EUROPEAN
COMMISSION

Brussels, 13.8.2026
SWD(2026) 269 final

COMMISSION STAFF WORKING DOCUMENT

EVALUATION

***Ex post* evaluation of the European Maritime and Fisheries Fund (EMFF) for the programming period 2014-2020**

{SWD(2026) 270 final}

Table of contents

1 INTRODUCTION 5

1.1 The European Maritime Fisheries Fund 5

1.2 Purpose and scope of the evaluation 6

1.3 Methodological framework and data limitations 6

2 WHAT WAS THE EXPECTED OUTCOME OF THE INTERVENTION? 9

2.1 Description of the intervention and its objectives 9

2.2 Point(s) of comparison 15

3 HOW HAS THE SITUATION EVOLVED OVER THE EVALUATION PERIOD? 20

3.1 Implementation of shared management 20

3.2 Implementation of direct management 25

3.3 Evolution towards the EMFF objectives 25

3.3.1 Promoting competitive, environmentally sustainable, economically viable and socially responsible fisheries and aquaculture 26

3.3.2 Fostering the implementation of the CFP 38

3.3.3 Promoting a balanced and inclusive territorial development of fisheries and aquaculture areas 42

3.3.4 Fostering the development and implementation of the Union's IMP in a manner complementary to cohesion policy and to the CFP. 44

3.4 Persistent Challenges and external factors 49

4 EVALUATION FINDINGS 52

4.1 To what extent was the intervention successful and why? 52

4.1.1 Effectiveness 52

4.1.1.1 Impact on promoting competitive, environmentally sustainable, economically viable and socially responsible fisheries and aquaculture 52

4.1.1.2 Impact on the implementation of CFP 56

4.1.1.3 Impact on the territorial development of fisheries and aquaculture areas 57

4.1.1.4 Impact on the development and implementation of the unions IMP 58

4.1.2 Efficiency 60

4.1.3 Coherence 64

4.2 How did the EU intervention make a difference and to whom? 68

4.3 Is the intervention still relevant? 71

5 WHAT ARE THE CONCLUSIONS AND LESSONS LEARNED? 75

5.1 Promoting competitive, environmentally sustainable, economically viable and socially responsible fisheries and aquaculture 75

5.2 Fostering the implementation of the Common Fisheries Policy 75

5.3 Promoting balanced and inclusive territorial development of fisheries and aquaculture areas 76

5.4 Fostering the development and implementation of the Union's Integrated Maritime Policy, complementing cohesion policy and the CFP 77

5.5 Cross-cutting lessons 77

ANNEX I. PROCEDURAL INFORMATION 78

ANNEX II. METHODOLOGY AND ANALYTICAL MODELS USED 80

ANNEX III. EVALUATION MATRIX, DETAILS ON ANSWERS TO THE EVALUATION QUESTIONS (BY CRITERION) 88

ANNEX IV. OVERVIEW OF BENEFITS AND COSTS, TABLE ON SIMPLIFICATION AND BURDEN REDUCTION 97

ANNEX V. STAKEHOLDERS CONSULTATION - SYNOPSIS REPORT 104

ANNEX VI. EMFF INTERVENTION LOGIC 116

ANNEX VII. EMFF UP, SO, MEASURES UNDER SHARED MANAGEMENT 118

ANNEX VIII. EMFF RESULT INDICATORS 123

ANNEX IX. EMFF IMPLEMENTATION PER MEASURE (INFOSYS) 126

ANNEX X. CONTEXT INDICATORS BASELINE VALUES 128

ANNEX XI CASE STUDIES 131

ANNEX XII ADDITIONAL DATA, GRAPHS AND TABLES 136

ANNEX XIII: EMFF ARTICLES RELATED TO THE CONSERVATION OF THE MARINE ENVIRONMENT AND RESTORATION OF BIODIVERSITY 137

ANNEX XIV. COST-EFFECTIVENESS- DIRECT MANAGEMENT MEASURES 140

Glossary

Term or acronym	*Meaning or definition*
AC	ADVISORY COUNCIL
AIR	Annual Implementation Report
AMIF	Asylum and Migration Fund
BMVI	Border Management and Visa Instrument
CAP	Common Agricultural Policy
CFP	Common Fisheries Policy
CINEA	Climate, Infrastructure, and Environment Executive Agency
CLLD	Community Led Local Development
CMES	Common Monitoring and Evaluation System
CMO	Common Market Organisation
CPR	Common Provisions Regulation
CR	Common Result Indicator
EAFRD	European Agricultural Fund for Rural Development
EIB	European Investment Bank
EFF	European Fisheries Fund
EMFAF	European Maritime, Fisheries and Aquaculture Fund
EMFF	European Maritime and Fisheries Fund
EMODNET	European Marine Observation and Data Network
EQ	Evaluation Question
ERDF	European Regional Development Fund
ESF+	European Social Fund Plus
ESIF	European Structural and Investment Funds
EU	European Union

EUMOFA	European Union Market Observatory for Fisheries and Aquaculture products
FAME	Fisheries and Aquaculture Monitoring and Evaluation Network
FAMENET	Fisheries and Aquaculture Monitoring, Evaluation and Local Support Network
FLAGs	Fisheries Local Action Groups
FIs	Financial Instruments
GES	Good Environmental Status
HEC	Horizontal Enabling Condition
ICES	International Council for the Exploration of the Sea
IL	Intervention Logic
IMP	Integrated Maritime Policy
ISF	Internal Security Fund
IUU Fishing	Illegal, Unreported and Unregulated Fishing
JC	Judgment Criterion
MAPs	Multiannual Plans
MAs	Managing Authorities
MEF	Monitoring and Evaluation Framework
MFF	Multiannual Financial Framework
MNSPAs	Multiannual National Strategic Plans for Aquaculture
MSFD	Marine Strategy Framework Directive
OR	EU Outermost Regions
RFMOs	Regional Fisheries Management Organisation
RI	Result Indicator
SCOs	Simplified Cost Options
SDG	Sustainable Development Goals

SFPAs	Sustainable Fisheries Partnership Agreements
SME	Small and Medium Enterprises
SO	Specific Objective
SSCF	Small Scale Coastal Fisheries
STECF	Scientific, Technical and Economic Committee for Fisheries
SWD	Staff Working Document
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TFEU	Treaty on the Functioning of the European Union
ToC	Theory of Change
UN	United Nations
UP	Union Priority

1 INTRODUCTION

1.1 THE EUROPEAN MARITIME FISHERIES FUND

The European Maritime and Fisheries Fund (EMFF) established under Regulation (EU) 2014/508[1] (hereinafter referred to as the EMFF Regulation) was the EU's funding instrument for maritime and fisheries policies from 2014-2020. It aimed to support the implementation of the Common Fisheries Policy (CFP)[2] and the Integrated Maritime Policy (IMP)[3], while also contributing to the Europe 2020 strategy[4]. It included increased international commitments in the field of ocean governance, especially in the context of the United Nations' 2030 Agenda for Sustainable Development[5], and aimed for stronger synergies with other EU policies, such as on food security, the sustainable blue economy and support for the EU's climate objectives[6]. The EMFF was one of the five European Structural and Investment funds (ESI Funds) which complemented each other to deliver more jobs, welfare and growth in the EU and were covered by the Common Provisions Regulation (CPR)[7].

The EMFF was allocated a budget of approximately EUR 6.4 billion for the 2014–2020 period. It operated under two main management modes:

- 89% under shared management with the Member States by means of operational programmes.
- 11% managed (in)directly by the European Commission to support EU-wide objectives in maritime and coastal affairs.

---

1 Regulation (EU) No 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Maritime and Fisheries Fund and repealing Council Regulations (EC) No 2328/2003, (EC) No 861/2006, (EC) No 1198/2006 and (EC) No 791/2007 and Regulation (EU) No 1255/2011 of the European Parliament and of the Council https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2014.149.01.0001.01.ENG

2 Regulation (EU) No 1380/2013 of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy, amending Council Regulations (EC) No 1954/2003 and (EC) No 1224/2009 and repealing Council Regulations (EC) No 2371/2002 and (EC) No 639/2004 and Council Decision 2004/585/EC https://eur-lex.europa.eu/eli/reg/2013/1380/oj

3 Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - An Integrated Maritime Policy for the European Union {COM(2007) 574 final)} {SEC(2007) 1278} {SEC(2007) 1279} {SEC(2007) 1280} {SEC(2007) 1283} https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52007DC0575

4 COMMUNICATION FROM THE COMMISSION - EUROPE 2020 A strategy for smart, sustainable and inclusive growth - {COM(2010) 2020 final} https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52010DC2020

5 https://sdgs.un.org/2030agenda

6 2030 climate and energy policy framework for the European Union

7 Regulation (EU) No 1303/2013 of the European Parliament and of the Council of 17 December 2013 laying down common provisions on the European Regional Development Fund, the European Social Fund, the Cohesion Fund, the European Agricultural Fund for Rural Development and the European Maritime and Fisheries Fund and laying down general provisions on the European Regional Development Fund, the European Social Fund, the Cohesion Fund and the European Maritime and Fisheries Fund and repealing Council Regulation (EC) No 1083/2006 https://eur-lex.europa.eu/eli/reg/2013/1303/oj/eng

1.2 PURPOSE AND SCOPE OF THE EVALUATION

Article 57 of the Common Provisions Regulation (EU) No. 1303/2013 and Article 117 of Regulation (EU) No. 508/2014 (henceforth the EMFF Regulation) stipulate that an ex-post evaluation shall be prepared for the funds under the Regulation (EU) No. 1303/2013.

The scope includes both the shared management and the (in)direct management expenditure of the EMFF.

The evaluation follows EU Better Regulation Guidelines[8] to evaluate the EMFF based on five key criteria:

- **Effectiveness**, achievements and impacts of the fund in relation to the objectives of the CFP and the IMP.
- **Efficiency,** whether simplification measures reduced the administrative burden.
- **Relevance** for strategic political and policy priorities
- **Coherence** with other EU, national and subnational instruments
- **EU Added Value:** do the effects generated by the EMFF go beyond what could be reasonably achieved by Member States.

1.3 METHODOLOGICAL FRAMEWORK AND DATA LIMITATIONS

The results of the ex-post evaluation summarised in this Staff Working Document help to provide a comprehensive understanding of how the EMFF performed after its implementation has concluded. It assesses how effectively the intended objectives were achieved, how efficiently resources were used, and what actual impacts—both expected and unexpected—occurred. By systematically analysing the results and their underlying causes, the evaluation sheds light on the effectiveness, efficiency, coherence, relevance and EU added value of the intervention in its real-world context. Moreover, the results serve to support accountability towards stakeholders and decision-makers by demonstrating what worked, what didn't, and why. Ultimately, the evaluation derives lessons learned that can be relevant for the design and improvement of future policies and programmes.

For more information on the methodology see Annex II.

[8] European Commission, 'Better Regulation Guidelines and Toolbox (Better regulation: guidelines and toolbox)', European Commission website, https://commission.europa.eu/law/law-making-process/planning-and-proposing-law/better-regulation/better-regulation-guidelines-and-toolbox_en

Evaluation of the Shared Management component

This Staff Working Document draws on evidence from the study underpinning the ex-post evaluation carried out by a consortium formed by Deloitte. The evaluation covers the 27 EMFF operational programmes[9] during the 2014-2020 period, assessing their implementation across EU Member States (excluding Luxembourg) and the UK[10].

The study underpinning the ex-post evaluation employed a mixed-method approach: an extensive desk review of over 250 sources, a Theory of Change (ToC)[11] to structure causal assumptions, analysis of INFOSYS[12] data (the EMFF's monitoring system), e-surveys with 139 respondents (see Annex V), interviews with 14 FLAGs and 19 Managing Authorities (MAs), six case studies (one per Union Priority), and two stakeholder webinars. This diversity of tools and sources aimed to ensure coverage of both strategic and operational aspects of the EMFF.

Findings were strengthened by triangulation—cross-validating insights from multiple sources—and systematic stakeholder engagement that enabled the evaluation questions defined in the Evaluation Question Matrix (EQM) (Annex III) to be addressed. The use of both qualitative and quantitative data increased reliability and reflected diverse perspectives across Member States and programme levels.

Despite the strengths, some limitations affected the analysis. For example, some result indicators were difficult to report and caused inconsistencies in the reporting across Member States. Where quantitative data was weak due to the inconsistencies of Member States reporting, the team relied on proxy indicators[13].

---

[9] 27 Operational Programmes, i.e. including the UK but excluding Luxembourg as there was no EMFF funding allocation for Luxembourg, https://oceans-and-fisheries.ec.europa.eu/funding/emff-operational-programmes-2014-2020_en

[10] The UK continued to implement its EMFF programme after its withdrawal from the EU and until programme closure, pursuant to Article 138 of the Withdrawal Agreement (https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A12019W/TXT%2802%29)

[11] The Theory of Change (ToC) approach is a framework used to map out how and why a desired change is expected to happen within a specific context. It starts by defining the long-term goals and then works backwards to identify the necessary preconditions, outcomes, activities, and inputs that lead to those goals. ToC makes explicit the assumptions underlying each step in the change process and considers external factors that may influence success. By clarifying the causal pathways and interconnections, the approach supports strategic planning, monitoring, and evaluation, and helps stakeholders develop a shared understanding of how their actions contribute to broader impacts.

[12] Infosys was based on Article 97(1) of the EMFF regulation saying that: *In addition to the general provisions of Article 125 of Regulation (EU) No 1303/2013, the managing authority must annually submit cumulative data on selected operations, including details about beneficiaries and projects, by 31 March of each year.* The details of the reporting were defined in Regulation (EU) No 1242/2014.

[13] Proxy indicators are used when direct measurement of a result is difficult, costly, or impossible. Instead of measuring the ultimate result directly, the ex post evaluation underpinning study used closely related indicators that serve as a proxy, as an indirect but meaningful sign of the intended change.

Evaluation of the Direct Management component:

The analysis presented in this report draws on information from several sources: an Interim evaluation study carried out by a consortium led by Coffey[14], an ex post evaluation carried out internally, a study on the synergies and clustering between maritime projects[15], an open public consultation, opinions expressed on individual components of the EMFF in open literature and insights of officials in the European Commission and the Executive Agency for Small and Medium-sized Enterprises (EASME).

Showing the impact of direct management measures was challenging for several reason:

- The lack of performance indicators or catalogue of project reports meant that too much effort was spent in finding and assembling the output of activities rather than assessing their impact.
- Information about the implementation and results are dispersed and difficult to find.
- For some measures, it will take some time before the impact can be assessed.
- The number and variety of measures financed by the European Maritime and Fisheries Fund. (Between 200 and 300 contracts through grants and procurement were signed each year on topics ranging from tuna-tagging in the Indian Ocean to coastguard fora in the Mediterranean.)
- The novelty of many of the actions.

[14] European Commission: Directorate-General for Maritime Affairs and Fisheries, POSEIDON, Coffey International, F&S, EUROFISH and P-C Engineering, *Interim evaluation study of the implementation of the direct management component of the EMFF Regulation (Articles 15 and 125) – Final report*, Publications Office of the European Union, 2018, **https://data.europa.eu/doi/10.2771/175536**

[15] European Commission: European Climate, Infrastructure and Environment Executive Agency, COGEA, ERINN and POSEIDON, *Synergies and clustering between maritime projects – Final report*, Publications Office of the European Union, 2024, **https://data.europa.eu/doi/10.2926/77582**

2 WHAT WAS THE EXPECTED OUTCOME OF THE INTERVENTION?

2.1 DESCRIPTION OF THE INTERVENTION AND ITS OBJECTIVES

The Impact Assessment (IA)[16] supporting the design of financial assistance for the implementation of the Common Fisheries Policy (CFP) and the Integrated Maritime Policy (IMP) for the 2014-2020 programming period structured the intervention logic around four pillars: smart, green fisheries; smart green aquaculture; sustainable and inclusive territorial development and integrated maritime policy.

Objectives were defined at two levels: (i) horizontal objectives applicable to all European Structural and Investment Funds (ESI Funds), and (ii) fund-specific objectives, including general, specific, and cross-cutting dimensions.

EU Policy context

At the horizontal level, the Europe 2020 Strategy provided the overarching framework for EU intervention. The ESI Funds—namely ERDF, ESF, CF, EAFRD, and EMFF—were expected to contribute to its three mutually reinforcing priorities: smart, sustainable, and inclusive growth. These priorities were operationalised through a set of thematic objectives designed to guide programming and implementation across policy areas.

The Common Provisions Regulation (CPR) established common rules for all ESI Funds and translated the Europe 2020 priorities into eleven thematic objectives (TOs). Within this framework, the EMFF contributed primarily to four TOs: competitiveness of SMEs and the fisheries and aquaculture sector (TO3), transition to a low-carbon economy (TO4), environmental protection and resource efficiency (TO6), and employment and labour mobility (TO8).

Policy framework: CFP and IMP

- The Common Fisheries Policy (CFP) constitutes the core regulatory framework governing fisheries and aquaculture. It aims to ensure the long-term sustainability of marine biological resources while contributing to economic viability, market stability, and food supply. Its scope includes conservation measures, aquaculture, and the processing and marketing of fishery products.

- The Integrated Maritime Policy (IMP) provides a complementary framework based on the integration of maritime sectors and policies. It seeks to enhance the sustainable development of the maritime economy and the protection of the marine environment through coordinated action across sectors and borders. Key areas of intervention include blue growth, marine knowledge, maritime spatial planning, maritime surveillance, and sea basin strategies.

[16] COMMISSION STAFF WORKING PAPER - Impact Assessment - Accompanying the document Proposal for a REGULATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL on the European Maritime and Fisheries Fund [repealing Council Regulation (EC) No 1198/2006 and Council Regulation (EC) No 861/2006 and Council Regulation No XXX/2011 on integrated maritime policy {COM(2011) 804 final} {SEC(2011) 1417 final} https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52011SC1416

These frameworks are directly aligned with the United Nations Sustainable Development Goals (SDGs)[17], particularly SDG 14 ("Life Below Water"), aiming to conserve and sustainably use marine resources.
During the latter phase of the programming period, increasing emphasis was placed on alignment with the European Green Deal, reflecting evolving EU policy priorities in relation to sustainability and climate action.

Fund-specific objectives

Article 5 of the regulation[18], the EMFF shall contribute to the achievement of the following objectives:
(a) promoting competitive, environmentally sustainable, economically viable and socially responsible fisheries and aquaculture;
(b) fostering the implementation of the CFP;
(c) promoting a balanced and inclusive territorial development of fisheries and aquaculture areas;
(d) fostering the development and implementation of the Union's IMP in a manner complementary to cohesion policy and to the CFP.

Complementary international instruments—namely Fisheries Partnership Agreements (FPAs) and compulsory RFMO contributions—remained outside the scope of the EMFF.

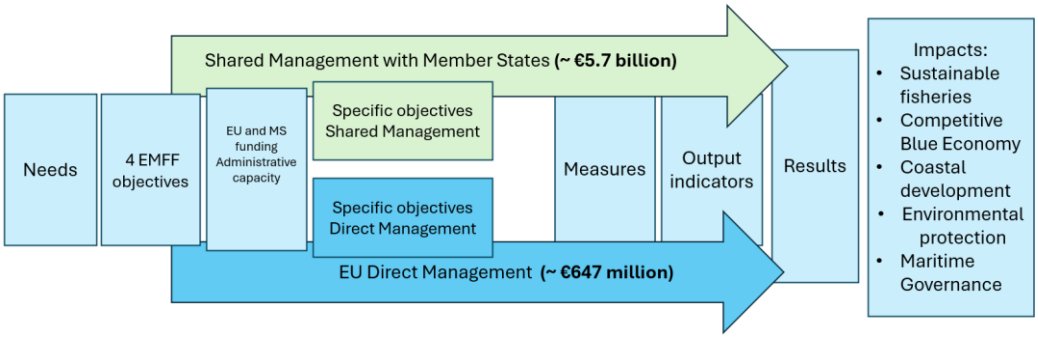
Intervention Logic

The intervention logic describes how policy decisions, measures taken and the desired outcome affect each other. It is the backbone of monitoring and evaluation, starting at policy level and continuing at the levels of individual programmes and operations.

Figure 1 shows a simplified graphic overview of the Intervention logic showing the division of the two components of the EMFF, Annex XIV shows a detailed overview of how the intervention adapts to the implementation dynamics. As stated in Article 7 of EMFF Regulation, measures covered by Title V shall be financed by the EMFF in accordance with the principle of shared management between the Union and Member States and the common rules laid down in Regulation (EU) No 1303/2013. Measures covered by Title VI shall be financed by the EMFF in accordance with the principle of direct management.

[17] https://sdgs.un.org/goals
[18] Regulation (EU) No 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Maritime and Fisheries Fund http://data.europa.eu/eli/reg/2014/508/oj

Figure 1: EMFF Intervention Logic



Shared Management objectives

The EMFF **intervention logic** for the shared management was structured around **six Union Priorities**, broken down into **17 Specific Objectives** and operationalised through a wide range of **measures**. The specific links between EMFF's union priorities and Specific Objectives were set in the EMFF Regulation (EU) 508/2014 and are shown in Figure 2 below (see also Annex VI):

Figure 2: EMFF Priorities and Specific Objectives under shared management

1. Promoting environmentally sustainable, resource efficient, innovative, competitive and knowledge based fisheries	a) Reduction of the impact of fisheries on the marine environment, including the avoidance and reduction, as far as possible, of unwanted catches; b) Protection and restoration of aquatic biodiversity and ecosystems c) Ensuring a balance between fishing capacity and available fishing opportunities d) Enhancement of the competitiveness and viability of fisheries enterprises, including of small scale coastal fleet, and the improvement of safety or working conditions e) Provision of support to strengthen technological development and innovation, including increasing energy efficiency, and knowledge transfer f) Development of professional training, new professional skills and lifelong learning
2. Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge based aquaculture	a) Provision of support to strengthen technological development, innovation and knowledge transfer b) Enhancement of the competitiveness and viability of aquaculture enterprises, including improvement of safety or working conditions, in particular of SMEs c) Protection and restoration of aquatic biodiversity and enhancement of ecosystems related to aquaculture and promotion of resource-efficient aquaculture d) Promotion of aquaculture having a high level of environmental protection, and the promotion of animal health and welfare and of public health and safety e) Development of professional training, new professional skills and lifelong learning
3. Fostering the implementation of the CFP	a) Improvement and supply of scientific knowledge and collection and management of data b) Provision of support to monitoring, control and enforcement, enhancing institutional capacity and the efficiency of public administration, without increasing the administrative burden
4. Increasing employment and territorial cohesion	a) Promotion of economic growth, social inclusion and job creation, and providing support to employability and labour mobility in coastal and inland communities which depend on fishing and aquaculture, including the diversification of activities within fisheries and into other sectors of maritime economy
5. Fostering marketing and processing	a) Improvement of market organisation for fishery and aquaculture products b) Encouragement of investment in the processing and marketing sectors
6. Fostering the implementation of the Integrated Maritime Policy	a) Development and implementation of the Integrated Maritime Policy

Source: EMFF Regulation 508/2014

The EMFF adopted a results-based approach by establishing clear result indicators linked to the Specific Objectives set out in the EMFF regulation No 508/2014 (see also Annexes VII and VIII). The

results-based approach was supported by a **Common Monitoring and Evaluation System (CMES)**, including a set of common result indicators and common context indicators. It aligns interventions with objectives through the following CMES elements defined in the implementation regulation (EU) 1014/2014[19]:

Four types of common indicators are used in the CMES, addressing different levels of objectives and serving different purposes:

- Context Indicators (CIs) are linked to the overall objectives of the EMFF and establish the baseline at the beginning of the OP implementation. The EMFF uses 25 common CIs.
- Output indicators (OIs) are the direct product of the implemented activities. In the case of the EMFF, they are mostly expressed as a number of operations. The EMFF CMES defines 28 OIs covering the 50 measures.
- Result Indicators (RIs) measure the gross effect of the EMFF. The CMES comprises a set of 28 RIs, some of which are linked to only one EMFF Specific Objective, others to more than one. MS were free to add specific indicators if they wished.
- Financial indicators (FI) are common to all ESIF and are set at UP level.

This helped record and track these operations' achievements. By doing so, it provides transparency on the use of public money and enables the evaluation of EMFF support. A framework for continuous dialogue, maintenance, support and the sharing of experience between the Commission and the Member States underpins the CMES. The aim of this framework is to provide common, comparable data that can be aggregated and analysed against various criteria across Member States.

Shared management implementation:

At Member State level, national authorities implemented 89% of the fund (~ €5.7 billion).
The EMFF was implemented through **operational programmes aligned with national Partnership Agreements** (PAs) agreed with the European Commission. These documents defined the selected thematic objectives, funding allocations, and coordination mechanisms among ESI Funds, thereby ensuring consistency with EU-level priorities and enabling an integrated approach to achieving policy objectives.

The EMFF linked budget allocation directly to the size of the fishing and aquaculture sectors in each country. It introduced a performance framework, anchored in the CPR, which tied funding to tangible performance indicators. This framework helped ensure that allocations and implementation were better aligned with sectoral outputs and results.

Member States developed Operational Programmes (OPs) tailored to their needs, choosing from the **common pre-set list of measures** set out in the EMFF Regulation (EU) 508/2014[20]. **These OPs were based on SWOT[21] analyses and needs assessments** conducted by each Member State. For each Specific Objective, Member States OPs chose relevant measures out of the pre-set list of 50 measures and provided information on the context indicators defined in the EMFF Regulation, addressing the 6

[19] CDR (EU) No. 1014/2014 defines common Context Indicators, Output Indicators and Result Indicators.
[20] Regulation (EU) No 508/2014 of the European Parliament and of the Council of 15 May 2014 on the European Maritime and Fisheries Fund http://data.europa.eu/eli/reg/2014/508/oj
[21] Strengths, Weaknesses, Opportunities and Threats

Union Priorities and 17 Specific Objectives. The Member States implemented the EMFF by individual operations creating outputs and results reported along output and result indicators.

In addition to the financial envelopes included in the priorities, OPs also benefited from support for technical assistance. In 2021, in response to the economic crisis caused by the COVID-19 pandemic, an amendment of the legislative framework allowed the reprogramming and reallocation of EMFF to cover support for crisis repair and resilience measures.

The evaluation made use of the different elements of the CMES and linked types of operations, outputs and result indicators and measured progress and contribution towards the Specific Objectives.

Example: link between EU priorities, specific objectives, measures and result indicators

EU priority 1 (promoting environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based fisheries) has six specific objectives. Each specific objective has a corresponding series of measures. For example, the permanent cessation of fishing activities and support for systems of allocation of fishing opportunities are measures (Articles 34 and 36 of the EMFF Regulation respectively) that contribute to the achievement of specific objective 3 (ensuring a balance between fishing capacity and available fishing opportunities), under EU priority 1.

The following common result indicators apply to specific objective 3: result indicator 1.3 (change in net profits) and result indicator 1.6 (change in the percentage of unbalanced fleets).

The full overview of EMFF measures linked to the EU priorities and respective SO can be found in Annex IX.

Direct Management objectives:

Just over 10% of the EMFF budget (~€647 million) had been earmarked for measures implemented directly by the European Commission and the Executive Agency for Small and Medium Enterprises (EASME).

The direct management component of EMFF financed measures and structures to deliver the data, advice, organisational structures, information systems and intelligence needed to implement the EU's fisheries policy effectively. It also supported the Maritime policy by promoting cooperation and coherence across countries and policy areas, recognising that the sustainability of the blue economy and the health of marine ecosystems depend on coordinated action, including with non-EU countries and those sharing the same sea basins. Through its direct management component, the EMFF supported measures to bring stakeholders together, improve the collection and sharing of marine data, encourage joint planning of maritime activities, and stimulate the blue economy. It also contributed to developing common approaches for assessing the state of the marine environment and strengthening communication between authorities responsible for preventing illegal or dangerous activities.

A broad package of measures aimed at private industry, public authorities, the research community and civil society involving advice, events, studies, capacity building, organisational support, dissemination of data and knowledge and bottom-up projects were financed.

Table 1: Direct management specific objectives

	Measures
Integrated Maritime Policy	Development and implementation of integrated governance of maritime and coastal affairs (Article 82.1)
	Development of cross-sectoral activities (Article 82.2)
	Support for sustainable economic growth, employment, innovation and new technologies (Article 82.3)
	Promotion of the protection of the marine environment (Article 82.4)
Fisheries (CFP)	Collection, management and dissemination of scientific advice under the CFP (Article 85.1)
	Specific control and enforcement measures under the CFP (Article 85.2)
	Voluntary contributions to international organisations (Article 85.3)
	Advisory Councils and communication (Article 85.4)
	Market intelligence, including the establishment of electronic markets (Article 85.5)

Direct management implementation

At the beginning of each year, the Commission adopted a work programme in a decision that allocated the year's budget to a set of identifiable measures for each specific objective of the EMFF regulation. The work programmes were approved annually by the EMFF Committee[22] and published on the European Commission website.

The European Commission has delegated the implementation of part of the EMFF to EASME[23] under direct management, representing a budget of €340 million. EASME launches and manages calls for proposals and calls for tenders, as well as ad hoc grants and service requests under framework contracts in the areas of fisheries scientific advice, maritime policy and the blue economy.

The direct Management component of the fund was not part of the EMFF Infosys in the period evaluated in this report, it has been integrated into INFOSYS for the programming period 2021-2027 under EMFAF. Therefore, **there were no key performance indicators** other than consumption of the budget.

The Commission has been developing tools for managing expenditure that reduce the bureaucracy of budget management; both for the contracting authority and for the beneficiaries.

However, during the period of this evaluation, 2014 to 2018, few were in operation. This is reflected in the conclusions on efficiency described in the next section.

[22] https://ec.europa.eu/fisheries/cfp/emff/legislation

[23] Commission Decision 2013/771/EU

2.2 POINT(S) OF COMPARISON

The European Maritime and Fisheries Fund (EMFF) 2014-2020 was introduced in response to a range of ongoing and emerging challenges in the EU's fisheries, aquaculture, and coastal communities. It followed the European Fisheries Fund (EFF) 2007-2013, which had achieved results, for example in reducing fleet capacity, enhancing environmental protection and modernising parts of the fisheries sector. However, by 2013, it was clear that many structural problems persisted.

