

2021 ANNUAL REPORT FROM FRANCE¹
on efforts made between 2011 and 2019 to establish a sustainable balance between fishing capacity
and fishing opportunities

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¹ In accordance with the guidelines for the analysis of the balance between fishing capacity and fishing opportunities according to Article 22 of Regulation (EU) No 1380/2013 of the European Parliament and of the Council on the Common Fisheries Policy, set out in Commission Communication COM(2014)545 final of 2 September 2014.

² In keeping with the format recommended by the SG-BRE 10-01 working group of the Scientific, Technical and Economic Committee for Fisheries on the examination of national reports on the balance between fishing capacity and fishing opportunities.

1. Summary of the report

1- Conclusions of the report

The report covered 232 segments over the period 2011-2019. In 2019, the French fleet comprised 195 segments, plus a further 3 segments (ATL ELE 27, MED ELE 37 and MED Ganguis) i.e. 198 segments. Of those segments, 99 were balanced, 22 were to be monitored, 5 had an imbalance, 14 were inactive and 58 required additional information in order to be assessed and/or had fewer than three vessels.

France welcomes the improvement in the 'bolincheurs' segments which target sardine in the Bay of Biscay and the Celtic Sea - West Scotland. These segments are once again balanced, after two consecutive years of imbalance. This was possible thanks to an improvement in the condition of the sardine stock which now has an F/Fmsy below 1 (0.84) according to the latest available ICES assessment from 2020. Nevertheless, five segments have an imbalance, namely the segments fishing eel off the Atlantic and Mediterranean coasts, the 'ganguis' fishing segment in the Mediterranean, and Mediterranean trawlers from 18 to 24 metres and from 24 to 40 metres fishing for red mullet and hake.

Stocks were assessed by taking into account the condition of 116 stocks for the entire period. In 2019, there were 112 stocks for which French landings were not at zero. Of those stocks, 75 were in good health and 37 were in poor condition. Within this category, France accounted for more than 5% of landings for 25 stocks and more than 80% of landings for six stocks, namely anchovy from the Mediterranean, eel from the Atlantic, shrimp from French Guiana, red mullet from the Mediterranean, spotted ray and whelk from the Atlantic.

Table 1: List of stocks assessed as being in poor condition where France accounted for more than 5% of international landings

Stock	Name	Percentage of French landings	Total landed quantity (France) (tonnes)
ANE.37.7	European anchovy	100%	921
ELE.27	European eel	100%	70
PEN.31	Penaeus shrimp	100%	320
MUT.37.7	Red mullet	83%	250
RJM.27.7a7e-h	Spotted ray	82%	825
WHE.27.7e	Whelk	81%	8561
RJA.27	White skate	75%	6
WHE.27.7d	Whelk	59%	6063
WHG.27.7bc7e-k	Whiting	58%	3202
ELE.37	European eel	52%	336
RJC.27.8	Thornback ray	43%	222
COD.27.7e-k	Atlantic cod	35%	369
CRE.27.78abd	Edible crab	35%	3398
HKE.37.7	European hake	34%	1062
SBR.27.678	Red seabream	24%	24
PLE.27.7hjk	European plaice	17%	16
WHG.27.47d	Whiting	16%	3009

RJM.27.67bj	Spotted ray	11%	8
BLI.27.123a4a8912	Blue ling	7%	26
MNZ.27.3a46	Monkfishes nei	7%	1559
COD.27.6a	Atlantic cod	7%	146
BET.47	Bigeye tuna	7%	5054
YFT.51	Yellowfin tuna	7%	27888
NEP.27.7gh.FU20-21	Norway lobster	6%	194
BET.51	Bigeye tuna	6%	4054

2- Structure of the French fleet in 2019

As at 31 December 2019, there were 6 086 administratively active vessels in the fleet. The present report analyses some 5 547 vessels.

This disparity is in line with the different method for activity accounting. Administratively speaking, inactivity means either zero trips during 6 of the previous 12 months, no regular landings of fishery resources during the previous 12 months, or fishing is not the primary source of income for the party responsible. However, for the purposes of this report, inactivity is where capacity was underused as at 31 December 2019.

3- Segmentation method and main segments of the French fleet

The fleet was segmented in accordance with the method set out under Appendices II and III to the Commission Decision of 18 December 2009 (2010/93/EU) adopting a multiannual Community programme for the collection, management and use of data in the fisheries sector for the period 2010–2013.

Under the method laid down in the aforementioned Commission Decision, each vessel is annually assigned to a segment according to three characteristics:

- a) the vessels' maritime zone of activity,
- b) the primary metier,
- c) and the overall length.

a) In terms of the maritime zone, the use of supra regions was not given priority so that the stock distribution and fishing strategies of French vessels would be consistent. Since the 2015 report, France has used geographical groupings which are more specific than supra-regional level in accordance with Annex 2 to Decision 2010/93/EU. The report identifies 10 reference regions:

- North Sea - Eastern Channel
- Western Scotland - Celtic and Irish Seas - Iceland
- Bay of Biscay - Balearic Seas
- Mediterranean
- Africa - Antarctica - Indian Ocean
- La Réunion
- Mayotte
- Guadeloupe
- Martinique
- French Guiana

b) As in the previous report, the segmentation was adjusted for certain fleet segments as it was not adapted to certain subsidiary or seasonal fishing activities. In those fisheries, active vessels were

distributed between different segments in which the landing share of each segment for those stocks was marginal. It is therefore impossible to identify an imbalance.

Three segments were therefore added in order to identify vessels engaging in real activity in respect of stocks at risk according to the SAR indicator (see point 8.2 of this report) so that the entire segment – which is not imbalanced – would not be targeted. To that end, the number of vessels with special eel fishing licences for the Atlantic and Mediterranean seabords and the number of vessels with ‘gangui’ licences was therefore transferred to those three segments for the years covered by the report.

The three segments are:

- ME ME VL0012 – ‘gangui’ fishing: vessels of between 0 and 12 metres engaging in ‘gangui’ fishing as a subsidiary activity on Mediterranean seagrass (*Posidonia*) beds,
- AT ELE VL0024: vessels of between 0 and 24 metres fishing eel as a subsidiary activity on the Atlantic seaboard,
- ME ME ELE VL0024: vessels of between 0 and 24 metres fishing eel as a subsidiary activity in the Mediterranean.

Under this segmentation, 15 segments were inactive, of which 3 had more than 100 vessels. 16 active segments had more than 100 vessels, 54 segments had fewer than 4 vessels (of which 24 were single-vessel segments) and 51 segments had between 10 and 50 vessels.

Table 2: List of fleet segments with the largest number of vessels

N.B.: the distribution of vessels between segments changes from year to year. In some years, segments may have no vessels. However, they are retained for the years in which they do have vessels.

Segment	Number of vessels in 2019	Supra region	Region	Metier	Category of length overall
AT NONACTIVE VL0010	139	Atlantic	Inactive	Inactive	0 to 10 metres
AT GG_Ib DFN VL0010	223	Atlantic	Bay of Biscay - Balearic Seas	Netter	0 to 10 metres
AT GG_Ib DTS VL1012	110	Atlantic	Bay of Biscay - Balearic Seas	Trawler	10 to 12 metres
AT GG_Ib DTS VL1218	110	Atlantic	Bay of Biscay - Balearic Seas	Trawler	12 to 18 metres
AT GG_Ib HOK VL0010	137	Atlantic	Bay of Biscay - Balearic Seas	Hooks	0 to 10 metres
AT GG_Ib MGO VL0010	157	Atlantic	Bay of Biscay - Balearic Seas	Various active gear	0 to 10 metres
AT MC_OE_Is FPO VL0010	147	Atlantic	Western Channel - Celtic and Irish Seas - West Scotland - Iceland	Potter	0 to 10 metres

ME NONACTIVE VL0612	135	Mediterranean	Inactive	Inactive	6 to 12 metres
ME ME DFN VL0006	135	Mediterranean	Mediterranean	Netter	0 to 6 metres
ME ME DFN VL0612	528	Mediterranean	Mediterranean	Netter	6 to 12 metres
ME ME PGP VL0612	111	Mediterranean	Mediterranean	Various passive gear	6 to 12 metres
OM NONACTIVE VL0010	555	Outermost regions	Inactive	Inactive	0 to 10 metres
OM Guadeloupe FPO VL0010	100	Outermost regions	Guadeloupe	Potter	0 to 10 metres
OM Guadeloupe HOK VL0010	104	Outermost regions	Guadeloupe	Hooks	0 to 10 metres
OM Guadeloupe PGP VL0010	209	Outermost regions	Guadeloupe	Various passive gear	0 to 10 metres
OM Martinique FPO VL0010	147	Outermost regions	Martinique	Potter	0 to 10 metres
OM Martinique HOK VL0010	147	Outermost regions	Martinique	Hooks	0 to 10 metres
OM Martinique PGP VL0010	196	Outermost regions	Martinique	Various passive gear	0 to 10 metres
OM Mayotte PP excl. seiners HOK VL0010	108	Outermost regions	Mayotte excl. seiners	Hooks	0 to 10 metres
OM Reunion PP excl. seiners HOK VL0010	148	Outermost regions	La Réunion excl. seiners	Hooks	0 to 10 metres

4 - Developments since the 2020 report

The segmentation used in 2021 contains a total of three more 'natural' segments compared to the previous report. This slight increase actually reflects larger movements in the fleet segments identified. The table below therefore lists the changes between the 2020 report and this year's report:

Table 3: Fleet segments newly appearing or no longer present – comparison between 2020 and 2021 reports

Segments present in the 2020 report but not in the 2021 report	Segments present in the 2021 report but not in the 2020 report
AT GG_lb MGP VL1218	AT GG_lb PGP VL1218
AT MC_OE_Is MGP VL1824	AT MC_OE_Is DRB VL1824
AT MC_OE_Is OTM VL2440	AT MC_OE_Is MGP VL1218
AT MC_OE_Is PGP VL2440	AT MC_OE_Is MGP VL2440
ME NONACTIVE VL40XX	AT MdN_Mchest OTM VL1012
ME ME MGO VL0006	AT MdN_Mchest PGO VL0010
OM Guyane HOK VL1012	AT MdN_Mchest TBB VL1012
	ME ME DRB VL0006
	OM NONACTIVE VL1218
	OM Mayotte PP excl. seiners HOK VL1012
	OM Reunion PP excl. seiners PGP VL1012

The segments created by France in the last report, i.e. eel in the Atlantic, eel in the Mediterranean and 'gangui', were maintained. As in the previous report, and in view of the poor condition of eel stocks on the Atlantic and Mediterranean seaboard, France has chosen to cover all eel stages³ in eel segments, so as to ensure consistent monitoring of eels throughout its territory.

The number of vessels recorded in this report across eel segments corresponds to the number of 'CMEA licences'⁴ and the number of regional fishing authorisations issued for this species for the years concerned.

A comparison of the French fleet between 31 December 2019 and 31 December 2017 showed that the number of vessels fell by 188. This corresponded to 3 052 KW of power exiting the French fleet, but paradoxically an increase in vessel tonnage of 4 768 GT. As a reminder, the French fleet comprised 7 380 vessels in 2011. The fleet shrunk in size by 17% over this period, registering a total of 6 086 vessels on 31 December 2019 (of which 5 550 were active vessels).

5 – Change in stock condition and/or fishing opportunities between 2018 and 2019

Stocks have remained in a relatively stable condition since last year.

Nevertheless, two stocks saw an improvement and were assessed as being in good health, having been considered in poor condition in 2018, namely:

- Haddock HAD.27.7. b-k
- European pilchard PIL (VII,VIIIabd)

By contrast, three stocks were assessed as being in poor condition in 2019, having been in good health in 2018, namely:

³ i.e. glass eel (only in the Atlantic), yellow eel (on both seaboard) and silver eel (only in the Mediterranean).

