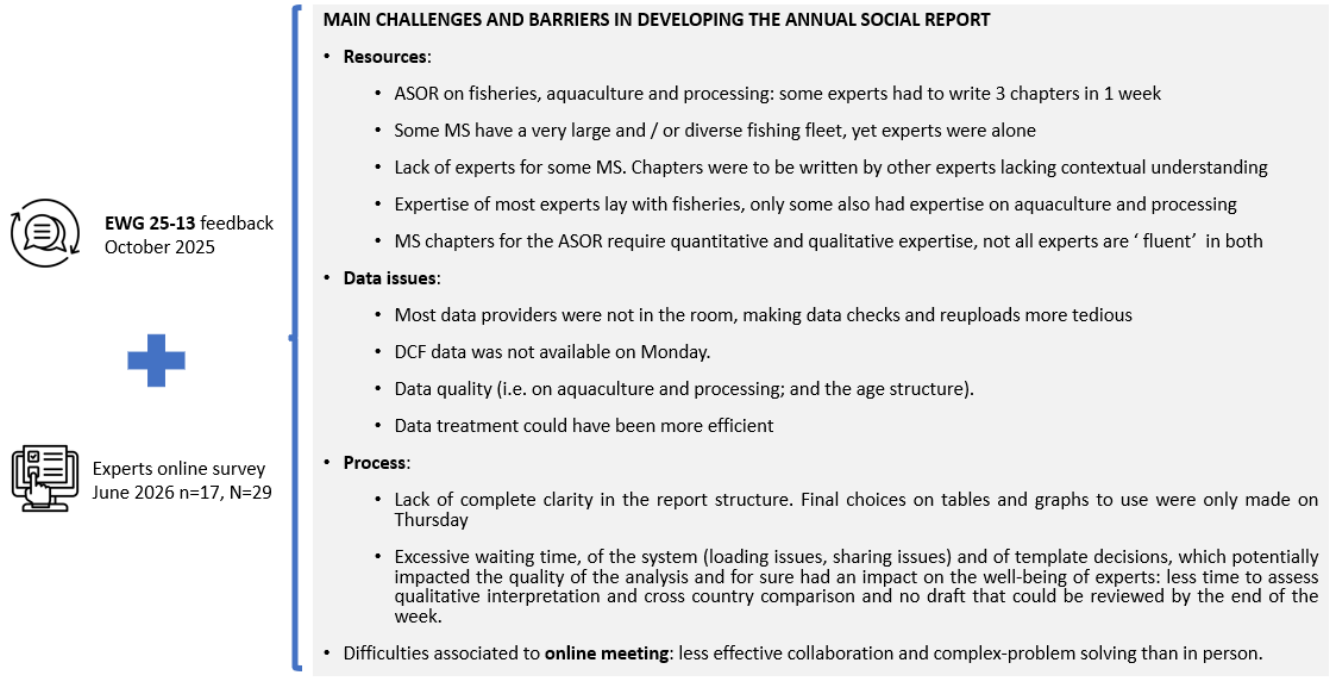
5. ToR 4. Annual Social report

5.1. ASOR 2025

The EWG reviewed the process leading to the production of the first Annual Social Report (ASOR https://publications.jrc.ec.europa.eu/repository/handle/JRC145884) with the aim of identifying key lessons learned and formulating recommendations for future work. This assessment drew on input collected through a targeted survey distributed in 2025 to experts involved in the preparation of the ASOR, as well as insights gathered during EWG 25-13.

Figure 6 provides an overview of the evidence gathered and highlights the main challenges and barriers identified.

Figure 6. Main challenges and barriers in developing the Annual Social Report.



Source: own elaborations.

Major points of improvement

The experts were asked which point of improvement they foresee. The following list was proposed:

1. Have the quantitative data ready (checked and updated *before* the meeting) in the right template.
2. Any issues with the data should be solved before Tuesday.
3. Improve the quality of the quantitative data.
4. Work with a better system (STECF- Fishreg workspace) with less loading time. Have a common repository, with everything set.

5. People analysing the data need to understand how it is collected.
6. Preferably there will be a standard way of collecting data for all MS (survey, sample etc.) – as this allows for comparability between MS.
7. The experts really need to refrain from discussing indicators, and simply do the analysis. Guarding this is a task of the chairs.
8. Make sure we have people who understand qualitative and quantitative data and approach both evidence types without bias.
9. Make sure that chapters have a fixed structure with figures and tables prepared.
10. Provide the codes we need to put in excel for analysis up front.
11. The connection between the 3 sectors and use of FCPs could be improved.
12. Have a physical meeting prior to the writing week, to prepare the data.
13. Being expected to write three chapters, especially for some MS, is a substantial workload for only one week
14. Invest time to better understand key shared challenges: generational renewal, employment structures, working conditions, skills/labour shortages, and social resilience, skills development and professionalisation, the increasing role of foreign labour, low attractiveness of certain occupations due to salary and working conditions, and the specific challenges faced by remote and coastal communities that depend on fisheries activities.
15. It was recommended to maintain an inclusive multidisciplinary working environment that values the complementary expertise of all disciplines involved in social reporting activities.

5.2. ASOR 2025: Data Transmission and Monitoring Tool (DTMT) process

The ASOR (EWG 25-13) section 5 details data quality issues and coverage for the fleet, aquaculture and processing social data calls.
EWG 26-02 acknowledges that the DTMT Guidance document is a useful tool to support EWG process and a smooth workflow, noting that social variables were not included in the guidance until the update of March 2026.
EWG 26-02 also observes that data issues with social variables from previous data calls (2017) have been identified as a result of the analysis.

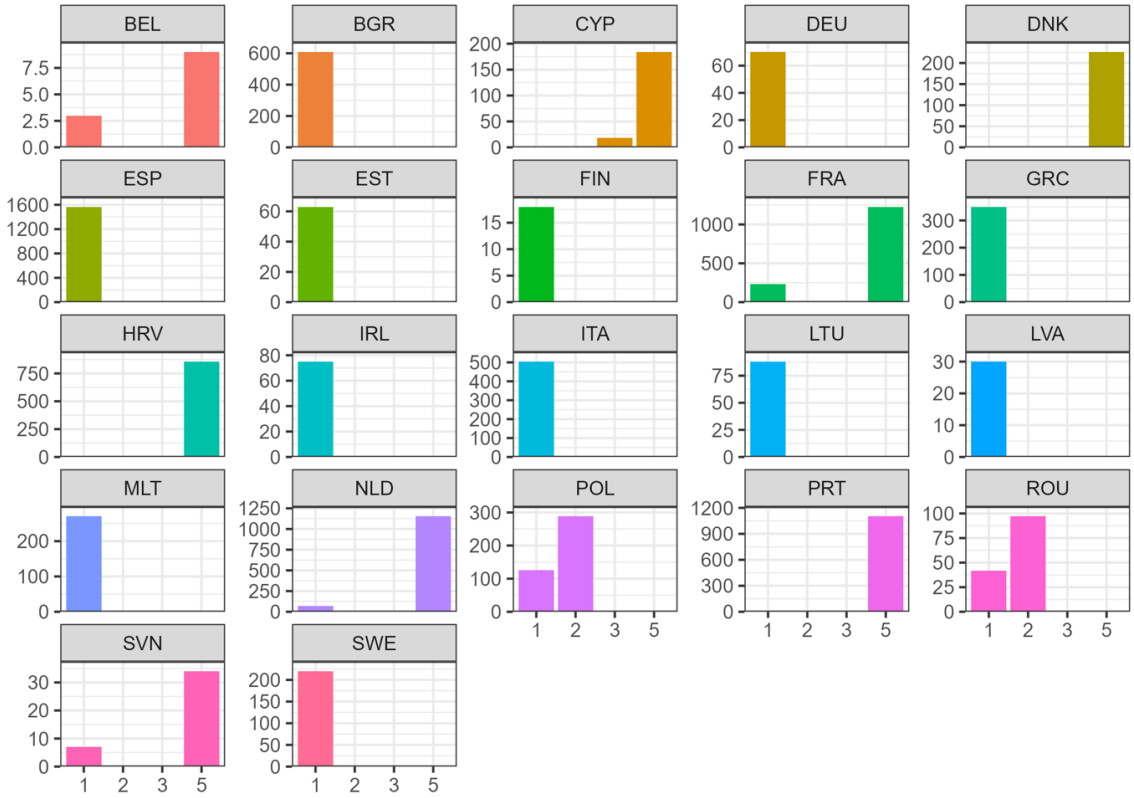
5.3. ASOR 2025. Indicators used: caveats, missing indicators.