The impact assessment identified the following main needs to be addressed by the EMFF 2014-2020[24]:

Table 2: Changes proposed by the 2014-2020 EMFF

Main needs identified	Changes proposed
Reduction of overcapacity and overfishing	The EMFF should bring more precision and effectiveness to capacity management, promoting a balance that considered biological, economic, and social dimensions. Moving beyond vessel scrapping, the focus turned to optimizing fleet performance and ensuring long-term sustainability of fishing activities.
Reduction of the environmental impact of fisheries and discards	The EMFF should expand and systematize efforts to minimise ecological harm. This included helping fishers adopt technologies and practices that reduce by-catch and improve compliance with the landing obligation. A second challenge that remained underdeveloped was achieving a more energy-efficient operation. Reducing CO2 emissions and improving resource efficiency continued to pose significant difficulties. With the EMFF, there was a need for a stronger, more deliberate approach to ecosystem protection, ensuring that fisheries and aquaculture development did not compromise long-term ecological integrity. This included support for habitat restoration, stock enhancement of vulnerable species, and actions contributing to the health of aquatic environments.
Overcoming the innovation gap in the fisheries and aquaculture sector	The EMFF aimed to foster a stronger culture of innovation, helping enterprises adopt advanced technologies, reduce environmental impacts, and enhance operational efficiency. Knowledge transfer between research institutions and the industry was essential to ensure that new ideas and practices could be implemented effectively. The EMFF should promote more structured and accessible training, equipping fishers with the skills needed to navigate evolving regulatory environments, adopt new technologies, and explore alternative income opportunities, thereby strengthening the sector's human capital.
	The EMFF should revitalise the sector by promoting innovation, supporting the adoption of Recirculating Aquaculture Systems and other advanced practices, and encouraging knowledge sharing to improve productivity and sustainability across different aquaculture environments.

[24] COMMISSION STAFF WORKING PAPER Impact Assessment SEC/2011/1416 final https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52011SC1416

Main needs identified	Changes proposed
Increase competitiveness and viability of aquaculture enterprises, and fisheries SMEs.	The EMFF should address these disparities, supporting modernization, diversification, and the development of more sustainable business models. Apart of the economic viability a critical concern was improving safety and working conditions at sea, particularly for small-scale fishers.
	The EMFF should develop professional skills, supporting lifelong learning and capacity-building initiatives that could enhance innovation, compliance, and competitiveness across the sector. Additionally, the EMFF aimed to provide targeted assistance to help SMEs modernize operations, access new markets, and improve overall competitiveness, creating a more dynamic and resilient aquaculture industry.
Reduction of the environmental impact of the aquaculture sector	The EMFF should better promote resource-efficient and environmentally responsible aquaculture, supporting projects that minimise ecological impacts and contribute to the conservation of aquatic ecosystems. This also included measures to restore degraded habitats and ensure the sustainable use of natural resources. Thus, the fund aimed to foster practices that ensured high levels of environmental stewardship, improved animal welfare, and strengthened public health protections, responding to consumer demand for responsibly produced seafood.
Reduce energy consumption in fisheries and aquaculture.	The EMFF should facilitate investments in energy efficiency. (Less fuel intensive techniques, pilot projects, onboard modernisation etc…)
Improvement of control and enforcement	The EMFF should enhance monitoring and control systems, improve compliance while also streamline administrative procedures to avoid unnecessary burdens on stakeholders and authorities.
Increasing social sustainability in coastal areas	The EMFF should focus on promoting diversification, supporting alternative livelihoods, and fostering social cohesion through Community-Led Local Development, ensuring these communities could adapt and thrive.
Improve attractiveness of jobs, (including gender equality) and support the viability of communities in areas dependent of fisheries, including reconversion to other maritime sectors.	The EMFF should support diversification and job creation in coastal communities, while investing in training to help fishers transition to other maritime sectors. It should ease employment losses by funding retraining and local development and improve working conditions to make the sector more attractive. The EMFF should also promote gender equality by recognising women's roles and improving their access to finance, training, and decision-making.
Improvement of marketing and processing in the fisheries and aquaculture sector	The EMFF should aim to strengthen market structures, support Producer Organisations, and promote better marketing strategies, ensuring that fishers and aquaculture producers could capture more value from their products. Furthermore, the EMFF should focus on high-value products, new market opportunities, and sustainable production methods.
Improve the availability of high quality and timely data and	The EMFF should recognise the critical importance of sound scientific knowledge, providing support for more robust data collection frameworks,

Main needs identified	Changes proposed
scientific advice. Ensure compliance with Data Collection Framework, co-ordinate fisheries and IMP related data.	improved management systems, and better integration of scientific advice into policy-making processes.
Promote an integration of policies enabling sustainable and crossborder/ ecosystem-based management of European sea basins.	The EMFF should help to regulate spatial deployment of economic activities at sea and encourage collaboration in the implementation of environmental policy.
Promote the use of cross-sectoral instruments tackling segmentation of maritime policies and contributing to the identification of new growth opportunities.	The EMFF should promote greater coordination and integration across maritime sectors. It should support innovation and research, particularly in emerging technologies that lack sufficient backing, and encourage improved data sharing and interoperability between surveillance systems. By reducing duplication of efforts and enhancing efficiency, the EMFF should contribute to safer and more cost-effective maritime operations. It should also foster a more coherent, cross-sectoral approach to maritime activities, helping to reduce conflicts among stakeholders and support Maritime Spatial Planning (MSP), thereby creating more predictable conditions for investment and sustainable economic growth

To assess the progress in achieving the changes proposed, a combination of quantitative and qualitative values was used.

For the shared management component of the fund:

- The values from the IA. The overview of the baseline values can be found in Annex X: EMFF Context indicators baseline values.
- Indicators used in the CMES: ex-ante values and targets for each result indicator. Member States defined in their respective operational programmes. Due to several reporting difficulties[25] however, data collected was not always reliable and comparable. Therefore, only part of the information was used in this evaluation. (See Annex VIII Result Indicators)
- The qualitative analysis provided by the study supporting this evaluation.

For the direct management component of the fund:

- Some of the measures in support of the CFP were mainly continuations of measures previously carried out under Council Regulation (EC) No 861/2006. The ex-post evaluation on Union financial measures for the implementation of the CFP and in the area of the Law of the Sea 2007-2013 can therefore provide a point of comparison for those measures to some extent; however, it does not include measures related to Advisory Councils and market intelligence.
- The Blue Book that announced the launch of an integrated maritime policy (IMP) in 2007 identified a range of maritime policy actions. A transitional financial programme (TFP) was

[25] The main problems were the poor target-setting in 2014 due to the lack of guidance and the overall challenges in the field on collecting reliable data. (Spending Review 2024)

established to provide financing for the further development and implementation of the IMP and aimed at supporting actions that were not covered by existing EU funding instruments. DG MARE subsequently commissioned an evaluation of this programme that ran from 2011 to 2014. It highlighted important achievements in strengthening maritime governance, enhancing cross-border cooperation, and improving data integration. These efforts helped lay the foundation for the adoption of the binding Maritime Spatial Planning Directive (2014/89/EU).

- At the time of the ex-post evaluation study, the conclusions remained provisional because several projects had not been completed. Nevertheless, they provide a useful comparative indication for the purposes of this evaluation.

The conclusions of those two evaluations used as points of comparison for the CFP and IMP measures are resumed in the table below.

Table 3: Direct Management points of comparison

Direct Management Measures		Points of comparison
CFP	Collection, management and dissemination of scientific advice	The study found that the timeliness of data submissions could be improved and that better tracking was needed to assess how the advice is taken account of in fisheries management. Responsibility for data collection shifted to the shared management part of the EMFF after 2013 with regional coordination handed to Member States in line with the Common Fisheries Policy's regionalisation strategy.
	Control and enforcement measures	The budget was largely taken up by introduction of new technologies, in particular IT tools. The study recommended a more long-term, flexible plan for control and enforcement, in particular for data exchange and IT tools development.
	Voluntary contributions to international organisations	The study found that financial support was effective and efficient and clearly benefited the organisations concerned, though some administrative processes could have been streamlined. Better performance indicators would have helped demonstrate the favourable outcomes.
	Advisory Councils	Seven Advisory Councils were set up following a 2004 Council Decision. Reform of the Common Fisheries Policy in December 2013 created four new Councils and reinforced their role in the regionalisation process. The reform introduced the obligation for 40% of members to be from outside the industry, for instance environmental lobbies or labour organisations. It was expected that this would deliver not only more balanced advice but would also enable local stakeholders to hear a more diverse range of views.
	Market intelligence	The European Market Observatory for fisheries and aquaculture products (EUMOFA) is the market intelligence tool on the European Union fisheries and aquaculture sector. It was developed by the European Commission and became operational during the period of this evaluation.
IMP	Integrated governance of	The study confirmed that events were well attended. Stakeholders reported that the European Maritime Days and regional workshops helped raise

	maritime and coastal affairs	awareness of maritime affairs and the sustainable development of the blue economy.
	Cross-sectoral initiatives	- The European Marine Observation and Data Network (EMODnet) was operational but still in its infancy. - The Common Information Sharing Environment for the maritime domain (CISE) was a new and complex information-sharing concept. The investment was considered worthwhile given the substantial improvement it could bring to the efficiency of Europe's maritime awareness capabilities by exchanging maritime information across sectors and borders. - Projects on spatial planning mainly focused on raising awareness amongst stakeholders, including through cross-border projects. This may have contributed to the adoption of the Maritime Spatial Planning Directive in 2014[26].
	Support for sustainable growth employment, innovation and new technologies	The studies on emerging economic activities funded under the programme for further development of maritime policy focused on those identified by the Commission's Communication on Blue Growth[27] (coastal tourism, blue biotechnology, ocean energy and aquaculture). According to the ex-post evaluation, these provided a useful knowledge base for future activities to maximise their potential.
	Protection of the marine environment	Eleven descriptors of good environmental status had been listed in the 2008 Marine Strategy Framework Directive and a Commission Decision[28] was adopted in 2010 laying down criteria and standards for their determination. However, a 2014 report by the Commission[29] on the first phase of implementation identified many shortcomings. Articles 3(5)b and 5(2) impose coherence at a regional and EU level but the report found no shared EU understanding of good environmental status. There were over 20 different determinations across the EU, and therefore no common or comparable goals.

[26] Directive 2014/89/EU.
[27] COM/2012/0494 final.
[28] Commission Decision 2010/477/EU.
[29] COM/2014/97 final.

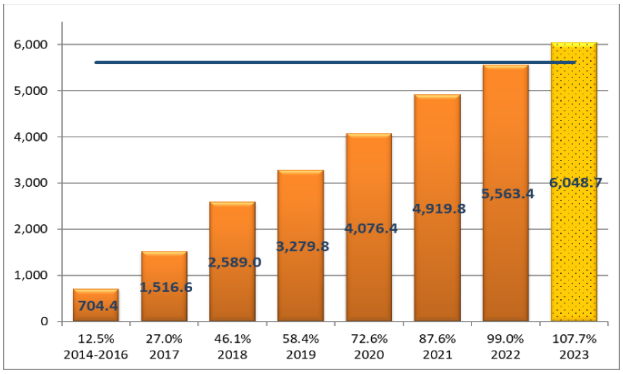
3 HOW HAS THE SITUATION EVOLVED OVER THE EVALUATION PERIOD?

3.1 IMPLEMENTATION OF SHARED MANAGEMENT

Implementation of the EMFF started slowly between **2014 and 2017**, mainly due to the late adoption of Operational Programmes, and administrative delays in the designation of implementing bodies and the set-up of the programme management in the Member States. From **2018 onwards**, the pace of implementation accelerated significantly, with **peak disbursement levels occurring between 2020 and 2022**, largely driven by crisis-response measures related to Covid and the Ukraine crisis.[30]

2023 was the final year of EMFF implementation, when beneficiaries could submit their applications for support and complete the implementation of all operations. The overall EMFF commitments for projects selected[31] as reported in Infosys reached around EUR 6 billion and correspond to 108%[32]. The following figure shows the financial evolution and the state of play of EMFF commitments reported by Member States.

Figure 3: EMFF funds committed – cumulative – in million EUR and as a percentage of total allocation[33]



Source: EMFF monitoring data 2023

By the end of the period, beneficiaries had declared a total expenditure of **EUR 4.8 billion**, bringing the **EMFF budget implementation rate to 85.5%**. As shown in Figure 4, **2023 marked the peak year** for payments, with Member States disbursing more than **18% of the total EMFF allocation**

---

30 Crisis-response measures under the EMFF included temporary cessation support, storage aid, compensation for income losses and additional costs, flexible fund reallocation, and relaxed state aid rules—introduced to help fisheries and aquaculture sectors cope with major disruptions such as the COVID-19 pandemic and the economic impacts of Russia's military aggression against Ukraine.

31 Commitments for projects selected once promising fishing or ocean-related project ideas are approved for funding by the European Maritime and Fisheries Fund (EMFF), the national authorities set aside the necessary funds. After the project work is completed and the beneficiaries have spent their own money on the activities, they submit claims with their expenses. The relevant national authority then reviews these claims and reimburses the beneficiaries for the eligible costs they have already paid to realize their approved projects.

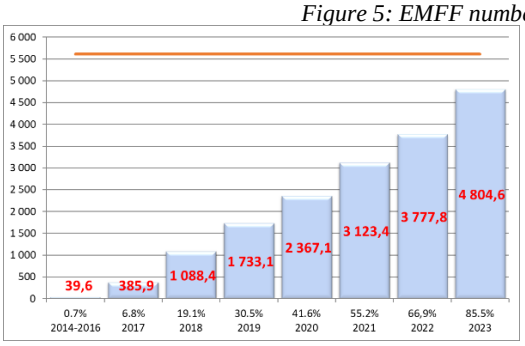
32 This committed amount appears inflated by approximately EUR 0.5 billion due to the inclusion of projects that were either not fully realized or only partially completed. Therefore, the actual commitments on fully implemented projects is expected to be around EUR 0.5 billion less than the committed figures reported as of the end of 2023.

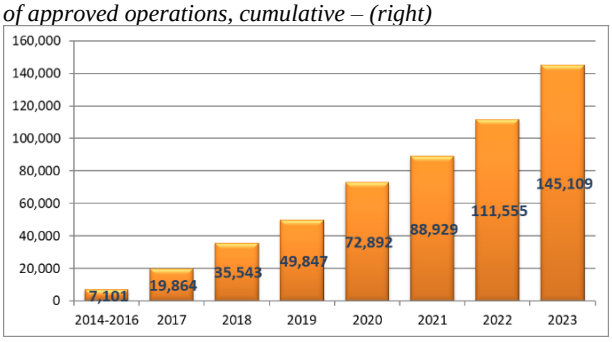
33 EMFF monitoring data calculates annual committed EMFF funding based on the approval date of each project, but these figures are subject to revisions by Member States in later reporting periods due to error corrections or changes to approval dates. Additionally, the total EMFF allocation itself can fluctuate due to decommitments. Consequently, the historical data presented in EMFF reports regarding annual funding commitments may vary from year to year as these adjustments are incorporated.

during that year. This surge is largely due to the approaching end of the implementation period, as previously approved operations reached maturity and triggered increased payment activity.

According to data from **EMFF Infosys** and the **Annual Implementation Reports (AIRs)** that the Member States submit to the European Commission every year, approximately **EUR 0.8 billion** had still not been paid to beneficiaries as of the end of 2023. Payments continued into **the following years,** and the total amount disbursed to beneficiaries has **increased to 94% of EMFF** by 31/7/2025 (date until when Member States can submit their last payment claim to the Commission).

Figure 4: EMFF spending – cumulative – as a percentage of total allocation[34] (left)
Figure 5: EMFF number of approved operations, cumulative – (right)





Source: Infosys 2023

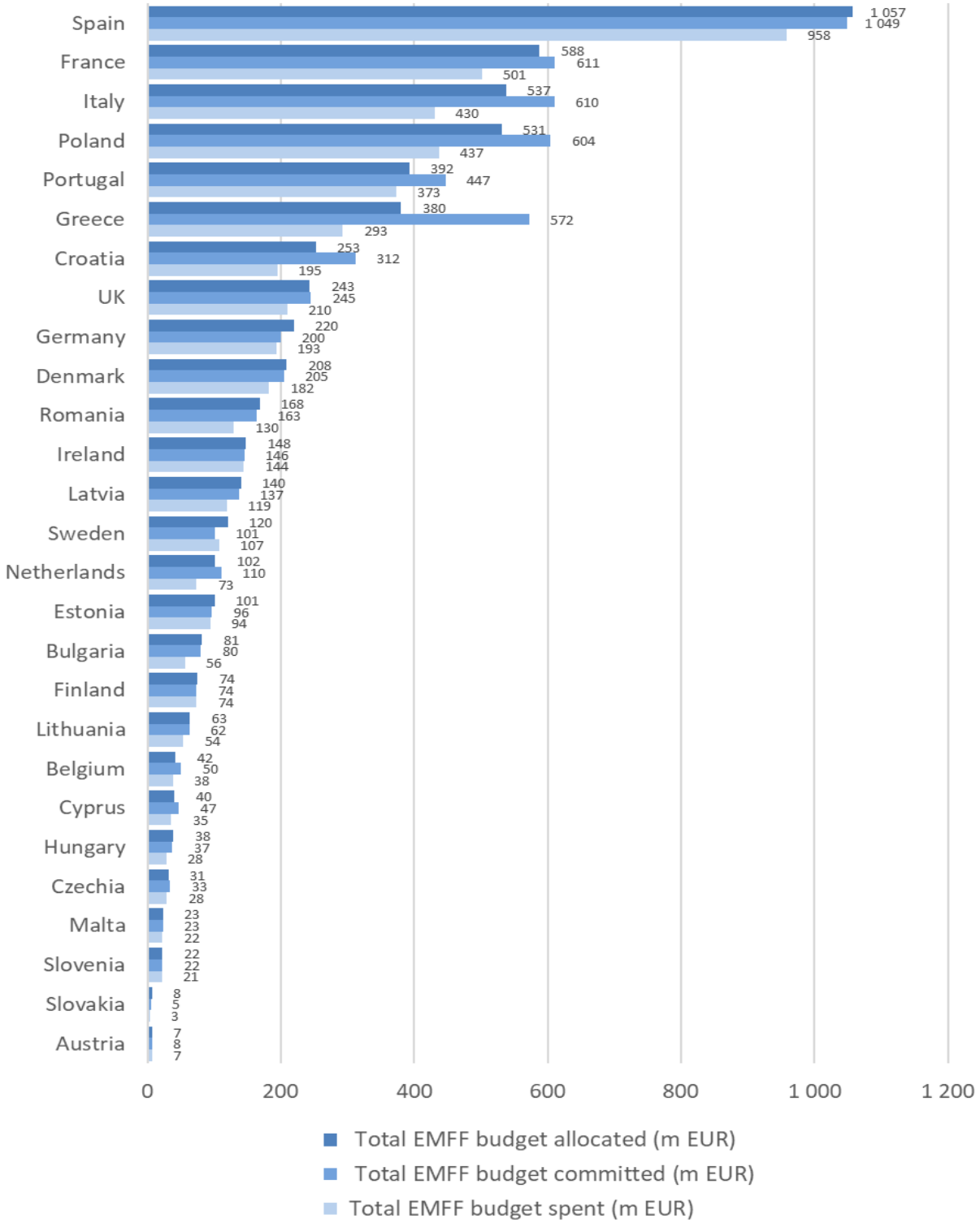
Over the 2014–2023 period, more than **145,000 projects** (operations) were reported under EMFF support measures, reflecting the broad scope and uptake of the fund across the EU. A significant increase occurred in **2023**, when over **33,000 new operations** were recorded—making it the year with the highest number of new entries. This spike follows earlier peaks in **2020 and 2022**, which were strongly influenced by the **introduction of crisis-related compensation measures** (see Figure 5), particularly in response to the COVID-19 pandemic and subsequent economic disruptions, including the energy and market crises.

A key driver behind the surge in the number of reported operations was the **widespread implementation of support for temporary cessation of fishing activities**. For instance, **over 48,000 operations** were reported **solely for temporary cessation support**, underscoring how emergency responses significantly shaped EMFF implementation patterns.

The level of EMFF eligible expenditure up to 2023 varies significantly between Member States, ranging from 39.7% to 100% (see Figure 6). Overall, of every EUR committed, EUR 0.79 has been claimed by beneficiaries.

[34] Calculating spending is to some extent less straightforward than calculating commitments. Infosys data on annual EMFF spending are calculated by subtracting the previous year's data from the current year's data. Moreover, this approach encounters the same challenges as those involved in calculating commitments. As a result, time series presented in EMFF reports may change each year.

Figure 6: EMFF budget allocated, EMFF budget committed and EMFF eligible expenditure per Member State at end-2023 (EUR million)



Source: Study underpinning the ex-post evaluation based on Article 97.1 EMFF data 2023

CONTRIBUTION OF SHARED MANAGEMENT TO EMFF OBJECTIVES

Table 4: EMFF implementation

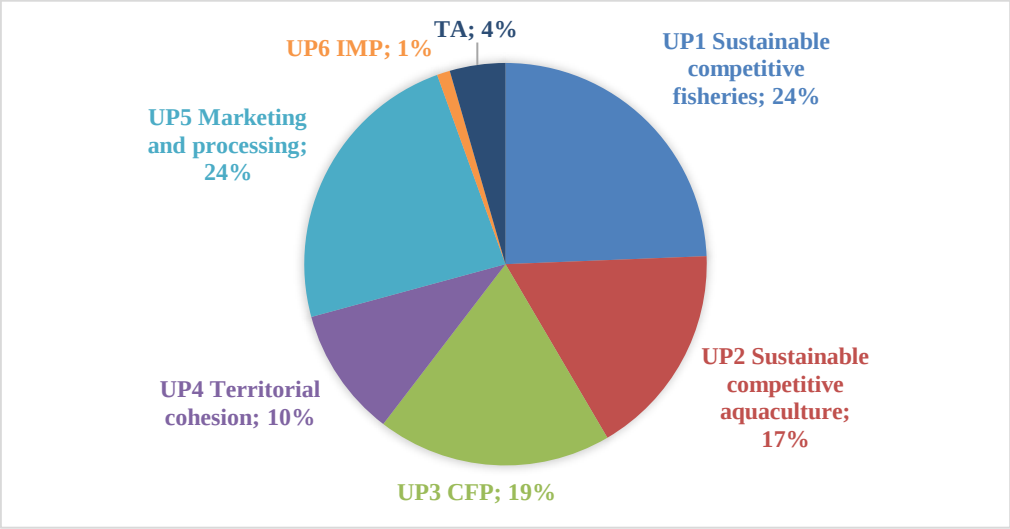
EMFF objectives Article 5 EC 508/2014	UP	Total EMFF allocation (EUR) (AIR, 31/12/2023)	Total EMFF committed by Managing Authority (EUR) (Infosys, 31/12/2023)	Commitment rate %	Total eligible EMFF expenditure declared by beneficiaries to the Managing Authority (EUR)	Absorption rate %	Number of operations
Promoting competitive, environmentally sustainable, economically viable and socially responsible fisheries and aquaculture	UP 1	1 368 489 197	1 558 541 504	113.9	1 190 318 862	87.0	72 562
	UP 2	965 337 576	1 046 581 202	108.4	820 124 720	85.0	14 451
	UP 5	1 331 619 720	1 295 026 717	97.3 1	1 131 907 590	85.0	38 268
	Total	3 665 446 493	3 900 149 423	106.4	3 142 351 171	85.7	125 281
Fostering the implementation of the CFP	UP3	1 058 344 968	1 191 476 961	112.6	968 700 946	91.5	2 157
Promoting a balanced and inclusive territorial development of fisheries and aquaculture areas	UP 4	583 243 009	641 361 107	110.0	429 329 541	73.6	15 120
Fostering the development and implementation of the Union's IMP in a manner complementary to cohesion policy and to the CFP	UP 6	58 756 593	61 971 894	105.5	54 550 823	92.8	278
Technical assistance, TA		251 024 173	253 774 031	101.1	209 647 594	83.5	2 273
Total		**5 616 815 236**	**6 048 733 416**	**107.1**	**4 804 580 075**	**85.4**	**145 109**

SOURCE: AIR/INFOSYS 2023

Based on the Famenet implementation report 2023[35], UP1 accounts for 72 562 operations, or half of all EMFF operations. The overall EMFF absorption rate is 85.5% (67.2% in 2022). UP6, the "smallest" UP, leads here with 92.8% absorption (EUR 54.6 million). It is followed by UP3 with 91.5% (EUR 968.7 million) of the total available EMFF funding already paid to beneficiaries. UP3 covers data collection and control, which are usually performed by state-governed entities. This implies an easier path to implementation, and as a result UP3 is the second-highest performer in relation to total eligible EMFF expenditure declared by beneficiaries. In absolute terms, under UP1 beneficiaries received EUR 1 190.3 million. Payments under UP2 and UP4 continued to progress during 2023 and reached 85.0% and 73.6% of the total allocations to these priorities. However, UP4 remains the slowest in terms of payments to beneficiaries.

[35] FAMENET EMFF implementation report 2023

Figure 7: EMFF implementation per UP under shared Management in Annex XII



Source: AIR/Infosys 2023 (state of play 31/12/2023)

Figure 7 shows the table related to EMFF implementation per measure based on Infosys data. Implementation per article varies considerably in terms of the EMFF funding committed and paid for, and in relative terms when compared to the planned allocation. We also observe that **57.3% of total EMFF commitments are concentrated under only six Articles** (Figures 8 & 9 below):

- Data collection (Article 77) achieves the highest uptake
- Implementation of CLLD (Article 63)
- Processing of fisheries and aquaculture products (Article 69)
- Investments in aquaculture (Article 48)
- Control and enforcement (Article 76)
- Investment in fishing ports and landing sites (Article 43(1,3))

Figure 8: EMFF committed per Article (EUR million) Infosys 2023

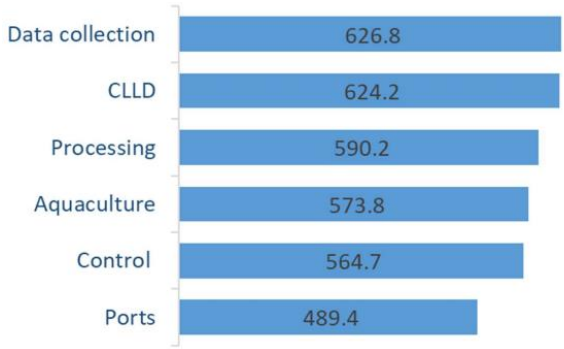
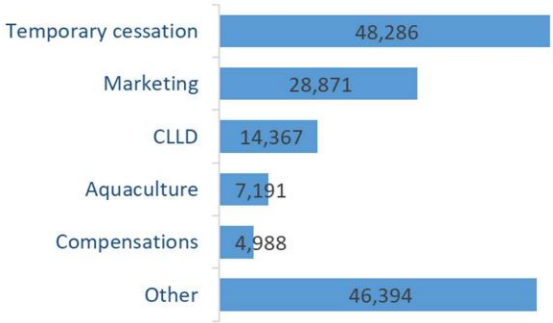


Figure 9: Number of operations per article – Infosys 2023



Measures attracting the least interest relate to conversion to eco-management, audit schemes and organic aquaculture (Article 53), with only one operation, and to trainees on board SSCF vessels (Article 29(3)), where 56 operations have been implemented.

In terms of operations, **one third, or 48 286, of all EMFF operations** (Figure 9) **have been implemented under Article 33 (Temporary cessation).** This number grew rapidly over the years (cumulatively): 12 496 by end 2019, 23 239 by end 2020, 31 955 by end 2021, and 44 173 by end 2022. In monetary terms the commitment under this Article is moderate: EUR 240.4 million. 19 327 **(40%) of these temporary cessation operations were reported as related to coronavirus impact mitigation.**

3.2 IMPLEMENTATION OF DIRECT MANAGEMENT

Just over 10% of the EMFF budget (a total of €647,275,400 over the seven-year funding period 2014-2020) was earmarked for measures implemented directly by the European Commission and the EASME. Between 200 and 300 contracts under this direct management part of the programme were signed each year.

The split between maritime policy and fisheries was roughly 50:50, with slightly more on fisheries in the first three years of the programme. The budget allocation was amended by a delegated regulation in 2017 to increase funding for "blue growth" projects: bottom-up projects, targeting SME-led innovations in the blue economy, including aquaculture, renewable energy and transport.

Table 5: Direct management specific objectives

Repartition of funding for direct management specific objectives				
Maritime Policy	Integrated maritime governance	6 %	€	38.836.524
	Marine data, spatial planning and maritime surveillance (EMODnet, IMS)	24 %	€	155.346.096
	Blue growth (EASME)	17 %	€	110.036.818
	Marine environment (Natura 2000)	5 %	€	32.363.770
		52 %	**€**	**336.583.208**
Fisheries	Scientific advice and data collection (ICES, JRC, STECF, cooperation on data, studies)	11 %	€	71.200.294
	Fisheries control and enforcement	11 %	€	71.200.294
	Voluntary contributions to international organisations	13 %	€	84.145.802
	Advisory councils and communication	7 %	€	45.309.278
	Market intelligence for seafood including the establishment of electronic markets (EUMOFA, IT and observatories, studies)	6 %	€	38.836.524
		48 %	**€**	**310.692.192**
Total			**€**	**647.275.400**

3.3 EVOLUTION TOWARDS THE EMFF OBJECTIVES

In this section we will analyse selected measures to assess the progress towards the EMFF objectives as described under Article 5 of the EMFF Regulation. The full list of implementations per measure can be found in the Annex IX.

3.3.1 PROMOTING COMPETITIVE, ENVIRONMENTALLY SUSTAINABLE, ECONOMICALLY VIABLE AND SOCIALLY RESPONSIBLE FISHERIES AND AQUACULTURE

This objective links union priorities UP1, UP2, UP5 and is complemented by measures implemented under direct management.

MSs selected 125 281 operations with a total budget of EUR 3 900 million, this corresponds to **86% of all the selected operations and to 64% of the total EMFF amount committed**.

REDUCTION OF THE ENVIRONMENTAL IMPACT OF THE FISHERIES AND AQUACULTURE SECTORS

- **Limiting the impact of fishing on the marine environment and adapting fishing to the protection of species (Article 38)**.