⁴ Special fishing rights for amphihaline fish.

- European hake HKE.27.8c9a
- Saithe POK.27.5b
- Blue skate RJB.27.67a-ce-k

The list of assessed stocks was expanded this year to include three stocks exploited in Martinique, namely Caribbean spiny lobster, spotted spiny lobster and snapper.

In terms of value and volume, unassessed stocks fished by the fleet and covered in this report represented approximately 20% of landings in 2019. The share of unassessed stocks decreased continually between 2011 and 2019, falling from 30% of French landings to 20%. Understanding of the condition of stocks has been consistently improving. The two projects aimed at improving understanding of the condition of octopus and gilthead seabream stocks in the Mediterranean should help to further reduce the share of unassessed stocks in landings by the French fleet. Fishing strategies and fisheries remained relatively stable during the period 2011-2019.

6- Management plans introduced in recent years

Fishing effort decreased during the period 2011-2019. This was in line with current fishing effort management measures, in particular the schemes in place for Western waters⁵, deep-sea species⁶, cod⁷, sole in the Western Channel⁸ and Bay of Biscay⁹, Southern hake and lobster¹⁰ and Mediterranean national management plans¹¹. The aforementioned fishing effort management measures under the cod and deep-sea species plans were repealed as of the 2017 management year.

In 2018, following the capacity report, the conditions for granting professional licences ('CMEA licences') covering the fishing of estuarine and amphihaline species were tightened in respect of eels so as to reduce the capacity in the Atlantic glass eel and yellow eel segment. This enabled pre-2015 levels to be restored as regards the number of special fishing rights for eel in the Atlantic with a decrease in the number of fishing licences (20 fewer) between 2017 and 2018. In 2019, the number of licences remained virtually unchanged (4 more).

In the Mediterranean, the European management plan for the Western Mediterranean came into force in 2019. The aim of this ambitious plan is to improve demersal stocks in GSAs 1 to 11, in particular hake stocks. It has already resulted in a considerable reduction in available fishing effort in the corresponding areas and allowed area-related and seasonal fishing bans for protecting juvenile hake. To supplement this plan, temporary cessation of activity is now planned for 2021 and, in the long-term, the exit of a certain number of vessels from the fleet.

In the context of the present COVID-19 health crisis, a comprehensive programme for temporary cessation of fishing activity was proposed to vessel owners in France following an amendment to the EMFF Regulation. Exceptionally, the measure may be used to compensate vessel owners forced to

⁵ Council Regulation (EC) No 1954/2003 of 4 November 2003 on the management of the fishing effort relating to certain Community fishing areas and resources.

⁶ Regulation (EC) No 2347/2002 of 16 December 2002 establishing specific access requirements and associated conditions applicable to fishing for deep-sea stocks.

⁷ Regulation (EC) No 1342/2008 on the multi-annual cod management plan.

⁸ Council Regulation (EC) No 509/2007 of 7 May 2007 establishing a multi-annual plan for the sustainable exploitation of the stock of sole in the Western Channel.

⁹ Council Regulation (EC) No 388/2006 of 23 February 2006 establishing a multiannual plan for the sustainable exploitation of the stock of sole in the Bay of Biscay.

¹⁰ Council Regulation (EC) No 2166/2005 of 20 December 2005 establishing measures for the recovery of the Southern hake and Norway lobster stocks in the Cantabrian Sea and Western Iberian peninsula.

¹¹ Management plan implemented under the Order of 13 May 2014 adopting management plans for professional fishing activities using purse seine, dredging, beach seine and gangui fishing methods in the Mediterranean sea by vessels flying the flag of France.

temporarily cease fishing activity due to the impact of COVID-19 on their working conditions. It was offered twice over the course of 2020 (in spring and during the last quarter of the year) and would appear to have had a significant impact on fishing effort in 2020.

In 2021, the impact of Brexit on the fishing industry justified the introduction of a plan for temporary cessation of activity for the French vessels hardest hit by the new situation. In the medium term, a fleet exit plan is also envisaged for those vessels which are now no longer economically viable.

Finally, the adoption of the EMFAF allows new temporary cessations of activity under the upcoming 2021-2027 programming period.

As a reminder, four fleet exit plans and one temporary cessation have been in place since 2011 in order to reduce fishing effort in the following fisheries:

- temporary cessation of Mediterranean trawlers in zone GFCM 37.GSA7 fishing Mediterranean hake and red mullet¹²;
- fleet exit plan for sole netters of between 0 and 18 metres in the Eastern Channel¹³ ;
- fleet exit plan for Mediterranean lobster trawlers in zone GSA8¹⁴;
- fleet exit plan for vessels of between 0 and 24 metres fishing glass eel and yellow eel in the Atlantic supra region¹⁵;
- fleet exit plan for netters of between 10 and 12 metres in the Eastern Channel and North Sea¹⁶.

7- Compliance with the fleet entry-exit plan

The capacity ceilings in force for mainland France and its outermost regions were observed throughout the period 2011-2019 (see point 5, section C).

8 - Fleet management system improvement plans

Due to the wide range of stocks which are monitored and assessed by France, it is possible to accurately analyse the French fleet segments.

In the case of imbalanced fleet segments, France prohibits new entries to the fleet and capacity increases. Moreover, it implements active management measures for reducing fishing effort, e.g. support for exiting the fleet.

9 - Use of technical, biological, economic and social indicators

This report follows the European Commission's guidelines of 2 September 2014 (COM(2014)545 final). Its method led to certain difficulties which subtly modified the analysis of certain fleet segments.

¹² Order of 15 December 2016 on the implementation of support for temporary cessation of fishing activity for vessels using trawls in the Mediterranean in zone GFCM 37.GSA7.

¹³ Order of 3 February 2017 implementing a fleet exit plan for vessels of between 0 and 18 metres fishing with nets in the Eastern Channel and North Sea.

¹⁴ Order of 26 July 2017 implementing a fleet exit plan for vessels of between 6 and 18 metres trawling lobster in zone GSA8 of the Mediterranean.

¹⁵ Order of 26 July 2017 implementing a fleet exit plan for vessels of between 0 and 24 metres fishing glass eel and yellow eel in the Atlantic supra region.

¹⁶ Order of 11 August 2017 implementing a fleet exit plan for vessels of between 10 and 12 metres fishing with nets in the Eastern Channel and North Sea.

In this respect, we would reiterate that the principle of a single metier was applied to allocate vessel activity to a segment. This led to fleet segments being assigned catch from vessels within the segment using other fishing gear.

We would also emphasise that the results of the economic indicators were weakened by a number of factors.

- Method applied: variables were based on sampling involving non-exhaustive answers.
- Segment size: variables were reported only for segments comprising more than three vessels in accordance with the rules on confidentiality applied to statistical data.

Lastly, France interpreted the results of this assessment with caution given the diversity of the vessels' fishing strategies and the biases observed in the quality of certain data, particularly economic and technical data. Economic and technical indicators could not be fully conclusive given the variety of fishing strategies existing within the same fleet segment, leading to results which were difficult to use, with account taken of the drop in the number of vessels in most segments.

2. Position of France regarding the balance between the capacity of its fleet and national fishing opportunities

2.1. Methodology used and indicator calculation results

France followed the guidelines for analysing the balance between fishing capacity and fishing opportunities under Article 22 of Regulation (EU) No 1380/2013 of the European Parliament and of the Council on the Common Fisheries Policy, set out in Commission Communication COM(2014)545 final of 2 September 2014.

To supplement the evaluation of its fleet segments, France included additional indicators in its report in order to make better use of stocks evaluated without analytical advice. These additional indicators, which were proposed by the Scientific, Technical and Economic Committee for Fisheries (STECF), are presented under point 8 of this report.

i. Preparatory stages for drawing up the report

The following preparatory stages were essential for calculating the indicators:

- identifying reference maritime regions. France chose to use a regional level as specified in the Commission Decision of 18 December 2009 (2010/93/EU),
- establishing a list of stocks to be monitored (see point 3.2). France sought to evaluate all stocks landed by its vessels. However, due to the wide variety of segments in the French fleet, France gave priority to the stocks of importance to its vessels. Selection was all the more necessary in view of the difficulty in collecting full biological data for the stocks landed. The concept of 'important stock' is explained under point 3. 2.
- defining a method for allocating vessels to fleet segments and a method for aggregating segments into clusters for the economic indicator where this was required under the principle of individual data confidentiality,
- gathering the necessary data for the study, including scientific opinions and data on the activity of all vessels.

ii. Presentation of different types of analysis

Article 22(4) of Regulation (EU) No 1380/2013 calls on Member States to distinguish imbalanced segments from balanced segments. France supplemented this distinction by means of the following categories:

- The following are balanced fleet segments (cumulative criteria):
 - o segments where the SAR indicator or 'SHI' indicator is positive for at least the last 3 years assessed in the report for 2021, i.e. 2017 to 2019,
 - o segments not targeting stocks in poor condition for at least the last 3 years assessed in the report for 2021 (i.e. 2017 to 2019) and/or where the economic dependence on stocks in poor condition is less than 40%.
- The following are imbalanced fleet segments (alternative criteria):
 - o segments where the SAR indicator or 'SHI' indicator is negative (greater than 1) for at least the last 3 years assessed in the report for 2021, i.e. 2017 to 2019,
 - o segments fishing stocks in poor condition for at least the last 3 years assessed in the report for 2021 (i.e. 2017 to 2019) and where the economic dependence on stocks in poor condition is greater than 40%.
- The following are fleet segments to be monitored (alternative criteria):
 - o where one of the biological indicators calculated is negative for at least two consecutive years between 2017 and 2019,
 - o where economic viability is untenable with respect to economic over-capacity for at least two years between 2017 and 2019 ,
 - o segments evaluated as being imbalanced but for which analyses are weak and discretion is allowed for in their interpretation.
- Inactive fleet segments are segments comprising vessels that did not perform any commercial fishing activity.
- Fleet segments for which it was impossible to calculate indicators due to:
 - o the small size of the fleet segment, as a result of which the segment did not 'exist' during the last year covered by the 2020 report,
 - o the absence of the minimum data needed for indicators to be calculated, such as fishing time, quantities landed or the biological condition of stocks targeted by these segments.

iii. 2021 assessment

For the 198 segments comprising the French fleet in 2019, the 2021 assessment is as follows:

- 5 segments are imbalanced,
- 22 segments are to be monitored,
- 99 segments are balanced,
- 14 segments are inactive,
- 58 segments are impossible to calculate indicators for (all indicators combined) and/or had fewer than three vessels.

In response to the main difficulties encountered in calculating the indicators in this report, France will ensure for future reports that:

- it continues to consult various stakeholders, particularly scientific experts, so as to have the most detailed information possible on the stocks fished by the French fleets in overseas coastal regions and Mediterranean regions in particular,
- it improves the quality and completeness of economic and landing data.

For the segments identified as imbalanced, France will implement an action plan for each segment, as described in point 6.2 and Annex 4 to this report. The plans to restore a sustainable balance between fishing capacity and fishing opportunities in these imbalanced segments will each primarily comprise the following measures:

- capacity ceilings for imbalanced segments,
- implementation of assisted management measures intended to reduce fishing effort in imbalanced segments,
- where necessary steering the renewal and redeployment of the fleet towards balanced segments, with support for temporary cessation of activity where appropriate,
- increasing selectivity of fishing gear, where appropriate by funding research to rebalance the stock(s) concerned more quickly,
- optimising the regulatory, technical and administrative measures in force so as to balance fishing capacity with fishing opportunities.