Caveats in the data processing and analysis of the Social data call

The collection and reporting of social variables continue to present specific challenges that are not encountered in other data calls. As outlined in the guidance provided by DG MARE and the Joint Research Centre for the social data call, the reporting templates allow Member States to submit both single and combined variables (e.g. gender by age, or gender by age by nationality). While this flexibility has the potential to provide a much richer understanding of the social characteristics of the fisheries sector, it also introduces complexities during data processing and analysis. In

particular, when combined variables are reported alongside individual variables, there is a risk of data duplication unless appropriate cleaning and harmonisation procedures are applied prior to the analysis. Although MS are currently not required to report combined variables, such information would be highly valuable for improving the understanding of demographic and social patterns within the sector.

Figure 7. Variability of the submitted social variables across MSs for the year 2023.The x-axis shows the number of social variables, and the y-axis shows the number of submitted observations.



Source: own elaborations.

Twelve of the 22 MSs reported data for only one social variable. Seven MSs submitted data on different combinations of social variables, while three MSs reported data for all five variables. Although the available variables allow employment to be disaggregated by characteristics such as gender and nationality, only a few MSs reported data for combinations of these variables (i.e. cross-tabulated data).

However, the additional effort required to process, validate, and harmonise these datasets should be explicitly recognised when planning the analytical work following data submission, particularly where EU-level comparisons are expected.

During the EWG discussions, several inconsistencies and interpretation issues were identified in the social data reported by MS. As a result, the EWG investigated possible approaches to reduce mistakes in the reporting process and improve overall data quality. Three main options were considered. The ***first option*** was to maintain the current reporting framework, allowing MS complete flexibility in the data submitted. While this approach minimises constraints on national reporting systems, it creates

significant challenges for the EWG when validating and analysing the data. The ***second option*** was to introduce stricter restrictions preventing the upload of datasets containing inconsistencies between related variables. Although this would substantially reduce the validation burden and improve data consistency, it could also result in missing data where MS are unable to resolve identified issues within the reporting deadline. The ***third*** and preferred ***option*** was the development of automated validation checks, similar to those already implemented for the Annual Economic Report (AER) and Fishing Dependent Information (FDI) datasets. Under this approach, potential inconsistencies would be identified immediately after data upload, allowing National Correspondents to review the results and, where necessary, resubmit corrected datasets before the data become available for analysis.

The EWG noted that the DTMT has proven to be an effective mechanism for facilitating communication between the EWG, Member States, and DG MARE regarding data quality issues. Nevertheless, the preferred approach is to identify and address potential problems before the EWG begins its analytical work, thereby reducing the need for subsequent clarification requests and minimising the inclusion of data quality concerns in the DTMT process. The EWG further considered that the establishment of a dedicated data validation phase, or a separate EWG group responsible for reviewing submitted datasets and initiating communication with National Correspondents prior to the analytical EWG meeting, would be highly beneficial. Such an approach would provide Member States with sufficient time to review identified issues and, where necessary, resubmit corrected datasets before the experts responsible for drafting the report begin their work. This would align the social data collection process more closely with the good practices already established in other STECF workflows, such as the AER, where data validation and quality assurance are largely completed before the analytical phase starts. Automated validation procedures implemented at the data submission stage would therefore represent a significant improvement in the efficiency and quality of the social data collection framework. Where data quality issues cannot be resolved by the reporting Member State, the DTMT would continue to serve as the appropriate mechanism for documenting and addressing outstanding concerns.

Indicators beyond DCF social variables

The ASOR mobilizes multiple data and knowledge sources useful to assess social performance. Beyond basic demographic indicators based on the social data call, the ASOR assessed additional social variables available across the EU from multiple data sources: wages and unpaid labour, with a particular focus on small-scale fisheries; social security coverage for vessel owners and crew operating on EU fishing vessels; compliance with relevant international standards, including ILO Convention C188 and the IMO conventions STCW 1978 and STCW-F on seafarer training and certification; and accidents at sea.
Several indicators were analysed lengthy (e.g. wages) while others remained in a more descriptive level (e.g. number of active vessels, or total employment by tonnes of landings) Given their potential value, EWG 26-02 considers that the next ASOR should allocate time and resources to fully utilize these indicators and enhance the insights they provide.

Likewise, indicators such as ageing workforce (% >64 years) would benefit from contextualization (e.g. in relation to the ageing of total population or the fact that in some MSs people continue working beyond what in others is the retirement age).
EWG 25-13, STECF 26-01 and EWG 26-02 remark the need to further develop the wages indicator (see also ToR3). The analysis of wages in the ASOR relies on a comparison between fisheries labour costs derived from the AER data call and labour cost indicators obtained from Eurostat. The approach adopted in the report appropriately recognises that the Data Collection Framework (DCF) records labour costs rather than wages, combining personnel costs and the estimated value of unpaid labour. For the purpose of cross-sector comparison, the report therefore uses Eurostat hourly labour cost data, which include both wage and non-wage components, and converts them into annual labour costs using national full-time equivalent working hours. While this methodology represents the closest available comparison with DCF labour cost data and it has been already used in the EU Blue Economy Observatory and published in recent papers on the wage attractiveness of the EU fishing sector (Guillen et al., 2025; Borriello et al., 2025), STECF 26-01 notes that the resulting comparison should be interpreted with caution. In particular, the methodology assumes that the share between labour costs and wages is similar in fishing and other sectors. While the adopted methodology represents the closest currently available approximation for comparing fisheries labour costs with those of other sectors, the results should be interpreted with caution. The comparison implicitly assumes a broadly comparable composition of labour costs across sectors. This assumption may not fully hold in fisheries, where remuneration arrangements are often characterised by self-employment, share-based payment systems, lower levels of non-wage labour costs, and the presence of unpaid labour. Consequently, differences observed between fisheries and other sectors may partly reflect differences in the composition of labour costs rather than differences in remuneration levels alone.
STECF 26-01 considers that the presence of specific regulatory frameworks in the fisheries sector that reduce taxation and social security contributions on labour, could further contribute to these differences. STECF observes that these aspects highlight the importance of careful interpretation of cross-sector labour costs comparisons derived through this approach.

Finally, safety at sea remains a key dimension of working conditions. While a valuable indicator, the EMSA database of Marine Casualties and Incidents records analysis of marine casualties or incidents accidents reported by the EU Member States in the European electronic database (EMCIP) established by the Directive 2009/18/EC. Therefore, it only includes marine casualties and incidents involving vessels flying the flag of an EU Member State, occurring within EU Member States' territorial seas or internal waters as defined under, or involving other substantial interests of EU Member States (EMSA, 2025). EWG 25-13 and EWG 26-02 note that the data itself may diverge from national datasets and need to be interpreted with caution.