Member States allocated EUR 25 million under this EMFF measure, supporting 1,795 operations. Most funding went to **improving gear selectivity** (EUR 13 million; 1,023 operations), followed by measures to protect gear and catches from mammals and birds (EUR 4.8 million; 295 operations) and to reduce discards or manage unwanted catches (EUR 4.7 million; 353 operations).
The study supporting the evaluation of the landing obligation[36] found that EASME-funded studies and pilot projects, such as MENDES 2 and SICAPTOR, helped advance more selective fishing gear. However, wider uptake remained limited because high costs and administrative complexity discouraged voluntary investment.

Overall, the measure likely contributed to better environmental performance, particularly through more selective fishing practices, but its exact impact on reducing unwanted catches cannot be clearly demonstrated. This is mainly due to weak discard data and the difficulty of isolating EMFF effects from other influences such as climate and environmental conditions.

Table 6: selected EMFF context indicators related to the sustainability of the fisheries sector

Context indicator presenting the initial situation[37]	**Value 2022**	**Value Baseline year 2011[38]**	**Change**
Stocks fished at sustainable levels (MSY)	30% of assessed stocks are both below FMSY and within safe biological limits	21,5%	+40%
Stocks overfished	20% of stocks fished above FMSY (NE Atlantic)	35%	-43%
Stocks outside safe biological limits	39% of stocks outside safe biological limits (NE Atlantic)	43%	-9%
Total stocks fished unsustainably	70% not meeting both FMSY and biological safety targets (approx.)	78,5%	-11%

Source: STECF – Ad hoc report 25-01.2025

[36] European Commission: European Climate, Infrastructure and Environment Executive Agency, Davie, S., Wakeford, R., Whitley, C., van den Berg, P. et al., *Study supporting the evaluation of the landing obligation – Common fisheries policy – Final report*, Publications Office of the European Union, 2025, **https://data.europa.eu/doi/10.2926/5282226**
[37] European Commission DG MARE, Impact Assessment 2011
[38] Baseline year and values in Annex VIII

- **Energy efficiency and mitigation of climate change (Article 41)**

MSs selected 2 022 operations with a total budget of **EUR 20.2 million to support the shift towards a low-carbon economy in all sectors**. This includes EUR 17 million on board investments; energy efficiency audits and schemes; studies to assess the contribution of alternative propulsion systems and hull designs, the remainder was allocated replacement or modernisation of main or ancillary engines. This measure experienced a relatively **low uptake** compared to other measures.

- **Productive investments in aquaculture, Article 48:**

Fourth-largest funding allocation, with total commitments of **EUR 573.8 million**. The largest share, **62% (EUR 357.9 million)**, was allocated to **productive investments**, followed by **modernisation** with **EUR 177.6 million**. The remaining **7%** was spread across five other areas: **product quality, restoration, diversification, complementary activities, and animal health**. In addition, EUR **34.8 million** targeted the development of **closed recirculation systems.**

- **Aquaculture providing environmental services (Article 54)**

2 104 operations with EUR 100.1 million committed are funded under this article. The largest proportion of the EMFF budget relates to aquaculture operations including **conservation and improvement of environment and biodiversity**, for EUR 56.5 million in 1 557 operations.
Measures supporting the aquaculture sector under the EMFF appear to have substantially increased the uptake of sustainable practices. Desk research suggests that environmentally friendly production methods were adopted by 15% more farms, bringing their share to around one quarter of total EU aquaculture production and contributing to the establishment of approximately 300 new sustainable farms[39].. Bivalve farming grew by 20%, adding 50,000 tonnes of production while also providing important ecosystem services[40]. At the same time, 40% of newly established farms introduced submerged cage systems, protecting 30,000 tonnes of production from extreme weather events and reducing environmental losses by 40%. However, smaller operators continued to face difficulties in accessing resources and technology, highlighting persistent structural inequalities within the sector.

Eurostat data further shows that total EU aquaculture production increased by 4%, from 97,000 to 101,000 tonnes, between 2014 and 2021, after reaching a peak of 106,000 tonnes in 2017 and 2018. Over the same period, the value of production rose by two-thirds, pointing to a significant increase in value added.

REDUCTION OF FISHING FLEET OVERCAPACITY

To **achieve a better balance between the fishing fleet capacity and available fishing opportunities**, EMFF primarily aimed at by supporting the permanent cessation of fishing activities.

---

39 Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet (STECF 23-07), Publications Office of the European Union

40 Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet (STECF 23-07), Publications Office of the European Union

- **Temporary cessation of fishing activities (Article 33)**

As already mentioned above (in section 3.1), Temporary cessation of fishing activities represents one third of all operations (see Figure 9). It provides support when fishing activities are temporarily stopped which eases pressure on stocks, reduces the fishing efforts for a limited period and helps fleets adapt during periods of crisis. On the long-term however it does not solve the overcapacity because the vessels are not removed from the fleet.

- **Permanent cessation of fishing activities (Article 34)**

EMFF funding for permanent cessation could only be granted if the vessel belonged to a fleet segment that a Member State had reported in its annual fleet report as not in balance with the fishing opportunities available. The Member State was then required to submit an action plan in annex to its fleet report detailing measures to address the imbalance, including the scope and targets for permanent cessation. **This process ensured that financial support was only granted where a structural imbalance was formally demonstrated and a targeted strategy was set out, thereby reinforcing the connection between policy compliance, corrective action, and funding in pursuit of sustainability objectives**. EUR 120 million were committed by MS for permanent cessation.
According to the STECF 2024 based on data from 2022, the EU fishing fleet comprised 70,986 vessels with a combined gross tonnage of 1.32 million and engine power of 5.26 million kW. There were 18,156 inactive vessels[41] (26% of the total number of vessels), bringing the number of active vessels to 52,830.

Of the active vessels, 76% were Small Scale Coastal Fisheries (SSCF)[42] vessels, 23.7% belonged to the EU large-scale fleet (LSF) and less than 0.5% to the EU Distant-Water Fleet (DWF).

For the EMFF the target set out by the Member States was to reduce overcapacity by 34.49% GT, but only 3.94% kW reduction was achieved. Nevertheless, the fishing fleet has reduced since 2014 in terms of number of vessels and capacity as shown in the table below. The fund contributed to the removal of 1 825 vessel.

[41] An "active vessel" is a fishing vessel that undertook fishing activities and recorded landings during the reference year. An "inactive vessel" refers to a vessel registered in the fleet register that did not record any fishing activity or landings during that same period. Thus, "inactive" vessels remain part of the official fleet but do not contribute to actual fishing effort or catches in that year.

[42] EMFF regulation (EU) No 508/2014 ‘small–scale coastal fishing’ means fishing carried out by fishing vessels of an overall length of less than 12 metres and not using towed fishing gear as listed in Table 3 of Annex I to Commission Regulation (EC) No 26/2004.

Table 7: selected EMFF context indicators related to fishing fleet

Context indicator	Measurement unit	Value 2022	Value baseline year 2013[43]	Change
1.1.a - Fishing fleet (number of vessels)[44]	number of active vessels	52 830	60 637	-7 807
1.1.b - Fishing fleet (kW)[45]	kW	4 477 279	4 919 333	-442 054
1.1.c - Fishing fleet (GT)[46]	GT	1 203 870	1 298 490	-94 620

PROTECTION OF THE MARINE ENVIRONMENT AND RESTORATION OF BIODIVERSITY

The EMFF supported investments aimed at protecting and restoring aquatic biodiversity and ecosystems in both marine and inland waters. In total, Member States committed EUR 606 million in EMFF funding across 11 639 operations contributing to the protection and restoration of biodiversity and ecosystems. Of this amount, EUR 390 million was committed to Natura 2000 measures. Examples are provided in Annex XIII.

Under Article 40 on the **protection and restoration of marine biodiversity and ecosystems, and compensation schemes in the framework of sustainable fishing activities**, EUR 284 million was committed across 6 576 operations.

Table 8 EMFF contribution to the conservation of the marine environment and restoration of biodiversity (see Annex XIII for the full description of the measures listed below)

EMFF article	Total EMFF allocation[47]	Total EMFF committed (EUR)[48]	Commitment rate (%)	Total eligible EMFF expenditure (EUR)	Absorption rate (%)	Number of operations
Article 28	51 895 371	44 724 651	86.2	13 753 600	26.5	167
Article 37	33 734 467	36 899 060	109.4	31 582 971	93.6	445
Article 38	31 762 228	20 061 641	63.2	15 216 609	47.9	1 364
Article 39	50 754 844	30 430 544	60.0	9 170 776	18.1	167
Article 40	250 937 739	284 353 784	109	223 376 078	97	6 576

[43] Baseline year and values in Annex VIII
[44] Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet. 24-07
[45] Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet. 24-07
[46] Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet. 24-07
[47] Based on EMFF AIRs, cut-off 31 December 2023
[48] Based on Infosys, cut-off 31 December 2023

Article 54	100 234 234	86 425 773	86.2	76 558 578	76.4	1 749
Article 80	58 756 593	61 971 894	108	54 550 824	92	278
Total	**568 649 089**	**606 085 399**	**128.9**	**504 104 553**	**111.1**	**11 639**

Source: EMFF Infosys/AIR 2023

Evidence collected during the study underpinning the ex-post evaluation indicates that the **EMFF provided targeted support and created enabling conditions that facilitated progress towards biodiversity-related objectives**. The scope, scale, and strategic orientation of EMFF funding were consistent with the protection and restoration of marine ecosystems, complementing the objectives of the CFP and the EU Biodiversity Strategy. Broader EU regulatory frameworks and national measures also played a role; it is therefore not possible to attribute observed environmental improvements solely to EMFF interventions. However, the fund's contributions are clearly associated with **tangible advances in marine biodiversity protection and restoration.**

Examples of projects directly related to Natura 2000 are:

- BioPradaRia - Restoration, management and conservation of biodiversity and biological resources associated with Ria de Aveiro seagrass ecosystems (PL)
- RESTAURA2020 – Improving environmental quality and developing mitigation measures against invasive species in Natura 2000 Atlantic estuarine marshes (PL)
- Reef habitats - Significance of reefs for fish, porpoise and fisheries management (DK)
- Reef habitats - Effects on the ecosystem component benthic fauna in Natura 2000 areas from fishery with scraping tools (DK)
- Reef habitats - Marine Biodiversity Scheme (IE)
- INTERMARES - Integrated, innovative and participatory management of the Natura2000 network in the Spanish marine environment (ES)

OVERCOMING THE INNOVATION GAP IN THE FISHERIES AND AQUACULTURE SECTOR

Innovation in fisheries

The EMFF targeted innovation in Union Priority 1, Specific Objective 5 (UP1-SO5), focusing on **strengthening technological development and innovation**, with a particular emphasis on **increasing energy efficiency** and promoting **knowledge transfer** through scientific collaboration. This objective was implemented by supporting improvements in vessels and equipment, fostering partnerships between fishers and scientists, and promoting the development and dissemination of technical and organisational innovations.

During the EMFF period approximately **40% of the EU fishing fleet - or around 30 000 vessels - adopted new technologies, including selective fishing gear and digital monitoring systems.** Furthermore, more than 500 collaborative projects between fishers and scientists were supported, leading to the **development of around 30 new fishing methods and bycatch reductions of up to**

30% in participating fleets.[49] Despite these achievements, regional disparities persist, underscoring the need for continued, targeted support.

Example of the successful project "Fully documented fisheries"[50]:

Dutch researchers and fishers developed an AI system that uses conveyor-belt cameras to identify fish species and size on board. It separates marketable catches from undersized fish in real time, helping crews adjust fishing and reduce overfishing. The tool was tested for three years on beam trawlers with voluntary, compensated fisher participation. (EMFF contribution EUR 4,094,243).

Innovation in aquaculture

EMFF Union Priority 2 Specific objective 1 (UP2-SO1) aims to strengthen technological development, innovation and knowledge transfer by supporting new knowledge creation for resource efficiency and sustainability in partnership with scientists and professional advice for aquaculture farms.

According to the study underpinning the ex-post evaluation the **EMFF fostered growth in aquaculture through technological innovation and knowledge sharing, achieving increases in production, value, and profitability.** Entrepreneurs gained access to the knowledge and support to develop better and more diversified techniques and products, to improve performance and develop competitiveness in aquaculture farms.

Case studies from the UK, Spain, and the Netherlands confirmed that EMFF funding helped de-risk innovation, enabling projects that would not have been feasible otherwise (see Text Box 2, Annex XI). While the results are encouraging, challenges remain, especially for small farms in less developed areas.

Examples of innovative projects[51]:

- MUSSELPRO[52] a project funded by the EMFF addressed new technologies for mussel processing.
- Aqua-Lit[53] project – whose genesis was stimulated by the EU Strategy for Plastics in a Circular Economy (2018) – developed a marine litter toolbox that has been the basis for much of the EU action on the subject since.

INCREASE COMPETITIVENESS AND VIABILITY OF AQUACULTURE ENTERPRISES, AND FISHERIES SMES.

Profitability and employment of the fisheries sector

EMFF Union Priority 1 – Specific Objective 4 (UP1-SO4) aimed to enhance the competitiveness and viability of fisheries enterprises, including the small-scale coastal fleet, and improve safety and

[49] ICES, 2023

[50] https://www.visned.nl/project/fully-documented-fisheries

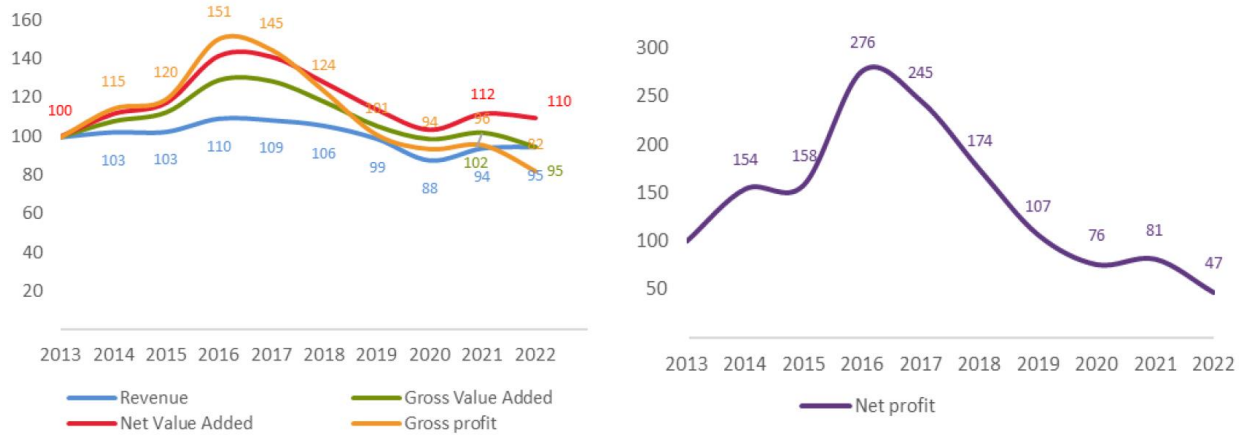
51 Mid-term assessment of the implementation of the 'Strategic guidelines for EU aquaculture' and the 'Multi-annual National Strategic Plans' for aquaculture, Publications Office of the European Union, 2025

52 https://www.musselpro.com/musselpro/

53 https://www.eurcaw-aqua.eu/

working conditions. **Between 2014 and 2022, the EU fishing sector recorded overall declined but notable profitability improvements until 2016 see Figure 10**. Supported by targeted EMFF investments in modernisation and sustainability the Net Value added increased over this period.

Figure 10: Variations in revenue and profits for the EU active fleet (based on 2013=100)



Source: Study underpinning the ex-post evaluation 2024

In 2022, the EU fleet generated EUR 3.4 billion in GVA and EUR 1.1 billion in gross profit, but net profit margins were slim at 2.2%, pressured by rising operational costs, fuel prices, and external shocks like COVID-19 and the Russia's military aggression against Ukraine.

Profitability assessments focused on changes in net profits and the share of unbalanced fleets. In 2022, GVA accounted for 49% of total revenue, and the gross profit margin was 16.5%, both declining from previous years (see table 9).

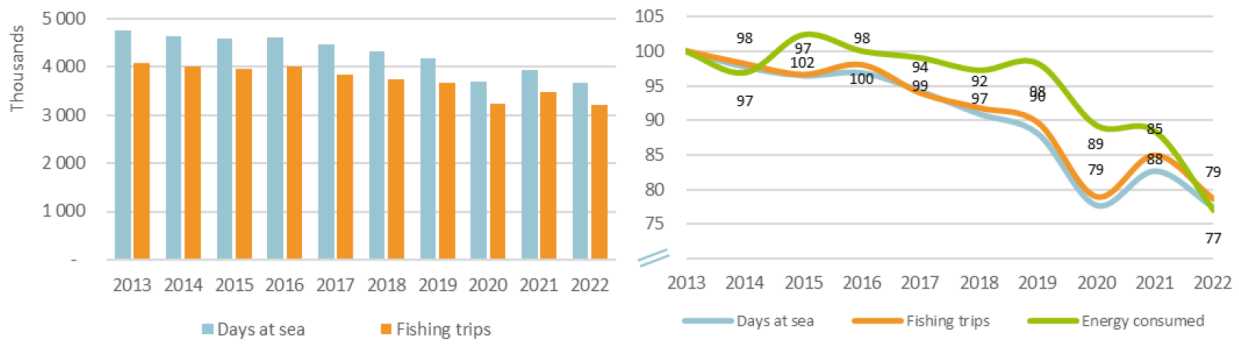
Table 9: selected indicators related to the profitability of the fishing sector

Year	GVA (EUR bn)	Gross Profit (EUR bn)	Net Profit (EUR bn)	GVA/Revenue	Gross Profit Margin	Net Profit Margin
2019	3.4	1.25	0.60	53%	20%	9%
2020	3.4	1.25	0.40	55%	~20%	7.2%
2021	3.3	1.16	0.22 (est.)	55%	~20%	4.6%
2022	3.4	1.1		49%	16%	

Source: STECF 2021 report, STEFC 2023 report

Although the **fuel efficiency** of the EU fleet has improved (Figure 11), **direct attribution to the EMFF cannot be comprehensively established.** Among other factors, low fuel prices in the middle of the last decade and high fuel prices at the beginning of this one are likely to be clouding the picture of the true extent of improvements in fuel efficiency. Nevertheless, stakeholders consulted in the study underpinning the ex-post evaluation mentioned for example how, in Spain, the modernisation of the fishing fleet under Article 43(2) of EMFF Regulation facilitated the upgrade of vessels with energy-efficient engines and advanced waste management systems.

Figure 11: Fishing effort and energy consumption, 2013-2022



Source: STECF Report 2024-07 Note: excludes Greece for time-series consistency

Employment Trends

When focusing only on Union Priorities 1, 2 and 4, EMFF supported employment by contributing to the creation of 2 025.9 FTEs and the maintenance of 30 675.97 FTEs[54]. Considering nevertheless overall employment in the fisheries sector, a decline by 29.1%, from 107,000 FTEs in 2013 to 75 816 in 2022[55] is observed (see table 10). Although EMFF measures aimed to support young fishers, available data lacks sufficient granularity to assess their participation.

Despite the shrinking workforce, labour productivity improved markedly, with GVA per FTE rising by 73.7% driven by technological advancements and modernisation efforts. This increase in productivity helped offset employment declines, showcasing the sector's adaptability and competitiveness.

Furthermore, work-related injuries and accidents decreased by 74% over the EMFF period, contributing to a reduction in insurance costs for fishers (table 10). However, safety improvements were uneven, with some Member States still reporting high accident rates due to gaps in training and equipment.

Table 10: selected EMFF context indicators related to profitability of the fisheries sector

Context indicator	**Measurement unit**	**Baseline value 2013**	**Value 2022**	**Change compared to 2013[56]**
1.2 - Gross value added per FTE employee	thousand Euros per FTE employee	26 906	46 727	19 820
1.3 - Net profit	thousand Euros	135 996 075	474 837 78	338 841
1.4 - Return on investment of fixed tangible assets	%	3%	10%	7 percentage points

[54] FAMENET EMFF implementation report 2023

[55] Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet. 24-07

[56] Baseline year and values in Annex VIII

Context indicator	Measurement unit	Baseline value 2013	Value 2022	Change compared to 2013[56]
1.8.a - Number of employed (FTE) including male and female	FTE	106 951	75 816	-31 135
1.9.a - Number of work-related injuries and accidents	number	Killed: 3, Injured: 31	Killed: 4, Injured: 5	Killed +1, Injured -26
1.9.b - % of work-related injuries and accidents to total fishers	%	0.024%	0,008%	-0,016%
1.10.a - Coverage of Natura 2000 areas designated under the Birds and Habitats directives	Km²	1 039 333	1 220 387	181 054

Source: STECF report 2024-07

Small scale coastal fisheries

The EMFF supported small-scale coastal fisheries (SSCF) under Union Priority 1, Specific Objective 4 (UP1-SO4), through measures such as support for start-ups, fleet modernisation, diversification of activities, and safety improvements. However, despite the ambition of this objective, actual investment remained limited, particularly among the small-scale fleet, which was constrained by limited financial capacity and a generally risk-averse investment behaviour.

In 2022, SSCF accounted for 76%[57] of the active EU fishing fleet in terms of vessel numbers, underlining its importance within the sector. Nonetheless, it continued to face significant structural disadvantages. In several Member States, including Germany, Denmark, Greece, Malta, Poland and Sweden, SSCF operated at both gross and net losses. At the same time, the economic evidence for the sector remains incomplete: data for the period concerned is fragmented, often based on estimates, and affected by reporting gaps and inconsistencies between Member States, which reduces precision and comparability.

According to the most recent available reports[58] for 2022, the SSCF fleet comprised:

- 40 083 active vessels
- 59 694 fishers employed
- 29 409 full-time equivalents (FTEs)
- 76% of the active EU fleet
- 53% of engaged crew

[57] Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet (STECF 23-07)

[58] Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2024 Annual Economic Report on the EU Fishing Fleet (STECF 24-03 & 24-07)

These figures illustrate the **strong prevalence of part-time work** in the sector, as the number of FTEs is substantially lower than the total number of fishers employed. While recent improvements under the EU Data Collection Framework have helped strengthen data availability, major challenges remain in fully capturing the socio-economic performance of SSCF, especially at regional level.

Although revenue, GVA and profits all declined compared with 2021, **SSCF at EU level remained profitable overall in 2022**. The picture, however, varies significantly across countries: while some Member States, notably Spain, Italy and Portugal, maintained relatively profitable SSCF segments, others continued to report gross and net losses. Growth in **other income** (+161%) and a sharp increase in **operational support** (+106% compared with 2013) helped partly offset the deterioration in core economic indicators[59].

Overall, these trends point both to the vulnerability and the resilience of the sector and underline the growing importance of complementary and alternative income sources. Although employment declined, SSCF continues to play a vital role in the EU fishing industry, not only through its economic contribution but also through its support to the socio-economic fabric of coastal communities and its contribution to more sustainable fishing practices.

EMFF financial support to small-scale vessels contributed in part to improving and diversifying activities, and to enhancing the competitiveness and viability of fisheries. By contrast, funding for larger trawl vessels was used mainly to compensate for permanent cessation and temporary cessation of fishing activities. **Employment-related results exceeded EMFF indicator targets, with 2 026 FTE jobs created and 30 676 FTE jobs maintained.**

Profitability of the aquaculture sector

EMFF Union Priority 2 Specific Objective 2 (UP2-SO2) aimed to enhance the competitiveness and viability of aquaculture enterprises, especially SMEs, by supporting investments in productivity, diversification, safety, and the establishment of new farms.

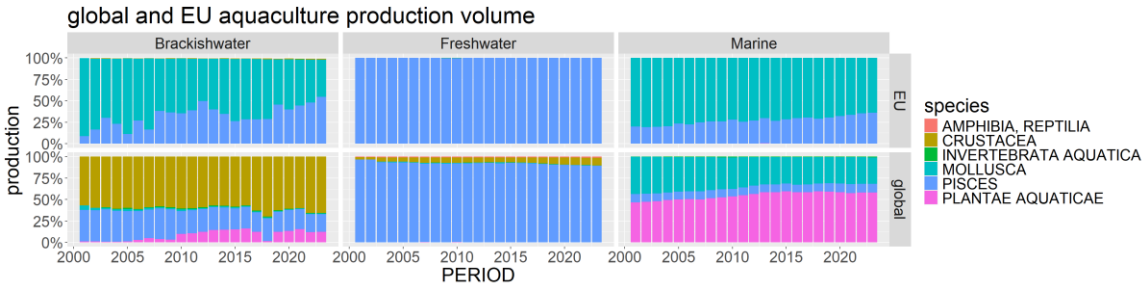
EMFF enhanced the competitiveness, safety, and resilience of aquaculture enterprises, especially SMEs. Exceeding employment targets, it positively impacted production and safety, aligning well with local needs. However, despite EMFF support exceeding indicator targets — creating 1 274 jobs (165% of the target) and maintaining 9 822 jobs (117%) —, but broader structural trends in the sector led to an overall decline in employment in aquaculture, with full-time equivalents dropping from around 40 000 to approximately 35 000 between 2014 and 2022. In other words, **while the EMFF created and maintained jobs, this was not enough to offset wider job losses across the sector.** The number of aquaculture enterprises also trended downward, from about 15 000 to 14 000, reflecting challenges in attracting new businesses and sustaining employment. Another element for this was the complex regulatory framework (such as on licensing).

By 2022/2023, the EU aquaculture sector demonstrated moderate profitability and stable production levels (see Figure 12 and Table 11 below). However, its global market share remained limited. Production between 2014 and 2023 increased by an average of 0.1% per year for freshwater species

[59] Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2024 Annual Economic Report on the EU Fishing Fleet (STECF 24-03 & 24-07)

and 0.3% for marine species[60]. This compares to 4.3% and 3.0% globally. Profitability varied across segments, with marine fish farming outperforming freshwater and shellfish farming. Indeed, the proportion of production of marine fish compared to shellfish increased and was much higher that the global average.

Figure 12: Nature of EU aquaculture production compared to global production (FAO database)



Persistent challenges, such as regulatory complexity, competition for space, climate change, limited access to finance, continue to constrain sector growth, particularly affecting smaller farms in less developed regions[61]. Targeted policy support and innovation investments remain essential to enhancing competitiveness and sustainability.

The table below presents selected EMFF context indicators related to aquaculture profitability, sustainability and growth.

Table 11: selected EMFF context indicators related to the profitability of the aquaculture sector

Context indicator presenting the initial situation	**Measurement unit**	**Baseline Value (year)**	**Value 2022**	**Difference compared to Baseline[62]**
2.1 - Volume of aquaculture production[63]	tonnes	1 035 305 (2013)	1 083 252	47 947
2.2 - Value of aquaculture production[64]	thousand Euros	2 957 242 (2013)	4 834 623	1 877 381
2.3 - Net profit[65]	thousand Euros	769 330 (2013)	1 328 133	558 803
2.4 - Volume of production organic aquaculture[66]	tonnes	appr 32 000 (2015)	(value 2020) 74 032	42 032

[60] From FAO database
[61] https://www.eib.org/en/projects/topics/regional-development/index
[62] Baseline year and values in Annex VIII
[63] Production from aquaculture excluding hatcheries and nurseries (from 2008 onwards), https://ec.europa.eu/eurostat/databrowser/view/fish_aq2a__custom_16519312/default/table?lang=en
[64] EUROSTAT Production from aquaculture excluding hatcheries and nurseries (from 2008 onwards), https://ec.europa.eu/eurostat/databrowser/view/fish_aq2a__custom_16519544/default/table?lang=en
[65] Based on STECF 24-14
[66] EUMOFA, organic aquaculture in the EU, table 4 and fig 4

Context indicator presenting the initial situation	Measurement unit	Baseline Value (year)	Value 2022	Difference compared to Baseline[62]
2.5 - Volume of production recirculation system[67]	tonnes	21 150 (2017)	30 814	30 814
2.6.a - Number of employed (FTE) including male and female[68]	FTE	40 878 (2016)	40 727	40 727

Source: see footnotes to the single indicators

IMPROVEMENT OF MARKETING AND PROCESSING IN THE FISHERIES AND AQUACULTURE SECTOR

EMFF funding committed to **Article 68 marketing measures** rose by EUR 206.4 million since 2022, reaching **EUR 382.2 million**. Operations increased from 5,002 to 28,871, **including 16,357 linked to the Ukraine crisis**. Five operation types made up 97% of all activities, led by new market development (12,467 operations; EUR 119.2 million), promotional campaigns (4,705; EUR 105.2 million), standard contracts (3,344; EUR 61.9 million), quality and value-added promotion (4,126; EUR 46.8 million), and production transparency (3,336; EUR 18.8 million).

A further 145 operations, worth EUR 2.8 million, supported the creation of producer organisations and associations.

In terms of EMFF commitments **Article 69: Processing of fisheries and aquaculture products** comes third after Data collection and CLLD**,** with **EUR 590.2 million** for 3 655 operations. New or improved products, processes or management systems cover 55% of the operations, followed by Improved safety, hygiene, health and working conditions (21% of operations) and Energy saving or reducing the impact on the environment (18% of operations).

Article 70 covers the compensation for the Outermost Regions. It helped reinforce the role of POs in implementing the CFP objectives on the ground and played a role in stabilising markets during disruptions like COVID-19. It generally promoted a shift toward more strategic, market-oriented operations among the sector, in particular producer organisations.

Smaller producers, non-members of POs, still faced challenges in scaling up and accessing markets. Some evidence of the EMFF contribution to the transition to Production and Marketing Plans, and a more market-oriented approach, was supplied by the case study on EMFF financial support promotes market organisation for fishery and aquaculture products (See textbox 4, Annex XI).

Based on the STECF 2024 report[69], it can be seen that **the compensation mechanism for additional costs in the EU's Outermost Regions (ORs) is crucial for operators involved in fishing, farming, processing, and marketing of fishery and aquaculture products.** Due to the geographic isolation and distance from supply chains, operators in ORs face higher operational costs compared to mainland Europe. The EMFF can play a central role in addressing these challenges by providing financial aid and compensation schemes. In the ORs, the compensation mechanisms help offset the increased costs

[67] STECF_24-14_EU Aquaculture economic sector data tables
[68] 2016: STECF 18-19, table 2.1, p.29 2022: STECF_24-14, table 1, p.13
[69] The 2024 Annual Economic Report on the EU Fishing Fleet (STECF 24-03 & 24-07)

of fuel, gears, and equipment, which are particularly burdensome for smaller-scale and labour-intensive operations.