2.2. Imbalanced segments

The methods for calculating the SHI, NOS, SAR and EDI indicators are specified in point 8 of this report.

i. Methodology used

France produced its assessment of imbalances:

- by giving priority to the results of biological indicators when qualifying imbalanced sectors, in line with the approach taken by France for several years regarding how it draws up this report. France considers that the biological indicators have slightly different objectives to the technical and economic indicators. They enable those segments to be assessed which have a definite impact, in terms of volume landed, on stocks in poor condition. By comparison, the technical and economic indicators for each segment (calculated systematically as soon as data is available) tend to suggest a segment's vessels are being underused or that a segment is unprofitable. The reasons for this relate to variables bearing no relation to stock condition, which instead identify situations caused by poor management, seasonal or complementary activity, and ultimately make no difference to the condition of fishery resources. Furthermore, as such decisions are specific to each business, no general assessment of a lasting imbalance is possible other than by means of a case-by-case examination. The results of these indicators can therefore only support, where appropriate, findings of an imbalance based on biological indicators. Finally, France would reiterate that it calculates the economic and technical indicators in the same way as the biological indicators for each of the segments identified in the report. However, it is essential for a distinction to be made when using these indicators as they differ in nature.
- by requiring biological indicators to be negative for 3 years in order for segments to be classified as imbalanced. Although all indicators (technical, economic and biological) provided for in EU legislation were calculated for each segment covered by this report, France only classified segments as imbalanced if their biological indicators were negative for the last 3 years. The 3-year requirement is justified by the objective of this report,

namely to identify real trends among vessel segments for stocks in poor condition to be overfished. An imbalance over 1 or 2 years is insufficient to identify long-term activity. If vessels change their fishing strategies and target stocks from one year to the next, 3 years is enough to confirm the focus of vessel activity in a segment. 3 years is therefore appropriate for assessing fishing activity which may result in a segment being classified as imbalanced and corrective measures being taken. Moreover, if a segment has negative biological indicators over 2 years during the period 2017-2019, the segment is then classified as a segment to be monitored.

- by basing itself on unambiguous biological indicators. Biological indicator calculations sometimes give rise to legitimate reservations as to their interpretation (questionable biomass evaluations, for example). Where this is the case, negative biological indicators, even if negative for three consecutive years, are insufficient to classify a segment as imbalanced. As a precaution, the segment would nevertheless be classified as a segment to be monitored.

For the purposes of this report, France considers an imbalanced segment to be a segment which meets one of the following conditions:

- 'sustainable harvest' (SHI) or 'stocks at risk' (SAR) biological indicators are negative for the last three years of the report,
- at least two of the 'number of overexploited stocks' (NOS) or 'economic dependence indicator¹¹' (EDI) biological indicators are negative for each of the last three years of the report.

It should be noted that the NOS and EDI indicators are not included in the European Commission guidelines of 2 September 2014. However, these indicators were proposed in STECF report No 15-02 from February 2015 which examined how Member States balanced their fishing capacity and the reports of those Member States.

As with the reports from previous years, France chose to calculate the NOS and EDI indicators in addition to the indicators mentioned in the guidelines as:

- they do not require knowledge of current $F(c)$ and $F(msy)$ fishing mortality for all stocks, as is the case for the SHI indicator,
- they use the concept of 'stocks in poor condition' which is broader than the concept of stocks at risk defined for the SAR indicator.

The use of these indicators was all the more useful because the available data and the methodology described by the STECF for calculating the SHI indicator do not allow imbalanced segments to be identified for France. As explained in point 3.2 of this report, the data for calculating the SHI indicator was only available for 61 stocks. However, the assessments are becoming more robust, with three additional stocks having now become subject to analytical assessment since the last report.

This is also true for the SAR indicator which applies only to Atlantic and Mediterranean eel, Mediterranean hake, Mediterranean red mullet and Mediterranean Posidonia-dependent stock as referred to in points 3.2.a and 8.2.

ii. List of imbalanced French segments

Table 4: List of the 5 imbalanced segments

Segment	Name	Number of vessels in 2018	Biological criteria (biological overcapacity)	Landed stocks in poor condition	Technical criteria (technical overcapacity)	Economic criteria (economic overcapacity)	Changes compared to 2017
ME ME DTS VL1824	Mediterranean - Mediterranean - trawlers - between 18 and 24 metres	28	Imbalance NOS 1, SAR	Red mullet - MUT (37.GSA7), European hake - HKE (37. GSA7)	Balance	Balance	Number of vessels and capacity frozen at the level of the last report
ME ME DTS VL2440	Mediterranean - Mediterranean - trawlers - between 24 and 40 metres	31	Imbalance NOS 1, SAR	Red mullet - MUT (37.GSA7), European hake - HKE (37.GSA7)	Balance	Economic non-viability	Number of vessels and capacity frozen at the level of the last report
ME ME ELE VL0024	Mediterranean - Mediterranean - between 0 and 24 metres – eel fishing as subsidiary activity	219	Imbalance SAR	Eel - ELE (37)	Not applicable to fleets of less than 12 metres	Balance	Increase in number of regional fishing authorisations (+2)
ME ME VL0012 - gangui fishing	Mediterranean - Mediterranean - between 0 and 12 metres – gangui fishing	23	Imbalance SAR	Posidonia beds	Not applicable to fleets of less than 12 metres	Balance	Number of vessels unchanged between 2017 and 2018
AT ELE VL0024	Atlantic - between 0 and 24 metres – eel fishing as subsidiary activity	435	Imbalance SAR	eel - ELE (27)	Not applicable to fleets of less than 12 metres	Balance	Decrease in number of CMEA licences with special fishing rights for glass eel and eel (+4)

As stated under point 1 of the summary of this report, France included in its imbalanced segments three segments which were not based on Commission Decision 2010/93/EU of 18 December 2009. The

aforementioned Decision classifies all vessels according to a single length, single primary gear and single zone of activity. This type of classification is not adapted to certain types of fishing activity carried out as a subsidiary activity. Indeed, vessels active in those fisheries are distributed between various segments in which the share of those stocks landed by the segment is marginal. It is therefore impossible to identify an imbalance. For fisheries with stocks deemed to be in poor condition, France therefore added fleet segments in order to bring vessels operating with those stocks into a single segment irrespective of their primary annual activity. The segments in question are those bringing together:

- vessels of between 0 and 24 metres fishing eel as a subsidiary activity on the Atlantic seaboard,
- vessels of between 0 and 24 metres fishing eel as a subsidiary activity in the Mediterranean,
- vessels of between 0 and 12 metres carrying out gangui fishing in the Mediterranean.

From a methodological perspective, the number of vessels in these three segments corresponds to:

- the number of eel licences¹⁷ issued for the years in question, irrespective of the age of the eels, and for the two seaboards,
- the number of European fishing authorisations for gangui fishing.

However, three segments were not classified as imbalanced despite biological indicators classifying them as such, on account of reservations as to the interpretation of the stock and the robustness of the indicator. Those segments were all classified as segments to be monitored. The segments in question are:

- Segment AT MC_OE_Is OTM VL40XX (Atlantic - Celtic Sea, West Scotland, Iceland - pelagic trawlers - more than 40 metres) was not included despite a negative SHI as it targets blue whiting in zone VIIbc, VIIe-k, which, despite being in poor condition, has a high biomass. Fishing mortality has been falling for a number of years and is now close to Fmsy level. Finally, the segment is made up of just one vessel and contributes less than 1% to the exploitation of the stock. This reflects the low impact which the fishing activity of this vessel has on the stock. All of these arguments combined are why this segment is not included as an imbalanced segment but as a segment to be monitored, largely for economic reasons.
- Segments AT MC_OE_Is FPO VL0010 and AT MC_OE_Is FPO VL1012 (Atlantic - Celtic Sea, West Scotland, Iceland - pot vessels - less than 12 metres) are also on the list of segments to be monitored despite having negative biological indicators (NOS 1 and NOS 2) for three consecutive years which would suggest classifying them as imbalanced segments. This was done on account of the stock exploited by those segments. In ICES subarea VII, whelk has been considered to be in poor condition (overfished) for a number of years. However, there are a number of reservations in terms of the interpretation of the assessment of the stock condition. Despite the reference document, i.e. the BESTCLIM programme, clearly presenting the stock condition until 2015, it only presents developments in biomass from 2016, without determining fishing mortality. It was updated in 2017, and then again in 2018. However, it has no reference value. The different stock assessment approaches proposed under the project are weak and offer differing results. The limitations inherent in this project mean that extreme caution must be taken when assessing the actual condition of the stock. Consequently – and in line with the principles set out in part 2.2, subsection i of this report – France has decided to include segments AT MC_OE_Is FPO VL0010 and AT MC_OE_Is FPO VL1012 with the segments to be monitored.

Two segments were not classified as having an imbalance despite their biological indicators suggesting they did.

¹⁷ CMEA licence for the Atlantic and regional fishing authorisations for the Mediterranean seaboard.

Those segments were:

- Segment ME ME OTM VL2440 (Mediterranean - Mediterranean - pelagic trawlers - between 24 and 40 metres) which mainly fishes anchovy and has an imbalance on account of its SHI indicator. There is only one vessel in the segment, which makes it highly questionable to consider there to be an imbalance in the segment. Furthermore, the segment's landings account for less than 1% (0.45% to be precise) of the total value of landings in the fishing region in question. This reduces the significance of the segment considerably. By comparison, segment ME ME DTS VL2440 contributes more than 14%, in value terms, to the same fishing zone (i.e. zone 37). Mediterranean trawlers have been progressively turning away from pelagic fisheries, in particular anchovy. There is now only this one vessel remaining, which accounts for half of the total volume of this stock caught by French vessels. Lastly, as is the case with the other trawlers covered by the West Med management plan, this vessel is subject to an increasing reduction in its annual fishing effort quota for the period 2019-2026. For all these reasons, the segment is not considered to have an imbalance but is instead considered a segment to be monitored.
- Segment OM AFR_Oind PS_ VL40XX (Africa - Indian Ocean - seiners – more than 40 metres) comprises ocean-going seiners fishing tuna-like species and has an imbalance according to the SHI indicator used by the French authorities. The segment's results indicate that it should be considered an imbalanced segment. As it is too heavily reliant on stocks which are in poor condition, namely yellowfin tuna in zone 51 and bigeye tuna in zones 51 and 47, the SHI indicator used by the French authorities points to a considerable imbalance over the last 3 years. Nevertheless, given the specific nature of this fishery, which is highly competitive and international, with foreign fleets using other fishing techniques and targeting the same stock, the economic viability of the fleet could be compromised by considering the segment to have an imbalance, if this rule is applied exclusively to the French segment without, at the very least, coordinating with the other EU fleets concerned. The French authorities do not believe that all conditions have been met to consider there to be an imbalance in the segment, deciding instead to consider it a segment to be monitored.

The capacity reduction objectives for those segments which are imbalanced in this report and the methodology used are specified under point 6.2 of the present report.

iii. Changes compared to the assessments presented in the 2020 report

The five segments with an imbalance in the 2021 report were already imbalanced in the 2020 report.

The segments in question are:

- vessels of between 0 and 24 metres fishing eel in the Atlantic,
- vessels of between 0 and 24 metres fishing eel in the Mediterranean,
- trawlers of between 18 and 24 metres in the Mediterranean,
- trawlers of between 24 and 40 metres in the Mediterranean,
- vessels of between 0 and 12 metres carrying out gangui fishing in the Mediterranean,

The segments comprising seiners of between 12 and 18 metres targeting sardine in the Bay of Biscay in the Atlantic and in the Celtic Sea and West Scotland are once again balanced due to an improvement in the condition of the sardine stock, which has an F/Fmsy ratio which is now below 1 (0.84).

2.3. Segments to be monitored

i. Methodology used

Segments to be monitored are determined by evaluating different indicators. In total, 22 segments were classified as segments to be monitored.