5.4. ASOR 2025. Balance capacity indicators

Section 4.2 of the ASOR (EWG 25-13) examines the use of fleet balance indicators as diagnostic tools for social analysis. The ASOR highlights that balance capacity indicators provide a harmonised, EU wide screening tool to identify fleet segments where biological, economic, or technical pressures may translate into social impacts. While these indicators do not measure social outcomes directly, they serve as an early signal specific fleet segments, and help to prioritise where deeper social analysis may be required. This screening function is particularly relevant in the context of the CFP, where management measures aimed at addressing capacity imbalance can have downstream effects on employment, income stability, and community resilience.
EWG 26-02 points out that balance capacity indicators provide a a valuable basis to integrate data, information and knowledge from the biological, ecological, technological, economic and social dimensions. The methodological approach jointly developed with EWG 26-06 for the Outermost Regions (described under ToR 2) illustrates how these indicators can be complemented by contextual social information to improve the interpretation of fleet balance outcomes and support more comprehensive assessments of fisheries sustainability.

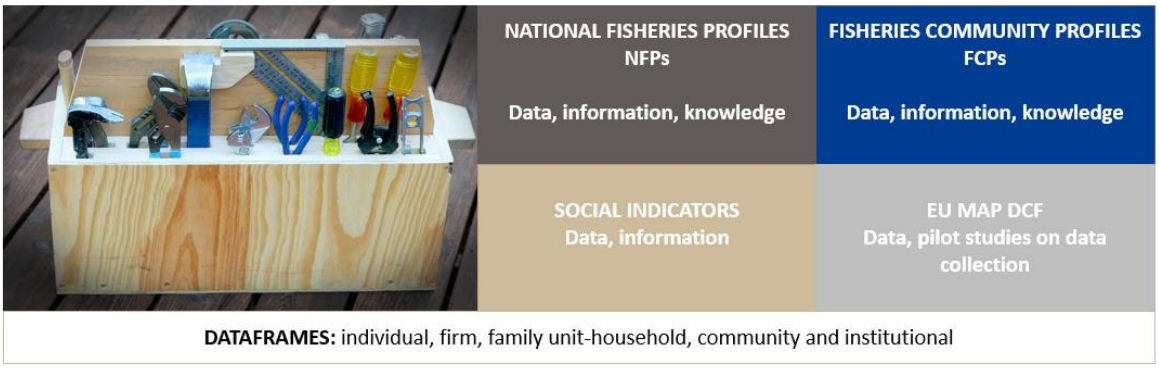
5.5. Upload and document the data issues identified by EWG 25-13 in the DTMT, following DTMT guidelines

All data issues that may have impacted the quality and robustness of the analysis in the ASOR have been reported in the Data Transmission Monitoring Tool (DTMT). The nine data issues in terms of coverage and quality include missing data (one mandatory variable not reported), increases in the level of unknown reported for some variables and inconsistencies in employment data between the social and the economic data calls.

5.6. Prepare for the next iteration of the ASOR (EWG 26-16)

The EWG Social has developed a toolbox which provides methods to track and understand changes in the social dimension across Europe.

Figure 8. Social dimension Analysis toolbox for the CFP.



Source: EWG 24-05.

To date, social indicators have been developed, data have been analyzed, and contextual profiles have been produced for 19 coastal Member States and 6 fisheries communities. The first social report (STECF-EWG25-13) provides a detailed overview of fleet demographics, presenting data on employment (total and full time equivalent) by gender, educational level, age, nationality and employment status.

By doing so, it characterises the demographic and socio-economic composition of the EU fisheries workforce. The first social report (STECF-EWG25-13) gives the insight based on the available data, which the EWG seeks to improve and expand. In addition to that there are a number of other pertinent social research questions that can be asked that guide a further unpacking of the social dimension (see table 33 below). Some aspects of these questions are addressed in the profiling work that has been done, i.e. the NFPs describe the governance context per member state. But the other questions require a different line of work and can be useful in different applications.

Table 33. Key social questions for the social dimensions.

Key social questions?	What it requires?
Who are the people fishing?	Social data collection
Why do fishers do what they do?	Contextual understanding of fishing practices
How have we organized the system in which fishers work?	Describing the governance system
How are fishers impacted by change?	Social impact assessment

Source: own elaborations.

Understanding why fishers make certain decisions is essential for interpreting how and why policy measures produce their observed outcomes. These dynamics can be explored through different research approaches, but they often require in-depth contextual studies (e.g. the MONS project in the Netherlands). In addition, the impacts of

change on fishers—such as policy reforms (e.g. Brexit or new technical measures) or sudden external shocks (e.g. COVID-19 or sharp increases in fuel prices)—can be assessed through structured social impact assessments (e.g. the SEI project in the Netherlands).

The experts of the EWG recognise that these strands of social science research are already being undertaken within various projects; however, the resulting knowledge is only rarely systematically integrated into EU-level advisory processes.
The EWG therefore highlights that a comprehensive understanding of fisheries systems and their responses to change benefits from combining quantitative indicators with contextual information and structured impact assessments. The group emphasises the value of strengthening multidisciplinary collaboration and improving the integration of evidence from diverse research activities into future social reporting and advisory frameworks at EU level.

Core Topic for the Next Iteration of the Social Report

As part of ToR 4, the EWG prepared for the next iteration of the ASOR (EWG 26-16). The group discussed a range of potential topics and assessed their relevance from a policy perspective. Several options were considered, including generational renewal, training and education, technical measures, further development of social data for aquaculture and processing sectors, social impact assessments, and the role of fisheries in coastal communities across the EU.

Generational renewal

Generational renewal was identified as a core analytical theme in the ASOR and remains a persistent policy priority for both decision-makers and stakeholders, including Advisory Councils and social partners. The ASOR has already synthesised a range of factors potentially influencing generational renewal in EU fisheries. Building on this foundation, the next iteration of the EWG could move towards a more structured assessment of the relative importance of these determinants, including their interactions and potential causal pathways.

The Commission's Evaluation of the CFP[9] points out that "there is a growing gap between policy ambition and the economic conditions required to ensure generational renewal. This situation is compounded by an ageing workforce that cannot be easily compensated by non-EU labour due to entrance barriers linked to certification requirements, especially in the LSF and DWF, as well as in aquaculture. Broader societal changes, including evolving expectations regarding working conditions, social protection, gender equality and work-life balance, may also explain the increasing lack of attractiveness of the sector although clear data is missing to determine its main drivers".

[9] COMMISSION STAFF WORKING DOCUMENT EVALUATION Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11December 2013 on the Common Fisheries Policy {SEC(2026) 133 final} - {SWD(2026) 121 final}

In particular, future work could examine the extent to which these drivers are generalisable across economic sectors versus those that are specific to particular fisheries and fleet segments. A comparative analytical framework with other primary and secondary sectors in Europe would further support the identification of transversal determinants of labour market entry and retention, as opposed to fisheries-specific constraints and incentives.

Within this broader framework, training and education emerges as a key sub-domain closely linked to generational renewal and warranting more detailed analysis. This is particularly timely given that the European Commission is currently assessing options for the transposition of international standards on fishers' training and certification into EU legislation. Further analytical work on training and education within the ASOR could therefore provide relevant evidence to inform understanding of how different policy designs may affect entry attractiveness, skill formation, and ultimately labour supply dynamics underpinning generational renewal in the fisheries sector.

Technical Measures

EWG 25-14 on Technical Measures and STECF 26-01 acknowledge the progress made in exploring available social data, reflecting their heterogeneity and barriers for effective integration into models.

A JRC colleague (co-focal for the EWG on Technical measures presented specific issues and potential avenues for collaboration between EWG Technical Measures and EWG Social Data.
The EWG on Technical Measures currently uses FLBEIA modelling to evaluate the ecological and economic consequences of technical measures across fleet segments and has expressed interest in further considering the social dimension within this analytical framework.

An initial review of the available social data identified a number of analytical questions relevant to the evaluation of technical measures. These questions primarily concerned the interpretation, scope, and limitations of the existing social indicators. The EWG Social discussed these issues and provided methodological clarification to support their appropriate use in future assessments. In addition, the group expressed its willingness to support future Technical Measures EWGs by identifying and involving social science experts where appropriate.