According to the underpinning the ex-post evaluation in practice the compensation schemes have shown limited scope and impact, especially in areas such as Guadeloupe, Martinique, and French Guiana, where local operators consider the financial support insufficient. The requirement for **upfront payments remains a barrier for small-scale fisheries to access EMFF funds**. Additionally, insufficient investment in operational infrastructure and the high cost of capital further exacerbates these challenges in the outermost regions. Although EMFF funding seeks to address these issues, its effectiveness is constrained by both economic limitations and the significant upfront expenses needed to adopt new technologies.

By 2022, the EU fish processing industry had shown signs of recovery and growth. The sector's turnover increased, and employment levels stabilised. The industry adapted to challenges such as the COVID-19 pandemic and geopolitical tensions by enhancing efficiency and exploring new markets. Additionally, there was a notable shift towards sustainable practices and value-added products, aligning with the EU's Green Deal objectives. According to Eurostat-, 110 000 persons were employed in the EU-27, fish processing industry in 2022. The sector recorded, in 2022 a value added of 5 billion euros, covering 2,3% of the value added of total manufacture of food products. The table below presents selected EMFF context indicators related to processing.

Table 12: selected EMFF context indicators processing

Context indicator presenting the initial situation	Measurement unit	Value 2021	Change to 2013[70]
Turnover	EUR	24.6 bln	2.6 bln
GVA	EUR	5.7 bln	1.5 bln
Employment (in FTE)	FTE	101 968	12 650

Source: STECF Report 24-07

3.3.2 FOSTERING THE IMPLEMENTATION OF THE CFP

The measures assessed in this section aimed at improving the supply of scientific knowledge and the control and enforcement of CFP objectives.

IMPROVE THE AVAILABILITY OF HIGH QUALITY AND TIMELY DATA AND SCIENTIFIC ADVICE

- **Data collection (Article 77)**

This second most important measure in terms of investment with EUR 578.5 million committed by MS.

The indicator on "Increase in the percentage of fulfilment of data calls" pointed to successful implementation exceeding its target value. **Data collection moved from a prescriptive system under EFF to being end-user driven, thus increasing its effectiveness.** The establishment of regional coordination groups with year-round work programmes ensured better alignment with end-user needs at sea-basin level thus improving data quality for scientific advice. The primary objective of the Data

[70] Baseline year and values in Annex VIII

Collection Framework (DCF) is to collect data for scientific advice on CFP implementation, in a consistent and unbiased manner. Therefore, sufficient support was provided under the EMFF by ringfencing, and the structures were set up for better coordination, improved data management, innovation and additional data types.

Member States had more flexibility and pilot studies targeted new data collection methods for recreational fisheries, bycatch monitoring, habitat impacts, social data and environmental indicators for aquaculture, making the DCF more coherent with policies other than the CFP.

- **Scientific advice and knowledge under direct Management (Article 86)**

The CFP would not work without scientific advice as management measures need to be drawn up in line with "best available scientific advice". In line with this principle, all proposals and decisions on major management tools, such as total allowable catch, quotas, gear restrictions and suchlike, rely on reliable and independent scientific advice. For EU waters, this advice is provided mostly by the **International Council for the Exploration of the Sea (ICES)** for northern waters and by the **Scientific, Technical and Economic Committee for Fisheries (STECF)**. The Commission's Joint Research Centre provides the secretariat for STECF and manages certain data – both concerning biological data and socioeconomic data such as employment, costs and income.

The advice it provided was assessed as "effective in influencing many areas of management decision-making under the CFP" in the Coffey evaluation study, such as for
the preparation of Article 15 (landing obligation) of the CFP basic regulation.

Data collected by Member States under the **EU Data Collection Framework (DCF)** feeds into the scientific advice delivered by ICES, STECF and other scientific bodies, including scientific committees of the RFMOs. EMFF direct management has supported the ongoing strengthening of regional cooperation in data collection, including Regional Coordination Groups (RCG) to ensure consistency and harmonisation on formats, categorisations and stratification. It also supported two specific EMFF calls for Proposals "Strengthening regional cooperation in the area of fisheries data collection".

- **Advisory Councils (Article 89)**

Advisory Councils provide the Commission with the local knowledge necessary to develop sound fisheries management advice. 60% of their membership is made up of representatives from the fishing industry. Other members come from environmental or labour-related NGOs, recreational fishers and 'women in fishing' groups. They provide recommendations and advice to the Commission and Member States and may also comment on proposals from the Commission or a Member State on which they are consulted. Member States are obliged to consult them on joint recommendations submitted to the Commission in the context of regionalisation.
The EMFF provides 90% of the funding for the Advisory Councils and the other 10% comes from membership fees. Each Advisory Council receives the same amount, irrespective of membership size, translation needs or travel requirements.

The Coffey evaluation study found that the Councils took some time to become fully responsive to requests for advice. Those that had been established for 10 years reacted faster than the newer Councils.

- **Market intelligence (Article 90)**

The **European Market Observatory for fisheries and aquaculture products (EUMOFA)** is a market intelligence tool on the EU's fisheries and aquaculture sector, developed by the European

Commission. It aims to increase market transparency and efficiency, analyses EU market dynamics, and supports business decisions and policy making.
To help increase market transparency and efficiency, the CMO Regulation[71] provides that the Commission must gather and process economic information on the EU markets in Fisheries and Aquaculture Products (FAPs) and disseminate it to stakeholders and the general public (Article 42 of the CMO Regulation). To this end, the Commission has set up the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA). EUMOFA has been developed since 2010 in the form of a preparatory action. A dedicated website and database have been online and fully operational since April 2013.

EUMOFA enables direct monitoring of the volume, value and price of fisheries and aquaculture products, from the first sale to retail stage, including imports and exports. Data are collected from EU countries, Norway, Iceland, from EU institutions and from private data providers. They are updated every day.

EUMOFA can be considered as a reference observatory for food commodities. It is also the most comprehensive database on international trade flows of FAPs. The web-based platform provides daily economic data on all steps of the value chain. The observatory is also a centre of expertise that carries out market analyses and issues publications on a series of topics that are of interest to industry and institutional stakeholders. It also publishes analytical material to support policymaking**. It played a key role in informing market stakeholders during the recent crises** (COVID-19 and Russia's invasion of Ukraine) by providing visibility and clarification on market developments[72].

IMPROVEMENT OF CONTROL AND ENFORCEMENT

The CFPs success depends very much on the implementation of an effective control and enforcement system to ensure uniform application of rules by Member States. The measures establishing a Union fisheries control system for ensuring compliance with rules of the CFP are provided for in the Regulation establishing a control system[73] (the Control Regulation), in the Regulation establishing a European Fisheries Control Agency (EFCA)[74], and in the Regulation establishing a system to combat illegal, unreported and unregulated fishing (IUU Regulation)[75]. They are complemented by the Regulation on the sustainable management of the external fleet (SMEF)[76]. The main objective of the Union control system is to ensure uniform application of CFP rules by Member States.

The fifth-highest commitment amount relates to Article 76: Control and enforcement, with a total of EUR 564.7 million of EMFF funding. Of 12 types of investment, the top four were Purchase, installation and development of technology; Purchase of other control means; Operational costs; and

[71] Regulation (EU) No 1379/2013 on the common organisation of the markets in fishery and aquaculture products
[72] REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL Implementation of Regulation (EU) No 1379/2013 on the common organisation of the markets in fishery and aquaculture products https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52023DC0101
[73] Council Regulation N° 1224/2009, OJ L 343, 22.12.2009 p.1
[74] Council Regulation (EC) No 768/2005, OJ L 128, 21.5.2005, p.1.
[75] Council Regulation (EC) No 1005/2008, OJ L 268, 29.10.2005, p.1
[76] Regulation (EU) 2017/2403 of the European Parliament and of the Council. OJ L 347 28.12.2017 p. 81

Modernisation and purchase of patrol vessels, aircraft and helicopters. These types of investment together attracted 81% of the funding.

Research shows that physical controls of landings are often insufficient to ensure compliance and accurate catch reporting, especially in complex fisheries involving high-volume catches of multiple species within a single fishing operation. Technologies like Remote Electronic Monitoring (REM) can help monitor these catches and are essential for reducing the risk of illegal discards; however, their **adoption has been slowed by high setup costs and privacy concerns from fishers.**

This is the only Specific Objective (UP3-SO2) that has been subject to interruption and suspension of interim applications payment deadlines for serious non-compliance of MS with CFP rules, according to Article 101 and 102 of the EMFF Regulation. This enforcement mechanism was a novelty of the EMFF compared to the EFF and has been triggered for those MS where Control and Inspections activities of DG MARE had identified serious deficiencies in the fisheries control system. The leverage provided by this mechanism was often instrumental in having MS quickly adopting the necessary remedial actions to address those deficiencies and reinstalling a level playing field for EU stakeholders and enhance the protection of aquatic resources.

The main expenditure under direct management supporting **control and enforcement (Article 87)** related to the **development of new control technologies**.

Initiated in 2010, an Integrated Fisheries Data Management (IFDM) programme was set up as the umbrella for several projects related to fisheries data exchange and introduced a universal data exchange format. The standard is being rolled out by the Commission, Member States and the European Fisheries Control Agency (EFCA) for exchanging fisheries data within and beyond the EU. **The complexity of the IFDM programme, the multitude of stakeholders both within as outside the EU as well as sub-optimal IT implementation resulted in significant delays to the programme.**

In 2020, with the Integrated Fisheries Data Management programme coming to a close, the Commission will undertake a thorough review of the state of play of the IFDM programme, collect the future needs for further data exchange and investigate the best way forward.

- **Voluntary financial contributions to international organisations (Article 88)**

Article 28 and Article 29 of the Common Fisheries Policy Regulation adopted at the end of 2013 stipulate that the EU should aim to lead the process of strengthening the performance of **Regional Fisheries Management Organisations (RFMOs)**. These international organisations are set up to establish binding measures for conservation and sustainable management of specific fish species, particularly those that migrate across regions or straddle multiple jurisdictions to better enable them to conserve and manage marine living resources. RFMOs have the authority to adopt rules for managing fisheries. The EU is a significant player, actively participating in 5 tuna-focused and 13 non-tuna-focused RFMOs, advocating for high standards of sustainability and combating illegal, unreported, and unregulated (IUU) fishing activities. **The EU is the most prominent actor in RFMOs and fisheries bodies worldwide[77].** Voluntary contributions go hand-in-hand with the EU's priorities for the external dimension of the CFP and strengthen those priorities by helping to 'export' higher standards and by levelling the playing fields upwards.

[77] European Commission: Directorate-General for Maritime Affairs and Fisheries, *Regional fisheries management organisations of which the EU is a member*, Publications Office of the European Union, 2022, https://data.europa.eu/doi/10.2771/073752

The compulsory contributions to RFMOs which are outside of the scope of the EMFF have contributed to reinforcing the same objectives.

The General Fisheries Commission for the Mediterranean (GFCM) is a good example of demonstrating EU achievements in the RFMOs[78].
GFCM is the only RFMO in charge of shared stocks, meaning that there is a need for both EU countries and riparian countries to agree on conservation and management measures, as well as control measures, to ensure sustainable fisheries in the Mediterranean and the Black Sea. Upon EU initiative, the following have been achieved for example:

- MedFish4Ever (2017) and Sofia ministerial Declarations (2018) - the two sea basins.
- Regional plans of action against IUU fishing and for small-scale fisheries, and the Aquaculture strategy.
- The 2030 GFCM Strategy, promoting sustainable exploitation of the fisheries resource as well as the protection of marine ecosystems, the development of sustainable aquaculture and the solidarity between Mediterranean countries.

3.3.3 PROMOTING A BALANCED AND INCLUSIVE TERRITORIAL DEVELOPMENT OF FISHERIES AND AQUACULTURE AREAS

MSs selected 14 367 operations with a total budget of EUR 624 million to promote a balanced and inclusive territorial development of fisheries and aquaculture areas**. It is the second highest performing measure in terms of commitment.**

INCREASING SOCIAL SUSTAINABILITY IN COASTAL AREAS

The EMFF supported the development and implementation of community-led local projects and transnational and interregional cooperation projects with preparatory support, implementation of strategies, running costs and animation (UP4).

- **Implementation of local development strategies (Article 63)**

This is one of the best performing measures overall. EMFF CLLD demonstrated its value as a bottom-up development tool that fosters inclusive, sustainable, and resilient coastal communities. EMFF **achieved notable success in mobilising fisheries and aquaculture communities** across Europe:

Table 13: selected CLLD indicators

Type of indicator	EFF	EMFF
Number of Local Action Groups	260	348
Average Funding per Group (EUR million)	2.2	3.4
Total Funding (public and private co-financing EUR million)	567.4	1057
Projects		14 278
Projected Jobs Created (total)		12 500
Actual Jobs Created or Maintained (average per FLAG)		60
New Businesses Created (average per FLAG)		4

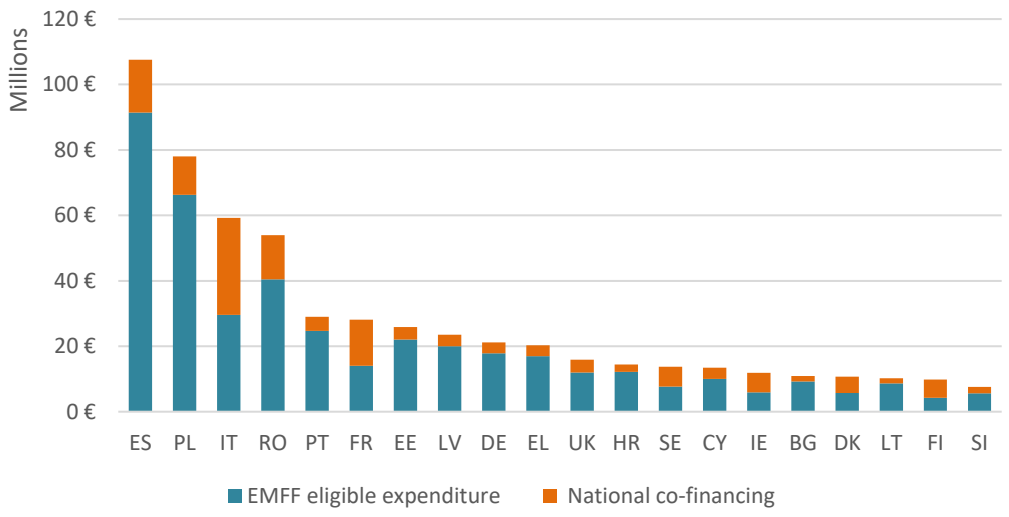
[78] Spending Review 2024

Type of indicator	EFF	EMFF
Existing Businesses Supported (average per FLAG)		12
Stakeholder Engagement (average per FLAG)		120 persons/ 7–11 interest groups[79]
300 stakeholders directly benefited from CLLD-supported projects		more than 9 300
Stakeholders who believe FLAG made a positive difference		95% (78% strong impact)

Source: FAMENET report on CLLD in fisheries and coastal communities - achievements and lessons, 2025

In absolute terms Spain, Poland, Italy, Romania, and Portugal had the largest UP4 funding in terms of total eligible public expenditure. Bulgaria, Cyprus, Germany, Denmark and Estonia show the highest CLLD share by EMFF expenditure of their total EMFF budget. National co-financing is essential but generally smaller than the EMFF contribution, with some countries (Finland, France, Italy and Ireland) providing a share of 50% and more. The variation in both absolute and relative funding reflects differences in fleet size, national co-financing capacity, and strategic priorities for fisheries and coastal development across the EU (see Figure 13).

Figure 13: Total eligible public expenditure under EMFF CLLD (EUR)



Source: EMFF monitoring data 2023

The leverage effect of public funding. In addition to the EUR 836.8 million in public contributions, approximately EUR 341.2 million—or around 41%—in private co-financing was mobilised through CLLD-related operations. The highest proportion of private co-financing was observed in Denmark, where private partners contributed about 63% of the total funding. (See Annex XII)

[79] In terms of the different interest groups decide which projects will receive funding and are responsible for ensuring the FLAG's local development strategy is implemented. Interest groups cover fishing, municipalities, tourism, NGOs, public sector, aquaculture, environmental groups, processing, research, education, port authorities, youth groups, national/regional/natural parks, women's groups, renewable energy sector, migrant groups.

Additionally, CLLD proved to be a powerful tool for strengthening citizens' engagement with the EU. Nearly half (48%) of all projects were implemented by first-time EU funding recipients, while 60% of stakeholders reported a more positive perception of the EU as a result of FLAG activities[80].

CLLD delivered significant social, economic, and environmental benefits. On average, each FLAG area created or maintained around 60 jobs, supported the establishment of four new businesses, and helped twelve existing businesses diversify their activities. FLAGs also fostered innovation, with an average of ten innovations per area, strengthened local governance, enhanced cooperation across sectors, and supported numerous environmental and resource-efficiency initiatives. In addition, they increased the visibility of fisheries and aquaculture within local communities.

CLLD has played a particularly important role in sustaining employment in fisheries and aquaculture communities. While job maintenance is more difficult to measure than job creation, it remains essential for preserving the socio-economic fabric of coastal, fisheries-dependent, and often remote regions.

Three EMFF common result indicators were used to assess CLLD performance: jobs created, jobs maintained, and businesses created. Data reported in Infosys by December 2023 show that CLLD was highly effective in generating employment, with 4,887 new jobs created.

CLLD supported the creation of 1,024 new businesses and was the only EMFF measure to report on this indicator[81]. Although results varied across Member States, supporting business diversification was a common objective across most FLAGs. Beneficiaries included both fisheries-related enterprises—such as fishers and aquaculture producers expanding into processing or tourism, and processors diversifying their product range—and non-fisheries businesses developing activities such as coastal tourism, algae-based products, or products derived from recycled marine litter[82].

Under the technical assistance measure of direct management, the Commission funded the FARNET support unit to connect and animate the fisheries local action groups (FLAGs) network. Tasks include capacity building, disseminating information, exchanging good practices, and cooperation amongst FLAGs and other stakeholder groups.

3.3.4 FOSTERING THE DEVELOPMENT AND IMPLEMENTATION OF THE UNION'S IMP IN A MANNER COMPLEMENTARY TO COHESION POLICY AND TO THE CFP.

Under shared management (UP6) MSs selected 278 operations with a total budget of EUR 62 million to foster the development and implementation of the Union's IMP. The three measures as described under Article 80 are: contribute to achieving the objectives of the IMS, and in particular those of the CISE, protect the marine environment, especially its biodiversity and marine protected areas such as Natura 2000 sites, and improve knowledge of the state of the marine environment.

The biggest share (24%) of **the EUR 336 million budget from direct management** was used for the development of cross-sectors initiatives (Article 82.2).

---

80 EMFF Infosys reports as of 31 December 2023

81 EMFF Infosys reports as of 31 December 2023.

82 EUROPEAN COMMISSION - Directorate-General for Maritime Affairs and Fisheries, Unit D.3 (2022): FAMENET report on the benefits of EMFF CLLD in coastal communities, Brussels

PROMOTE AN INTEGRATION OF POLICIES ENABLING SUSTAINABLE AND CROSSBORDER/ ECOSYSTEM-BASED MANAGEMENT OF EUROPEAN SEA BASINS.

Integrated Governance (Article 82.1)

A wide range of ministries and departments shape maritime and coastal policy, making cross-government coordination a longstanding priority of EU maritime policy. In the 2007 Blue Book launching the Integrated Maritime Policy[83], the Commission committed to encourage Member States to develop integrated national maritime policies, issue supporting guidance, and establish stakeholder consultation structures to promote policy development and the exchange of best practices.

In practice, developing guidance that was both sufficiently operational and adaptable to the diversity of national administrative systems proved difficult. **The focus therefore shifted towards stakeholder coordination and exchange.** The most visible success has been European Maritime Day, which has become the flagship platform for dialogue among public and private maritime stakeholders, raising awareness of key policy issues and supporting discussion of shared priorities. Its strong participation, including 1,500 attendees in 2019, indicates its value as a coordination tool.

Efforts have also intensified at sea-basin level. Through the EMFF, the EU has supported assistance mechanisms in areas such as the Atlantic and the Western Mediterranean, alongside related events and cooperation activities. These have been especially important in the Mediterranean and Black Sea, where they provide an inclusive forum for dialogue with non-EU countries not covered by other governance frameworks.

In addition, the Maritime Forum provides a durable online space for stakeholder exchange and community-building, helping preserve results beyond the lifetime of individual projects. It also supports alignment with the Commission's digital policy through migration to the Europa domain. The platform is increasingly used to underpin events, assistance mechanisms and communities of practice across a range of maritime policy areas.

Evolution towards the protection of the Marine environment

The **Marine Strategy Framework Directive (MSFD)**[84] sets 11 descriptors for good environmental status (GES). The 2017 Commission Decision established harmonised criteria and methodological standards for assessing GES, including the setting of threshold values. EMFF funding supported implementation of these requirements at national, regional and EU level.

About €31 million was spent on monitoring the marine environment which is sorely needed in view of the unknown nature of the environmental status, identified in a 2020 Commission report[85], of many of the marine waters of Member States. An analysis of the titles of the projects supported showed that each of the eleven descriptors of good environmental status as defined in the Marine Strategy Framework Directive was targeted by at least one project.

---

[83] COM(2007) 575 final.

[84] Directive 2008/56/EC of the European Parliament and of the Council of 17 June 2008 establishing a framework for community action in the field of marine environmental policy (Marine Strategy Framework Directive).

[85] REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL on the implementation of the Marine Strategy Framework Directive (2008/56/EC) COM(2020) 259 final

Aligning MSFD implementation with existing monitoring and reporting under regional sea conventions is both efficient and necessary. In the Baltic, the BALTIC BOOST project reinforced HELCOM's work on biodiversity, seabed habitats and related pressures, including hazardous substances and underwater noise, supporting the development of joint environmental targets. While the Coffey evaluation found uneven uptake of some tools, several project outputs were used directly in HELCOM's HOLAS II assessment of the Baltic Sea's environmental status.

PROMOTE THE USE OF CROSS-SECTORAL INSTRUMENTS TACKLING SEGMENTATION OF MARITIME POLICIES AND CONTRIBUTING TO THE IDENTIFICATION OF NEW GROWTH OPPORTUNITIES.

Marine knowledge (Articles 80.1(c) and 82.2)

EMODnet (the European Marine Observation and Data Network) is an EU-funded long-term initiative that improves access to marine data across Europe. It supports the EU's **Marine Knowledge 2020 strategy**, alongside the **Copernicus** programme and the **Data Collection Framework for fisheries**. EMFF funding over the period 2014-2020 was €61 million[86].

The network brings together **more than 120 organisations** that collect, standardise and share marine data using international standards. Its core principle is **"collect once and use many times"**, making marine information freely available and interoperable for **policy-makers, scientists, industry and the public**.

EMODnet helps **reduce costs**, **support innovation**, and **lower uncertainty** in activities linked to the sea. This strengthens investment in the **blue economy** and improves protection of the **marine environment**. It offers free access to marine **data, metadata, products and services** across **seven themes**: bathymetry, geology, physics, chemistry, biology, seabed habitats and human activities

By transforming marine observations into **maps, digital terrain models, time series, statistics, dynamic plots and applications**, EMODnet provides practical tools for research, industry and policy-making.

Achievements

Annual reports show that the volume of data held, and number of users are growing. Specifically:
- It has reduced the cost of offshore or coastal activities. Numerous small businesses engaged in planning or assessing the impact of new structures such as wind farms or pipelines have reported that it has increased their efficiency[87]. It was used by WindEurope to estimate the space requirements for the planned deployment of offshore wind turbines in 2050[88].
- It has supported innovation. It was used by the Blue Time Machine (BTM)[89] (from Spain) who won second prize in the 2019 EU datathon with their simulation of the impact of climate change on marine activities.
- It has reduced uncertainty. The UK meteorological office have reported that the seabed topography map from EMODnet has massively improved their storm surge forecasts in the North Sea. A €4 million grant to the Euro-Argo ERIC (European Research Infrastructure Consortium) co-financed the procurement and deployment of 150 floats measuring salinity and temperature as a contribution towards the European effort under the

[86] https://emodnet.ec.europa.eu/en/emodnet-budget
[87] Some examples of use are provided on the EMODnet web page http://www.emodnet.eu/use-cases
[88] Our energy, our future; How offshore wind will help Europe go carbon-neutral, WindEurope, November 2019.
[89] http://msp.ihcantabria.com/

international Argo programme. The 2019 Intergovernmental Panel on Climate Change (IPCC) Special Report on the Ocean and Cryosphere in a Changing Climate (SROCC) concluded that Argo had greatly improved understanding of large-scale ocean circulation, including the Meridional Overturning Circulation in the Atlantic.

An external evaluation of EMODnet completed in 2018[90] concluded that the net annual benefits of EMODnet are "*between €288 million to €407 million from a combined effect of increased productivity, fostered innovation and reduced uncertainty*". Further improvements could increase these benefits. The external evaluation, stress tests undergone for each sea basin and the cross-border spatial planning projects supported by the EMFF determined that benefits would increase if the resolution of the digital seabed maps increased. Abundance maps have been prepared for a number of species, but biodiversity remains a challenge. Combining different surveys is a laborious task because the same species may be labelled differently and because absence of a particular species may be because it was not present, because it was misidentified or because it was not included in the analysis.

Maritime surveillance

The Common Information Sharing Environment (CISE) for the maritime domain is a voluntary collaborative process, which seeks to ensure increased and reliable information exchange, across sectors and borders, amongst EU and Member States authorities involved in maritime surveillance.

The objective is to ensure that maritime surveillance information collected by any maritime authority and considered necessary for the operational activities of others can be shared and be subject to multiuse, rather than collected and produced several times, or collected and kept for a single purpose / user.

The EU and Member States have made significant human resource and financial investments into developing CISE. EMFF funding in CISE in the 2014-2020 period consisted of:

- EMFF in direct management to support the design, development and testing of CISE at EU and national levels and to facilitate the direct involvement of EMSA in the alignment of CISE with the EU information systems embedded in EU law and for the transitional phase towards operational CISE; and
- EMFF in shared management to support the integration of maritime surveillance (CISE) at national level. It represented a small percentage of the overall EMFF budget for shared management (UP6 represents around 1-2% of the total EU contribution in many Member States).

CISE enables an effective understanding of all activities carried out at sea that could impact the security, safety, economy, or environment of the European Union and its Member States.

The process was long, as it had to take into account the existing legally established and operational EU-wide systems and services and accommodate the views and participation of systems of around 300 maritime authorities across the EU.

Cooperation on coastguard functions between the European Maritime Safety Agency (EMSA), the European Fisheries Control Agency (EFCA) and the European Borders and Coastguard Agency

[90] Evaluation of the European Marine Observation and Data Network (EMODnet) Sent to Publications Office 2019.

(FRONTEX), legally mandated in 2016, increased the participation of these EU agencies in the process.

Following a number of national and EU-wide interoperability and research projects, in 2019 CISE entered into a new phase that aims to facilitate the transition of the pre-operational CISE network to operations. The European Maritime Safety Agency (EMSA) has been entrusted and financially supported by the Commission to set up and manage the CISE transitional phase with the close involvement of Member States and other relevant EU bodies.

Maritime Spatial Planning (Article 82.2)

Maritime spatial planning (MSP) is one of the important cross-sectorial tools for the implementation of the IMP. Responding to the competitive needs of sectorial interests in the seas, MSP sets out to promote efficient use of maritime space as a means to mitigate climate change impacts. MSP is a tool to improve decisionmaking and coordination amongst Member States.

Directive 2014/89/EU of the European Parliament and of the Council of 23 July 2014 set the obligation for 22 Member States to draw up maritime spatial plans by March 2021 at the latest.

The report[91] published by the Commission in 2022 found that while the majority of the coastal Member States had a maritime spatial plan in place, eight countries did not make sufficient progress. The report furthermore concluded that maritime spatial planning (MSP) is an effective and strategic tool to coordinate the different activities at sea and prevent conflicts over the use of maritime space. The EU remains global leader in this area.

The EU has been supporting MSP projects in all EU sea basins, including outermost regions, even before the Directive was adopted. The nature of these funded projects ranges from research and innovation (e.g. Horizon 2020), higher education (Erasmus+) and regional cooperation (e.g. Interreg) to capacity development and cross-border cooperation (EMFF). **By the end of 2021, the EMFF had funded 15 projects under direct management, for a total amount of around EUR 25 million.** These regional and cross-border projects were coordinated by the Member States' planning authorities and have helped Member States cooperate on issues of common interest (e.g. environmental protection or renewable energy production) when developing their maritime spatial plans. They have also supported capacity building for MSP by transferring experiences and best practice from other Member States, or by developing tools to support MSP activities. Lastly, they have facilitated cross-border exchanges with stakeholders and consultations. These projects have also strengthened MSP's EU dimension, in particular in the context of sea basin cooperation.

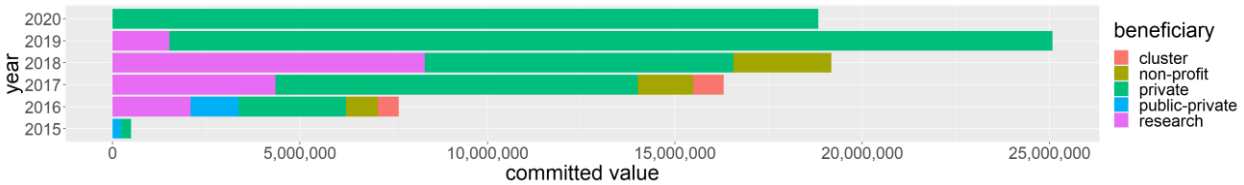
[91] REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT AND THE COUNCIL outlining the progress made in implementing Directive 2014/89/EU establishing a framework for maritime spatial planning COM/2022/185 final

Blue growth (Article 82.3):

The study[92] carried out to collect information on these projects concluded that a total 91 projects were supported by the EMFF following several calls for proposals between 2016 and 2021. **Overall, these 91 projects account for a total budget of €122 million**, of which €87 million was funded by the EMFF. The calls were distinguished by their bottom-up nature. Some calls for proposals were limited to areas such as "blue careers" or "blue labs or marine litter", but most were general in scope.