- a) The segments concerned are segments which contributed significantly to landings of stocks in poor condition, albeit infrequently, i.e. in two of the last three years examined. Landings did not reach the point of imbalance for indicators over the last three years. The segments were monitored as a precaution in order to check their impact on the quantities of stocks in poor condition which were removed. There are three such segments. The segments in question are: AT GG_Ib PS_VL1218 (Atlantic - Bay of Biscay - seiners- between 12 and 18 metres), AT MC_OE_Is PS_VL1218 (Atlantic - Celtic Sea, West Scotland - seiners - between 12 and 18 metres) targeting sardine, and AT MC_OE_Is DTS VL1824 (Atlantic - Celtic Sea, West Scotland - trawlers - between 18 and 24 metres) targeting cod.
One of the segments in this category last year has been removed, namely segment AT MC_OE_Is DTS VL2440 (Atlantic - Celtic Sea, West Scotland - trawlers - between 24 and 40 metres), comprising trawlers mainly targeting cod in the Atlantic.
- b) Segments assessed as imbalanced, albeit with scientific knowledge subject to interpretation (slight imbalance for a single indicator, recent scientific opinions suggesting an improvement in the stock, difficulties in interpreting the status of the stock) were also classified as segments to be monitored. Segments which exploit these stocks and were seen to have the same status but only in two of the last three years were also included in this list. There were two segments with an imbalance, namely segments AT MC_OE_Is FPO VL0010 and AT MC_OE_Is FPO VL1012 (Atlantic - Celtic Sea - West Scotland, Iceland - pot vessels - less than 12 metres) comprising pot vessels targeting whelk in zone 27.7e. There were also two segments with an imbalance but only during the last two years which exploit whelk in zone 27.7d, namely segments AT MdN_Mchest FPO VL0010 and AT MdN_Mchest FPO VL1012 (Atlantic - North Sea, Eastern Channel - pot vessels - less than 12 metres).
- c) There were segments with an imbalance according to their biological indicators which were deliberately classified as segments to be monitored due to their specific characteristics. This was the case for three segments, two of which comprise a single vessel, namely ME ME OTM VL2440 (Mediterranean - Mediterranean - pelagic trawlers - between 24 and 40 metres) targeting anchovy, OM AFR_Oind PS_VL40XX (Africa - Indian Ocean - seiners – more than 40 metres) and AT MC_OE_Is OTM VL40XX (Atlantic - Celtic Sea, West Scotland, Iceland - pelagic trawlers - more than 40 metres).
- d) The segments to be monitored were also segments classified as such on account of their economic viability. The SAR, SHI and NOS indicators did not demonstrate a significant impact or primary activity involving stocks in poor condition, while the EDI indicator did not point to economic dependence on stocks in poor condition. Segments were therefore identified on the basis of economic overcapacity observed during two of the last three years. 12 such segments were identified for this report.

ii. List of French segments to be monitored

Table 5: List of the 10 segments to be monitored according to biological indicators.

Segment	Name	Associated species/gear	Number of vessels in 2019	Average vessel age	Changes between 2018 and 2019
AT GG_Ib PS_VL1218	Atlantic - Bay of Biscay - seiners - between 12 and 18 metres	Sardine (PIL 27.8abd)	14	36	3 vessels fewer
AT MC_OE_Is PS_VL1218	Atlantic - Celtic Sea, West Scotland - seiners - between 12 and 18 metres	Sardine (PIL 27.8abd)	11	36	3 vessels fewer
AT MC_OE_Is FPO VL0010	Atlantic - Celtic Sea, West Scotland, Iceland - pot vessels - less than 10 metres	Whelk (WHE 27.7e)	147	26	23 vessels fewer
AT MC_OE_Is FPO VL1012	Atlantic - Celtic Sea, West Scotland, Iceland - pot vessels - between 10 and 12 metres	Whelk (WHE 27.7e)	43	21	1 vessel fewer
AT MC_OE_Is DTS VL1824	Atlantic - Celtic Sea, West Scotland - trawlers - between 18 and 24 metres	Cod (COD 27)	53	23	3 vessels fewer
AT MdN_Mchest FPO VL0010	Atlantic - North Sea, Eastern Channel - pot vessels - less than 10 metres	Whelk (WHE 27.7d)	74	22	11 additional vessels
AT MdN_Mchest FPO VL1012	Atlantic - North Sea, Eastern Channel - pot vessels - between 10 and 12 metres	Whelk (WHE 27.7d)	27	28	8 additional vessels
ME ME OTM VL2440	Mediterranean - Mediterranean - pelagic trawlers - between 24 and 40 metres	Anchovy (ANE 37)	1	16	No change
OM AFR_Oind PS_VL40XX	Africa - Indian Ocean - seiners - more than 40 metres	Yellowfin tuna (YFT 51), bigeye tuna (BET.47 and BET.51)	22	19	No change
AT MC_OE_Is OTM VL40XX	Atlantic - Celtic Sea, West Scotland, Iceland - pelagic trawlers - more than 40 metres	Blue whiting (WHB 27)	1	45	No change

Table 6: List of the 12 balanced segments to be monitored in terms of their economic viability.

Segments to be monitored	Name	Assessment of economic viability	Number of vessels	Average vessel age	Change as compared to 2020 report (i.e. between 2018 and 2019)
AT MC OE Is PGP VL0010	Atlantic - Celtic Sea, West Scotland - between 0 and 10 metres	Economic overcapacity over the period 2011-2018. However, the number of vessels has been falling considerably over time (-37% over the period). Furthermore, no impact on stocks in poor condition (biological indicators remained positive throughout the period).	16	27	8 vessels fewer
AT MC_OE_Is DTS VL40XX	Atlantic - Celtic Sea, West Scotland -	The segment has fewer than 10 vessels which limits the usefulness of the analysis. Economic overcapacity observed for 2 years. Furthermore, positive biological indicators for the entire period.	3	12	No change
AT MC_OE_Is PMP VL1012	Atlantic - Celtic Sea, West Scotland -	Economic overcapacity observed for 2 years. The number of vessels has fallen by almost 25% since 2011. Furthermore, positive biological indicators for the entire period.	24	26	3 additional vessels
AT MdN_Mchest DFN VL0010	Atlantic - North Sea, Eastern Channel	Economic overcapacity observed for 2 years. The number of vessels has fallen by almost 40% since 2011. Furthermore, positive biological indicators for the entire period.	34	21	8 additional vessels
AT MdN_Mchest DFN VL1012	Atlantic - North Sea, Eastern Channel	Economic overcapacity observed for 3 years. Negative economic indicator. Economic imbalance in the segment. The number of vessels has fallen by almost 46% since 2011. Furthermore, positive biological indicators for the entire period.	39	28	9 vessels fewer

AT MdN_Mchest DTS VL40XX	Atlantic - North Sea, Eastern Channel	The segment has fewer than 10 vessels which limits the usefulness of the analysis. Economic overcapacity observed for 2 years. Furthermore, positive biological indicators for the entire period.	7	22	1 vessel fewer
AT MdN_Mchest HOK VL0010	Atlantic - North Sea, Eastern Channel - hooks - between 0 and 10 metres	Continued economic overcapacity since 2016, intensifying in 2018. However, dependence on stocks in poor condition fell considerably over the course of the period and is now virtually at zero (EDI close to 0). No negative biological indicators at any point during the period.	23	28	5 vessels fewer
AT MdN_Mchest FPO VL1218	Atlantic - North Sea, Eastern Channel	The segment has fewer than 10 vessels which limits the usefulness of the analysis. Technical overcapacity in the segment.	4	46	2 additional vessels
ME ME DTS VL1218	Mediterranean - Mediterranean - between 12 and 18 metres	The segment has fewer than 10 vessels which limits the relevance of the assessment.	3	58	1 vessel fewer
ME ME HOK VL1218	Mediterranean - Mediterranean - between 12 and 18 metres	The segment has fewer than 10 vessels which limits the usefulness of the analysis. The overcapacity in the segment is only technical, with values reaching the point of balance for 90 effort.	8	17	No change
ME ME DFN VL1218	Mediterranean - Mediterranean - netters - between 12 and 18 metres	The segment has fewer than 10 vessels which limits the usefulness of the analysis. Technical overcapacity for the entire period. No impact on biological indicators which remain positive.	7	39	1 vessel fewer
OM Reunion PP excl. seiners HOK VL1218	Other regions - La Réunion - between 18 and 24 metres	Economic overcapacity since 2011 which is increasing over time.	15	19	1 vessel fewer

iii. Changes compared to the assessment presented in the 2020 report

There is an upward trend in the number of segments to be monitored, which increased from 15 to 22 segments, or by 32%. This is due to a notable increase in the number of segments with economic overcapacity.

The analysis of economic overcapacity needs to be qualified given the small number of vessels in each segment. Only half of the 12 segments assessed as being economically non-viable actually have more than 10 vessels, which is the threshold for considering an economic assessment to be useful. Nevertheless, in the case of almost all fisheries the imbalance was slight. Segments were either close to profitability or had alternated since 2011 between profitable and unprofitable years.

iv. Situation for fleet segments in the outermost regions

In accordance with Article 22(3) of Regulation (EU) No 1380/2013, 'separate assessments shall be drawn up for fleets operating in the outermost regions and for vessels operating exclusively outside Union waters'. The specific characteristics of such fleets were therefore taken into account when drawing up this report. The specific overriding segmentation in the outermost regions concerns 35 segments. In 2019, those segments comprised 1 572 vessels, of which 96% were less than 12 metres in length.

Considerable effort has been made since 2015 to address the lack of available data for certain segments. The situation has improved, with biological, technical and economic data having been provided for a growing number of segments. We would emphasise that economic data has been provided for segments of less than 12 metres in Guadeloupe and French Guiana since 2016. This year, a problem was encountered in obtaining this information. Consequently, it was not included in the calculations for the economic and technical indicators for the segments in this region. The data is due to be updated in September 2021 and will allow values to be obtained for the indicators in question. France intends to continue its efforts to fully integrate those territories into the report.

In 2019, 12 segments had landing data enabling them to be classified as balanced:

- Eight segments had landings for which the SHI indicator could be calculated (at least 40% of landings were from stocks for which F/Fmsy is available). The results obtained for those segments led to them being classified as balanced (SHI below 1).
- In the four other segments, the landing volume for species subject to an analytical assessment accounted for less than 40% of the total landing volume, but was not zero. It accounted for at least 10% of the landing volume. Moreover, with NOS 1 and NOS 2 values of zero, it was noted that there was no reliance on stocks in poor condition. Due to the fulfilment of these cumulative conditions, it can be inferred that those segments are considered balanced.

France has launched a comprehensive programme for improving scientific understanding of the stocks fished in these territories, as shown this year by the three new stocks for which an analytical assessment was available. At the same time, France has also improved the reporting system for economic information needed to establish the economic and technical indicators. A thorough and comprehensive data collection and consolidation project has been underway in these territories for a number of years, picking up the pace in 2021.

Table 7: List of the 12 balanced segments in the outermost regions in 2019

Segment	Associated species/gear	Technical and economic indicator(s)	Number of vessels in 2019	Average vessel age
OM Martinique FPO VL0010	Caribbean spiny lobster SLC.31	Long-term but moderate economic overcapacity.	147	23

		Imbalance only observed in a single year.		
OM Martinique FPO VL1824	Snapper SNA.31	Balance	2	8
OM Martinique FPO VL1218	Snapper SNA.31	Balance	1	26
OM Martinique PGP VL0010	Caribbean spiny lobster SLC.31	Long-term but very moderate economic overcapacity. Imbalance only observed in a single year.	196	23
OM Mayotte PP excl. seiners HOK VL0010	Yellowfin tuna YFT.51	Balance	108	21
OM Mayotte PP excl. seiners HOK VL1012	Swordfish SWO.51	Balance	18	1
OM Reunion PP excl. seiners HOK VL0010	Yellowfin tuna YFT.51	Analysis impossible due to insufficient data	148	17
OM Reunion PP excl. seiners HOK VL1218	Yellowfin tuna YFT 51	Imbalance	15	19
OM Reunion PP excl. seiners PGP VL1012	Swordfish SWO.51	No use as only one vessel	1	12
OM Reunion PP excl. seiners HOK VL1824	Swordfish SWO.51	Economic overcapacity but unverified over 3 years	4	14
OM Reunion PP excl. seiners HOK VL1012	Swordfish SWO.51	Balance	4	13
OM Reunion PP excl. seiners PGP VL0010	Yellowfin tuna YFT 51	Balance	8	21

3. Section A: Fleet segments and fisheries

3.1. Description of fleet segments

The fleet segments defined for this report were created in accordance with the segments set out in Appendices II and III to Commission Decision 2010/93/EU of 18 December 2009 adopting a multi-

annual Community programme for the collection, management and use of data in the fisheries sector for the 2010–2013 period, i.e. by length class, primary gear and zone of activity.