The discussion highlighted three main considerations:

- Availability of social data. Existing data sources provide broader evidence base than is often recognised. In addition to the variables available through the Data Collection Framework (DCF), official national statistics include time series on employment and full-time equivalents (FTEs) for countries such as France and Spain, as well as information on wages, working hours, and time spent away from home or at sea.

- Limitations of the current DCF social variables. Previous STECF reports (EWG 24-05 and EWG 25-02) concluded that the current set of DCF social variables provides only limited capacity to assess the social dimensions of fisheries management. These reports recommended the development of additional social indicators to better capture employment quality, working conditions, and broader social outcomes. Proposed indicators are discussed further under ToR 3.

- Interpretation of proxy indicators. Several of the currently available indicators represent indirect proxies for complex social concepts. For example, the number of days at sea is often used as a proxy for working conditions or well-being, although its interpretation is context dependent. As noted in EWG 24-05, extended periods away from home may be perceived differently across fisheries, fleet segments, and individual fishers, meaning that identical values may represent substantially different social outcomes. These methodological limitations should be explicitly acknowledged when incorporating social indicators into evaluations of technical measures.

In addition, EWG 26-02 expressed its willingness to support future work on technical measures by facilitating access to relevant social expertise and by exploring mechanisms for collaboration between the Social EWG and the Technical Measures EWG. The discussion identified several complementary approaches through which social science could strengthen the assessment of technical measures:

1. Integration of social data into modelling frameworks, where appropriate, to better represent the human dimensions of fisheries systems.
2. Complementary social impact assessments alongside bioeconomic or fisheries modelling to evaluate the broader implications of technical measures for fishers, households, and communities.
3. Social interpretation of modelling outcomes, extending the analysis beyond fleet-level economic impacts to consider consequences for employment, coastal communities, and fisheries value chains.
4. Review of behavioural assumptions underpinning modelling exercises from a social science perspective. Empirical evidence demonstrates that fishers' responses to management measures are heterogeneous and influenced by a range of social, cultural, institutional, and economic factors (e.g. Schadeberg et al., 2021). Examining these assumptions can help identify limitations in model outputs and improve the realism and policy relevance of impact assessments.

The EWG recognised that closer integration of social expertise would strengthen the evaluation of technical measures by providing a more comprehensive understanding of likely behavioural responses and their wider social consequences. However, the group concluded that technical measures should not constitute a priority thematic focus for the next Social EWG, given that the Technical Measures EWG is not currently part of the formal advisory pipeline.

Furthering the development of the social dimension of Aquaculture and Processing

In the ASOR, the chapters on aquaculture and fish processing had a more limited scope than those on the capture fisheries sector, reflecting time constraints, the availability of expertise, and the current evidence base across Member States. During the discussions, it was suggested that future work could focus on improving the interpretation of the available social data and identifying opportunities to address existing data limitations.

The EWG recognised the value of analysing social data for aquaculture and processing within an appropriate contextual framework, rather than presenting descriptive statistics alone. However, it also noted that such an analysis would require additional preparatory work, including the development of sector-specific contextual information. While aquaculture and processing are partially included within the National Fisheries Profiles (NFPs), aspects such as governance arrangements, labour market characteristics, gender dynamics, and other relevant social dimensions are not yet systematically documented.

The EWG further acknowledged that expanding the social analysis of these sectors would require expertise that complements the predominantly capture fisheries background of the current expert group. In addition, although there is growing interest in the social dimensions of aquaculture and processing, there is currently no immediate advisory requirement that would necessitate a substantial expansion of this work in the short term.
The EWG therefore proposed a stepwise approach to strengthening the social evidence base for aquaculture and processing. As an initial step, the work undertaken under ToR 2c to assess whether Fisheries Community Profiles (FCPs) can be used to incorporate aquaculture and processing activities, where these are relevant within fisheries communities, was identified as an first step towards developing a more comprehensive contextual understanding of these sectors.

Fishing’s place in coastal communities.

Coastal communities represent the spatial scale at which the social, economic, and cultural consequences of fisheries management are ultimately experienced. While the ongoing development of Fisheries Community Profiles (FCPs) will provide an important evidence base, the EWG recognised that there is value in analysing emerging developments before a complete set of FCPs becomes available, given the pace of structural, demographic, and policy change affecting European fisheries.

A stronger analytical focus on community-level dynamics would complement existing sectoral analyses by providing a better understanding of how policy changes and broader societal trends translate into local outcomes. Relevant themes include the effects of fisheries management measures, generational renewal, the cultural significance of fisheries, gender dynamics, knowledge systems, community resilience, and the role of fisheries within local economies and social networks. Such analyses would

provide important contextual evidence to support the interpretation of quantitative social indicators and improve the understanding of the mechanisms through which policy impacts are experienced.
EWG 26-02 also recognised that many measures intended to mitigate the social consequences of fisheries policies are designed and implemented at national or regional levels rather than at EU level. As Member States differ in their governance arrangements, policy instruments, and institutional responses, a comparative assessment of community-level experiences could generate valuable evidence on how different approaches influence social outcomes.

Social Impact Assessment

Under the Commission's Better Regulation framework, legislative initiatives are accompanied by an assessment of their expected economic, environmental, and social impacts. For amendments to existing legislation, the "evaluate first" principle requires that the performance of the current regulatory framework be assessed before alternative policy options are considered. This evaluation forms the basis for identifying the need for policy intervention and for defining a set of feasible policy options.
Impact assessments generally compare a baseline scenario ("no policy change") with a number of alternative policy options. These may include non-regulatory approaches, such as guidance or voluntary measures, as well as different regulatory options that vary in their scope, implementation, or degree of alignment with international standards. The relative merits of these options are then assessed by considering their expected impacts against the objectives of the proposed intervention. While the Better Regulation framework establishes the overall requirements for impact assessment, the analytical methods used to evaluate policy options may differ depending on the policy context and the evidence available. For example, social impacts may be assessed using a multi-criteria framework that combines quantitative indicators with qualitative evidence.

EWG 26-02 discussed the potential contribution of established social impact assessment methodologies to both ex ante and ex post evaluations of fisheries policy. Existing methodological frameworks, including those developed internationally (e.g. Clay and Colburn, 2020), provide structured approaches for assessing the distributional and community-level consequences of policy interventions. The group noted that greater consideration of such approaches could strengthen the evidence base underpinning future policy assessments, particularly where quantitative indicators alone are insufficient to capture social outcomes.

EWG 26-02 also recognised that many social policy domains relevant to fisheries—including employment, education, occupational health and safety, and social protection—fall within the remit of Directorates-General other than DG MARE. Consequently, comprehensive social impact assessments may require coordination across policy areas and the integration of expertise from multiple disciplines and institutional actors.

Topic, expertise needed and preparatory work

EWG 26-02 considered that generational renewal, including training and education, was seen as the best topic to be explored further in the next EWG. Aligned with this, ToR 3 on indicators paid special attention to generational renewal and training and education in its assessment of the route to advance the collection and / or use of social indicators. Therefore, EWG 26-02 proposes to change the topic of the forthcoming EWG 26-16 from Social Data in EU fisheries 2: national chapters for processing and aquaculture to EWG Generational renewal.

The expertise required for the next EWG on generational renewal should encompass both quantitative and qualitative social science perspectives. Where possible, experts should have experience in analysing statistical data alongside contextual and qualitative evidence relating to generational renewal, training, and education within their respective Member States.