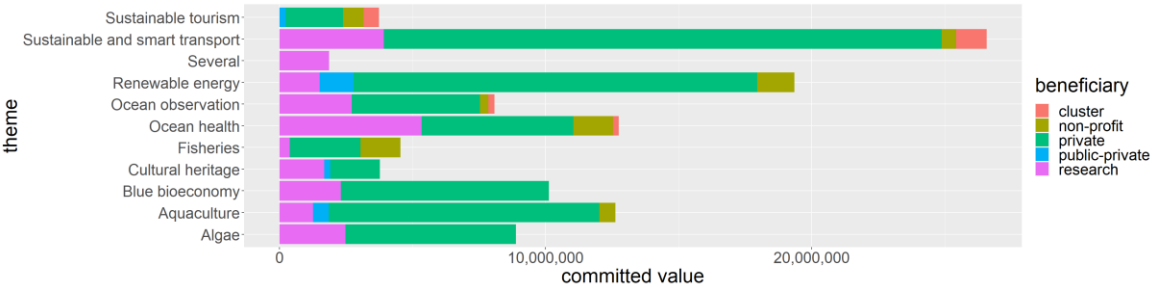
In the 2017 and 2018 work programme, these grants were awarded to consortia involving both research and SMEs but in the final two years, they were **reserved for SMEs** as individual beneficiaries or in a consortium (Figure 14.). Those with ideas for new products or services were invited to present proposals following a model developed by Horizon 2020's SME instrument phase 2[93] with grants of up to €2.5 million and selection more on the business plan than the originality and scientific excellence.

Figure 14 The evolution of financing of bottom-up actions



The intended market of the projects is shown in Figure 15. **The two largest categories were renewable energy and transport.**

Figure 15 Intended market of projects[94]



3.4 PERSISTENT CHALLENGES AND EXTERNAL FACTORS

Despite the Fund's flexibility (when compared to EFF 2007-2013), the 2018 EMFF Implementation Report[95] noted that some challenges persisted, including limited demand for certain measures. The report also identified areas for improvement, such as providing additional support during project

---

92 SYNERGIES AND CLUSTERING BETWEEN MARITIME PROJECTS Final Report EASME/EMFF/2020/3.1.12 https://cinea.ec.europa.eu/document/download/1def99af-470f-41d5-8bb6-2b731df2cc91_en?filename=Final%20Report%20%20Synergies%20Clustering%20HZ-02-24-235-EN-N.pdf&prefLang=ga

93 Article 22 of the Horizon 2020 Regulation (EU) 1291/2013

94 Some projects aimed at two markets so summing the committed values of all the projects comes to more than the total value

95 EUROPEAN COMMISSION - Directorate-General for Maritime Affairs and Fisheries, Unit D.3 (2019): FAME SU, EMFF implementation report 2018 (full), September 2019, Brussels

preparation, encouraging greater private co-funding, and addressing operational aspects like administrative capacity and the clarity of evaluation criteria.

Additional issues included delays in designating programme authorities, adopting implementing legislation at the Member State level and complex regulations and administrative procedures leading to implementation delays.

In the early implementation of the Fund, favourable conditions such as attractive fish prices, low fuel costs, and declining capital costs supported the EU fishing fleet's performance. However, rising labour and other operational costs began to erode profitability, with key financial indicators like gross and net profits declining from 2016 and value-added metrics falling from 2018. While there was a slight recovery in 2021, revenue improved slightly in 2022[96].

Many of the administrative and regulatory challenges reported in the 2018 EMFF Implementation Report[97] persisted in some Member States during the majority of the EMFF implementation period. Issues included the coordination of various ministries and authorities, insufficient administrative capacity, and difficulties interpreting common result indicators.

The second half of the EMFF period was marked by major global trends that significantly impacted the fisheries and aquaculture sectors, including climate change, biodiversity loss, the COVID-19 pandemic, and Russia's military aggression against Ukraine.

The uncertainty following the UK's 2016 decision to leave the EU also created lower demand for investments from the sector, a concern highlighted in subsequent reports such as the 2019 Annual Implementation Report[98]. By 2021, however, the EMFF AIR reports show that BREXIT leads to a structural shift in territorial access and trade, further straining a sector already weakened by sanctions against Russia following the 2014 annexation of Crimea

To help mitigate the influence of the aforementioned external factors, the European Commission amended the EMFF Regulation to provide some flexibility to Member States in how to allocate funds to address those challenges.

2020 marks a critical turning point where the EMFF was amended to provide emergency liquidity. Over **€500 million** (approx. 10% of the EU budget available to shared management) was redirected toward crisis support, specifically for temporary cessation of fishing activities and storage aid to prevent a total market collapse

The years 2022–2023 of the EMFF implementation were defined by the economic fallout of the Russia's military aggression against Ukraine. EMFF AIRs reports mention how the Fund was used to mitigate the impact of increasing operating costs—particularly fuel and energy—which threatened the viability of fuel-intensive fleets despite the brief revenue recovery of 2021.

In the context of the underpinning external study, an e-survey was conducted (see Annex V). The figure below presents results from this e-survey and in particular the impact of the aforementioned external factors as perceived by Managing Authorities and Intermediate Bodies. The findings indicate

---

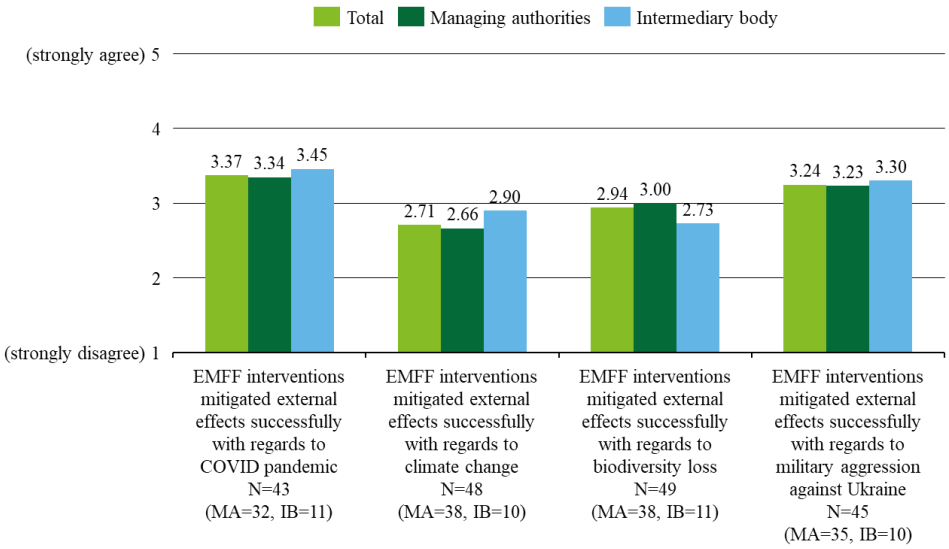
96 Scientific, Technical and Economic Committee for Fisheries (STECF) - The 2023 Annual Economic Report on the EU Fishing Fleet (STECF 23-07)

97 EUROPEAN COMMISSION - Directorate-General for Maritime Affairs and Fisheries, Unit D.3 (2019): FAME SU, EMFF implementation report 2018 (full), September 2019, Brussels

98 2019 EMFF annual implementation report

more favourable assessments for crises where the European Commission could take direct action—namely, the COVID-19 pandemic and the Russia's military aggression against Ukraine—compared to more diffuse challenges like climate change and biodiversity loss. Across all issues, Intermediate Bodies provided more positive ratings than Managing Authorities (Annex V). Notably, climate change and biodiversity loss received average scores below the neutral midpoint of 3.

Figure 16: Mean respondent scores for the corresponding statements on external factors



Source: Study underpinning the ex-post evaluation survey 2024

4 EVALUATION FINDINGS

This section is dedicated to the description of findings and provides a follow-up analysis for each of the evaluation criteria ***(effectiveness, efficiency, coherence, relevance and added value)****.*

This section compares what was expected to be achieved with the measures implemented by the EMFF as described in section 2 and what has been achieved as described in section 3. It will assess whether the interventions put in place to answer to the needs identified achieved their objectives effectively, efficiently and in a coherent way.

4.1 TO WHAT EXTENT WAS THE INTERVENTION SUCCESSFUL AND WHY?

4.1.1 EFFECTIVENESS

Sustainable, competitive, viable and socially responsible fisheries/aquaculture	Partly effective
Reducing environmental impact	Limited to moderately effective
Reducing overcapacity and improving profitability	Weak on overcapacity; moderate/indirect on profitability
Overcoming innovation gap	Partly effective, but limited
Increasing competitiveness/viability of aquaculture enterprises and fisheries SMEs	Partly effective
Ensuring the availability of high-quality and timely data and scientific advice.	effective
Control and enforcement	effective
Territorial development of fisheries and aquaculture areas	effective to a moderate and often significant extent
Integrated, sustainable, cross-border sea-basin management	generally effective
Cross-sectoral instruments (MSP, EMODnet, CISE)	effective overall, with EMODnet strongest, MSP and CISE more mixed in implementation depth
Blue Growth	effective in identifying and testing opportunities, less consistently effective in scaling them

4.1.1.1 Impact on promoting competitive, environmentally sustainable, economically viable and socially responsible fisheries and aquaculture

REDUCTION OF THE ENVIRONMENTAL IMPACT OF THE FISHERIES AND AQUACULTURE SECTOR

EMFF support contributed to the reduction of the negative environmental impact of the fishing sector. The indicators and surveys conducted by the study underpinning the ex-post evaluation suggested that better equipment and techniques led to some regional successes in reducing bycatch, fuel consumption, and marine waste (see Annex X).

While EMFF investments in fisheries supported a reduction of the negative environmental impacts of fisheries, particularly in bycatch reductions, **the overall effectiveness in significantly lowering unwanted catches across the EU is inconclusive** due to the fact that major factors influencing bycatch cannot be addressed by EMFF (such as periods of fishing which are under national jurisdiction). In addition, more consistent efforts in data collection would have been needed to achieve measurable results on the reduction of the impact of fisheries on the marine environment.

In the e-survey conducted by the study underpinning the ex-post evaluation, respondents provided a positive overall assessment of the objective to promote aquaculture having a high level of environmental protection (UP2 SO4) and its alignment with local needs. Examples cited included improved testing and preventive capacities introduced by state institutions in support of aquaculture farms.

The EMFF made progress towards SO4's goals by supporting the adoption of environmentally friendly practices, enhancing animal health, and improving resilience to external shocks, but its full impact was not as initially expected. While farms were supported in delivering ecosystem services, and developments such as expanded bivalve farming and submerged cage systems strengthened climate resilience, these achievements did not fully meet targets set by the Member States in their EMFF programmes.

Economic and health improvements, including annual gains were notable; however, persistent barriers for small-scale operators meant that access to EMFF benefits remained uneven.

The fund's positive contribution to sustainable aquaculture is clear, but structural and data limitations restricted the scope and measurability of its overall impact, especially for the smallest operators.

The EMFF may have played a certain role in advancing marine biodiversity protection and restoration in the EU fisheries and aquaculture sector. Its funding enabled a wide range of conservation and innovation projects and was positively received by stakeholders. However, the complexity of attributing ecosystem improvements to specific funding streams within the EMFF, but also across other Funds such as LIFE and Horizon, and the underperformance in expanding other marine protected areas, highlight areas for future attention. Continued, well-targeted investment and improved monitoring will be essential to sustain and build upon these achievements.

REDUCTION OF FISHING FLEET OVERCAPACITY

In conclusion, despite targeted EMFF measures to reduce fleet overcapacity and promote sustainability, **the actual reduction in fleet capacity was less than Member States anticipated**. Nonetheless, the decrease in fleet size contributed to improved profitability for active vessels, even though persistent imbalances and overfishing continue to be a challenge for some regions. It is reasonable to assume that EMFF-funded efforts to modernise fleets and promote sustainability improved efficiency and reduced costs. One main lasting contribution of EMFF in promoting efficiency and sustainability was the measure of permanent cessation; with the support of the EMFF, 1 291 vessels were removed from the fleet. However, it is difficult to measure how lasting profitability effects are after the termination of EMFF interventions. Stakeholders' perceptions of the effectiveness of this Specific Objective were overall neutral.

OVERCOMING THE INNOVATION GAP IN THE FISHERIES AND AQUACULTURE SECTOR

Innovation in the fisheries sector

During the study underpinning the ex-post evaluation, interviewees noted that the result indicators failed to adequately capture qualitative advances, such as innovations developed in response to the landing obligation (e.g. improved selective gear). Stakeholders also stressed the importance of promoting initiatives that support new entrants to the sector and revising public-private partnership models to enhance the role of EU funds in driving innovation.

The EMFF advanced innovation in the EU fisheries sector, fostering technological upgrades, scientific collaboration, and improved energy efficiency. However, persistent regional disparities, measurement gaps, and the need for better support mechanisms indicate that further efforts are required to fully realize the sector's innovation potential.

Innovation in the aquaculture sector

Overall, both data and stakeholder feedback collected during the study underpinning the ex-post evaluation suggested the EMFF effectively supported innovation in aquaculture, even though direct attribution is difficult.

The study underpinning the ex-post evaluation suggested that more attention could have been paid to environmental resilience, including energy efficiency, and that aquaculture farms that are smaller and/or in less developed regions are lagging behind.

Although policy frameworks recognize the potential of aquaculture, insufficient progress in simplifying governance -notably regarding access to space and water and production licences- and in improving market access continues to constrain innovation, leaving the sector underperforming relative to its growth potential.

The EMFF support has contributed meaningfully to fostering innovation, knowledge transfer, and collaboration between aquaculture farms and scientific bodies, with positive outcomes. The funding helped de-risk investments in innovation, enabling projects that would otherwise have been unfeasible. However, while EMFF interventions laid important groundwork, further efforts are needed to ensure more widespread and sustainable innovation in EU aquaculture.

INCREASE COMPETITIVENESS AND VIABILITY OF AQUACULTURE ENTERPRISES, AND FISHERIES SMES.

Small scale coastal fisheries

Despite positive efforts, SSCF remain vulnerable, particularly in the Mediterranean and Atlantic, where 30% of fleets remain unbalanced due to fuel crisis, overfishing and limited alternative income sources. Most funding (64%) went to large-scale fleets, with limited support reaching small vessels. Within the EMFF, support for investments in selective gear and for the first acquisition of fishing vessels was either limited or not available in unbalanced fleet segments, to avoid exacerbating overcapacity and to encourage a sustainable balance between the capacity of the fleet and its fishing opportunities (see Article 31, 34, 38 of the EMFF regulation).

Additionally, according to surveys in the study underpinning the ex-post evaluation, the EMFF was not always fully utilized in the Mediterranean and Atlantic regions due to perceived complex administrative procedures, unclear eligibility criteria, and limited co-financing, which particularly disadvantaged small-scale fishers. Additional perceived challenges included bureaucratic delays,

fragmented responsibilities among authorities, insufficient technical assistance, and competition with national funding schemes, all of which made it difficult for many operators—especially those pursuing innovative or sustainable projects—to access and benefit from EMFF support.[99]

The EMFF has made progress in supporting SSCF fleet modernisation and enhancing competitiveness, particularly through targeted investments and improvements in safety. However, SSCF continues to face persistent challenges. Structural issues, together with limited financial resources and risk aversion, have sometimes restricted SSCF's ability to fully access available support. While advances in employment and safety are encouraging, ongoing regional disparities and the continued calls for fleet renewal underscore the importance of further targeted efforts to reinforce the viability and innovative potential of small-scale coastal fisheries.

Profitability of the aquaculture sector

Stakeholders' perceptions collected during the study underpinning the ex-post evaluation strongly endorsed the relevance of EMFF support, though administrative burden was cited as limiting broader uptake, with some aquaculture producers abandoning investment efforts altogether. The positive stakeholder perceptions suggest that the EMFF contributed to a more viable aquaculture sector.

The EMFF contributed to improving the profitability of the aquaculture sector by fostering innovation, diversification, and production growth through targeted investments and knowledge transfer. However, structural barriers – in particular the administrative burden linked to the licensing process and all steps including environmental authorisations – disproportionately affected smaller operators and constrained the full realisation of these benefits. It is important to note that these regulatory constraints were not specific to EMFF implementation but largely derived from how national/regional/local authorities interpret and apply the broader EU environmental framework. As a result of this and other factors (social acceptance of aquaculture activities, private sector interest, disease outbreaks), the increase in aquaculture production volumes varied significantly across regions and types of aquacultures. Difficulties in access to funding for small scale farms also made results in terms of funding depend on farm size with profitability gains being unevenly distributed.

IMPROVEMENT OF MARKETING AND PROCESSING IN THE FISHERIES AND AQUACULTURE SECTOR

The EMFF successfully supported market stability and strategic development in the fishery and aquaculture sector, which helped mitigate the effects of crises like COVID-19. The compensation mechanism remains essential for mitigating structural disadvantages in the outermost regions, but its design and implementation need to be strengthened to ensure sufficient, timely and accessible support, particularly for small-scale operators.

The EMFF facilitated the transition from an intervention-based mechanism to a market-oriented approach. This is a key achievement, which derives from the reform of the CFP.

The EMFF was useful and relevant, but not consistently transformative. **It performed best as a support instrument for individual investments, local initiatives and specific sustainability**

[99] NISEA Research Cooperative, Salerno, Italy, WWF Mediterranean, Rome, Italy (2022), Analysis of the available funds supporting marine activities in some key European Mediterranean countries Volume 7 - 2022 https://doi.org/10.3389/frma.2022.927383

measures. It was less effective where success depended on deep structural change.

4.1.1.2 Impact on the implementation of CFP

AVAILABILITY OF HIGH QUALITY AND TIMELY DATA AND SCIENTIFIC ADVICE

Data collection

EMFF support has led to marked improvements in the availability, quality, and use of scientific data to inform fisheries management, as demonstrated by the substantial overachievement in the percentage of data calls fulfilled. Increased regional cooperation, closer end-user interaction and improved data management systems resulted in more effective data collection under EMFF.

The participatory approach supported by the EMFF, involving fishers directly in data collection and knowledge exchange, facilitated trust and engagement and contributed to improved compliance, although challenges remain regarding observer-based data collection and administrative burdens in some Member States.

The study underpinning the ex-post evaluation finds evidence that involving fishers in data collection and knowledge-sharing processes can positively affect compliance through increased understanding and engagement. This finding was further validated by the e-survey.

Case studies (see Annex XI) from Germany, Italy, and Denmark highlighted the benefits of this participatory approach, though some resistance from fishers—particularly regarding observer-based data collection—and administrative burden, such as delays in accessing funds, persisted as challenges.

The Coffey evaluation study found that scientific advice and data collection financed under EMFF direct management were delivered through well-established processes, helping to ensure that they effectively supported the objectives of the CFP. The study also noted improved coordination in the commissioning of work, enabling a better alignment with key policy needs, clearer prioritisation of workstreams, and some flexibility in funding ad hoc projects to respond to emerging issues.

While the respective roles of ICES and STECF in the provision of scientific advice are clearly defined, the evaluation identified scope to strengthen coordination between STECF and the General Fisheries Commission for the Mediterranean (GFCM) in relation to Mediterranean and Black Sea stocks. Improved coordination could help avoid overlaps, reduce duplication in stock assessments, and enhance acceptance of the resulting scientific advice. This need is also reflected in the 2017 MedFish4Ever ministerial declaration, which called for a forum to bring together scientific activities through coordinated stock assessment. GFCM is supported under the EMFF component on voluntary support to international organisations as explained in section 3.

More broadly, the evaluation concluded that the EMFF direct management component made a significant contribution to regional cooperation, both within and beyond EU waters, including through the provision of data needed to meet fisheries scientific advice requirements.

Advisory Councils

Without EMFF support, it is very unlikely the Advisory Councils could continue operations and this advice would not have been available to the Commission. Their effectiveness largely depended on their ability to find consensus among members.

Market intelligence

EUMOFA has proven to be an effective tool for improving transparency, knowledge and decision-making in the EU fisheries and aquaculture sector. By providing reliable market data, analysis and accessible information, it supports stakeholders in understanding market trends, anticipating developments and making informed choices. Its contribution helps strengthen the competitiveness, sustainability and resilience of the sector.

CONTROL AND ENFORCEMENT

Under shared management, stakeholders recognised the importance of effective fisheries control and enforcement, but survey evidence indicates that achieving these objectives requires addressing resistance among fishers and moving beyond traditional physical inspections towards more innovative tools, notably Remote Electronic Monitoring (REM).

Under direct management, the Coffey evaluation found that difficulties in finalising and implementing the IT systems required by EU legislation constrained progress; while an increase in the financial envelope may be warranted, funding alone does not appear to explain the delays, pointing instead to the need for a more detailed assessment of the underlying obstacles to IT development.

Voluntary agreements

The Coffey evaluation study found that EU voluntary contributions to international organisations did indeed improve the effectiveness and efficiency of these organisations.

Although it helps these organisations to work better, stakeholders reported that it does not increase the EU's influence on subsequent decisions on fisheries management.

EMFF support generally strengthened the practical implementation of the CFP across the EU.

4.1.1.3 Impact on the territorial development of fisheries and aquaculture areas

Assessing the effectiveness of Community-Led Local Development (CLLD) funding at EU level is difficult because CLLD is designed as a locally driven, participatory instrument rather than a standardised, target-based funding scheme. Its results often emerge gradually and are not always easy to capture through uniform indicators. Even so, available evidence shows that CLLD has been effective in mobilising local actors, improving local governance, and generating bottom-up projects tailored to territorial needs.

A central factor in this effectiveness is the role of Fisheries Local Action Groups (FLAGs), especially their staff, who act as animators, facilitators and connectors within local communities. In 2023, 74% of supported projects were generated directly through FLAG outreach, and 82% of project promoters reported that they would not have implemented their project without FLAG support. Across the EU,

348 FLAGs implemented 14,278 projects and helped mobilise more than €310 million in private investment in addition to public funding.

Stakeholder feedback also points to strong local relevance and accessibility: 88% considered FLAG strategies relevant to local needs, and 92% found FLAGs accessible. At the same time, administrative complexity remains a significant weakness, with only 66% of respondents considering application procedures simple. There are also continuing concerns about unequal participation, particularly the underrepresentation of women and young people.

Overall effectiveness varies considerably between territories. Outcomes depend on factors such as the size of available budgets, the efficiency of national and regional delivery systems, and the administrative capacity of local actors.

Despite these differences, **CLLD is widely seen as valuable for fostering participation, strengthening governance, and delivering targeted local development in fisheries and coastal areas.** Continued support structures, such as the FAME Unit, and the Commission's post-2021 EMFAF approach confirm this strategic importance. The main challenges ahead are to simplify procedures, improve inclusiveness and develop better ways of measuring long-term impact.

4.1.1.4 Impact on the development and implementation of the unions IMP

INTEGRATION OF POLICIES ENABLING SUSTAINABLE AND CROSSBORDER/ ECOSYSTEM-BASED MANAGEMENT OF EUROPEAN SEA BASINS.

Integrated governance

The EMFF was reasonably effective as a facilitator of regional maritime cooperation, especially in sea-basin contexts, but less effective as a driver of comprehensive integrated maritime governance.

Marine environment

The EMFF made a meaningful contribution to implementing the MSFD's 2017 requirements on good environmental status by financing monitoring and assessment work at national, regional and EU level.

A key strength was support for aligning MSFD implementation with existing regional sea convention monitoring systems, which improved efficiency and avoided duplication.

Although the Coffey evaluation found that some tools were taken up unevenly, a number of project outputs were nevertheless used directly in HELCOM's HOLAS II assessment, indicating tangible regional impact.

PROMOTE THE USE OF CROSS-SECTORAL INSTRUMENTS TACKLING SEGMENTATION OF MARITIME POLICIES AND CONTRIBUTING TO THE IDENTIFICATION OF NEW GROWTH OPPORTUNITIES. (MSP)

Marine knowledge

Maritime policy took up about half of the budget for direct management which funded actions that could not or would not be supported by Member States themselves because they relied on cooperation or competition between bodies from different Member States.

The interim evaluation covering the period up to 2018[100] did indeed find the interventions effective. Since then, a separate evaluation[101] of the European Marine Observation and Data Network (EMODnet), which received less than €10 million a year from EMFF, found annual benefits of hundreds of millions of euros in terms of increased productivity and innovation in the blue economy and reductions in uncertainty in the state and dynamics of the ocean. Beneficiaries consulted as part of a study[102] on the bottom-up projects that were introduced in the last years of the programme felt that the funding did contribute to bringing their new services and products to market. The "learning by doing" improved staff skills.

2020 marked EMODnet's first decade and the end of its third phase of development (2017-2020). Over the past 10 years, the EMODnet partnership has collectively delivered the Marine Knowledge 2020 vision objectives, producing a high-resolution multi-parametric map of European seas. Over the years, EMODnet has become a mature and operational provider of multidisciplinary marine data, data products and services fostering a diverse and expanding user base. It is now an essential tool for scientists, engineers, managers and policy-makers to generate the information necessary to improve our knowledge of the seas and to support sustainable economic growth and employment[103].
The objective set in 2012[104] has been achieved. A complete multi-resolution digital map of European waters has been constructed.

Maritime surveillance

The EMFF appears to have been effective in supporting the development of CISE during the 2014–2020 period. EMFF funding helped support design, testing and pilot actions, improve cross-border and cross-sector information sharing and prepare the transition from project-based development towards more operational use.
The EMFF's contribution is generally seen as effective particularly as an enabler of cooperation and maritime surveillance integration.

Spatial planning

Directive 2014/89/EU of the European Parliament and of the Council of 23 July 2014 obliged EU Member States to draw up maritime spatial plans by March 2021. The Coffey evaluation study pointed out that, without proper indicators, it had not been possible to monitor Member States' progress in drawing up plans or to assess the contribution of the EMFF in helping them do so.

---

[100] COMMISSION STAFF WORKING DOCUMENT EVALUATION Interim Evaluation of the direct management component of the European Maritime and Fisheries Fund (EMFF) SWD/2020/0221 final
[101] COMMISSION STAFF WORKING DOCUMENT EVALUATION of the European Marine Observation and Data Network (EMODnet) SWD/2023/0281 final
[102] Synergies and clustering between maritime projects: final report (2024). European Publications Office
[103] EMODnet annual report 2020
[104] Green Paper Marine Knowledge 2020 from seabed mapping to ocean forecasting COM(2012) 473.

Blue Growth (Direct management)

An evaluation was carried out to measure the actual impact of these projects even after their conclusion[105]. For this evaluation, survey responses were received from 71 out of 91 EMFF-funded projects in the scope of "Synergies and Clustering", and 64 interviews were conducted by the evaluation team. The findings reveal that the majority of evaluated projects (66%) underwent changes in their Technology Readiness Levels (TRL), particularly within the "Ocean health and observation" cluster. A substantial percentage of projects (35%) generated new Intellectual Property (IP) and patents, with the "Renewable energy" cluster leading in this aspect. Notably, a significant outcome was the upskilling of staff and stakeholders across various sectors. Several projects indicated that the new skills and experience gained were widely transferrable among their current sector and other sectors and industries. Regarding revenue, many projects anticipated future positive changes, especially within the "Renewable energy" and "Bioeconomy, aquaculture, and fisheries" clusters. Some 44% of projects stated that a change in revenue was not applicable to their project. This was evident particularly among projects which aimed at filling a knowledge gap and not at developing a marketable product. 86% of projects had devised postproject plans and activities, showcasing a proactive approach towards sustainability and future developments. **Furthermore, 59% of projects demonstrated the potential for replication on a larger scale, both within and beyond the EU regions**, suggesting the possibility to scale and adapt the project outcomes across different sectors and markets.

The **EMFF 2014–2020 appears to have been broadly effective** in supporting the development and implementation of the **EU Integrated Maritime Policy (IMP)** in the three areas you mention, though with **uneven performance across instruments and some limitations in monitoring, uptake, and scaling**.

The direct management interim evaluation concluded that demonstrating effectiveness would have been easier if the results and impacts had been made available in a more structured way. Accordingly, and also because of strong demand from Member States, the EMFAF includes an obligation[106] to provide indicators for each individual commitment. These allow an analysis of the type of beneficiaries (SME, academia etc), the type of action (event, advice, data dissemination etc), and the results (jobs created, visits to websites etc).

4.1.2 EFFICIENCY

- The perception of the complexity of the fund application and reporting hindered in some cases access for small-scale operators.
- Overall, the Fund can be considered reasonably cost-efficient, even though scope remains to better evidence and further reduce administrative burdens.
- Simplification measures improved efficiency where applied, especially through digitalisation, tailored support and, to a lesser extent, SCOs, though implementation remained uneven.
- Financial instruments were implemented only in Estonia.

[105] European Commission: European Climate, Infrastructure and Environment Executive Agency, COGEA, ERINN and POSEIDON, [European Climate, Infrastructure and Environment Executive Agency, COGEA, ERINN, POSEIDON], *Synergies and clustering between maritime projects – Final report*, Publications Office of the European Union, 2024, **https://data.europa.eu/doi/10.2926/77582**

[106] Commission Implementing Regulation (EU) 2022/79

- The EMFF's crisis-response measures, enabled by regulatory amendments and backed by SCOs and flexible tools, were implemented efficiently and are perceived by stakeholders as highly effective in stabilising income and employment.
- The EMFF provided some flexibility, following an amendment of the Regulation, in responding swiftly to external shocks (COVID-19, Russia's military aggression against Ukraine) but lacked contingency funding to meet the high demand during crises.
- Monitoring systems and data indicators were sometimes insufficient, limiting the ability to attribute outcomes directly to EMFF support.

EFFICIENCY OF THE SHARED MANAGEMENT COMPONENT

Administrative costs

The analysis shows that the EMFF generated a broad mix of costs and benefits across stakeholder groups, with administrative and enforcement costs forming a proportionate part of delivering support and being balanced by important direct and indirect advantages.

Direct compliance costs for administrations and beneficiaries mainly reflect the normal effort required to process, monitor and report on public funding, and for small-scale beneficiaries they are estimated at roughly 5–10% of project budgets, which is in line with what can be expected for an EU fund with robust control requirements. These costs cover tasks such as preparing and assessing applications, verifying eligibility, managing payments and compiling reports, and they are partly offset by the use of digital tools and more standardised procedures that facilitate handling of files over time.