Nevertheless, priority was not given to the use of supra regions. In order to align the stock distribution and fishing strategies of French vessels, France refined its vessel segmentation by using more specific geographical groupings than supra-regional level whilst remaining compliant with Annex 2 to Decision 2010/93/EU. The study identifies 10 reference regions:

Table 8: Reference regions for indicator calculations

Supra region (DCF)	Regions selected for the segmentation of the French fleet	ICES division	Description of the region in the indicator tables ('Region Capacity')
Atlantic	North Sea - Eastern Channel	27.1; 27.2; 27.3; 27.4; 27.7.d	MdN_Mchest
	Western Channel - Celtic and Irish Seas - West Scotland - Iceland	27.5; 27.6; 27.7 (except 27.7.d); 27.12; 27.14	MC_OE_Is
	Bay of Biscay and the Balearic Seas	27.8; 27.9; 27.10	GG_lb
Mediterranean	Mediterranean	37	ME
Other regions	Africa, Antarctica, Indian Ocean - Seiners of more than 24 metres	34; 47; 48; 51; 58	OM AFR_Oind
	La Réunion – Vessels of less than 24 metres	51 (Vessels registered in La Réunion)	OM Reunion PPHSen
	Mayotte – Vessels of less than 24 metres	51 (Vessels registered in Mayotte)	OM Mayotte PPHSen
	French Guiana	31 (Vessels registered in French Guiana)	French Guiana
	Guadeloupe	31 (Vessels registered in Guadeloupe)	Guadeloupe
	Martinique	31 (Vessels registered in Martinique)	Martinique

Primary gear and length categories are as defined in the abovementioned Appendix III, namely:

Table 9: List of primary metiers in French fleet segments

Gear code	Description of gear	Metier type
DRB	Dredgers	Active gear
DTS	Demersal trawlers and demersal seiners	Active gear
MGO	Other active gear	Active gear

MGP	Various active gear	Active gear
OTM	Pelagic trawlers	Active gear
PS_	Purse seiners	Active gear
TBB	Beam trawlers	Active gear
DFN	Drift and/or fixed netters	Passive gear
FPO	Vessels using pots or traps	Passive gear
HOK	Hooks	Passive gear
PGO	Other passive gear	Passive gear
PGP	Various passive gear	Passive gear
PMP	Various active and passive gear	Polyvalent gear
NONACTIVE	Inactive	Inactive

Table 10: List of length categories in French fleet segments

Atlantic - Outermost regions	Mediterranean
0 < 10 m = VL0010	0 < 6 m = VL0006
10 < 12 m = VL1012	6 < 12 m = VL0612
12 < 18 m = VL1218	
18 < 24 m = VL1824	
24 < 40 m = VL2440	
40 m and over = VL40XX	

After segmentation by region, primary metier and length category, more than 239 fleet segments were identified according to the following geographical distribution during the period:

Table 11: Changes in the vessel population and number of segments by region (2011-2019)

	2011	2012	2013	2014	2015	2016	2017	2018	2019
Africa - Antarctica - Indian Ocean	2	1	2	2	2	2	2	2	2
Bay of Biscay and the Balearic Seas	38	40	44	41	42	44	42	44	44
Guadeloupe	10	10	10	10	10	10	10	10	10

French Guiana	4	3	4	5	7	5	5	5	4
Martinique	14	12	12	11	12	11	10	10	10
Mayotte PP excl. seiners					3	3	3	3	4
Celtic Sea - West Scotland	43	43	40	40	37	34	37	36	36
North Sea - Eastern Channel	38	37	36	36	36	36	35	33	36
Mediterranean	32	32	31	29	31	29	28	28	28
Reunion PP excl. seiners	6	6	6	8	6	6	7	6	7
Inactive vessels	18	17	17	17	16	16	14	14	14
Total	205	201	202	199	202	196	193	191	195

3.2. Link with fisheries

i. Identification of evaluated stocks

During the period 2011-2019, there were 289 stocks for which French landings were calculated not to be at zero. As France did not have biological data for all of those stocks, efforts to gather data focused as a priority on the following stocks (alternative criteria):

- Criterion 1: stocks for which France's share in terms of value represents at least 1% of all French landings
- Criterion 2: stocks for which France's share in terms of quantity represents at least 1% of all French landings
- Criterion 3: stocks managed through a regional fisheries organisation
- Criterion 4: stocks managed through a European multi-annual management plan
- Criterion 5: stocks for which France accounts for more than 30% of the European allowable catch rate
- Criterion 6: stocks for which France has a quota in excess of 1 000 tonnes
- Criterion 7: notified stocks. This category also includes stocks subject to a fishing ban. As bans were complied with by vessels flying the French flag, such stocks are indicated merely for information purposes.

Once the list had been drawn up, France commissioned the French Research Institute for Exploitation of the Sea (Ifremer) to gather all biological data available on those stocks, including as a minimum,

- an opinion or trend: this assessment is based on stock evaluations carried out internationally (ICES, ICCAT, IOTC, etc.). It may be quantitative, i.e. current fishing mortality (Fc) in relation to the reference point (Fmsy), or qualitative, i.e. an expert assessment.
- quantities landed internationally of each stock.

116 of these stocks were monitored and a scientific opinion drawn up, as indicated in Annex 5 (stocks for which France accounts for less than 1% of the total are not included in this Annex either).

France therefore has the data needed to calculate the indicators covered by this report for 116 stocks. Annex 5 to this report contains the list of stocks for which the necessary variables for calculating the SHI could be gathered for the years 2011 to 2019. Although 116 stocks are indicated, only 112 stocks had a landing value which was not at zero.

ii. Assessment of stocks used

The assessment for the stocks used is binary:

- 0: stock in poor condition
- 1: stock in good health.

The assessment was produced for each stock on the basis of two indicators:

- the stock exploitation level (mortality),
- the stock condition (biomass level).

The indicator of the stock exploitation level determines the final condition of the stock used in the report except where overfishing is low whilst biomass is high when the B/B_{msy} ratio is greater than 1.5, or where biomass is very high when the ratio is close to or greater than 2.

In total, five stocks were assessed as being in good health when seen in terms of low overfishing and high biomass:

- Haddock - HAD (VIIb-k)
- Saithe - POK (IIIa, IV,VI)
- Blue whiting - WHB (27)
- European plaice – PLE (VIIe)
- Common sole – SOL IV and VIIIab

iii. Use of assessments for the indicators covered by the report

Assessments for the stocks used were integrated depending on the indicator calculation conditions (see point 8.2).

a. For the 'stocks at risk' indicator (SAR):

In line with the guidelines referred to under point 8.2, this indicator is only calculated for active fleet segments exploiting stocks:

- which comply with the definition set out in point 10.1 of Commission Communication COM(2014)545 final of 2 September 2014,
- where the stocks caught by the segment represent at least 10% of the segment's total landings, or if the segment contributes to at least 10% of total landings for that stock.

This very restrictive definition does not take into account certain stocks notified by scientific experts and international organisations.

Furthermore, in the absence of the list of stocks at risk produced for all Member States for the 2021 report, France, drawing on the definition set out in the guidelines, still included in this category:

- stocks dependent on a fragile habitat or in poor condition and recognised as such by relevant international organisations. The same applies to gangui fishing activity on Posidonia beds in the Mediterranean as detailed in point 8.2 and Annex 2 to this report. This assessment is confirmed by Annex II to the Barcelona Convention for the protection of the Mediterranean

Sea and Annex IV to the Habitats Directive. Annex 2 to this report – also provided in 2018 – summarises this fishing method.

- Mediterranean hake, red mullet and shrimp for which a significant reduction in fishing effort is recommended in a GFCM16 opinion and repeated each year.
- Atlantic and Mediterranean eel, in particular Atlantic glass eel, for which a significant and lasting reduction in recruitment to the stock was observed in the September 2016 opinion of ICES and the Joint EIFAAC/ICES Working Group on Eels (WGEEL), which has since been renewed.

The list of SARs therefore comprises the following stocks for the years 2011 to 2019: - hake (HKE) in the Mediterranean; - red mullet (MUT) in the Mediterranean; - stocks associated with Mediterranean Posidonia and exploited by vessels using gangui fishing methods - eel stocks on the Atlantic and Mediterranean seaboard (ELE).

b. For the 'sustainable harvest indicator' (SHI):

Assessments of a given fleet segment must meet the following two cumulative criteria:

- stock exploited with an F_c/F_{msy} ratio that can be calculated
- the same stock with available F_c/F_{msy} ratio must account for at least 40% of total landings for the segment in question.

France included an additional SHI calculation which allows the segment's contribution to the overall fishing mortality of each exploited stock to also be taken into account. The EU's SHI otherwise does not allow this to be identified as it focuses on the segment's stock dependence. Both criteria were taken into account to define the imbalance.

The F_c/F_{msy} ratio is only available for 61 stocks. Moreover, 51 segments meet the second criteria, i.e. the share of the stock accounts for at least 40% of the total volume of landings for the segment over the last three years. Under this indicator, there is therefore an imbalance in two segments, namely ocean-going seiners of more than 40 metres operating in the Atlantic and Indian Ocean, and pelagic trawlers of more than 40 metres fishing in the Western Channel, West Scotland.

An analysis of the stocks underlying the segment of pelagic trawlers of more than 40 metres fishing in the Western Channel, West Scotland resulted in France preferring to classify the segment as a segment to be monitored as this better reflected reality. Indeed, despite being overfished, blue whiting (WHB (27)) is considered to be correctly exploited due to its high biomass.

The segment comprising ocean-going seiners has not been classified as imbalanced either. This is because, competitively speaking, such a decision could have a particularly negative economic impact on the French segment.

Consequently, no French segments ultimately have an imbalance on the basis of the SHI indicator.

c. For the 'number of overexploited stocks' indicator (NOS):

An analysis was carried out on the basis of two evaluations:

- an 'NOS 1' evaluation calculating the number of stocks in poor condition fished by the segment where:
 - 80% or more of the calculated stock is landed by segments of the French fleet, and
 - the segment's contribution to total landings is greater than 1/the number of French segments fishing the stock.

- an ‘NOS 2’ evaluation calculating the number of stocks in poor condition fished by the segment for which the segment’s contribution to total landings is greater than 15%. The analysis allowed the 5% and 10% NOSs to be refined. However, only the 15% NOS was used in conjunction with the EDI to identify the imbalance.

For segments actively fishing stocks in poor condition according to the ‘NOS 1’ and ‘NOS 2’ calculations, the imbalance assessment was used.

For segments actively fishing stocks in poor condition according to only one of either the ‘NOS 1’ or ‘NOS 2’ calculations, the imbalance assessment was only used if the segments’ economic dependence on those stocks was high. Dependence was considered to be high where the EDI indicator demonstrated that dependence was greater than 40% of the total value of the species landed by the segment.