Preparatory work for a successful implementation of EWG 26-16:

1. Interviews on generational renewal in European Fisheries. EWG 26-02 drafted an initial guideline for interviews (annex 2). The research design is based on semi-structured qualitative interviews conducted onsite in a fisheries community during a 10-day period (5-10 interviews per community, 1 community per country).
2. Bring young fishers from a range of MS to discuss their outlook to working in the industry (experiences, motivations and expectations). Such exchanges could provide valuable qualitative evidence to support generational renewal and inform public intervention to improve the age structure of the fisheries workforce (‘ungrey the fleet‘) while enhancing the understanding of the factors influencing recruitment and long-term retention in the sector.
3. Assess the initiatives implemented by different MSs to support generational renewal and assess the available evidence regarding their effectiveness. As information on these initiatives is already being compiled through a parallel collaboration among experts preparing a scientific publication, the EWG 26-16 could build on this work by undertaking a comparative assessment of measures.
4. To better understand the nature and extent of generational renewal challenges in EU fisheries, it would be valuable to benchmark fisheries against other sectors. Such a comparative perspective could help distinguish factors that are common across sectors from those that are specific to fisheries. Targeted ad hoc analysis could be developed under ad hoc contracts. Potential cases to look at could be:

- Fisheries vs Aquaculture in Greece/Italy
- Fisheries vs Agriculture in the Netherlands/Spain
- Fisheries vs Tourism in Italy

6. CONTACT DETAILS OF EWG-26-02 PARTICIPANTS

[1] - Information on EWG participant's affiliations is displayed for information only. In any case, Members of the STECF, invited experts, and JRC experts shall act independently. In the context of the STECF work, the committee members and other experts do not represent the institutions/bodies they are affiliated to in their daily jobs.

STECF member		
Name	**Affiliation[1]**	**Email**
BALLESTEROS, Marta (EWG co-chair)	Spanish Institute of Oceanography (IEO-CSIC), Center of Vigo, Subida a Radio Faro 50-55, Vigo, Spain.	marta.ballesteros@ieo.csic.es

Invited experts		
Name	**Affiliation[1]**	**Email**
ARIAS SCHREIBER, Milena	World Maritime University. Sweden.	milena.schreiber@gu.se
AVDIC MRAVLJE, Edvard	Fisheries research institute of Slovenia. Slovenia.	edoavdic@gmail.com
BARZ, Fanny	Thünen Institute of Baltic Sea Fisheries. Germany.	fanny.barz@thuenen.de
CANO, Suzana	Direção Geral de Recursos Naturais, Segurança e Serviços Marítimos, Portugal	sfcano@dgrm.pt
CEPIC, Drazen	Institute for Social Research in Zagreb. Croatia.	drazen.c@gmail.com
COZZOLINO, Maria	Nisea. Italy.	cozzolino@nisea.eu
DANATSKOS, Christos	ELGO DIMITRA-FISHERIES RESEARCH INSTITUTE. Greece.	cdanatskos@elgo.gr
DAVIDJUKA, Irina	Independent expert. Latvia.	irina.davidiuk@inbox.lv

FRANGOUDES, Ekaterini	Université de Bretagne Occidentale / UUEM. France.	Katia.Frangoudes@univ-brest.fr
KOVSARS, Maksims	Institute of Food safety, Animal Health and Environment "BIOR", Fish resources research department. Latvia.	maksims.kovsars@bior.lv
KRAAN, Marianne (EWG co-chair)	WSER. Netherlands.	marloes@marloeskraan.eu
LE GRAND, Christelle	IFREMER. France.	christelle.le.grand@ifremer.fr
NICHEVA, Simona	Executive agency for fisheries and aquaculture. Bulgaria.	simona.nicheva@iara.government.bg
NTAVOU, Stavroula	FRI INALE-ELGO DIMITRA, Greece	
PASCUAL-FERNANDEZ, Jose Jaime	Universidad de La Laguna. Spain.	jpascual@ull.es
PITA, Cristina	CESAM - Centre for Environmental and Marine Studies, University of Aveiro. Portugal.	c.pita@ua.pt
PITA, Cristina	CESAM - Centre for Environmental and Marine Studies, University of Aveiro, Portugal	c.pita@ua.pt
SINTORI, Alexandra	ELLINIKOS GEORGIKOS ORGANISMOS-DIMITRA, Greece	sintori@elgo.gr
SVELS, Kristina	Natural Resources Institute Finland, Finland	kristina.svels@luke.fi
TZOURAMANI, Irene	Agricultural Economics Research Institute - ELGO DIMITRA. Greece	tzouramani@agreri.gr
VAN DER VALK, Olga	Wageningen Social and Economic Research. Netherlands	olga.vandervalk@wur.nl

ZHELEV, Kolyo	Executive Agency for Fisheries and Aquaculture, Bulgaria	kolyo.zhelev@iara.government.bg

European Commission		
Name	**Affiliation[1]**	**Email**
Doerner, Hendrik	European Commission, Joint Research Centre (JRC), Ispra, Italy	Stecf-secretariat@jrc.ec.europa.eu
ROUSSOULIERE-AZZAM, Joan	DG MARE D3	Joan.ROUSSOULIERE-AZZAM@ec.europa.eu

7. REFERENCES

Bultel Elise, Leblond Emilie (2023). Projet Accobiom. ACquisition de COnnaissances sur les paramètres BIologiques des ressources marines exploitées en Outre-Mer. Objectifs, bilan et perspectives. Ifremer. https://archimer.ifremer.fr/doc/00822/93441/

Duband Maelle (2024). Analyse de performance d'indicateurs basés sur les distributions de longueur d'espèces côtières des eaux caribéennes. Ref. Mémoire de Master 2 Sciences de la Mer. Parcours Océanographie Biologique et Écologie Marine. Université Aix-Marseille. https://archimer.ifremer.fr/doc/00943/105496/

Frangoudes K., C. Le Grand, O. Guyader, 2024, National Fisheries Profile of France: A detail social analysis of the French fisheries Sector. European Commission, ISBN 978-92-68-31595-8 doi:10.2771/5647815 KL-01-25-047-EN-N

Katselis, G.; Tsolakos, K.; Theodorou, J.A. Mapping of Greek Marine Finfish Farms and Their Potential Impact on the Marine Environment. J. Mar. Sci. Eng. 2022, 10, 286. https://doi.org/10.3390/jmse10020286.

Pascual Fernández, J. (1991). Entre el mar y la tierra. Los pescadores artesanales canarios. Santa Cruz de Tenerife, Ministerio de Cultura - Interinsular Canaria.

List of figures

Figure 1. Summary of the development of National Fisheries Profiles. 19

Figure 2.Draft Layout of the webpage hosting the NFPs as web-based documents and illustrative example of a web presenting reports and content (quantitative and qualitative)..... 26

Figure 3. Comparative analysis of data sources in the NFPs. 27

Figure 4. Comparative analysis of data sources used in the last two NFPs 29

Figure 5. Mapping of the cage arrays' location and cage arrays' spatial cluster of Greek marine fish farms. Higher black nr (1-5) mark the sites with an aggregation of cage arrays, red nrs show the cage arrays' spatial clusters (1-75) and lower black nrs the cage arrays (1-433) (Source: Katselis et al 2022). 38

Figure 6. Main challenges and barriers in developing the Annual Social Report..... 84

Figure 7. Social dimension Analysis toolbox for the CFP 90

List of Tables

Table 1. NFP Template v4. 20

Table 2. Template v4. for the Assessment of National Fisheries Profiles for Finland and Malta. 21

Table 3. Fisheries Community Profiles available: 31

Table 4. Planned community profiles 32

Table 5. Fisheries Community Profiles template: assessment of applicability for Aquaculture and Processing. 34

Table 6. Design of the template of biological, economical technical and social indicators combined. 45

Table 7. Overview of economic indicators for the French OMR 48

Table 8.. Distribution of the social information of the French fisher' population presented in number for to total fleet, the outermost fleet and an example of one fleet segment in Guadeloupe 49

Table 9. Demographics of French fisher population (percent). 49

Table 10. Guadeloupe fisheries information at a glance. 51

Table 11. Guadeloupe condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles). 51

Table 12. Martinique fisheries information at a glance (for the fleet segment identified out of balance by STECF EWG 25-12). 53