On the benefit side, EMFF support contributed to improved viability and modernisation of companies and organisations for programme beneficiaries, including job creation or maintenance, staff training and better infrastructure, and for businesses and coastal communities more broadly it enhanced market efficiency, processing performance and territorial cohesion, while for citizens it generated indirect benefits such as employment opportunities and environmental improvements linked to climate and biodiversity actions.

For administrations, beyond the direct enforcement costs of the Common Monitoring and Evaluation System (CMES), the intervention also delivered qualitative gains through more systematic data and a clearer framework for monitoring policy results (see also Annex IV).

The EMFF's administrative and enforcement costs appear proportionate to the level of control and oversight required, and are outweighed by the programme's economic, social and environmental benefits across stakeholders.

Simplification

The analysis of simplification effects is based mainly on qualitative evidence, but it consistently points to a reduction of administrative costs over time, driven by the simplification of the CMES and the implementation of SCOs.

The EMFF incorporated key lessons from the EFF, particularly by introducing Simplified Cost Options (SCOs) and improving flexibility under common rules for management, control, monitoring and evaluation.

Simplification measures such as digital platforms and SCOs reduced administrative costs and processing times in several Member States, with national examples (e.g. Poland, Finland, Denmark, Greece) illustrating how e-reporting tools, expanded use of SCOs and improved interfaces increased efficiency, even though national public procurement rules still added complexity in some cases.

Additionally, simplification measures were adjusted to different groups (e.g. small-scale fishers, young fishers, cooperatives), although some Member States did not systematically tailor support, and in a few cases digitalisation was perceived as increasing complexity for vulnerable operators (see also Annex IV).

According to the survey conducted by the study underpinning the ex-post evaluation, the average stakeholder rating for cost-efficiency was moderate, indicating room for improvement, but stakeholders consistently considered that EMFF simplification and flexibility measures responded effectively to external crises such as COVID-19 and the conflict in Ukraine, once the Regulation had been amended. Streamlined procedures for temporary cessation of fishing activities, storage aid and other emergency measures, combined with a strong increase in the use of SCOs triggered by the Ukraine war and related compensations, were seen as instrumental in stabilising income and employment and in reducing the administrative burden per project.

Financial instruments

The EMFF aimed to broaden the use of financial instruments (FIs) to complement grants. This was a response to the fact that small scale fishers continued to face limited access to finance, thus not making use of the benefits of EMFF funding. These instruments provided favourable terms (e.g. long repayment periods, low interest), reducing financing barriers for SMEs and demonstrating administrative efficiency through collaboration with experienced intermediaries.

Estonia was the only Member State to implement FIs and at a reasonable cost, offering tailored products like growth and long-term investment loans for aquaculture and processing operators. While Estonia effectively applied lessons from the EFF and tailored its FIs to diverse sectoral needs, other countries lacked the required systems or familiarity with the banking sector to do so.

Broader uptake was rejected by Member States as unsuitable for their national context or encountered administrative complexities, as well as issues with financial institutions being unwilling to assume the perceived risk of lending to the fisheries sector. It can be concluded that FIs are effective for long-term investments.

EFFICIENCY OF THE DIRECT MANAGEMENT COMPONENT

According to the Coffey evaluation, stakeholders concurred that the results could not have been obtained with fewer resources (Figure 31 Annex XIV) but considered that the administrative burden was excessive (Figure 32 Annex XIV).

This was not the case for some time-critical measures. For instance, the Coffey evaluation study considered that the annual work programme for the Scientific, Technical and Economic Committee for Fisheries (STECF) ensured that essential scientific advice was delivered in time to meet policy needs.

A high proportion of the calls for proposals and calls for tender are handled by the Executive Agency for Small and Medium Enterprises (EASME). According to EASME annual reports, the average time

to grant fell from 221 days in 2017 to 188 in 2018. For procurement, the time between the "*time limit for receipt of tenders"* and "*signature by the last party*" was 135 calendar days for 2017 and 160 calendar days for 2018. These figures are better than those achieved by other programmes managed by the Agency (e.g. Horizon 2020). The EU Financial Regulations[107] sets a maximum of nine months (243 calendar days) for time to grant except in exceptional circumstances. There is, however, still room for improvement in terms of efficiency. Much of the work involved entails routine checking for compliance with regulations. Due to its novelty, EMFF was implemented in relative isolation with paper-based procedures. It also lacked a common support service in the Commission for legal matters, business processes and IT tools. Dedicated IT systems and the move to fully electronic grant management procedures (eGrant) were implemented in time for the 2018 calls for proposals. These measures will aid project management and will facilitate policy feedback, communication and dissemination of the activities. Further simplification, a more risk-based approach to compliance and better alignment with other programmes could considerably reduce the workload and speed up the process.

Although some long-term planning helps applicants and EASME plan their resources, the process could be more flexible to adjust to changes in policy priorities. Proposals to allocate a proportion of the EMFF for spending in a particular year are for all intents and purposes fixed in June[108] each year for implementation the following year. If the need for a new study is identified in July, but not included in the June proposal, it takes 18 months before a project contract can be signed.

In the latter stages of EMFF and in its successor, the EMFAF there have been improvements in efficiency including:

- alignment of procedures with the Horizon research programmes including the use of e-grants;
- progressive reduction of the average time between the closing of a call for proposals and award of a grant owing to the introduction of two-stage evaluations. (Table 14).

Table 14 Time (days) between the closing of a call for proposals and award of a grant.

year	**grants**	**working days[109]**			
		mean	**maximum**	**minimum**	**median**
2019	28	165	181	67	173
2020	15	130	175	105	120
2021	18	144	254	105	141
2022	28	107	185	55	100
2023	31	111	174	35	127

[107] Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018.
[108] The proposal goes into inter-service consultation before summer and to the comitology process afterwards
[109] excludes weekends and Commission holidays

4.1.3 COHERENCE

- The EMFF demonstrated strong internal coherence, aligning fleet modernisation, sustainability, innovation, and local development across Union Priorities.
- It fostered synergies between economic, social, and environmental goals, particularly through innovation and CLLD measures.
- It maintained external coherence with other EU funds (ERDF, EAFRD, ESF) and programmes (LIFE, Horizon Europe).
- The EMFF integrated EU principles of gender equality, non-discrimination, and sustainability, though implementation varied across Member States.
- The EMFF complied with international commitments like SDG 14 and WTO rules, prohibiting harmful subsidies and supporting responsible fisheries.
- EMFF respected its role within global ocean governance and contributed to EU efforts to promote responsible fisheries worldwide.
- Voluntary contributions go hand-in-hand with the EU's priorities for the external dimension of the CFP and strengthen those priorities by helping to 'export' higher standards and by levelling the playing fields upwards.

INTERNAL COHERENCE OF EMFF INTERVENTIONS

The **design of the EMFF Regulation** ensured coherence by integrating multiple Union Priorities (UPs) to promote complementary actions. For example, measures implemented under **Article 38** supported environmentally sustainable fisheries through gear selectivity, while measures under **Article 41** encouraged fleet modernisation and energy efficiency. Similarly, measures implemented under **Article 26** fostered innovation and knowledge transfer, complementing actions in marketing and processing. EMFF interventions were also consistent with wider EU marine policy goals, including the **Marine Strategy Framework Directive (MSFD)** and **Maritime Spatial Planning (MSP)**, particularly under UP6.

According to the survey conducted by the study underpinning the ex-post evaluation the average score of internal coherence was medium. Among 19 Member States consulted, **84% confirmed coherence**, though some, like Germany and Finland, noted fragmentation in collective or multi-sectoral projects due to the structure of the EMFF Regulation.

SYNERGIES AND COMPENSATION FOR TRADE-OFFS

The EMFF also fostered **synergies across economic, social, and environmental objectives**. Fleet modernisation not only improved efficiency and reduced emissions (Articles 38 and 41) but also supported environmental goals by reducing discards and overfishing, as seen in France and the UK. **Innovation funding** (Article 26) enabled risky but sustainable investments, such as **recirculating aquaculture systems** in Finland, by compensating for initial financial burdens.

At the regional level, potential trade-offs-such as support for small-scale versus large-scale operators-were addressed through **CLLD** initiatives under UP4, with FLAGs enabling locally adapted, inclusive development. In Sweden, this helped balance territorial cohesion with national competitiveness.

According to the survey conducted by the study underpinning the ex-post evaluation among 19 Member States, **58% agreed that synergies were achieved**, while 16% disagreed and 26% were

unsure. Some countries, like Czech Republic, reported that only complementarities were defined, not explicit synergies. Others, like Slovenia and Finland, highlighted examples of alignment across measures, though Finland also noted gaps in support for new entrants and challenges in transferring enterprises in small-scale fisheries.

Despite occasional challenges (such as fragmented project structures or uneven support for small-scale operators), the EMFF demonstrated a high level of internal coherence and successfully generated synergies across objectives and sectors. These outcomes were supported by both regulatory design and implementation practices that fostered cross-cutting, mutually reinforcing interventions.

EXTERNAL COHERENCE OF EMFF INTERVENTIONS

The EMFF was designed to be externally coherent with other EU funds, notably those supporting **sustainable development**, **environmental protection**, **economic growth**, and **job creation**. Unlike its predecessor (EFF), the EMFF followed the same regulatory framework as other structural funds, which facilitated better alignment and coordination.

Desk research conducted by the study underpinning the ex-post evaluation highlighted strong **synergies with other EU funds**, including the **European Agricultural Fund for Rural Development (EAFRD)**, **European Regional Development Fund (ERDF)**, and **European Social Fund (ESF)**. For example, EMFF and EAFRD jointly supported coastal and rural development by combining fisheries modernisation with broader economic revitalisation. The ERDF complemented EMFF infrastructure projects, improving market access and regional connectivity. In the UK, EMFF-funded modernisation was supported by ESF training programmes, ensuring that innovation led to job retention and reskilling, rather than displacement.

The EMFF also aligned with EU environmental programmes such as **LIFE** and the **Cohesion Fund**, reinforcing biodiversity and climate objectives. In France, investments in the energy efficiency of vessels under EMFF were complemented by biodiversity initiatives, showing how economic and ecological goals were integrated. Financial tools, combined with grants, further supported long-term resilience and reduced financial risk for beneficiaries.

According to the survey conducted by the study underpinning the ex-post evaluation stakeholders' opinion was that EMFF interventions complemented national and local policies without significant overlap. **Among 19 Member States, 74% agreed that EMFF was coherent with other EU funds.**

Nonetheless, challenges were noted. Some Member States, like Slovenia and Spain, reported administrative complexity due to the unique needs of fisheries beneficiaries. Others, like Sweden and Lithuania, showed strong coordination across funds, helping to avoid duplication. A webinar discussion on **Marine Protected Areas (MPAs)** conducted by the study underpinning the ex-post evaluation highlighted EMFF's key role in complementing other funds like ERDF and EAFRD, with examples of joint actions in Horizon Europe projects.

Consultations under the interim evaluation of the direct management component revealed a general opinion that coherence with other EU financial and regulatory measures could have been better. A number of measures have been taken to improve matters including:

- integrating EMODnet and the Copernicus Marine Service within a Digital Twin Ocean;
- beginning discussions on strengthening links between EMODnet and environmental reporting increasing maritime policy input to EU research programmes, including through Mission Ocean.

- an action plan combining actions on fisheries management with protecting and restoring marine ecosystems[110];

Nevertheless, there is still a perception amongst stakeholders that the landscape for funding opportunities is difficult to navigate.

While evidence of external coherence was slightly less robust than for internal coherence, there remains strong support for the view that EMFF effectively complemented other EU funds. Through coordination with structural and environmental programmes, the EMFF helped to integrate fisheries and aquaculture into broader EU strategies for sustainability, economic development, and social inclusion. It remains challenging to isolate the individual impact of a particular EU fund.

HORIZONTAL OBJECTIVES – GENDER EQUALITY, NON-DISCRIMINATION, AND SUSTAINABILITY

The EMFF regulation explicitly promoted gender equality, non-discrimination, and sustainability, aligning with EU-wide horizontal objectives. Articles 7, 29, and 50 encouraged support for equal opportunities, including the participation of women and under-represented groups in fisheries and aquaculture.

While countries like Sweden and Finland actively advanced **gender inclusion** through targeted FLAG projects, broader uptake was uneven. Survey results indicated strong agreement on gender and age representation, but weaker perceptions of inclusivity.

Sustainability, however, was well integrated across EMFF priorities. For example, articles 38 and 41 of the EMFF-regulation, improve the selectivity of fishing gear to reduce discards, and addresses fleet modernisation and promotes reducing emissions, respectively. The EMFF had a broad reach enabling Member States to support a wider range of initiatives, from marine conservation to aquaculture innovation[111]. Member States targeted sustainability for example in:

- France where fleet modernisation efforts under UP1 (Sustainable Fisheries) not only increased energy efficiency and reduced fuel costs but also aligned with environmental goals, such as reducing overfishing and bycatch. These synergies allowed for a balanced approach that supported economic growth without sacrificing ecological health.
- the UK, selective fishing gear reduced environmental impact while also improving the competitiveness of fisheries by lowering operational costs, reinforcing the EMFF's dual goals of sustainability and economic efficiency. These interventions demonstrated the EMFF's ability to generate synergies that linked environmental and economic priorities in a way that benefited both sectors.
- Finland, Germany and Austria, investments in recirculating aquaculture systems, for example, demonstrated coherence with the EU's goal of fostering sustainable, climate-resilient food systems.
- Estonia, the financial instruments were designed with a strong focus on long-term sustainability, particularly for aquaculture and processing businesses. External Coherence with SDGs (esp. SDG 14)

[110] Commission Communication EU Action Plan: Protecting and restoring marine ecosystems for sustainable and resilient fisheries COM/2023/102 final

[111] European Commission, 'fi-compass study on the use of EMFF financial instruments', 2021, https://www.fi-compass.eu/sites/default/files/publications/fi-compass_study_on_the_use_of_emff_financial_instruments.pdf

The EMFF was coherent with international commitments, particularly SDG 14.6, which calls for **eliminating harmful fisheries subsidies**. EMFF rules explicitly prohibited funding that contributes to overcapacity or Illegal, unreported and unregulated fishing (IUU), and embedded safeguards via the CFP and IUU Regulations. Although the WTO agreement on fisheries support was adopted after the EMFF period, the fund's design and implementation were consistent with international trade and sustainability obligations.

Overall, EMFF respected its role within global ocean governance and contributed to EU efforts to promote responsible fisheries worldwide.

DELIVERY SYSTEM COHERENCE

The EMFF delivery system ensured coherence across programmes through alignment with Union Priorities, integrated management, and consistent monitoring. Articles 97–109 mandated structured planning, evaluation, and reporting, allowing Member States to adapt to evolving needs. Examples from Finland and Sweden showed proactive approaches, including continuous evaluation and alignment with national strategies.

During the study underpinning the ex-post evaluation, some countries reported specific challenges. For example, Belgium noted that the initial set-up of the monitoring and evaluation system was complex, leading to several changes to the operational programme throughout the period and difficulties in adapting to unforeseen events such as COVID-19. Slovenia reported that some indicators were only defined after the programming period had ended, and that not all measures could be adequately monitored with the available indicators. Latvia, in contrast, praised the EMFF's support in addressing market disruptions caused by COVID-19.

Despite some implementation difficulties, most Member States agreed that the delivery system upheld coherence throughout the 2014–2020 period.

The EMFF demonstrated **strong alignment with EU horizontal objectives, international sustainability commitments, and internal programme coherence**. While progress on gender equality and non-discrimination was uneven, sustainability was effectively embedded throughout. The fund's design aligned with international obligations under SDG 14 and the WTO fisheries subsidies framework. Its delivery-system maintained coherence through structured planning and monitoring, though some Member States faced challenges with complexity and adaptability. Despite these, the EMFF contributed meaningfully to a more sustainable, inclusive, and coordinated approach to fisheries and maritime policy across the EU.

4.2 HOW DID THE EU INTERVENTION MAKE A DIFFERENCE AND TO WHOM?

The **primary objective of the Common Fisheries Policy (CFP)** — an **exclusive competence of the European Union** under **Article 3(1)(d) TFEU** — is to ensure the **sustainable conservation and management of marine biological resources**, both **within and beyond EU waters**. Achieving this objective often requires **restrictive and potentially costly measures** at national level, such as **limitations on fishing effort, fleet capacity reductions, or vessel scrapping schemes**. While these measures can have significant economic and social consequences for Member States, they are necessary to address a challenge that is inherently **cross-border and transnational**. In many cases, actions aimed at preventing **overfishing**, combating **illegal, unreported and unregulated (IUU) fishing**, or restoring marine ecosystems would not be sufficiently financed, coordinated or effective without intervention at **EU level**.

In this context, the **EMFF** provides clear **European added value** as the main financial instrument supporting implementation of the CFP. It contributes by:

- **Promoting sustainable fisheries and aquaculture**, helping ensure the long-term viability of marine resources while also supporting the **competitiveness and adaptation** of operators in these sectors;
- **Improving the resilience and sustainability of the blue economy** through investments in **modernisation, innovation, selectivity, safety, energy efficiency, and compliance with environmental requirements**;
- Promoting a **level playing field** for all EU stakeholders operating in the blue economic sectors.
- All MS receive support and are **incentivised to support research, data collection efforts, fisheries control** and facilitate the adoption of sustainable fishing practices.
- To ensure **MS' compliance with CFP rules**, the EU needs an effective system of control, inspection and enforcement. This should also include financial support to MS for them to develop and implement comparable and effective systems for control, inspection, and enforcement that would ensure a level playing field between MS on fisheries control.
- To ensure **implementation of the CFP** the EU needs to support MS in **development of efficient data collection** as an essential part of the establishment of a high-quality fisheries governance framework
- **Protecting marine and coastal ecosystems**, thereby supporting broader EU objectives related to **biodiversity, climate adaptation, and environmental sustainability**;
- Beyond EU waters, EU funds provide the framework for following up on **international obligations but also protect economic interests in fisheries worldwide.**
- **Supporting coastal and fisheries-dependent communities**, notably through **CLLD** which promotes **social inclusion, local diversification, and territorial cohesion**;
- **Facilitating coordination between European, national and regional levels**, especially in response to shared challenges such as the **green and digital transitions**, which require coherent action beyond the capacity of individual Member States acting alone.

Through its combination of **shared management and direct management**, the EMFF helps ensure that implementation of fisheries policy is guided by **common EU priorities**, rather than by fragmented or short-term national considerations alone. It provides both the **financial support** and the **governance framework** necessary for the effective delivery of the CFP. Without this **EU-level funding,**

coordination and oversight, key objectives such as **sustainable fish stocks, a level playing field, and the protection of marine ecosystems** would be at serious risk.

EU Added value under shared Management

The EMFF has been crucial in enabling the implementation of projects that would have been beyond the scope of national budgets and strategic planning alone. For example, in Greece, the EMFF supported the adoption of sustainable aquaculture practices under Article 48(1), including the implementation of innovative technologies such as RAS and feed optimisation strategies. This development, requiring an estimated EUR 25 million in funding, with stakeholders noting that EMFF funding not only addressed immediate sectoral needs but also facilitated long-term strategic planning that was previously lacking at the national level.

Moreover, the e-survey results collected by the study underpinning the ex-post evaluation reinforce these findings, with 76% of respondents indicating that most sustainability and innovation outputs would not have been achieved without the EMFF's support. Follow-up interviews conducted by the study underpinning the ex-post evaluation provided further evidence, highlighting that EMFF interventions were particularly effective in regions that struggled with financial and technical constraints.

The EMFF played a complementary role by enhancing national and regional efforts, thereby delivering additional outputs and results. For instance, in Portugal, the fund was instrumental in establishing 30 new MPAs through Article 40(1)(d) measures, expanding the national network to cover over 1.5 million hectares-almost doubling the existing coverage of 800 000 hectares (European Commission Report on MPAs, 2023)[112]. **Follow-up interviews** with Portuguese stakeholders conducted by the study underpinning the ex-post evaluation revealed that EMFF support was pivotal in overcoming administrative and logistical barriers that had previously hindered MPA expansion.

Follow-up consultations, conducted by the ex-post evaluation underpinning study, confirmed that the EMFF significantly extended the reach of national projects, particularly in areas requiring cross-border collaboration. According to **the e-survey**, conducted by the study underpinning the ex-post evaluation, 64% of respondents agreed that EMFF interventions were crucial in expanding the scale and scope of national projects, particularly in biodiversity conservation and regional development. This added value was evident in projects such as the transnational management of fish stocks in the North Sea, where coordinated research and policy measures were implemented, surpassing what national efforts alone could have achieved.

Evidence that the EMFF ensured a higher quality of outputs due to adherence to stringent EU standards and rigorous oversight, comes, for example, from Ireland, where scientific research on fish stocks under Article 77 led to the collection of comprehensive and high-quality data, significantly improving fisheries management decisions and stock assessments. This EUR 10 million project produced data sets that were more robust than those generated by previous national efforts, which had been

[112] European Commission Report on MPAs, 'Marine Protected Areas in Portugal', 2023, https://www.eea.europa.eu/en/analysis/indicators/marine-protected-areas-in-europes-seas

constrained by budget limitations and methodological shortcomings (Marine Institute, 2019)[113]. In follow-up interviews, conducted by the study underpinning the ex-post evaluation, stakeholders highlighted that the EMFF not only provided the necessary financial resources but also facilitated access to technical expertise and best practices from across the EU. This support was critical in enhancing the quality and scope of national research efforts.

Similarly, in Italy, EMFF investments under Article 41 incorporated cutting-edge technologies for waste management and energy efficiency, setting new benchmarks for sustainability that national funding alone could not have achieved (European Court of Auditors, 2020)[114]. These advancements were further validated by feedback from Italian stakeholders during **follow-up interviews**, conducted by the study underpinning the ex-post evaluation, who noted that EMFF funding enabled the adoption of technologies and standards that would have otherwise been unattainable.

The **e-survey results,** conducted by the study underpinning the ex-post evaluation, support this assessment, with 70% of respondents agreeing that EMFF-funded projects maintained higher standards of quality compared to national initiatives. This was particularly evident in Finland, where EMFF funding enabled the use of advanced eco-innovation technologies and sustainable practices that were not previously employed in national projects. Follow-up interviews indicated that these projects not only met but often exceeded national and EU environmental standards, demonstrating the added value of EMFF interventions.

The EMFF also played a crucial role in accelerating the implementation of key projects, achieving results more rapidly than would have been possible with national funds alone. EMFF funding under Article 38(1)(a) supported the timely rollout of anti-IUU control and monitoring technologies, which French authorities reported as critical in strengthening surveillance systems. This accelerated implementation contributed to a 30% reduction in IUU fishing incidents within two years, compared to a projected five-year timeline with national funds alone[115].

In Poland, EMFF support enhanced a potential of local development, enabling more FLAGS under Article 63 for quicker implementation of the local strategies and projects. Stakeholders from Poland noted that EMFF funding provided the necessary impetus to establish these groups, which played a pivotal role in local economic development and community engagement during challenging times, such as the COVID-19 pandemic.

According to **the e-survey**, conducted by the study underpinning the ex-post evaluation, 62% of respondents agreed that EMFF funding improved the timeliness of project implementation, especially in areas such as environmental protection and local economic development. This was particularly evident during the COVID-19 pandemic, where the EMFF provided rapid financial support to ensure the continuity of fishing activities, which would have faced significant delays under national funding mechanisms alone. Follow-up interviews underscored the EMFF's role as a responsive and adaptable funding mechanism, capable of addressing emergent needs in a timely manner.

---

[113] Marine Institute, Irish EMFF Scientific Research on Fish Stocks, 2019, https://oar.marine.ie/handle/10793/1433

[114] European Court of Auditors, 'Report of the European Court of Auditors on the performance of the EU budget – Status at the end of 2020', 2020, https://www.eca.europa.eu/lists/ecadocuments/annualreport-performance-2020/annualreport-performance-2020_en.pdf

[115] European Union and Canada, 'Declaration on Combating IUU Fishing', 2019, https://www.pm.gc.ca/en/news/backgrounders/2019/07/18/declaration-canada-and-european-union

Direct Management measures

The Coffey evaluation study concluded that the interventions supported by the **direct management component of EMFF achieve benefits beyond what could have been achieved by national and/or regional spending**. EUMOFA, STECF, Advisory Councils and FARNET, as well as maritime policy interventions such as EMODnet and mechanisms and projects for fostering cross-border maritime spatial planning would have not existed had it not been for EMFF support."

The EU provides the institutional framework for countries to come together and tackle common issues. No other body could have done this. And it could not have been achieved without contractual arrangements.

The criteria to provide EU added value and ensure the transferability of project results to other EU regions were included in the eligibility and award criteria for grants to develop innovative solutions, products and services and to promote blue careers.

A number of existing organisations, notably the regional fisheries management organisations, would have operated without EMFF support. But without this support for scientific knowledge or organisational support, their operations would not have been so effective or efficient. The EU was the only donor prepared to put substantial resources to achieving these goals and therefore added value.

4.3 IS THE INTERVENTION STILL RELEVANT?

The EMFF is relevant precisely because Europe's seas are under growing pressure from two linked dynamics:

- **A faster race for ocean resources and maritime space**
  Fisheries, aquaculture, offshore energy, shipping, conservation, tourism and coastal protection increasingly compete for the same marine areas and resources.
- **The triple environmental threat**
  Climate change, biodiversity loss and pollution are degrading marine ecosystems, reducing productivity and making coastal and fisheries-dependent communities more vulnerable.

EMFF addresses the growing competition for ocean resources and maritime space by funding a more resilient, innovative and sustainable blue economy. It helps the EU respond to climate change, biodiversity loss and pollution not only by protecting marine ecosystems, but also by enabling practical investment in adaptation, technological innovation and long-term sustainability.

- The EMFF remained relevant throughout the programming period, addressing the needs of diverse target groups across fisheries, aquaculture, and coastal communities.
- It supported fisheries, aquaculture and coastal communities in adapting to climate impacts, environmental change and market shocks, helping them remain viable over time
- It supported significant progress in safety, innovation, sustainability, and local development, particularly through crisis-responsive and some flexible funding mechanisms.
- Ongoing structural challenges-such as overcapacity, climate threats, social exclusion, and administrative burdens-demonstrate a continuing need for such an EU-level fund.
- It contributed to measures that protect marine habitats and ecosystems, which are essential for both ecological recovery and long-term economic activity
- It enables investment in more sustainable and efficient practices that many national budgets alone may not fund at sufficient scale or speed.

- By promoting sustainable fisheries and aquaculture, the EMFF helps limit overexploitation, improve resource management and support the healthier use of maritime space.
- To remain fully relevant, future programmes should strengthen coordination, broaden innovation uptake, improve inclusiveness, and enhance monitoring and compliance systems.

EMFF RELEVANCE FOR THE TARGET GROUPS

The EMFF interventions **remained relevant throughout the programming period** by aligning with the sectoral priorities defined in Member States' Operational Programmes and adapting to emerging challenges. For example, in Italy and Germany, the EMFF supported sustainability and innovation goals through targeted investments, while Spain and Croatia effectively adapted their interventions during the COVID-19 pandemic, demonstrating the Fund's relative operational flexibility under Article 13.

Overall, the EMFF's design reflected the diverse needs of its target groups, but implementation gaps-particularly in administrative complexity and inclusive outreach-limited full impact. These needs persist, especially in light of systemic challenges like overcapacity, overfishing, climate change, and ageing workforce trends. Thus, while the EMFF addressed many needs, it remains highly relevant, with its core objectives still valid and necessary.

However, this adaptability was not universal. While the EMFF had some structural flexibility compared to EFF (2007-2013), its effectiveness depended on the institutional capacities of individual Member States. Stakeholders called for more streamlined reallocation mechanisms and better real-time needs assessments to enhance responsiveness during crises.

Despite these limitations, the EMFF generally succeeded in meeting Member States' evolving priorities and responding to both pre-identified and unforeseen sectoral needs. The fact that the EMFF Regulation had to be amended to provide some flexibility in reallocating resources in response to geopolitical disruptions such as COVID-19 and the Russia's military aggression against Ukraine highlighted it had some relevance as a policy tool for resilience and continuity but it was not optimal. This was a useful lesson for the future (EMFAF 2021-2027) where a dedicated crisis mechanism was an integral part of the EMFAF Regulation.

EMFF RELEVANCE TO EUROPEAN STRATEGIC OBJECTIVES

The EMFF made meaningful contributions to several **Europe 2020** societal challenges, including employment, innovation, and environmental sustainability, though its impact on education and poverty reduction was more limited. It played a key role in maintaining over 58,000 jobs and creating nearly 9,000, particularly in coastal communities through CLLD initiatives. It also supported R&D in sustainable fishing technologies, biodiversity protection, and co-management models.

The EMFF was clearly aligned with the objectives of the **European Green Deal**, especially in promoting biodiversity conservation, sustainable marine resource use, and pollution reduction. It supported 12 934 operations[116] under Thematic Objective 6 for environmental protection, including marine protected areas in Portugal, habitat restoration in the Baltic, and energy-efficient technologies

[116] EMFF Infosys reports as of 31 December 2023

in Denmark and Germany. Stakeholders' perception collected during the study underpinning the ex-post evaluation confirmed the EMFF's strong environmental contribution, though they also called for more consistent implementation and increased investment in green innovation across Member States to meet ambitious EU climate and biodiversity targets.

The EMFF integrated EU **horizontal principles** with mixed success. Sustainability was a core focus, and investments in sustainable fisheries and aquaculture practices were significant. However, gender equality and non-discrimination measures were implemented unevenly. Some Member States introduced valuable training and funding opportunities for women and marginalised groups, particularly in family-run aquaculture businesses, but many lacked a strategic or consistent approach. Stakeholders recommended more targeted support, such as gender-sensitive training and inclusive funding streams, to ensure the EMFF better addresses these principles in future programming.

The EMFF made **strong contributions** to **technological and scientific innovation** in the fisheries and aquaculture sectors. It funded selective fishing gear, real-time monitoring systems, and digital traceability tools, helping reduce bycatch, improve regulatory compliance, and promote environmental and economic sustainability. Examples include species-targeted tools in Spanish tuna fisheries and electronic logbooks in Denmark and Ireland. According to the study underpinning the ex-post evaluation stakeholders praised these investments scoring R&D impact highly and recommended innovation hubs to expand collaboration across research, policy, and industry.