Although six segments were identified under the NOS indicator, it was decided that two segments exploiting whelk should not be included, specifically

- whelk, WHE (Vile), which is subject to a number of reservations in terms of its interpretation. This stock has been considered to be in poor condition (overfished) for a number of years. However, the assessment of the stock condition is ambiguous. The reference document, i.e. the BESTCLIM programme, presents developments in biomass since 2016, without determining fishing mortality. It was updated in 2017, and then again in 2018. However, it has no reference value. The various stock assessment approaches proposed under the project makes the assessment weak and offers differing results. The limitations inherent in this project mean that extreme caution must be taken when assessing the actual condition of the stock. Consequently, the two segments comprising pot vessels fishing whelk were not included as imbalanced segments but instead as segments to be monitored.

In order to illustrate the different approaches relating to this indicator, the following table summarises and explains once again how they have been used in the reports submitted by France since 2015. As in previous reports, this report includes the NOS indicator in accordance with the STECF recommendations (see point 8.2). However, two different calculation methods have been applied.

Table 12: Summary of different NOS indicator variants in reports submitted by France since 2015

NOS indicator variants	Methodology	2015 report	2016 report	2017 report	2018-2019 and 2020 reports

NOS 1 54%	Number of stocks in poor condition by segment where the segment's landing ratio for a stock as a proportion of all landings is higher than the ratio 1/total number of active segments fishing the stock. As the total number of segments is only understood at the level of each Member State, the indicator is calculated solely for stocks for which France has a share of at least 54%. In this context, the number of segments targeting this stock in France was considered to be a proxy of the total number of segments targeting this stock.		X		
NOS 1 80%	Number of stocks in poor condition by segment where the segment's landing ratio for a stock as a proportion of all landings is higher than the ratio 1/total number of active segments fishing the stock. As the total number of segments is only understood at the level of each Member State, the indicator is calculated solely for stocks for which France has a share of at least 80 %. In this context, the number of segments targeting this stock in France was considered to be a proxy of the total number of segments targeting this stock. The ratio was increased to 80% in the interests of identifying those segments making the biggest contribution.			X	X
NOS 2 15%	Number of stocks in poor condition by segment where the landings of the segment for a stock are higher than 15% of all landings of that stock.	X		X	X
NOS 2 10%	Number of stocks in poor condition by segment where the landings of the segment for a stock are higher than 10% of all landings of that stock.				X
NOS 2 5%	Number of stocks in poor condition by segment where the landings of the segment for a stock are higher than 5 % of all landings of that stock.				X

d. For the 'economic dependency indicator' (EDI)

This indicator allows a fleet segment's economic dependence on stocks in poor condition to be evaluated. It alone cannot justify the existence of an imbalance in a fleet segment. However, it is able to support such an assessment in conjunction with other biological indicators. This indicator is also used to identify segments to be monitored due to their economic dependence on stocks in poor condition.

The list of stocks and their assessment (i.e. in good health or in poor condition) used in this report is contained in Annex 5.

3.3. Development of the fleet

The French fleet is renewed by means of operating permit applications. All vessel owners/operators wishing to enter a new fishing unit into the fleet or modify the technical characteristics of one of their vessels must apply for an operating permit. Furthermore, a distinction is drawn between operating permits requested due to:

- a shipwreck or other type of incident at sea resulting in a fishing vessel becoming unseaworthy: 'operating permit by right',
- a new fleet entry or active vessel upgrade without the exit of a vessel of equivalent capacity by the applicant: 'other operating permit',
- fleet renewal or an active vessel upgrade, i.e. applications for operating permits submitted in return for one or more vessels permanently exiting the fleet: 'one-for-one operating permit'.

Between 1 January 2011 and 31 December 2019, 1 204 new fleet entries and upgrade projects were launched within the segment for mainland France. Projects consisted of fleet unit upgrades or entries of new fishing units into the fleet by constructing, importing or changing the activity of vessels.

Table 13: Coast-by-coast summary of fleet renewals

Coast of mainland France	Projects	2011	2012	2013	2014	2015	2016	2017	2018	2019
South Atlantic coast	Fleet entries	1	9	13	12	12	19	7	18	5
(vessel equal to or less than 25 metres)	Vessel upgrade	8	4	20	11	15	27	6	7	9
Eastern Channel - North Sea coast	Fleet entries	8	4	6	9	7	12	12	17	22
(vessel equal to or less than 25 metres)	Vessel upgrade	1	2	10	10	11	5	5	7	5
Western Channel - North Atlantic coast	Fleet entries	12	14	24	13	34	24	11	37	33

(vessel equal to or less than 25 metres)	Vessel upgrade	10	4	11	9	8	10	16	9	16
Mediterranean coast	Fleet entries	26	8	56	37	37	41	11	33	26
(vessel equal to or less than 25 metres)	Vessel upgrade	8	3	30	20	30	28	28	29	40
All coasts	Fleet entries	4	6	3	1	4	11	1	3	2
Vessel exceeding 25 metres	Vessel upgrade		4	2	2	1	5	3	6	4
Total		78	58	175	124	159	182	100	166	162

4. Section B: Fishing effort adjustment plan

4.1. Fishing effort reduction plan

i. Available tools

There are various types of management measures in force to reduce fishing effort in fisheries where this is necessary.

These include:

- limits on fishing time: quotas (kW*days or days at sea),
- catch limits: by tonnage or maximum volume, percentage or quota,
- access restrictions: introduction of authorisation schemes,
- technical restrictions: by means of mesh size, selective devices,
- spatial and time-based limits,
- support for permanent or temporary cessation of activity.

This also includes regional access schemes implemented by professionals in their regions to limit the fishing effort of some fleets, such as the measures governing netters in the 'North Atlantic – Western Channel', 'Eastern Channel – North Sea' and 'Southern [French] – Atlantic' regions.

ii. Implementation of supported fleet exit plans

The following fleet exit plans have been implemented with public support:

- in 2007 for the anchovy, 'thonaille', cod, sole, deep-sea species, Mediterranean hake, eel and anglerfish fisheries,
- in 2008 for the anchovy, cod, sole, deep-sea species, Mediterranean hake, eel and anglerfish fisheries,
- in 2009 for the anchovy, cod, sole, deep-sea species, Mediterranean hake, eel, anglerfish, bluefin tuna and tuna fisheries in Senegalese waters,
- in 2010 for the eel and porbeagle fisheries,
- in 2011 for the Mediterranean (trawl), bluefin tuna, cod and eel fisheries,
- in 2012 for the Mediterranean (trawl), porbeagle, cod and Mediterranean eel fisheries,
- in 2013 for the Mediterranean trawl and European eel fisheries in the Mediterranean,

- in 2016 for the Mediterranean trawl fishery and gangui fishery on Posidonia beds in the Mediterranean in zone GSA734,
- in 2017 for the sole netters of between 0 and 18 metres fishery in the Eastern Channel,
- in 2017 for the Mediterranean lobster trawler fishery in zone GSA8,
- in 2017 for the fishery for vessels of between 0 and 24 metres fishing glass eel and yellow eel in the Atlantic supra-region,
- in 2017 for the fishery for netters of between 10 and 12 metres in the Eastern Channel and North Sea.

Fleet exit plans were halted on 31 December 2017 and there have been no supported exits since then. However, this measure was reintroduced under the West Med plan which entered into force in the summer of 2019.

In addition, under the new 'EMFAF Regulation', which replaces Regulation (EU) No 508/2014, fleet exit plans have been reintroduced into ordinary law and will be possible to roll out as soon as the new EMFAF Regulation enters into force. In line with the wishes of the industry (the measure being voluntary as with temporary cessation of activity) and the results of the management measures for segments with an imbalance, fleet exit plans will be possible to roll out. Finally, the post-Brexit context and the situation in the Mediterranean following the entry into force of the West Med plan justify offering fleet exit plans to the professionals affected.

iii. Adjustment of fishing effort for the period 2017-2019

The following fishing effort limits were applied in respect of the different French coasts:

➤ Mediterranean:

- Special attention was paid to trawlers. During the mid-2010s, with a view to the future Mediterranean management plan, the maximum authorised fishing effort for Mediterranean trawlers was reduced to 10% in zone GSA7 due to the condition of the fleets' target hake stock. Under the national management plan for Mediterranean trawlers, fishing effort in 2018 was limited to 18 148 days for Mediterranean trawlers in GSA 7. This limit was maintained in 2019.
- An annual 5-day closure to Mediterranean trawlers for biological recovery.
- Measures under the West Med plan, adopted in 2019, began in 2020.
- In 2021, temporary cessation of activity is due to be reactivated for Mediterranean trawlers in GFCM 37.GSA7 in order to offset the reduction in fishing effort quota for this fleet (-8.5%) due to the entry into force of the West Med plan.
- Under the national management plan for small-scale métiers in the Mediterranean and in view of the situation in terms of the stocks fished, limits on fishing effort were introduced in 2016 for vessels using beach seines, purse seines and dredges in the Mediterranean. Those limits are based on activity levels during the period 2014-2015, serving as a ceiling which may not be exceeded. Other than this ceiling, fishing effort was also reduced for beach seines and purse seines in 2016 under the Mediterranean management plan.

➤ Atlantic:

- The fishing effort of active vessels is governed in accordance with the following schemes: 'cod in the Eastern Channel, North Sea, Western Scotland and the Irish sea', 'deep-sea species', 'Western waters', 'Southern hake – lobster' and 'Western Channel sole'. The fishing effort scheme for the cod fishery was abolished in 2017. In 2018, the capacity system for this fishery was also abolished.
- A quota scheme for vessels with authorisation to access the Eastern Channel sole fishery was introduced in 2015 due to the condition of the stock.

- In 2017, a moratorium was applied to all metiers targeting sea bass in ICES division IV b-c, VIIa and VII d to k, excluding bottom trawls, Danish seines, hook gears (partial closure only in February and March) and static nets.
- A 21-day closure between 1 January and 31 March is applied to sole netters in the Bay of Biscay.

Table 14 : Active fleet levels and ceilings for the period 2011-2019 (31/12/2019)

REGIONS	YEAR	Tonnage (GT or UMS)	Power (kW)
MAINLAND	CEILING	178 124	769 423
	31/12/2019	148 464	674 897
	31/12/2018	150 151	679 103
	31/12/2017	147 301	677 373
	31/12/2016	145 804	673 919
	31/12/2015	144 019	673 087
	31/12/2014	144 654	676 014
	31/12/2013	147 761.53	685 925
	31/12/2012	151 926.35	693 989
	31/12/2011	153 795.82	700 277
LA RÉUNION	CEILING	10 002	31 465
	31/12/2019	3 921	15 501
	31/12/2018	6 595	19 439
	31/12/2017	6 703	19 653
	31/12/2016	6 694	19 397
More than 12 metres	31/12/2015	6 715	19 014
4FD	31/12/2014	6 710	19 014
	31/12/2013	6 713.88	18 502
	31/12/2012	7 048.02	19 509
	31/12/2011	7 568.35	20 579
LA RÉUNION	CEILING	1 050	19 320
	31/12/2019	342	15 501
	31/12/2018	347	11 181
	31/12/2017	355	11 397
	31/12/2016	347	11 107
Less than 12 metres	31/12/2015	342	10 887
4FC	31/12/2014	357	11 254
	31/12/2013	358.06	11 293
	31/12/2012	363.1	11 453
	31/12/2011	397	12 561
GUADELOUPE	CEILING	6 188	162 590
	31/12/2019	2 044	111 985
	31/12/2018	2 302	126 200
	31/12/2017	2 285	126 307
	31/12/2016	3 014	160 762
Less than 12 metres	31/12/2015	3 023	160 434
4FL	31/12/2014	3 001	158 017
	31/12/2013	2 974.84	156 500
	31/12/2012	2 967.70	156 280
	31/12/2011	2 887.13	151 112
GUADELOUPE	CEILING	500	1 750