Table 13. Martinique condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles) 53

Table 14. French Guiana fisheries information at a glance for the fleet segment identified out of balance by STECF EWG 25-12. 54

Table 15. French Guiana condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles). 54

Table 16. Mayotte fisheries information at a glance for the fleet segment identified out of balance by STECF EWG 25-12. 54

Table 17. Mayotte condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles). 54

Table 18. La Réunion fisheries information at a glance for the fleet segment identified out of balance by STECF EWG 25-12. 55

Table 19. La Réunion condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles). 55

Table 20. Saint Martin fisheries information at a glance for the fleet segment identified out of balance by STECF EWG 25-12. 56

Table 21. Portuguese fisheries information at a glance. 57

Table 22. Demographics of the Portuguese fisher population. 57

Table 23. Madeira fisheries information at a glance. 58

Table 24. Madeira condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles). 59

Table 25. Azores fisheries information at a glance. 59

Table 26. Azores condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles). 60

Table 27. Spanish fisheries information at a glance. 60

Table 28. Canary Island fisheries information at a glance. 60

Table 29. Canary Island condensate table compiling economical technical and biological indicators (from EWG Balance Capacity 2025) and social information (from EWG Social 2025 and national profiles)..... 61

Table 30. Demographics of the Spanish fisher population. 63

Table 31. Operational readiness of indicators for assessing generational renewal in EU fisheries. 75

Table 32. Indicators relative to the evaluation of alternative training schemes with partial or full data availability..... 79

Table 33. Key social questions for the social dimensions..... 90

ANNEXES

Annex 1. Abbreviations

AER	Annual Economic Report
ASOR	Annual Social Report
BAR	Brexit Adjustment Reserve
CFP	Common Fishery Policy
DaS	Days at Sea
DCF	Data Collection Framework
DG MARE	Directorate-General for Maritime Affairs and Fisheries
DTMT	Data Transmission Monitoring Tool
DWF	Distant Water Fleet
EEA	European Economic Area
EEZ	Exclusive Economic Zone
EMCIP	European Marine Casualty Information Platform
EMFF	European Maritime and Fisheries Fun
EMFAF	European Maritime, Fisheries and Aquaculture Fund
EMSA	European Maritime Security Agency
ESF	European Social Fund
EU	European Union
EU-MAP or EU-MAP	EU Multi-Annual Plan
EUMOFA	European Market Observatory for fisheries and aquaculture product
EUROSTAT	Statistical office of the European Union
EWG	Expert Working Group
FAO	Food and Agriculture Organization
FAOLEX	Food and Agriculture Organization Legal Database
FCPs	Fisheries Community Profiles
FLAG	Fisheries Local Action Group
FTE	Full Time Equivalent
GDP	Gross Domestic Product
GISCO	Geographic Information System of the Commission
GNP	Gross National product

GT	Gross Tonnage
GVA	Gross Value Added
HD	Heavy Duty
HOK	Hooks and lines
HSA	Ireland's Health and Safety Authority
ICES	International Council for the Exploration of the Sea
IIU	Illegal Unreported Unregulated fishing
ILO	International Labour Organisation
IMO	International Maritime Organisation
ITQ	Individual Transferable Quota
L12AG	Specific vessel length and gear category used in the European Union (EU) for vessels of less than 12 meters using non-towing gears
LFS	Labour Force Survey
LOA	Length Overall
LSF	Large-Scale Fleet
LWE	Live Weight Equivalent
MBS	Mediterranean and Black Seas
MPAs	Marine Protected Areas
MS	Member State
MSFD	Marine Strategy Framework Directive
MSP	Maritime Spatial Planning
NACE	Statistical classification of economic activities in the European Community
NAFO	North-West Atlantic Fisheries Organisation
NAO	North Atlantic Ocean
NCP	National Contact Points
NEAFC	North-East Atlantic Fisheries Commission
NFPs	National Fisheries Profiles
NSAC	North Sea Advisory Council
NWWAC	North-Western Waters Advisory Council
OECD	Organisation for Economic Co-operation and Development
OFR	Other Fishing Regions
OMR	EU Outermost Regions
PG	Passive Gears
PGP	Polyvalent Passive Gear (fishing technique)

PGO	Polyvalent Gears/Other Gears
PS	Purse Seines
RCG ECONl	Regional Coordination Group on Economic Issues
SBS	Structural Business Statistics
SCF	Small-Scale Coastal Fishing
SFPA	Ireland's Sea Fisheries Protection Authority
SSCF	Small Scale Coastal Fleet
SSF	Small Scale Fisheries
STCW 1978	International Convention on Standards of Training, Certification and Watchkeeping for Seafarers
STCW-F	International Convention on Standards of Training, Certification and Watchkeeping for Fishing Vessel Personnel
STECF	Scientific, Technical and Economic Committee for Fisheries
ToR	Terms of Reference
VL0612	Vessel between 6 meters and 12 meters in length
VL1218	Vessel between 12 meters and 18 meters in length
VL2440	Vessel between 24 meters and 40 meters in length
VL40XX	Vessel greater than 40 meters in length
VME	Vulnerable Marine Ecosystems

European Member States

BEL	BE	Belgium	IRL	IR	Ireland
BGR	BG	Bulgaria	ITA	IT	Italy
CYP	CY	Cyprus	LTU	LT	Lithuania
DEU	DE	Germany	LVA	LV	Latvia
DNK	DK	Denmark	MLT	MT	Malta
ESP	ES	Spain	NLD	NL	Netherlands
EST	EE	Estonia	POL	PL	Poland
EU	EU	European Union	PRT	PT	Portugal
FIN	FI	Finland	ROU	RO	Romania
FRA	FR	France	SVN	SV	Slovenia
GRC	EL	Greece	SWE	SE	Sweden
HRV	HR	Croatia			