The EMFF advanced social **inclusion through CLLD**, fostered environmental restoration-particularly in the Baltic Sea and strengthened compliance frameworks via enhanced monitoring and reporting systems. These investments improved data quality, supported better governance, and enabled more effective fisheries management. While not equally effective across all regions, the fund's focus on inclusive, sustainable, and well-governed fisheries aligned well with the EU's strategic objectives.

EMFF RELEVANCE TO SUSTAINABLE DEVELOPMENT GOAL 14 (SDG 14)

The EMFF was highly relevant to the objectives of SDG 14, "Life Below Water," by supporting the conservation and sustainable use of oceans, seas, and marine resources across the EU. It directly contributed to SDG 14 targets through a combination of marine conservation efforts, sustainable fisheries management, pollution reduction, and the promotion of sustainable aquaculture.

The EMFF significantly supported the expansion and management of MPAs, such as the creation of 30 new MPAs in Portugal, which aligned with SDG 14.5 to conserve at least 10% of coastal and marine areas. Habitat restoration projects, like those targeting Posidonia seagrass meadows in France, further supported marine biodiversity and ecosystem resilience. These actions underscore the fund's contribution to preserving vital marine ecosystems.

In terms of fisheries management, the EMFF enabled the implementation of the CFP, helping Member States move closer to achieving Maximum Sustainable Yield (MSY) targets and thus contributing to SDG 14.4. EMFF investments supported better data collection and sustainable fisheries practices and EMFF projects tackled marine litter and nutrient pollution, aligning with SDG 14.1.

In aquaculture, the fund promoted innovation and environmental sustainability through the support of RAS and feed optimisation in countries like Finland, Germany and Austria. These initiatives contributed to reducing environmental pressures and enhancing the environmental footprint of aquaculture.

However, follow-up consultations stressed the need for further investment in monitoring, enforcement, and research to ensure that these gains are sustained and scaled up. Stakeholders also highlighted the importance of greater cross-border collaboration in managing shared marine resources and addressing transboundary environmental challenges.

5 WHAT ARE THE CONCLUSIONS AND LESSONS LEARNED?

This section presents the conclusions of the evaluation. It describes whether the EMFF intervention achieved its objectives described in section 2.

5.1 PROMOTING COMPETITIVE, ENVIRONMENTALLY SUSTAINABLE, ECONOMICALLY VIABLE AND SOCIALLY RESPONSIBLE FISHERIES AND AQUACULTURE

This objective represented the largest part of EMFF implementation, with 125 281 operations across UP1, UP2 and UP5, EUR 3.9 billion committed, and an absorption rate of 85.7%, showing strong uptake and broad relevance across the sector.

EMFF helped fisheries and aquaculture move towards sustainability and resilience by supporting innovation, sustainable practices, marketing and processing, and environmentally better production systems. It also contributed to progress towards Maximum Sustainable Yield and SDG 14 and supported aquaculture innovation such as recirculating aquaculture systems and feed optimisation.

The fund also supported biodiversity and ecosystem protection linked to this objective, including EUR 606 million committed across 11 639 operations for biodiversity and ecosystem restoration measures, with substantial support for Natura 2000 and marine biodiversity actions.

However, implementation and impact were affected by persistent administrative complexity, uneven administrative capacity across Member States, and difficult external conditions including climate change, biodiversity loss, Covid-19, energy and market shocks, Brexit, and Russia's war against Ukraine.

Lessons Learned

Flexible crisis-response capacity is essential. A large number of operations, especially temporary cessation, show that the fund became an important stabilisation tool during shocks, but crisis support can strongly shape implementation patterns and divert attention from structural transformation if not well balanced.

Administrative simplification and stronger support for beneficiaries during project preparation are important to improve uptake, delivery and private co-funding, especially in measures requiring more investment planning.

Environmental and economic objectives can be mutually reinforcing when innovation, sustainability and competitiveness are designed together, as shown by coherence between fleet efficiency, innovation, marketing and environmental measures.

Direct management was relevant mainly through strategic and innovation-oriented actions at EU level, including blue growth support and other centrally managed initiatives that complemented shared management by testing scalable solutions and supporting sector wide priorities rather than local delivery.

5.2 FOSTERING THE IMPLEMENTATION OF THE COMMON FISHERIES POLICY

This objective is one of the best-performing priorities in spending terms.

Strong performance is linked to the fact that many CFP-related actions, such as data collection and control, are carried out by public authorities, which made implementation more straightforward.

EMFF supported the implementation of the CFP by improving data collection, sustainable fisheries practices, and progress towards MSY targets, thereby contributing to SDG 14.4 and broader responsible fisheries governance.

The fund was coherent with international and EU policy frameworks, including WTO rules and global ocean governance commitments, and strengthened the external dimension of the CFP through support aligned with EU priorities.

Lessons Learned

Publicly managed CFP actions can deliver high absorption and implementation efficiency, suggesting that clear institutional responsibilities and stable administrative structures are key success factors.

There is a continuing need to invest in monitoring, enforcement, research and cross-border cooperation to consolidate gains and address shared marine resource challenges.

Earlier evaluations found that control and enforcement spending was useful, especially for IT tools, but would benefit from a more long-term and flexible planning approach, especially for data exchange and tool development.

For scientific advice and data, timeliness of submissions and better tracking of how advice informs management decisions remain important improvement areas.

Direct management was especially relevant under this objective. It financed EU-level strategic functions such as scientific advice, control and enforcement, market intelligence and voluntary contributions to international organisations. These centrally managed actions were effective for common EU needs that require coordination beyond Member State level, and they complemented shared management after some responsibilities, such as data collection, shifted to Member States.

5.3 PROMOTING BALANCED AND INCLUSIVE TERRITORIAL DEVELOPMENT OF FISHERIES AND AQUACULTURE AREAS

EMFF contributed to local development by linking economic, social and environmental aims and by fostering synergies with innovation and community-led local development measures.

The lower absorption suggests that territorially based, locally driven interventions were more demanding to implement, likely reflecting capacity constraints, multi-level coordination challenges and the complexity of local development approaches**:**

Lessons Learned

Local development approaches need strong administrative support, clear guidance and local capacity-building if they are to deliver fully, especially where many small actors are involved.

Integrated territorial measures work best when economic diversification, social inclusion and environmental sustainability are combined rather than treated separately.

More targeted support at project design stage and clearer evaluation criteria could improve implementation quality and uptake in local development measures.

Direct management had a more limited role under this objective. Its contribution was mainly indirect, by supporting broader EU knowledge-sharing, governance and policy learning environments that could inform local approaches, rather than financing territorial delivery itself.

5.4 FOSTERING THE DEVELOPMENT AND IMPLEMENTATION OF THE UNION'S INTEGRATED MARITIME POLICY, COMPLEMENTING COHESION POLICY AND THE CFP

This objective was the smallest in financial size but one of the strongest in implementation performance.

EMFF support under this objective contributed to integrated maritime governance, marine data, spatial planning, surveillance and awareness-raising for the blue economy.

Actions such as EMODnet, CISE and maritime spatial planning were considered worthwhile and strategically important, even where they were still at an early stage. They helped improve maritime information sharing, cross-sectoral cooperation and the foundations for better maritime governance.

Earlier experience from the transitional financial programme showed that maritime policy support strengthened governance, cross-border cooperation and data integration, and helped lay foundations for the Maritime Spatial Planning Directive.

Lessons Learned

Even relatively small-scale funding can have high strategic value when it supports common governance tools, shared data infrastructures and cross-border frameworks

Maritime policy actions often require patience: systems such as EMODnet and CISE were operational or emerging, but still maturing, so their value lies partly in building long-term enabling infrastructure.

Awareness-raising and stakeholder engagement matter. European Maritime Day and regional workshops were reported as useful in increasing awareness of maritime affairs and sustainable blue economy development.

Direct management was particularly important under this objective. Maritime governance, marine data, spatial planning, surveillance and blue growth are naturally suited to EU-level management because they create public goods, common standards and cross-border interoperability. Direct management therefore played a central role in delivering IMP actions and complementing both cohesion policy and the CFP.

5.5 CROSS-CUTTING LESSONS

EMFF showed strong internal and external coherence across sustainability, innovation, competitiveness, territorial development and maritime governance, but implementation quality varied considerably between Member States.

Across all four objectives, the main lessons are the need for simplification, stronger administrative capacity, flexible but well-targeted crisis response, better monitoring and performance indicators, and continued investment in EU-level functions through direct management where coordination, standard-setting or cross-border public goods are involved.

ANNEX I. PROCEDURAL INFORMATION

The European Commission conducted the ex-post evaluation of the European Maritime Fisheries Fund (EMFF) in the programming period 2014-2020 by the end of 2024, in line with Article 57 of the Common Provision Regulation (CPR) 1303/2013.[117]

The Decide planning entry for the ex-post evaluation is PLAN/2024/29. The Call for evidence and the Public Consultation were published on 'Have your say' on 12 June 2024 and 21 June 2024 respectively for a 12-week period (until 6 and 13 September 2024) for stakeholders and the general public to provide feedback.[118]

The evaluation was led by the European Commission's Directorate-General for Maritime Affairs and Fisheries (DG MARE). An Interservice Steering Group (ISSG) was set up comprising the following Commission services: DG EMPL, DG ENV, DG REGIO, SG. Several DG MARE colleagues also formed part of the ISSG. The ISSG helped ensure the representativity of the evidence considered, the validity of the analysis and the reliability of the conclusions. In particular, the ISSG was consulted as follows:

- In February 2023 on the technical specifications of the external study;
- In August 2023 on the kick-off meeting with the external contractor;
- In October 2023 on the Inception Report of the external study;
- In March 2024 on the draft 1st Interim Report of the external study;
- In May 2024 on the Call for evidence and the Public Consultation questionnaire;
- In July 2024 on the draft 2nd Interim Report of the external study;
- In October 2024 on the Validation workshop;
- In October 2024 on the Draft Final Report;
- In October 2024 on the revised Draft Final Report;
- In November 2024 on the letter to Deloitte concerning comments on the Draft Final Report;
- In January 2025 on the Final Report;
- In February 2026 on the SWD and its annexes.

In line with the requirements set out in the Commission Better Regulation Guidelines,[119] the ex-post evaluation examined the effectiveness, efficiency, relevance, coherence and Union added value of EMFF. The evaluation relied on the following component:

1. An external independent supporting study (i.e. the supporting study) awarded to a consortium consisting of Deloitte Consulting BV, Stichting Wageningen Research, MRAG Europe Limited and Ramboll Management Consulting SA/NV. The service contract started on 31 August 2023 and ended in January 2025. The analysis relied on desk research, data analysis, a Theory of Change,

[117] Regulation (EU) 1303/2013. Available at: https://eur-lex.europa.eu/eli/reg/2013/1303/oj/eng

[118] Call for Evidence and Public Consultation on the ex-post evaluation of the European Maritime Fisheries Fund (EMFF) for 2014-2020. Available at: https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14120-EU-Maritime-and-Fisheries-Fund-EMFF-2014-2020-ex-post-evaluation_en

[119] Better Regulation: guidelines and toolbox https://commission.europa.eu/law/law-making-process/planning-and-proposing-law/better-regulation/better-regulation-guidelines-and-toolbox_en.

extensive stakeholder consultation activities (interviews, survey and validation workshop) and case studies.

For a full discussion on the evidence considered, including limitations faced and mitigations adopted, see Annex II. Annex V provides a full report of all consultation activities conducted.

ANNEX II. METHODOLOGY AND ANALYTICAL MODELS USED

Overall approach to the evaluation

The ex-post evaluation of EMFF is largely based on an external supporting study. Additional sources of information included inputs from FAMENET, Infosys analysis, contributions from DG MARE and other Commission services' colleagues, and relevant European Commission and DG MARE publications. DG MARE relied on the work of the contractor to (i) collect and analyse the relevant evidence (including consultation work); (ii) provide initial answers to all evaluation questions; and (iii) present evidence-based conclusions and lessons learnt. The study followed an approach based on mixed-method data collection approaches, combining qualitative and quantitative research methods. The overall methodological approach was guided by an evaluation matrix/framework presented in Annex III and an Intervention Logic presented in section 2.1.

In accordance with the terms of reference and the tasks described in there, an inception phase of the study was dedicated to fine-tuning and operationalising the methodology and preparing the data collection tools for the following phases. The study consisted of eight tasks, with respective activities and outputs presented in the figure below:

Figure 17: Methodology, tasks, activities, and outputs (Source: Contractor's own elaboration)

Inception	Desk research and analysis			Synthesis			Dissemination
Task 1	**Task 2**	**Task 3**	**Task 4**	**Task 5**	**Task 6**	**Task 7**	**Task 8**
Inception report EMFF	EMFF Operational programmes overview	Development of the Theory of Change model	Analysis of the programme achievements	Summary of the findings	Draft final ex-post evaluation report	Ex-post validation workshop	Final ex-post evaluation report
Activities							
• Understand the assignment • Refine and propose the evaluation questions and judgement criteria • Formulate relevant indicators for the judgement criteria • Refine and finalise the selection criteria of the case studies • Conduct scoping interviews • Create e-survey to gather additional insights • Draft the inception report	• Review documents and summarise the findings • Review AIRs and national evaluations • Define the criteria structure • Initiate long-list development of case studies • Share the findings in the defined structure with the Commission	• Review the literature to verify existence of any causal relationships • Develop an intervention logic • Identify a case study that fits the context of each UP • Highlight relevant measures from the intervention logic, covered under a first case study • Collect data and conduct interviews with stakeholders to test any perceived causality • Draft the findings in the interim reports	• Refine the EQM based on the information collected in previous tasks • Conduct interviews to gather additional relevant information from stakeholders • Formulate a generalised ToC behind the interventions for each case study (or UP) • Conduct assessment for each evaluation criteria and note preliminary insights for the case study	• Draft a template to present the key findings per case study (or UP) • Extract the general findings per evaluation question • Draft the preliminary conclusions from the assessment	• Draft the recommendation for the period 2021-2027 • Draft the final ex-post evaluation report	• Draft the agenda for the validation workshop • Identify workshop participants • Send invitations along with a concept agenda • Set up and execute a workshop and collect the feedback • Share a report-out of the findings with DG MARE and the participants	• Adjust the final report based on the feedback from the validation workshop • Include main conclusions and lessons learnt in final report • Share the report with the Commission services for approval
Outputs							
• Detailed activity breakdown and expected outputs • Final list of evaluation questions and judgement criteria • List of KPIs for each question • List of case studies • Additional insights • Inception report	• Summary of findings • Overview of the Ops • Draft long-list of case studies	• Finalised intervention logic and ToC models • Application of a case study with potential explanations • Overview of data needs and data per case study • Draft short list of case studies • Interim report	• Completed evaluation questions overview with insights • Generalised ToC per case study • Preliminary evaluation insights and case studies	• Template for key findings • Overview of general findings • Overview of conclusions	• Overview of recommendations • Draft final ex-post evaluation report	• Workshop agenda • List of participants • Overview of invites and acceptance • Workshop outputs • Report out of the workshop	• Final ex-post evaluation report

Methodology for desk research and relevant tasks

- **Source identification** was essential as a long list of sources was relevant to enrich the analysis both with primary and secondary data. The identification of relevant data sources was based on utilising literature already known to the study team and expanding it further using a keyword search. A combined keyword search utilising Boolean operators (compound keywords) to identify further literature and applying a snowball approach to the reference lists of the documents identified to further extend our general literature base.
- In-depth **literature review** was conducted to gather a solid understanding of any publicly available data relevant for the ex-post evaluation study. It aimed to be broad and exploratory in nature and give a rich data basis. Moreover, it targeted to cover specific studies and working papers to supplement specific parts of content of the ex-post evaluation.
- Conducting an in-depth **document review** helped understand which evaluations and reports have been written related to the EMFF. This was a targeted evaluation of documents directly related to the EMFF and included documents provided by the Commission support units FAME (2014-2020), FARNET (2014-2020), FAMENET (2021-2027), with the initial list of sources included in chapter 2.7 of the Terms of Reference.
- The **review of available monitoring data** aimed to screen for possible gaps. This helped identify gaps in the data collected for a specific Member State's Operational Programme. This included screening EMFF Regulation Article 97 (1) data (INFOSYS data), as well as AIRs (annual implementation reports). In the Terms of Reference, Task 2 outlined additional monitoring data sources to be included in the review.
- The review of **national evaluation reports** aimed to create a complete view of the success of the EMFF, combining bottom-up (Member State documentation) analysis with top-down (Commission driven documentation) analysis. Assessment of additional work performed at Member State level was considered. As an example, OP overviews, summaries and factsheets of each Member State were considered.

Methodology for field research and relevant tasks

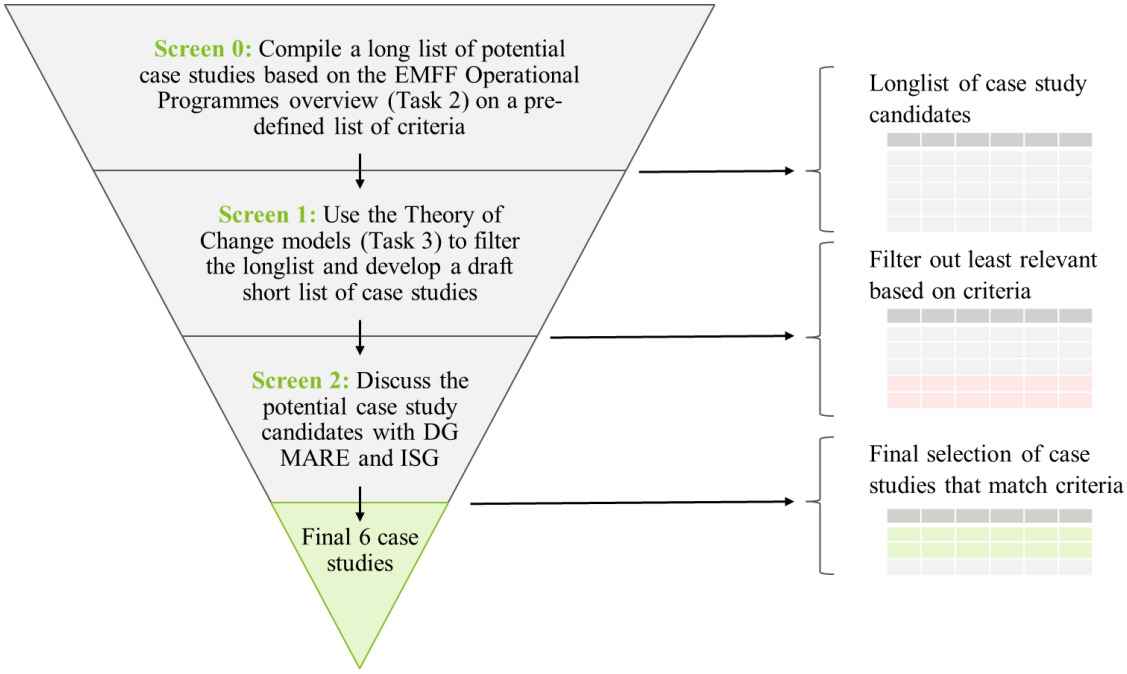
- The study team opted for an **e-survey** because it is an effective and efficient way to engage with stakeholders horizontally across the EU and across OPs, and it allows all different types of stakeholders to give inputs. For example, it was used as input for case study development, and the programme evaluation and analysis. For the e-survey, a draft of the questionnaire was created and then approved by the Commission services. The final outline for the e-survey(s) and suggested MA's and additional stakeholder audience, was shared after consultation with the Steering Committee, and is being proposed in the inception phase. The e-survey(s) was developed in the English language and was subsequently machine translated to other EU languages (using AI tools) using Qualtrics. The draft of the e-survey can be found in a separate Annex of the underpinning study.

- **Scoping interviews** with the Commission offered a better understanding of the EMFF from a practical perspective and the objective of this ex-post evaluation. They fed into the drafting of data collection tools and refinement of the methodology as part of the inception phase. Moreover, they helped to gather contact details and to connect with stakeholders at EU, national, and where required international levels.
- **Expert validation and stakeholder interviews** were used to gain an understanding of the situation in Europe or in specific Member States. This gave detailed inside knowledge of first-hand experiences and needs of stakeholders engaged in the EMFF over the past years, and thus provided a basis for the overall analysis. All interviews were conducted via email enquiries to optimize the use of resources and gain detailed data. Interview topics were adapted based on the information collected through desk research and to better understand the context from the stakeholders directly involved with the OPs.
- **Case studies** were used to gather deep insights into the evaluation findings per UP. There is one case study per UP. The case studies were identified through a high-level assessment of the OPs, and outline of the UPs. These case studies have been summarised in Task 5 of the supporting study. For the case studies, desk research, interviews and e-survey were used to create a long list as described in Task 1.
- Any recommendations resulting from this project for the Commission should be validated by a selected group of stakeholders to ensure they are sound, fair, and balanced. After completion of the first six tasks, an online **validation webinar** was hosted to validate the findings and conclusions of the ex-post evaluation study. A detailed approach for the ex-post webinar is shared in Task 7.

Methodology for case studies

A long list of case studies was developed alongside Tasks 2 and 3 of the supporting study and a set of pre-defined criteria was made explicit by the study team and agreed with the Commission services (see below) for all screening stages. The following approach was followed for case study selection:

Figure 18: Case study selection approach (Source: Contractor's own elaboration)



The case study selection was performed in three distinct steps referred to as "screens". The unit of analysis of the case studies will be the Operational Programmes (OPs), therefore including all measures funded within a specific OP related to the UP in question. For the first step (screen 0), we reviewed the EMFF-supported initiatives at Member State level to create a long list of potential case study candidates. The following criteria for **Screen 0** were used to identify the long list of potential case study candidates:

- **Representativeness across Union priorities:** The case studies must cover all 6 Union priorities and a number of UP specific objectives.
- **Spread of sea basins and Member States:** The aim was to select at least one case study per sea basin and take a spread of Member States. This shows the diversity of external and internal factors that can affect the mechanisms of change of each measure within a Union priority.
- **Share of funding allocated:** The aim was to select Member States that have received the largest shares of overall funding. This increased the relevance of the case studies for testing the Theory of Change as part of Task 3, as well as the chances of finding a substantial evidence base to develop the case study.

Once the long list has been created under Screen 0, the study team applied the following criteria under **Screen 1** to arrive at 25-30 case study candidates. This step was conducted together with the development of Theory of Change models as part of task 3 for which data was collected using desk research and interviews:

- **Relevance to test ToC models:** At this stage, the analysis focused on whether the case study candidates could be used to test linkages with the ToC models based on the availability of data of the case study candidates from screen 0. As the case studies must have a balance of quantitative information supported by qualitative assessment, this criterion ensured case studies are evidence-based.
- **Response to external situations:** The description of each case study candidate in the list was reviewed with the aim to identify if the description explicitly mentions

the impact of the external situations like the COVID-19 crisis, Russia's military aggression against Ukraine and the climate change/biodiversity crisis. The details and the extent of the response to external situations was elaborated and analysed through interviews for the final six selected case studies. Based on that, UP5 case study includes a focus on the COVID-19 pandemic and Russia's military aggression against Ukraine.

Once the case study candidates were identified, the **Screen 2** process was initiated with its central element being a discussion of the potential case study candidates with the Commission services (DG MARE geographical units and the ISG members) to arrive at six case studies. These were selected for deep dive for which a specialised template was developed to present a summary of insights (as described in Task 4 and 5).

Additionally, the final selection of case studies had a chapter of the response to adverse external situations (as applicable) like the COVID-19 crisis, Russia's military aggression against Ukraine and the impact of climate change/biodiversity.

Methodology - EMFF Operational programmes

The EMFF under shared management allocated 5.6 billion EUR (89% of the total 6.4 billion budget) to each EU Member State, which prepared an operational programme (OP) setting out how to use the budget for projects that best fit their economy and fishing industry. Task 2 of the ToRs requested an overview of the EMFF OPs which was carried out through the steps outlined in the following figure:

Figure 19: Methodology for the EMFF OPs overview (Source: Contractor's own elaboration)

The OP overview presented in section 3 of this SWD was created based on a detailed collection of country and EU-level data from the INFOSYS database (2023 reports, submitted by Member States in March 2024) and the EMFF implementation report 2022[120]. This data includes information on the financial contribution and expenditure by Union priority (UP) and by EMFF Article.

Limitations and challenges in evaluating effectiveness of EMFF Operational Programme Implementation

The ex-post evaluation of the EMFF marks a significant milestone in EU maritime policy. As the first maritime fund to implement a detailed, result-oriented monitoring system—contrasting sharply with the **EFF (2007–2013)** and its predecessors the EMFF (2014–2020) pioneered a "data-first" approach including the reporting of detailed information at the single project level. However, as a first-generation system, it revealed structural and conceptual challenges that impacted the evaluation process. Several limitations and

[120] Microsoft Word - CT3.1_EMFF_implementation_report_full_2023-11.docx (europa.eu)

challenges were identified early on and mitigation measures were introduced. However, their structural impact affected the evaluation of the **EMFF (2014-2020)**.

Systematic Limitations of the EMFF CMES

While intended to be robust, the system encountered several structural disadvantages that complicated the ex-post assessment:

- **Incoherence of the evaluation structure:** The initial design often failed to align with the operational realities of Member States. This led to "indicator fatigue" and a mismatch between the data requested and the actual impact of the measures (for example the reduction of unwanted catches was based on indicators difficult to feed with reliable data, or the employment effect was not addressed under priorities, which are known to produce most jobs after capital investment).

- **Structural rigidity:** The framework was less suitable for tracking grant-based operations at the local level, being overly oriented toward high-level policy (for example indicators asked about the ration of catch/liter of fuel, whereas at project level the capture of the hourly fuel consumption would make more sense). Many projects considered the allocated indicators to be "non-applicable" in their cases, resulting in missing data in extreme cases for up to 70% of all projects.

- **Reporting errors and data reliability:**
    - Frequent errors occurred in reported units (e.g., confusing "kg" with "tonnes" or "thousand Euro" with "million Euro").
    - Lack of attention to semantics and arithmetic signs led to mixing positive and negative values, notably in critical areas like "change in unwanted catches" (UP1-SO1), making the assessment of the reported data impossible.
    - While **Annual Implementation Reports (AIRs)** corrected some errors at the SO level, they only provided aggregated data. Consequently, a deep-dive analysis at the measure or single-operation level remains impossible for the full dataset at the level of result indicators (financial and operation description data were reliable).

Broad external constraints

Beyond the technicalities of the monitoring system, the evaluation was impacted by external factors that created significant "noise" in the data:

- Massive shocks post-2019 made it difficult to isolate the *direct* impact of EMFF funding from broader economic shifts caused by the pandemic and the energy crisis.
- As the evaluation concludes shortly after the 2014-2020 period (actual implementation stretching out to 2023 due to the n+3 rule), the long-term impacts on biodiversity and socio-economic resilience are not yet fully visible.
- While quantitative data from INFOSYS was robust, qualitative depth varied across Member States, leading to an uneven granularity in regional analysis.

Mitigating measures

To address these shortcomings, **DG MARE** introduced quality assurance and validation tools during the implementation period to improve reliability. However, due to conceptual limitations, some indicators remained unreliable and had to be excluded from the current evaluation.

Key Remedial Actions:

- The underpinning study conducted by **Deloitte** identifies unreliable indicators and utilizes proxy data to ensure the evaluation remains evidence-based.
- Evaluators relied on inferences drawn from both INFOSYS operation-level data and the aggregated values from AIRs, exploiting the advantages offered by the two complementary reporting streams.
- Identified weaknesses—from administrative burden and unit errors to the incoherence of the evaluation structure—have been systematically addressed. The **EMFAF (2021–2027)** framework, which organically evolved from the 2014-2020 CMES, introduced a more flexible, adaptable, and reliable Monitoring and Evaluation Framework.

ANNEX III. EVALUATION MATRIX, DETAILS ON ANSWERS TO THE EVALUATION QUESTIONS (BY CRITERION)

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
Effectiveness	To what extent was the EMFF implemented effectively?	• Extent to which the EMFF has been implemented effectively • Extent to which the EMFF has been implemented effectively for CLLD • The implementation of EMFF interventions benefited from lessons learned in the previous period (EFF 2007-2013) • EMFF interventions addressed different beneficiaries effectively • EMFF interventions' results made a tangible difference in comparison with the previous programming period (EFF 2007-2013) for various different beneficiaries • EMFF interventions contributed to sustainable structural changes in national systems supporting the relevant policy areas • EMFF interventions have mitigated external effects successfully (economic crisis, energy crisis, COVID pandemic, climate change) • The achieved results are likely to continue after the end of the funding,	• CLLD implementation rate • Number of LAG-led projects approved/implemented; • LAG activity level; • Alignment of local strategies with sectoral objectives • Number and type of EFF ex-post evaluation recommendations addressed in EMFF design; • Evidence of procedural improvements (complexity reduction, processing time); • Evidence of structural/organizational improvements; • Implementation rate by target group (SMEs, aquaculture, processing, conservation, fisheries data collection, etc.); • Success rate (approval/disbursement) variance by beneficiary type; • Evidence of targeted outreach and capacity building measures	• Annual implementation reports • FAMENET annual reports • FAMENET studies • FAMENET stories • Infosys data • MA interviews • Survey • Web analysis • Case studies	see section 4.1.1 • The EMFF was moderately successful in achieving its overarching objectives, though results varied by EMFF priority and region • EMFF investments in fisheries supported a reduction of the negative environmental impacts of fisheries, particularly in bycatch reductions, the overall effectiveness in significantly lowering unwanted catches across the EU is inconclusive due to the fact that major factors influencing bycatch cannot be addressed by EMFF (such as periods of fishing which are under national jurisdiction). • The EMFF was effective in supporting innovation, with 30,000 fishing vessels adopting new technologies and over 500 fisher-scientist partnerships enhancing

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
		both at individual, institutional and policy level • EMFF interventions are sufficiently visible to the public (in general and per MS/region/stakeholder group in particular)	• Comparative analysis of key output/result indicators (scale, scope, quality) between EMFF and EFF periods; • Number and value of additional projects implemented under EMFF; • Beneficiary satisfaction with programme implementation; • Perception on institutional capacity building outcomes; • Changes in policy/regulatory frameworks influenced by EMFF; • Number and type of interventions addressing external shocks; • Programme flexibility and responsiveness • Perception on sustainability of project results.		efficiency and contributing to knowledge gains. • EMFF supported over 14,000 local projects through CLLD, strengthening community resilience and economic diversification. • The direct management component enabled better coordination between different Member States through access to data that was seamless across and measures to support cooperation between Member States
	To what extent did the EMFF interventions contributed to CFP objectives?	• EMFF interventions contributed to the CFP objective - to protect the marine environment • EMFF interventions contributed to the CFP objective - to improve data collection • EMFF interventions contributed to the CFP objective - to ensure the economic viability of EU fleets	• Number and type of interventions addressing CPR objectives	• STECF Annual Economic Reports. • Infosys database • National Strategic Plans (NSPs) • Interviews with Managing Authorities (MAs)	see section 4.1.1 • Progress in reducing fleet overcapacity was limited, with only 3.94% reduction of the unbalanced fleet achieved compared to the targeted 34.49% reduction, although reduced fleet competition did yield profitability gains.