	31/12/2019	0	0
	31/12/2018	0	0
	31/12/2017	0	0
	31/12/2016	0	0
More than 12 metres	31/12/2015	0	0
4FM	31/12/2014	0	0
	31/12/2013	0	0
	31/12/2012	0	0
	31/12/2011	0	0
MARTINIQUE	CEILING	5 409	142 116
	31/12/2019	1 467	79 417
	31/12/2018	1 633	89 25
	31/12/2017	1 732	92 057
	31/12/2016	1 807	96 938
Less than 12 metres	31/12/2015	1 748	94 476
4FJ	31/12/2014	2 090	110 724
	31/12/2013	2 038.09	108 109
	31/12/2012	1 907.14	99 099
	31/12/2011	1 884.08	96 649
MARTINIQUE	CEILING	1 046	3 294
	31/12/2019	154	1 051
	31/12/2018	317	1 718
	31/12/2017	274	1 403
	31/12/2016	274	1 403
More than 12 metres	31/12/2015	233	1 035
4FK	31/12/2014	233	1 035
	31/12/2013	372	1 549
	31/12/2012	415	1 864
	31/12/2011	501	2 495
FRENCH GUIANA	CEILING	903	11 644
	31/12/2019	712	9 991
	31/12/2018	676	9 541
	31/12/2017	685	9 584
	31/12/2016	642	9 114
Less than 12 metres	31/12/2015	580	7 071
4FF	31/12/2014	700	8 313
	31/12/2013	656	7 808
	31/12/2012	638	7 608
	31/12/2011	577	6 968
FRENCH GUIANA	CEILING	7 560	19 726
	31/12/2019	1 689	4 470
	31/12/2018	2 169	6 050
	31/12/2017	2 104	6 090
	31/12/2016	2 104	6 090
Shrimp vessels, more than 12 metres	31/12/2015	2 393	7 035
4FG	31/12/2014	2 896	8 345
	31/12/2013	3 088	8 971
	31/12/2012	2 877	8 345
	31/12/2011	3 031	9 177

FRENCH GUIANA	CEILING	3 500	5 000
	31/12/2019	0	0
	31/12/2018	0	0
	31/12/2017	0	0
	31/12/2016	0	0
Pelagic vessels, more than 12 metres	31/12/2015	0	0
4FH	31/12/2014	166	723
	31/12/2013	166	723
	31/12/2012	166	723
	31/12/2011	166	723
MAYOTTE	CEILING	13 916	24 000
	31/12/2019	12 641	19 562
	31/12/2018	12 634	19 400
	31/12/2017	12 634	19 400
	31/12/2016	12 634	19 400
Tuna seiners	31/12/2015	2 393	7 035
4FN	31/12/2014	Non-outermost region	Non-outermost region
	31/12/2013	Non-outermost region	Non-outermost region
	31/12/2012	Non-outermost region	Non-outermost region
	31/12/2011	Non-outermost region	Non-outermost region
	CEILING	Definition in progress	Definition in progress
MAYOTTE			
	31/12/2019	287	5 738
	31/12/2018	287	5 779
	31/12/2016	298	6 228
Tuna longliners	31/12/2015	305	6 404
More than 24 metres	31/12/2014	Non-outermost region	Non-outermost region
4FP	31/12/2013	Non-outermost region	Non-outermost region
	31/12/2012	Non-outermost region	Non-outermost region
	31/12/2011	Non-outermost region	Non-outermost region
MAYOTTE	CEILING	Definition in progress	Definition in progress
	31/12/2019	Inventory in progress	Inventory in progress
	31/12/2017	Inventory in progress	Inventory in progress
Demersal and pelagic species	31/12/2016	Inventory in progress	Inventory in progress
Less than 10 metres	31/12/2015	Inventory in progress	Inventory in progress
4FO	31/12/2014	Non-outermost region	Non-outermost region
	31/12/2013	Non-outermost region	Non-outermost region

	31/12/2012	Non-outermost region	Non-outermost region
	31/12/2011	Non-outermost region	Non-outermost region

4.2. Impact on capacity reduction

Fishing effort adjustment measures are aimed at limiting the maximum effort of the French fishing fleet. Fishing effort is no longer increasing. However, vessel activity is shifting. The fleet has been reducing in order to adjust to the available fishing effort and catch quotas.

The impact of support for permanent cessation of activity has been all the more effective where beneficiaries have been highly dependent on fisheries subject to fishing effort reduction measures. Fishing effort has therefore reduced significantly in anchovy and bluefin tuna fisheries. The measure was rolled out again between 2016 and 2017. Although the fleet exit plans came to an end on 31 December 2017, they have been reintroduced under the EMFAF which is due to enter into force by 2022.

5. Section C: Compliance with the entry/exit scheme (power and tonnage)

Pursuant to Article 22(7) of Regulation (EU) No 1380/2013 on the Common Fisheries Policy, the fishing capacity of the French fishing fleet is limited in power (kW) and tonnage (UMS) to the levels set out in Annex II to the abovementioned Regulation. Recognised capacity is understood to mean the fishing capacity of vessels holding a fishing licence within the meaning of Article 4(9) of Regulation (EC) No 1224/2009 establishing a Community control system for ensuring compliance with the rules of the common fisheries policy.

On 31 December 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018 and 2019, the fleet in possession of a fishing licence was below the capacity ceilings allocated to France.

Between 1 January 2011 and 31 December 2019, the French fishing fleet able to undertake fishing activity (declared active on the fishing vessel register) remained stable.

More vessels exited than entered the mainland segment during the period 2011-2015. However, since 2016 this trend has reversed with tonnage and power increasing slightly due to new construction projects and fleet entries related to safety and improving on-board quality of life. This was confirmed in 2019 with the capacity of the mainland fleet remaining well above that of 2016, despite decreasing slightly.

6. Section D: Fleet management

6.1. Strengths and weaknesses of the national fleet management system

- The 2015 and 2016 reports confirmed the revision of the geographical disaggregation of fleet segments with a view to honing the assessments. The disaggregation referred to under point 3.1 was applied as in the report, albeit with sub-segments for the coastal fleets from La Réunion and Mayotte which had previously been grouped together in the same region – in line with the 2017 and 2018 reports. The active fleets and stocks fished did not overlap with each other. Consequently, a separate assessment was deemed appropriate.

A number of difficulties are still being experienced.

- The time lag between an evaluation of N-2 data and the current situation of the fisheries make it difficult to understand the management measures taken.
- A lack of European data on international catches. Without this data it is difficult to estimate the impact of national fleets on each stock.
- In 2019, 101 active segments had fewer than 10 vessels, i.e. 55% of the French fleet. This proved problematic from a statistics point of view, giving rise to questions of a statistical nature regarding the relevance of producing an economic assessment. This major limitation with regard to the economic criteria has already been explained as part of the analysis of segments to be monitored, specifically regarding their economic viability. Extreme caution should be exercised when using this criterion.
- The estimate of the replacement value and capital depreciation costs prevented capital data from being taken into account when calculating the RoFTA and CR/BER economic indicators. Capital data could be included for most segments in this report. However, discussions on strengthening how this variable is calculated are ongoing.
 - Assigning each vessel to a primary region could result in vessels with highly divergent fishing strategies being grouped together within a single segment, e.g. vessel A spending 99% of its time in region 1 and vessel B visiting 3 fishing regions within the same year and only spending 34% of its time in region 1.
 - The creation of sub-segments distinguishing vessels according to landing composition is still being examined. However, for the past two years, the decision was taken to use adapted segments in order to address:
 - active vessels fishing eel in the Atlantic supra-region,
 - active vessels fishing eel in the Mediterranean,
 - active vessels carrying out gangui fishing in the Mediterranean.Vessels involved in these two activities are split into different fleet segments despite each contributing to the targeted fishing effort developed for sensitive fisheries in poor condition. However, as activity in such fisheries is generally of a subsidiary nature, it is impossible to identify dedicated fleet segments. In order to avoid this shortcoming, segments were evaluated for the purposes of this report according to the standard criteria referred to above. France therefore added three subsidiary fishing activity segments:
 - ME ME VL0012 – ‘gangui’ fishing: vessels of between 0 and 12 metres carrying out gangui fishing as a subsidiary activity on Mediterranean seagrass (*Posidonia*) beds,
 - AT ELE VL0024: vessels of between 0 and 24 metres fishing eel as a subsidiary activity on the Atlantic seaboard,
 - ME ME ELE VL0024: vessels of between 0 and 24 metres fishing eel as a subsidiary activity in the Mediterranean.
- It should be a prerequisite that Member States are provided with the data needed to produce this report, particularly in terms of:
 - the dissemination of scientific advice on all stocks fished. As this information is not provided, each Member State gathers the most recent opinions from recognised scientific bodies, some of which are national bodies, without sharing this information. Furthermore, the uniformity of the advice is impossible to verify,

- the dissemination of total quantities fished in respect of stocks to be monitored. As this data is not made available to Member States, each Member State obtains from recognised bodies the total quantities fished, without sharing this data. However, some of these quantities are unavailable or unstable. It is therefore impossible to be certain as to the completeness of the quantities obtained,
- access to the number of vessels and fleet segments from all Member States targeting a specific stock. Obtaining certain indicators, such as NOS 1, is therefore otherwise limited only to Member State segments which are not always representative in terms of total landings.
- Lastly, in order to ensure enhanced monitoring and assessments of French fleet segments, there is still a need to:
 - strengthen dialogue with scientific and professional partners on methodological choices (list of stocks, assignment of vessels to regions, grouping of segments into clusters, etc.) for future reports,
 - improve the quality and availability of data gathered for the preparation of future reports,
 - oversee the renewal and redeployment of the fleet towards balanced segments, where appropriate with support for temporary cessation of activity,
 - optimise the regulatory, technical and administrative measures in force so as to balance fishing capacity with fishing opportunities.

6.2. Action plans for improving the national fleet management system

France welcomes the stock coverage in this report, which has continued to progress with each year, and intends to keep up its efforts to improve it. The national action plan will therefore endeavour to make available data which Member States are responsible for, although the need for stronger European coordination should be kept in mind.

The plan is a move towards comprehensive monitoring of the French fishing fleet, so as to ensure timely management in view of achieving a sustainable balance between fishing capacity and fishing opportunities. In view of this, the plan comprises two sections:

- a qualitative section, for improvements to data gathered for drafting the capacity report,
- a section focusing on reducing the capacity of imbalanced segments and optimising segment management.

i. Improving the quality and availability of data needed to prepare the capacity report

The list of monitored stocks has increased considerably since the 2017 report. During the period 2011-2013, 34% of landings were of monitored stocks. During the period 2011-2014, this increased to 68%. Progress has been constant, leading to a coverage rate in 2017 of 74% of the volume landed on national territory (including overseas regions), or 72% in terms of the landing value. In 2019, following a slight decline in 2018, the share of monitored stocks within landings reached its highest level since the inception of the capacity report, estimated at 79% of landings in both volume and value terms.

Table 15: Coverage rate of reference stocks in volume and value terms

Year	No of REF* stocks	Tonnes (REF stocks)	Tonnes - total FRA	Value in EUR '000 (REF stocks)	Total value in EUR '000 landings FRA	% coverage (tonnage)	% coverage (value)
2011	110	339 918	492 363	819 409	1 201 936	69%	68%
2012	111	349 656	504 569	832 912	1 175 288	69%	71%
2013	110	373 844	528 582	874 534	1 200 267	71%	73%
2014	109	401 793	545 423	892 489	1 236 872	62%	65%
2015	110	398 565	535 934	920 330	1 260 784	74%	73%
2016	108	421 605	552 491	972 561	1 319 744	76%	74%
2017	108	415 962	552 690	997 158	1 368 546	75%	73%
2018	105	409 501	565 245	957 690	1 398 045	72%	69%
2019	112	410 161	1 023 780	518 548	1 294 003	79%	79%

* for which French landings were calculated not to be at zero.

ii. Support for reducing capacity in imbalanced segments

After identifying the segments with an imbalance in point 2 of this report, France estimated the reductions to be made to each imbalanced segment, taking into account the latest available scientific advice and the share of each of those segments in French landings of stocks in poor condition responsible for the imbalance.