Fishing Technologies – DCF categories

DFN Drift and/or fixed netters

DRB Dredgers

DTS Demersal trawlers and/or demersal seiners

FPO Vessels using pots and/or traps

HOK Vessels using hooks

MGO Vessel using other active gears

MGP Vessels using polyvalent active gears only

PG Vessels using passive gears only for vessels < 12m

PGO Vessels using other passive gears

PGP Vessels using polyvalent passive gears only

PMP Vessels using active and passive gears

PS Purse seiners

TM Pelagic trawlers

TBB Beam trawlers

Fishing activity – scale of fishing operations

SSCF Small-scale coastal fleet

L12AG Vessels under 12 metres using active gears

LSF Large-scale fleet

DWF Distant water fleet

Fishing regions

BS Baltic Sea

BKS Black Sea

MED Mediterranean Sea

NSEA North Sea & Eastern Arctic North Atlantic

NWW North Western Waters

OFR Other fishing regions

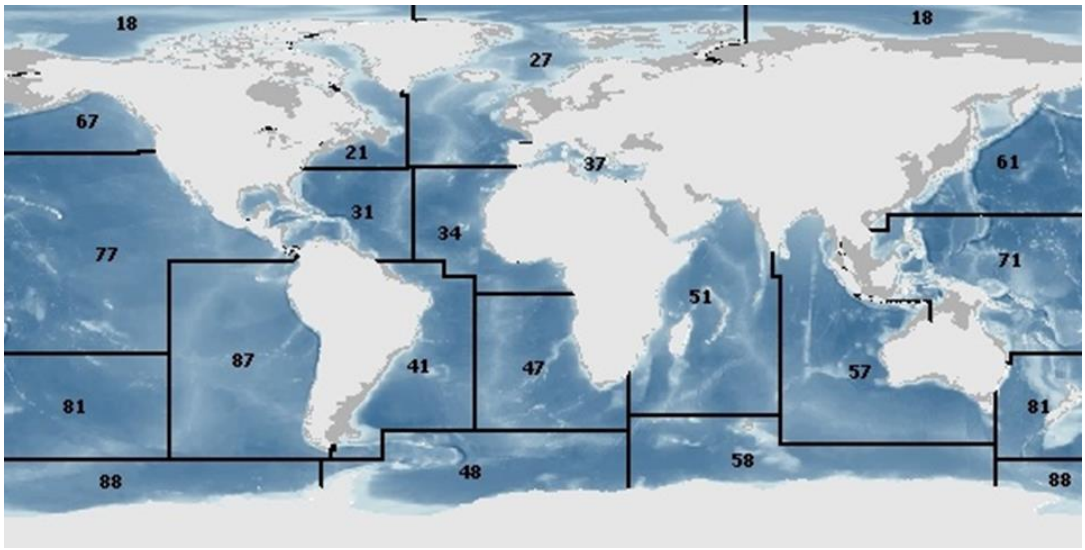
SWW South Western Waters

Regional fisheries

ABNJ	Areas Beyond National Jurisdiction
CECAF	Fishery Committee for the Eastern Central Atlantic
GFCM	General Fisheries Commission for the Mediterranean
ICCAT	International Commission for the Conservation of Atlantic Tunas
IOTC	Indian Ocean Tuna Commission
LDF	Long Distant Fisheries
NAFO	Northwest Atlantic Fisheries Organization
NEAFC	North-East Atlantic Fisheries Commission
OMR	EU Outermost Regions
RFB	Regional Fisheries Bodies
RFMO	Regional Fisheries Management Organisations
SFPAs	EU Sustainable Fisheries Partnership Agreements

Food and Agriculture Organization of the United Nations (FAO) Major Fishing Areas

FAO area 18	Arctic Sea	FAO area 57	Indian Ocean. Eastern
FAO area 21	Atlantic. Northwest	FAO area 58	Indian Ocean. Antarctic and Southern
FAO area 27	Atlantic. Northeast	FAO area 61	Pacific. Northwest
FAO area 31	Atlantic. Western Central	FAO area 67	Pacific. Northeast
FAO area 34	Atlantic. Eastern Central	FAO area 71	Pacific. Western Central
FAO area 37	Mediterranean and Black Sea	FAO area 77	Pacific. Eastern Central
FAO area 41	Atlantic. Southwest	FAO area 81	Pacific. Southwest
FAO area 47	Atlantic. Southeast	FAO area 87	Pacific. Southeast
FAO area 48	Atlantic. Antarctic	FAO area 88	Pacific. Antarctic
FAO area 51	Indian Ocean. Western		

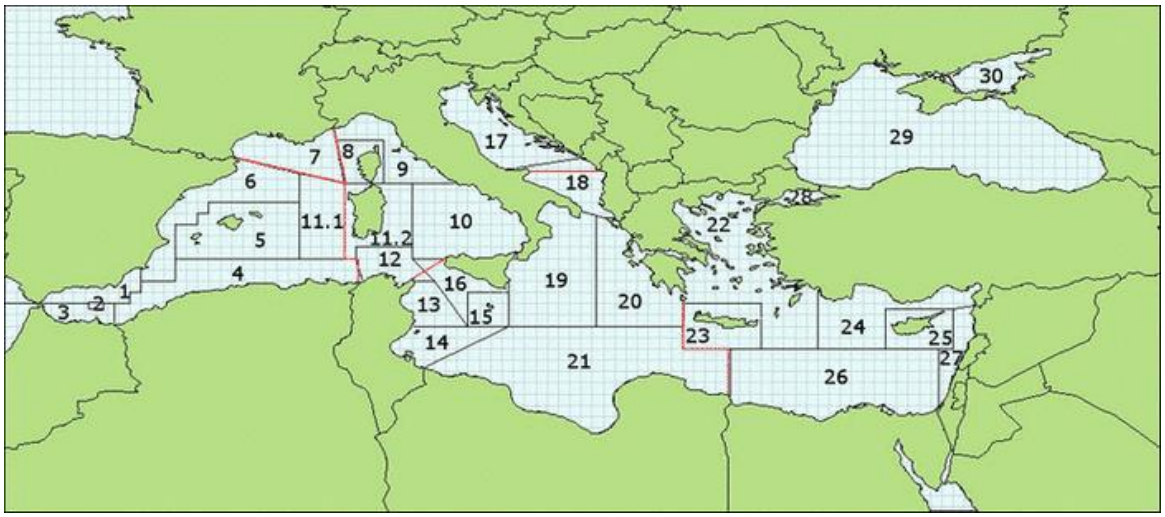


Source: http://www.fao.org/fishery/area/

General Fisheries Commission for the Mediterranean (GFCM) Geographical subareas (GSAs)

GSA 1	Northern Alboran Sea	GSA 16	Southern Sicily
GSA 2	Alboran Island	GSA 17	Northern Adriatic
GSA 3	Southern Alboran Sea	GSA 18	Southern Adriatic Sea
GSA 4	Algeria	GSA 19	Western Ionian Sea
GSA 5	Balearic Island	GSA 20	Eastern Ionian Sea
GSA 6	Northern Spain	GSA 21	Southern Ionian Sea
GSA 7	Gulf of Lion	GSA 22	Aegean Sea
GSA 8	Corsica	GSA 23	Crete
GSA 9	Ligurian Sea and North Tyrrhenian Sea	GSA 24	Northern Levant Sea
GSA 10	Southern and Central Tyrrhenian Sea	GSA 25	Cyprus
GSA 11.1	Western Sardinia	GSA 26	Southern Levant Sea

GSA 11.2	Eastern Sardinia	GSA 27	Eastern Levant Sea
GSA 12	Northern Tunisia	GSA 28	Marmara Sea
GSA 13	Gulf of Hammamet	GSA 29	Black Sea
GSA 14	Gulf of Gabes	GSA 30	Azov Sea
GSA 15	Malta		



Source: http://www.fao.org/gfcm/data/maps/gsas

Annex 2. Outermost Regions (OMR) Regional Fisheries Profiles.

A. BACKGROUND TO THIS OUTERMOST REGION FISHERIES PROFILE

B. EXECUTIVE SUMMARY (highlight mainly the differences with the rest of the country).....

a. General Description of the Society .....

b. Fisheries sector structure .....

c. Governance system .....

d. Social, cultural and Economic aspects of fisheries .....

e. Main trends in and affecting the industry (constrains and opportunities) .

C. METHODS AND DATA (highlight mainly the differences with the rest of the country analysis, if any) .....

1. GENERAL DESCRIPTION OF THE SOCIETY (highlight mainly the differences with the rest of the country).....

2. FISHERIES SECTOR-STRUCTURE (highlight mainly the differences with the rest of the country)

2.1. General overview .....

2.2. Summary of fleets .....

2.2.1. Summary of the Small-Scale Fisheries fleet (SSF) (highlight mainly the differences with the rest of the country and describe the fleet in OMR).....

2.2.2. Summary of the Coastal Scale Fleet (CSF) (highlight mainly the differences with the rest of the country and describe the fleet in OMR)

2.2.3. Summary of the Large Fishing Fleet (LSF) Summary of the Coastal Scale Fleet (CSF) (highlight mainly the differences with the rest of the country and describe the fleet in OMR).....