Overcapacity was estimated in order to reduce as a priority landings of stocks in poor condition causing segments to become imbalanced. An average landing reduction target for those stocks was set per segment. Once the landing reduction target had been set for a segment, it was used to establish an objective for reductions in the number of vessels, tonnage and power by segment. The objective is indicative. It was evaluated by considering that the catch taken by all vessels is identical. It can therefore be adjusted in line with the vessels reducing their fishing effort. This objective may also be revised in the light of future scientific advice or the first cessations of activity.

Management measures have been identified for each reduction objective to ensure that the imbalances found are corrected by 31 December 2021 at the latest.

The reduction objectives will primarily be achieved through the following actions:

- temporary cessation of activity without support and temporary cessation with support in accordance with the procedures set out in the OP EMFF,
- greater selectivity of fishing gear, where appropriate by funding studies,
- restrictions on fleet renewal and fleet entries in imbalanced segments,
- discussions on stepping up management measures under the multi-annual plans in force for vessels flying the flag of France.

Timetable for support for temporary cessation of activity

If support for temporary cessation of activity is granted, it shall be on an exceptional basis in order to address serious situations as described in Article 33(1) of Regulation (EU) No 508/2014 or to implement a sustainable reduction in fishing effort that guarantees the attainment of the maximum sustainable yield objectives as referred to in Article 2(2) of Regulation (EU) No 1380/2013.

In this context, support measures for the temporary cessation of activity will be implemented as follows:

- the decision to make support available will be taken and will mention the fisheries targeted and the selectivity objectives for which the set-up time or testing period may result in compensation,
- filing, processing and granting of support must be finalised by 31 May of the year following the year that support is made available.

iii. General information on compliance with fleet management measures

Regulation (EC) No 1224/2009 of 20 November 2009 establishing a community control system and its Implementing Regulation (EU) No 404/2011 of 8 April 2011 came into force on 1 January 2012.

These two Regulations govern, in particular, the monitoring of engine power, which is divided into two stages, namely engine certification, followed by engine verification (document checks and, where appropriate, physical checks). In accordance with these provisions, the French authorities used the engine certifications described in detail in the 2013 report.

In 2012, France entered the verification stage, submitting the necessary sampling plans to the European Commission for approval. These plans, which were approved by the Commission, have been in place since 2013.

7. Changes to administrative procedures concerning the national fleet management system

The Directorate for Sea Fisheries and Aquaculture is responsible for the management of the French fleet as regards French strategic fisheries. It works with decentralised departments, producer organisations and maritime fisheries committees and marine breeders to implement management measures and ensure compliance.

Moreover, since 2011 producer organisations and committees have been delegated the task of authorising certain schemes. This delegation came in response to operators' requests for more flexibility to balance the necessary capacity with their production opportunities and optimum marketing conditions.

In the same vein, France is continuing to simplify its administrative procedures for managing access rights by extending electronic authorisations. Fishing authorisations such as licences are no longer issued in paper form; the entire process is now electronic. This development is in line with European legislation on fisheries control and enables more fluid management and more flexibility to react to the activity programmes of fishing vessels.

Lastly, we would reiterate that in 2013, France initiated a reform of production rights management (catch and effort opportunities) in collaboration with the fishing industry, which continued into 2015. These reforms responded to the need for administrative procedures to be simplified and for the industry to be more involved in management decisions, in particular as regards balancing fishing capacity with fishing opportunities. Ultimately, the capacity management reform entered into force in mainland France in February 2017 and was implemented in the overseas regions in March 2019.

8. Assessment of indicators relating to the fishing fleet

Of the 198 fleet segments, indicator calculations covered all active segments. However, for confidentiality reasons, economic indicators were only reported for segments with more than three vessels.

8.1. Technical indicators

The technical indicators used for this report were those used by STECF for the assessment of Member State reports submitted for 2012, namely:

- the number of inactive vessels by region and the DCF length category explained under point 3.1 of this report,
- the utilisation rate for the segment's production capacity, i.e. average number of days at sea of the segment against the maximum possible days at sea (average days at sea/max. possible days at sea) of the segment. Maximum possible days at sea are within the segment's 90th percentile. If this indicator is below 0.7, the segment's productive capacity is being under-utilised.

It should be noted that the second technical indicator is reported for segments of less than 12 metres. However, no assessment could be carried out. Given the diversity of individual strategies among masters/owners of vessels for which fishing is in many cases not the sole activity, interpreting the production capacity utilisation rate for this category is a delicate process. A more detailed assessment of the dependence on fishing of segments comprising vessels of less than 12 metres should be conducted in order to take account of their greater versatility.

Furthermore, the submission method used for the reporting obligations of vessels of less than 10 metres – one fishing log per month – does not allow for optimal monitoring of their fishing effort. In order to assess the technical indicator for these segments, it is therefore necessary to review the data which must be collected.

8.2. Biological indicators

The biological indicators used for this report were those used by STECF for the assessment of Member State reports submitted for 2012¹⁸, and the two new indicators recommended in its 15-02 report. We would reiterate that when drawing up the 2020 French report, a change was made compared to previous reports regarding how the biological indicators are calculated. Until then, biological indicators had been calculated by taking into account the most recent biological assessment which would in turn 'colour' the entire data series. However, when preparing the 2020 report, the assessment for the current year was used, without colouring the entire dataset. This method is in line with European recommendations and has the advantage of better capturing the actual stock status during a multi-annual series. This helps the weighting of the last known assessment of a stock to be put into perspective and the positive or negative trends in stock status over time to be better taken into account.

a- Sustainable harvest indicator (SHI)

This is a standardised fishing mortality average $F^*(F_c/F_{msy})$ for all stocks fished by the segment in question with an estimated F_{msy} weighted according to the landing volume of the stocks under consideration:

- this indicator is recorded if landings of the stock under consideration account for at least 40% of the segment's landings,
- $SHI \leq 1$ means that the segment is economically dependent on stocks that can be fished sustainably.

For France, this indicator was only calculated for the 61 stocks for which the necessary information was available (see table 8, point 3.2).

b- Stocks at risk indicator (SAR)

This is the number of stocks at risk exploited by the segment if the stock in question makes up at least 10% of the segment's landings, or if the segment takes at least 10% of total landings for that stock.

For the STECF, a stock at risk means a stock:

1. with a biomass below the biomass limit (Blim) or,
2. for which an international advisory body recommends closing the fishery, prohibiting targeted fishing, reducing fishing activities to the greatest possible extent or adopting similar measures, even where this opinion has been issued on the basis of limited data or,
3. for which a regulation on fishing opportunities provides that fish should, wherever possible, be released alive back into the sea or that landings are prohibited or,
4. that is included on the IUCN 'red list' or in the CITES annexes.

France has added to this definition:

- stocks dependent on a fragile habitat or in poor condition and recognised as such by authorised international organisations. Due to the fragility of certain habitats, fishing practices that present a risk to their health should be limited. This is the case for gangui fishing methods used on Mediterranean Posidonia beds. These fishing practices, described in Annex 2 to this report, are a threat to those habitats, and should be reduced. In this context, France considers Mediterranean stocks dependent on Posidonia beds to be stocks at risk. This assessment is

¹⁸ COM(2014)545 final of 2 September 2014 - Point 7.1 Guidelines for analysis of the balance between fishing capacity and fishing opportunities in accordance with Article 22 of Regulation (EU) No 1380/2013 of the European Parliament and of the Council on the Common Fisheries Policy.

confirmed by Annex II to the Barcelona Convention for the protection of the Mediterranean Sea and Annex IV to the Habitats Directive¹⁹.

- stocks for which there is scientific advice recommending a significant reduction in fishing effort to be applied even if the biomass limit is not known and closure of the fishery has not been advised. This is the case for:
 - Mediterranean hake, red mullet and shrimps for which a significant reduction in fishing effort is recommended in a GFCM opinion²⁰,
 - Atlantic and Mediterranean eel stocks for which a significant and lasting reduction in recruitment to the stock was observed in the September 2016 opinion of ICES and the Joint EIFAAC/ICES Working Group on Eels (WGEEL).

c- Number of overexploited stocks (NOS)

This indicator includes stocks for which only an 'expert opinion' is available.

For this report, France differentiated between two calculation methods for this indicator:

- the 'NOS 1' variant which identifies the fleet segments responsible for the condition of the stock. This variant is closest to the calculation method proposed in the STECF-15-02 report. However, where no information is available on the number of fleet segments fishing each stock at international level, the NOS 1 indicator is calculated by assuming that a segment is considered to fish one or more stocks in poor condition once the share of FR landings as a proportion of all landings is high (> 80 %) and the ratio (segment-stock catches/total catches of stock) is higher than the ratio (1/total number of segments). 'Overexploited' stock is accounted for in the NOS for the segment. In this context, the number of segments targeting this stock in France is considered to be a proxy of the total number of segments targeting this stock,
- the 'NOS 2' variant which allows segments with significant landings of stocks in poor condition to be identified. A segment is considered to be fishing an overexploited stock where the quantity of the stock in poor condition removed accounts for at least 15% of total landings for that stock.

d- Economic dependency indicator (EDI)

This indicator represents the landing share in value terms of stocks in poor condition within a segment's total landings. An EDI exceeding 40% means that the segment's turnover depends predominantly on stocks in poor condition, compromising the economic viability of the segment. The EDI is not estimated for many of the segments comprising vessels of less than 12 metres in the Mediterranean and overseas territories.

The NOS and EDI indicators have been calculated for all stocks to be monitored, as listed in Annex 5 to this report.

8.3. Economic indicators

For the purposes of this report, France would reiterate that the outcomes of these indicators are weakened by

- the method applied: variables were based on sampling involving non-exhaustive answers,

¹⁹ Annex IV to Directive 92/43/EEC on the conservation of natural habitats and of wild fauna and flora, and Annex II to the Barcelona Convention for the protection of the Mediterranean Sea.

²⁰ GFCM:SAC18/2016/Inf.11, pp. 11-13.

- the segment size: variables were reported only for segments comprising more than three vessels in accordance with the rules on confidentiality applied to statistical data.

Furthermore, owing to the variety of fishing strategies, these indicators could not be conclusive. France has therefore interpreted the outcomes of this evaluation with caution.

Otherwise, the economic indicators used for this report were those used by STECF for the assessment of Member State reports submitted for 2012, namely.

- RoFTA (Rate of return on fixed tangible asset) = (net profit + opportunity cost of capital) / tangible asset value (vessel depreciated replacement value).
- CR/BER = current revenue / break-even revenue.

So as to obtain long, stable data sets, it was decided that segments of at least 10 vessels would be created to calculate the economic indicator. The groupings take into account the following vessel classes identified by the EU and follow the order presented below:

1° Groupings formed within a single supra-region and single region,

2° Cluster takes the name of the largest segment in terms of number of vessels,

3° Groupings follow the order presented below:

a- Clusters comply with vessel classes identified by the EU:

- Small-scale fleet (SSF): vessels of less than 12 m with primary 'passive' gear.

- Large-scale fleet (LSF): other vessels, with the exception of LWF vessels.

Long-distance water fleet (LWF): overseas vessels exceeding 24 m.

b- vessels practising the same metier and belonging to a closely adjoining (e.g. 0–10 m/10–12 m) length overall category (LOA) in metres (m) are grouped together;

c- Vessels practising a similar but not identical metier and belonging to an identical LOA category are grouped together.

d- By way of derogation to point c, a different grouping must be adopted in view of their specific characteristics in the case of:

- vessels of more than 40 metres: priority is given to groupings by LOA irrespective of the metier practised by the vessels grouped together.

- for overseas segments: priority is given to groupings by fishing method irrespective of the length classes concerned (albeit observing point 4.a above).

4° It is possible to retain segments of fewer than 10 vessels given their variety by comparison to neighbouring segments.