2.3. Geographical areas (highlight mainly the differences with the rest of the country).....

2.3.1. Areas at sea .....

2.3.2. Main resources (waters/seas).....

2.3.3. Communities (landing) ports, vessels and auctions.....

2.4. Fishing practices/systems (highlight mainly the differences with the rest of the country) .....

2.5. Recreational maritime fishing.....

2.6. Processing, trade and markets.....

2.6.1 Processing industry and trade (highlight mainly the differences with

the rest of the country) .....
2.6.2. Fish Sales (highlight mainly the differences with the rest of the country) .....
2.6.3. Seafood consumption (highlight mainly the differences with the rest of the country) .....
2.7. Fisheries innovation .....
2.8. Fishing communities/central ports .....
2.8.1. Communities and ports .....
2.8.2. Ancillary activities .....
3. GOVERNANCE SYSTEM (highlight mainly the differences with the rest of the country) .....
3.1. Responsible authorities .....
3.2. Organizations .....
3.2.1. Producer organizations .....
3.2.2. National sector organizations: Cofradías de Pescadores .....
3.3. Management instruments .....
3.3.1. Access to fisheries .....
3.3.2. Government Support to Fisheries .....
3.4. Marine Spatial Planning .....
3.5. Fighting Irregular Fishing .....
4. Social, cultural and economic aspects of fisheries (highlight mainly the differences with the rest of the country) .....
4.1. Fisheries in the regional societal context .....
4.2. Markets and trade .....
4.3. Employment .....
4.4. Education and training .....
5. Current trends, issues and developments (highlight mainly the differences with the rest of the country) .....
5.1. Societal trends .....
5.2. Trends .....
5.2.1. Resource productivity and efficiency indicators .....
5.2.2. Regional fleet performance .....
5.2.3. Trends in fishing communities .....
5.3. Constrains .....
5.3.1. General challenges fisheries .....

5.3.2. General challenges trade.....
5.4. Opportunities.....
5.4.1. Fisheries.....
5.4.2. Trade.....
REFERENCES .....

Annex 3. Guidelines for Interviews on Generational Renewal in European Fisheries.

Research Design: Semi-structured qualitative interviews conducted onsite in a fisheries community during a 10-day period (5–10 interviews per community, 1 community per country).

Type of respondents (all genders)—interview guide to be adjusted to each profile, but the core stays the same

- **Current Fishers (Skippers/Crew/LSF/SSF):** for this group, the focus will be on daily operational realities, job satisfaction, ways of life, changes over time, and personal stay-leave dilemmas.
- **Youth / Potential Entrants:** focus on aspirations, perceived barriers, social pressures, and what would make the sector attractive.
- **Exited Fishers / Retirees:** Focus on the turning points that led to their exit, comparisons of the past versus the present, and feelings about legacy. Improvements and regrets if there.
- **Spouses / Parents/ traditional fishing families:** focus on cultural heritage, family traditions, household stability, the impact of absence on family life, and whether they support their children entering the sector.
- **Representatives of Producer organizations, fisheries guilds, cooperatives:** focus on institutional bottlenecks and community-wide labor trends
- **For Unrelated Community Members:** focus on the visible changes in local identity, the local economy, and the changing social status of fishers. What will happen with the community if the fisheries disappear?

Topic 1: Social Perception, Identity, and Entry Pathways

Objective: Explore how the community and broader society view fishing, and how this shapes a young person's willingness to enter the trade.

- **Image of Fishing:** How the profession is perceived today (e.g., prestigious, marginalized, or an employment of last resort).
- **"Push" and "Pull" Dynamics:** What currently makes fishing attractive to young people versus what actively drives them away (e.g., social status, peer pressure, or family expectations; esp. competing sectors of marine economy which recruit entrants—see also Topic 4).
- **Recruitment Process:** Lived experiences of trying to enter the sector or bringing someone to enter fisheries.

Topic 2: Employment, stability, and voice

Objective: to capture the lived experience of job security, safety networks, and decision-making power.

- **Job Arrangements and Predictability:** How hiring and working agreements are made in practice (e.g., verbal handshakes vs. written contracts, self-employment setups) and how this shapes a fisher's sense of long-term security.
- **Safety networks:** What happens when things go wrong. How fishers view their protection regarding illness, off-seasons, workplace injuries, and their expectations for a future pension.
- **Collective Voice and Agency:** The perceived strength or absence of cooperatives, unions, or associations. Whether fishers feel they have a say in local market dynamics and rule-making, or if they feel isolated.

Topic 3: Operational issues, risk, and well-Being

Objective: Investigate the physical, mental, and social toll of the working environment on the fisher and the household.

- **Onboard working conditions:** Perceptions of workload, crew sizes, and pace of work. How cost-cutting or a shortage of hands alters daily safety, stress levels, and the physical risk of accidents on board.
- **Physical Workspace:** How the state of vessels affect daily comfort, exhaustion, and safety.
- **Work-Life Balance:** The emotional and logistical impact of being away from home. How time spent at sea shapes family relationships, and the role a spouse or family's support plays in the decision to stay or leave.
- **Identity and community wellbeing:** The relational aspect and feelings of pride in maintaining a traditional lifestyle and contributing to local identity, contrasted with the psychological weight of witnessing the decline of fishing.
- **Subjective Freedom:** The positive emotional drivers of the job, such as independence, the pride of "not having a boss," and thevalue of working in nature, singular experiences and "the trill of the catch"

Topic 4: Economic Viability and Financial issues

Objective: Uncover the financial pressures, debt cycles, and incentives that dictate a fisher's career trajectory.

- **Income:** How a fishing income holds up relative to other local opportunities (e.g., tourism, aquaculture) and whether it can support a modern family standard of living.
- **Financial Vulnerability and Income Diversification:** The necessity of taking on alternative or seasonal work to survive, and how families patch together income to maintain continuity in fishing.
- **Debt Lock-ins:** The hidden financial forces that manipulate career choices—such as bank loans or vessel debts that *force* fishers to keep going, the perceived fairness of subsidy allocation, and how decommissioning schemes or poor pensions alter retirement planning.

Topic 5: Governance

Objective: Examine how external political, spatial, and administrative pressures manifest as daily stressors.

- **Competition and Blue Economy:** Lived experiences of sharing or losing marine space to competing industries (e.g., tourism development, marine protected areas, green energy) and how this shapes views on the sector's future survival.
- **Administrative Burden:** The mental energy and daily stress consumed by paperwork, strict quota compliance, electronic reporting, and dealing with complex regulations.
- **Perceived Legitimacy of Governance:** Whether local fishers feel respected, heard, and supported by local, national, and European authorities, or if they feel governed by distant entities who do not understand their reality.

List of Background Documents

Background documents are published available on:
https://stecf.ec.europa.eu/meetings-calendar/past-meetings

List of background documents:

EWG-26-02– Doc 1 - Declarations of invited and JRC experts (see also the section of this report ‘Contact details of EWG-26-02 participants’)

.

GETTING IN TOUCH WITH THE EU

In person

All over the European Union there are hundreds of Europe Direct centres. You can find the address of the centre nearest you online (european-union.europa.eu/contact-eu/meet-us_en).

On the phone or in writing

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

— by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),

— at the following standard number: +32 22999696,

— via the following form: european-union.europa.eu/contact-eu/write-us_en.

FINDING INFORMATION ABOUT THE EU

Online

Information about the European Union in all the official languages of the EU is available on the Europa website (european-union.europa.eu).

EU publications

You can view or order EU publications at op.europa.eu/en/publications. Multiple copies of free publications can be obtained by contacting Europe Direct or your local documentation centre (european-union.europa.eu/contact-eu/meet-us_en).

EU law and related documents

For access to legal information from the EU, including all EU law since 1951 in all the official language versions, go to EUR-Lex (eur-lex.europa.eu).

Open data from the EU

The portal data.europa.eu provides access to open datasets from the EU institutions, bodies and agencies.

STECF

The Scientific, Technical and Economic Committee for Fisheries (STECF) has been established by the European Commission. The STECF is being consulted at regular intervals on matters pertaining to the conservation and management of living aquatic resources, including biological, economic, environmental, social and technical considerations.

Science for policy

The Joint Research Centre (JRC) provides independent, evidence-based knowledge and science, supporting EU policies to positively impact society

EU Science Hub
joint-research-centre.ec.europa.eu

@EU_ScienceHub
EU Science Hub - Joint Research Centre
EU Science, Research and Innovation
EU Science Hub
@eu_science

Publications Office
of the European Union