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
		• EMFF interventions contributed to the CFP objective - to provide consumers with good quality food			• EMFF contributed to profitability gains in fisheries and aquaculture, including a 10% rise in net profits for small-scale coastal fleets and a 15% increase in aquaculture production value. • The fund performed particularly well in data collection and scientific support, exceeding targets and strengthening CFP implementation through regionalization (setting up of Regional Coordination Groups, regional work plans and regional databases) and tailored data collection addressing end user needs. • Support to SSCF showed mixed success. While employment and safety improved, persistent structural barriers sometimes limited access to funding and innovation.
Efficiency	To what extent were the EMFF operational programmes implemented efficiently?	• EMFF interventions were implemented at a reasonable cost to the administration and beneficiaries (ratio of administrative cost). • Inefficiencies and obstacles were identified and solutions put in place to overcome them.	• Number of bottlenecks and obstacles identified; • Timeline for solution implementation (identification to resolution); • Effectiveness score of implemented solutions;	• Annual implementation reports • FAMENET annual reports • Infosys data • MA interviews	see section 4.1.2 • The EMFF delivered meaningful results but faced administrative burdens; the perception of the complexity of the fund application and reporting

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
		• The investment in the CLLD delivery system and its specific requirements (Local Action Groups, partnerships, local development strategies, local governance, dissemination of best practices, etc.) led to better results at the local level.	• Processing time and administrative burden reduction; • Systemic improvements achieved	• Survey	hindered in some cases access for small-scale operators. • Overall, the Fund can be considered reasonably cost-efficient, even though scope remains to better evidence and further reduce administrative burdens. .
	To what extent were simplification measures implemented efficiently?	• Simplification measures were successfully implemented at a reasonable cost to the administration and beneficiaries. • The implementation of simplification measures benefited from lessons learned, including from the previous period EFF 2007-2013. • The implementation was simplified compared to the previous programme. • Simplification measures were continuously improved. • Simplification measures addressed different target groups according to their different needs. • Simplification measures responded to and mitigated external effects successfully (economic crisis, energy crisis, COVID-19 pandemic, climate change, biodiversity).	• Number of EFF simplification recommendations incorporated; • Beneficiary perception of improvement • Number of simplification improvements introduced over period; • Take-up rate of simplified procedures by beneficiary type; • Evidence of tailored simplification approaches; • Satisfaction score by target group; • Evidence of agile simplification response to crises; • Flexibility of simplified procedures during external shocks; • Emergency provision implementation and effectiveness;	• Annual implementation reports • FAMENET annual reports • Infosys data • MA interviews • Survey	see section 4.1.2 • Simplification measures (e.g. digital platforms, Simplified Cost Options) reduced costs and processing time in some countries. • Simplification measures improved efficiency where applied, especially through digitalisation, tailored support and, to a lesser extent, SCOs, though implementation remained uneven

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
			• Beneficiary access to support during crises; • Impact on continuity of funding during disruptions		
	To what extent has the EMFF implemented Financial Instruments efficiently?	• Financial instruments were successfully implemented at a reasonable cost to the administration and beneficiaries. • The implementation of financial instruments benefited from lessons learned. • Financial instruments addressed different target groups according to their different needs. • Financial instruments have responded and mitigated external effects successfully (economic crisis, energy crisis, COVID-19 pandemic, climate change, biodiversity).	• Number of financial instruments • Evidence of financial instrument experience incorporated;	• Financial instrument management reports; • National EMFF evaluations • FAMENET interview • Survey among MAs	see section 4.1.2 • Financial instruments were implemented only in Estonia. • The EMFF provided some flexibility, following an amendment of the Regulation, in responding swiftly to external shocks (COVID-19, Russia's military aggression against Ukraine) but lacked contingency funding to meet the high demand during crises. • Monitoring systems and data indicators were sometimes insufficient, limiting the ability to attribute outcomes directly to EMFF support.
Relevance	To what extent did the EMFF contribute to the Europe 2020 objectives?	• EMFF interventions contributed to employment. • EMFF interventions contributed to an increased level of education and lifelong learning. • EMFF interventions contributed to energy efficiency. • EMFF interventions contributed to reduced GHG emissions.	• Number of jobs created (FTE) by sector and region; • Number of jobs maintained/safeguarded; • Number of training courses and training places provided; • Improvement in beneficiary qualifications/certifications	• Annual implementation reports • FAMENET annual reports • Infosys data • MA interviews • Survey	see section 4.3 • The EMFF supported significant progress in safety, innovation, sustainability, and local development, particularly through crisis-responsive and some flexible funding mechanisms.

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
		• EMFF interventions contributed to investment in R&D. • EMFF interventions contributed to reduced poverty.	• Energy savings achieved (MWh/year equivalent); • Fleet and facility energy efficiency improvements (%); • Investment in renewable energy and efficient technologies; • CO2 reduction equivalent (tonnes CO2-eq/year); • Fossil fuel use reduction • Contribution to climate targets • Budget allocated to innovation projects (EUR); • Number of innovation projects implemented. • Commercial uptake of innovative results		
	To what extent was the EMFF relevant to the needs of the target groups?	• EMFF interventions were relevant to the needs of the target groups identified in the programme document. • EMFF interventions addressed the needs identified in the MS throughout the whole programming period.	• Alignment score of interventions with identified needs; • Target group satisfaction with relevance of support; • Evidence of needs-based intervention design; • Identified needs addressed; • Beneficiary perception of programme relevance • Evidence of responsive programme adjustments to evolving needs;	• National EMFF evaluations • MA interviews • Survey • Infosys data	see section 4.3 • The EMFF remained relevant throughout the programming period, addressing the needs of diverse target groups across fisheries, aquaculture, and coastal communities.

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
			• Flexibility of intervention portfolio; Frequency of needs reassessment; • Adoption of new interventions responding to emerging needs		
	To what extent was the EMFF relevant to European strategic objectives?	• EMFF interventions addressed the objectives of the Green Deal • EMFF interventions contributed the seven "societal challenges" of Europe 2020. • EMFF interventions addressed the horizontal principles (gender equality, non-discrimination, sustainability) • EMFF interventions contributed to technological or scientific advances that appeared in Europe during the programming period. • EMFF interventions contributed to social, environmental advances or advances related to implementation, reporting and compliance during the programming period	• Number and type of interventions supporting Green Deal objectives; Biodiversity impact indicators; Circular economy implementation evidence; Sustainable ecosystem management improvements; Alignment with climate neutrality targets • Number and type of interventions addressing each societal challenge; • Output and result contribution for each challenge;	• National EMFF evaluations • MA interviews • Infosys data	see section 4.3 • Ongoing structural challenges- such as overcapacity, climate threats, social exclusion, and administrative burdens- demonstrate a continuing need for such an EU-level fund. • To remain fully relevant, future programmes should strengthen coordination, broaden innovation uptake, improve inclusiveness, and enhance monitoring and compliance systems.
	To what extent was the EMFF relevant to UN SDG14?	• EMFF interventions contributed to SDG14 on conservation and sustainable use of the oceans, seas and marine resources for sustainable development	• Nr and type of intervention aligned with SDG14 targets;	• National EMFF evaluations • Expert interviews • Survey	see section 4.1.3

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
Coherence	To what extent is the EMFF interventions internally coherent and externally coherent	• EMFF interventions were coherent with one another. • EMFF interventions generated synergies and/or compensated possible trade-offs among them. • EMFF interventions generated synergies with other EU funds (for example EAFRD, ERDF, ESF or others). • EMFF interventions were coherent for achieving EU cross cutting objectives both at national and EU level. • EMFF interventions were coherent with the EU interventions (notably MSFD, MSP, IUU regulation, etc.) towards SDGs • EMFF interventions were coherent with the UN International Ocean Governance agenda • The EMFF delivery system assured the coherence of the programmes throughout the whole period.	• Number of overlaps and gaps with national and regional strategies • Number of overlaps and gaps among different specific objectives • Conflicting incentives or design contradictions; • Evidence of deliberate synergy design	• National EMFF evaluations • Expert interviews • Survey	see section 4.1.3 • The EMFF demonstrated strong internal coherence, aligning fleet modernisation, sustainability, innovation, and local development across Union Priorities. • It fostered synergies between economic, social, and environmental goals, particularly through innovation and CLLD measures. • It maintained external coherence with other EU funds (ERDF, EAFRD, ESF) and programmes (LIFE, Horizon Europe). • The EMFF integrated EU principles of gender equality, non-discrimination, and sustainability, though implementation varied across Member States. • The EMFF complied with international commitments like SDG 14 and WTO rules, prohibiting harmful subsidies and supporting responsible fisheries.
EU value added	To what extent could the identified outputs and	• EMFF outputs and results would not exist without EU interventions. • EMFF provided additional outputs and results to the national and regional output and results in MS.	• Expert judgment on EMFF necessity • Beneficiary testimony on EU intervention criticality	• National EMFF evaluations • Expert interviews • Stakeholder interviews	see section 4.2 the EMFF clearly demonstrated strong EU added value by enabling broader, more ambitious, and higher-quality results than Member

Evaluation criteria	Evaluation question	judgement criteria	Evaluation indicators	Sources	Reference in the SWD
	results have been achieved without EMFF support/EU intervention?	• EMFF outputs and results were of higher quality than the output and results of national and regional interventions in MS. • EMFF outputs and results were delivered earlier than they would have been by the MS.		• Case studies • Survey	States could have achieved independently

ANNEX IV. OVERVIEW OF BENEFITS AND COSTS, TABLE ON SIMPLIFICATION AND BURDEN REDUCTION

Overview of costs and benefits identified in the evaluation									
		Citizens/Consumers		Businesses (not direct recipients of Funding		Administrations		Programme Beneficiaries	
		Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
[Cost or Benefit description]:									
Direct compliance costs (adjustment costs, administrative costs, regulatory charges)	**One-off per project, recurrent when dealing with many projects**	N/A	N/A	N/A	N/A	N/A	Cost of processing applications and subsequent processes through to closure. Small-scale beneficiaries reported high administrative costs—estimated at 5–10% of project budgets	N/A	Administrative costs of lodging application for funding + reporting Permitting costs (regulatory charges/compliance costs) associated with certain project types (e.g. infrastructure, licensing) Cost of compliance with enforcement requirement
Enforcement costs (costs associated with activities linked to the implementation of an initiative such as monitoring,	**Recurrent**	N/A	N/A	N/A	N/A	N/A	Cost of implementation of the CMES	N/A	Not applicable unless contingency funds have been set aside for possibility of

inspections and adjudication/litigation)									adjudication / litigation
Indirect costs (indirect compliance costs or other indirect costs such as transaction costs)	**Recurrent**	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Cost of maintaining beneficiary infrastructure support but not directly part of the project Opportunity costs of not maximising access to EMFF funding across genders and diverse communities
Direct benefits (such as improved well being: changes in pollution levels, safety, health, employment; market efficiency)	**One-off for funding granted; jobs created / maintained / personnel trained.**	N/A	N/A	between €288 million to €407 net annual benefits[121]	The net annual benefits of EMODnet are *from a combined effect of increased productivity, fostered innovation and*	N/A	N/A	N/A	EUR 5.62 million in EMFF funding + EUR 2.19 million in national funding Improved viability of sector operations through modernisation, job creation/maintenance,

[121] An external evaluation of EMODnet completed in 2018[121]

	Otherwise recurrent				*reduced uncertainty*”. Market expansion and stability in coastal communities. Processing efficiency and product quality improvements. Enhanced market efficiency through support to professional organisations such as Producer Organisations				increase in trained staff, particularly SMEs

Indirect benefits (such as wider economic benefits, macroeconomic benefits, social impacts, environmental impacts)	**Recurrent**	N/A	Territorial cohesion; employment opportunities in new / expanded complementary activities; improved environment from funding combating climate change, reversing biodiversity loss	N/A	Enhanced sector resilience and stability. Long-term economic stability supported through various interventions.	N/A	N/A	N/A	N/A

S***implification and burden reduction (savings already achieved)*** *Report any simplification, burden reduction and cost savings* ***achieved already*** *by the intervention evaluated, including the points of comparison/ where available (e.g. REFIT savings predicted in the IA or other sources).*								
	Citizens/Consumers/Workers		Businesses		Administrations		Programme Beneficiaries	
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
One-off and Recurrent (Depending on the situation as explained in the comment under columns "Administration" and "Programme Beneficiaries")	N/A	N/A	N/A	N/A	N/A	There are documented savings at Member State level for the time and money saved by handling applications and project processing and reporting verification using digital platforms, but there is not aggregate figure Perceptions are available that: Simplified Cost Options saved time and money in processing applications and reporting	N/A	Perceptions are available that: Simplified Cost Options saved time and money in lodging applications and reporting
One-off and Recurrent (Depending on the situation as explained in the comment under columns "Administration" and "Programme Beneficiaries")	N/A	N/A	N/A	N/A	N/A	There is quantitative data only at Member State level as explained in the first part of this table. Where available, the data is not collected on the same basis everywhere. There are no programme indicators which are related to administrative burden or cost savings or savings from simplification.	N/A	The only data available comes from perceptions. There are no programme indicators related to administrative burden or cost savings, or

						The savings from the use of digital platforms and Simplified Cost Options are recurrent as they produce an ongoing ability to handle more throughput in the case of digital platforms The flexibility provisions provide one-off benefits each time they are invoked with two examples under the EMFF: the COVID-19 pandemic and Russia's military aggression against Ukraine		simplification measures The savings from the use of digital platforms and Simplified Cost Options are recurrent as they result in savings for each project

PART II: II <u>Potential</u> simplification and burden reduction (savings)

*Identify further potential simplification and savings **that could be achieved** with a view to make the initiative more effective and efficient without prejudice to its policy objectives*[122].

	Citizens/Consumers/Workers		Businesses (other than beneficiaries)		Administrations		Beneficiaries	
	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment	Quantitative	Comment
Description								

[122] This assessment is without prejudice to a possible future Impact Assessment.

One-off	N/A	N/A	N/A	N/A	N/A	Automated consistency checks of entries when Member States self-report on result indicators would flag implausible results and increase the reliability of the indicators Simplified procedures for small-scale fishers would further reduce the time and money spent on verifying applications and reports	N/A	Simplified procedures for small-scale fishers would reduce the cost of applications for this group

ANNEX V. STAKEHOLDERS CONSULTATION - SYNOPSIS REPORT

This annex summarises all stakeholder input from the consultation through "Have your say" on the Call for Evidence as well as the Public Consultation questionnaire.[123] In addition, it summarises all consultation activities undertaken by the external study conducted on behalf of DG MARE to support the evaluation.

Starting with the consultation through "Have your say", in line with Article 57 of the Common Provisions Regulation (EU) No 1303/2013, the Commission is required to carry out an ex-post evaluation of the EMFF. In accordance with this obligation and in compliance with the Better Regulation Guidelines, DG MARE launched a public consultation aiming to gather evidence and different perspectives on the management and use of the funding. The consultation started on 6 June 2024 and ended on 13 September 2024. This report should be regarded solely as a summary of the contributions made by stakeholders and citizens on the Call for evidence and also on the basis of an EU survey (questionnaire) in all official EU languages, both publicly available through the "Have your say" portal. It cannot in any circumstances be regarded as the official position of the Commission or its services. Responses to the consultation activities cannot be considered as a representative sample of the views of the EU population.

The feedback gathered by stakeholders is presented below following the 5 criteria under the Better Regulation Guidelines (on the effectiveness, efficiency, relevance, coherence and EU added value).

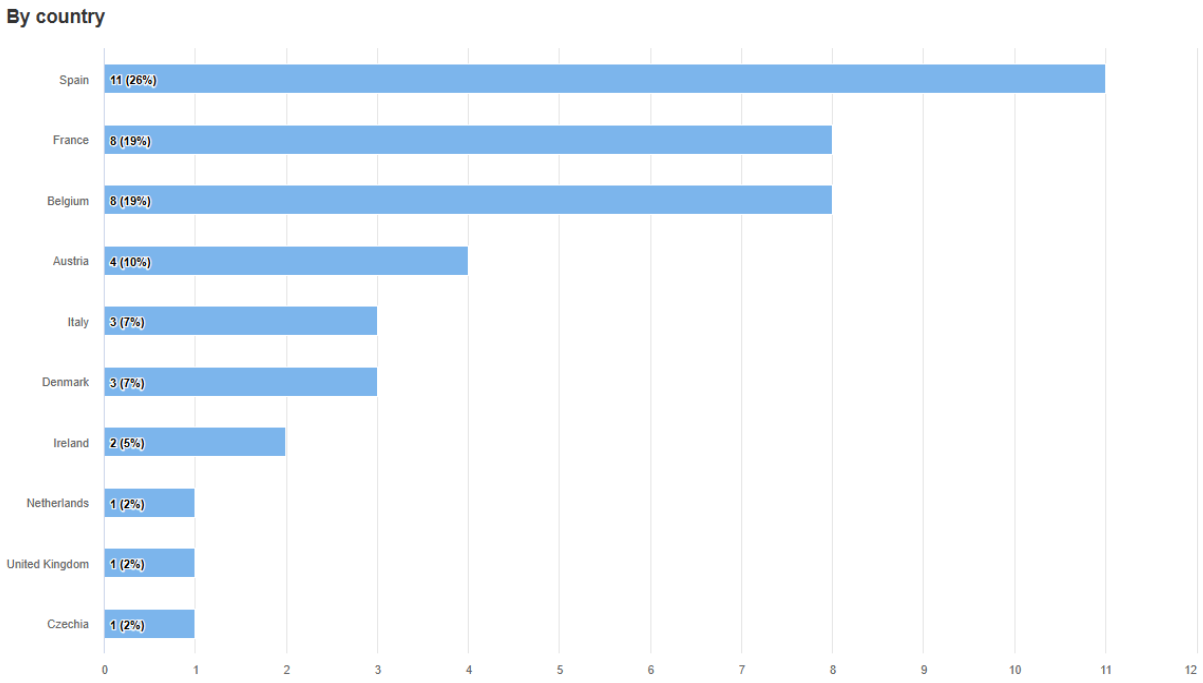
The respondents

Regarding the feedback received on the Call for evidence through "Have Your Say portal", there were 42 comments from different organisations, ranging from public authorities to NGOs and businesses associations. The vast majority comes from Spain with a 26% of the total, followed by France and Belgium with a 19% each of the total.

Most of the contributions come from business associations accounting for 38% of the total (16 comments), followed by non-governmental organisations accounting for 29% of the total (12 comments) and public authorities accounting for 19% of the total (8 comments).

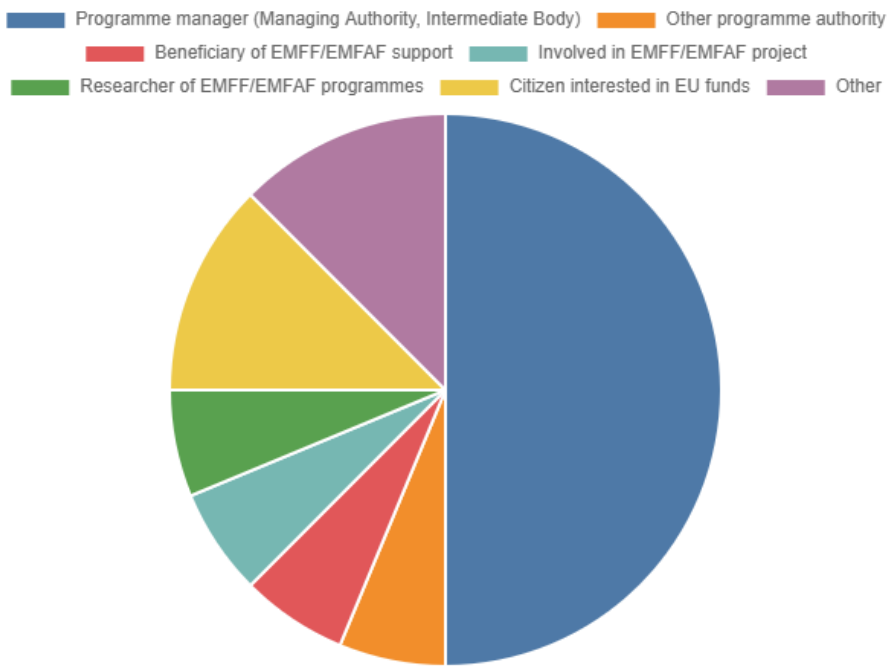
[123] Call for Evidence and Public Consultation on the mid-term evaluation of the European Maritime, Fisheries and Aquaculture Fund (EMFAF) for 2021-2027. Available at: https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14119-EU-Maritime-Fisheries-and-Aquaculture-Fund-EMFAF-2021-2027-midterm-evaluation_en

Figure 20: Overview of respondents of the Call for Evidence per country.



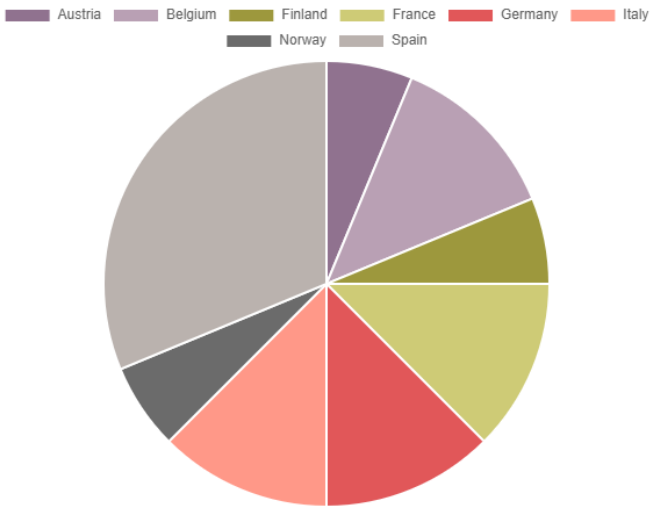
Regarding the feedback on the EU Survey, the Commission received 16 replies which half of them corresponded to programme managers (e.g. managing authorities or intermediate bodies).

Figure 21 : Overview of respondents of the EU survey per Stakeholder group.



Most of the answers came from Spain, with up to 32% of the share see Figure 22.

Figure 22: Overview of respondents of the EU survey per country.



Effectiveness

Respondents stress that the success of EU fisheries and aquaculture policies hinges on the development of clear and measurable sustainability and animal welfare indicators. These metrics are essential for tracking progress toward environmental and welfare objectives while ensuring that funding aligns with sustainable practices.

They also argue that the industry's transition to low-impact, climate-smart fisheries requires targeted investment in modernising vessels, adopting energy-efficient technologies, and improving infrastructure. Without such structural modernisation, the green transition's effectiveness will remain constrained.

Achieving equitable growth through funds like the EMFF is closely tied to prioritising support for small-scale and coastal fisheries. These operations are often more sustainable but financially vulnerable and directing funds to them is seen as key to fostering meaningful, sector-wide impact.

To be effective across all EU regions, funding must also adapt to regional conditions, such as the unique needs of inland aquaculture or outermost regions. Tailoring policies in this way ensures they remain responsive and applicable to diverse environmental and economic contexts.

Participants of the public consultation stated that the effectiveness of both EMFF and EMFAF in achieving desired objectives was rated as reasonably effective. Specific areas like implementing the Common Fisheries Policy scored well (31.25% rated it 7 out of 10, 18.75% rated it 10 out of 10).

Efficiency

Respondents across emphasise that the effectiveness of EU funding is hindered by a lack of transparency and insufficient monitoring. Strengthening tracking and auditing processes is seen as crucial to ensuring funds are allocated and utilised as intended, minimising waste and inefficiencies.

Improved efficiency could also be achieved by linking funding to sustainability benchmarks. Making funding conditional on meeting these standards would discourage support for unsustainable practices and prioritise resource allocation to operators who are sustainable and responsible.

Another challenge identified is the administrative burden associated with fund applications and compliance, particularly for small-scale and artisanal fishers. Simplifying these processes would make funding more accessible and efficient, enabling quicker and more impactful resource distribution.

Economic incentives play a vital role in enhancing efficiency as well. Focusing on low-cost, high-impact investments, such as offering low-interest loans for vessel upgrades, would accelerate the adoption of sustainable practices across the industry.

On cost-effectiveness and timely results, 50% of the respondents believed objectives were met to some extent, while 31.25% saw only minor success. Burdensome processes like reporting, audits, and project implementation were noted with many scoring these processes between 6 and 10 on a scale of burden intensity.

Coherence

Respondents stress that funding for fisheries and aquaculture must align with the EU Green Deal, Biodiversity Strategy, and Marine Action Plan. Achieving coherence is essential to ensure that investments and subsidies actively support climate and environmental objectives rather than undermining them by financing high-impact practices. In this regard, strong coherence was identified between the funds and other EU initiatives like the LIFE programme (50% reinforcement) and ERDF/CF (43.75% reinforcement).

There is widespread agreement that animal welfare should be integrated into the sustainability objectives for aquaculture. Failing to include welfare indicators creates a disconnect between welfare goals and the EU's broader sustainability ambitions, undermining the consistency of policy objectives.

Many participants argue that EU funds should prioritise small-scale, low-impact fisheries to better align with goals for environmental protection and resource efficiency. Supporting larger industrial operations is often viewed as contradictory to these aims, reducing the overall effectiveness of efforts to meet the sustainability targets of the Common Fisheries Policy.

To enhance coherence, respondents also advocate for harmonising how EMFF (and EMFAF) funding is allocated and regulated across Member States. This would ensure a consistent application of environmental and social objectives, creating a more level playing field throughout the EU.

Relevance

EU fisheries and aquaculture funding is recognised as crucial for addressing key challenges and supporting sustainable development. Funding like the EMFF plays a central role in enabling modernisation, climate adaptation, and the continuation of rural and structurally weak areas' fishing activities. There is a strong call to increase allocations to meet the sector's needs, especially as rising costs from inflation and energy crises strain operations.

The alignment of funding with EU environmental objectives is highlighted as essential, with an emphasis on eliminating harmful subsidies that support unsustainable practices, such as those linked to fossil fuels. Redirecting funds toward transitioning the sector into a low-impact, climate-smart industry is considered vital to preserving marine ecosystems and ensuring long-term sustainability.

Additionally, respondents stated that addressing generational renewal is considered critical for the sector's future, requiring adjustments to funding regulations to remove barriers and improve operational safety and efficiency. These measures would help ensure that funding not only preserves existing activities but also supports innovation and sustainability in fisheries and aquaculture across the EU.

Up to 32% of the participants in the public consultation found the funds relevant in addressing regional and local economic needs, mostly regarding towns and villages.

EU added value

Respondents emphasise that EU funds deliver significant added value when they address gaps not covered by other funding sources. Supporting small-scale, coastal, and artisanal fisheries is one such area where EU intervention can make a substantial impact, helping to preserve local communities and promote sustainable practices. A significant majority of the participants in the public consultation (43.75%) felt the funds enabled initiatives that would not have been possible without EU funding.

Another area of added value lies in fostering generational renewal within the fisheries sector. Many suggest that EU funding can support young fishers entering the industry, encouraging them to adopt sustainable methods. This approach helps rejuvenate the workforce, ensuring the continuity of local fishing traditions and sustainable practices.

EU funding also plays a critical role in advancing decarbonisation and climate adaptation within the fisheries sector. Financial support for transitioning to low-impact, climate-resilient operations is seen as essential, particularly as these changes would be difficult for operators to achieve without external assistance.

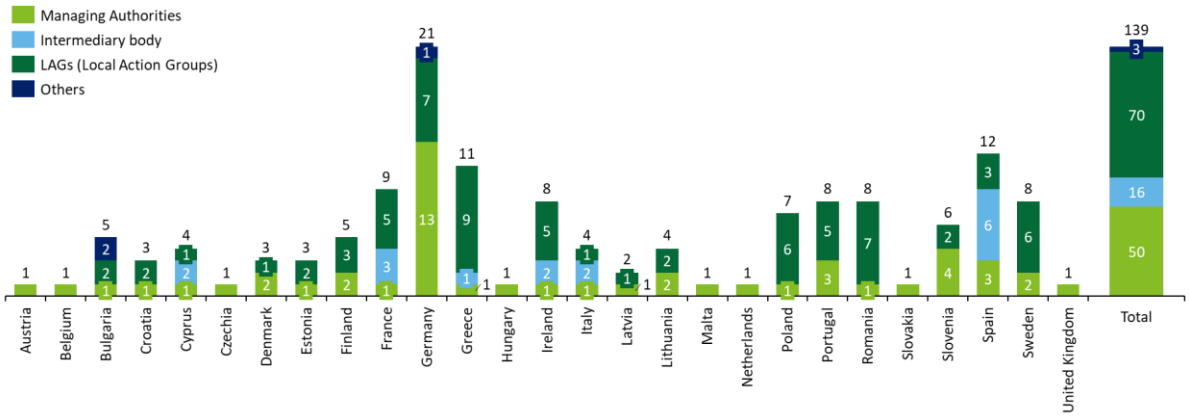
Investing in research and innovation further highlights the EU's value-added contribution. Funding initiatives like the development of selective fishing gear or alternative feed sources fosters sector-wide sustainability by reducing environmental impact and improving resource efficiency. These efforts are viewed as transformative in advancing sustainability within the industry.

As regards the consultation activities undertaken by the external study conducted on behalf of DG MARE to support the evaluation, a qualitative and quantitative analytical overview of the results is provided below. Stakeholder consultation took three forms: **an e-survey** with one set of questions to Managing Authorities (MAs) and Intermediate Bodies (IBs), and a second set of questions to the Fisheries Local Action Groups (FLAGs). The second step was more specific **follow-up interviews via e-mail** with (MAs) and (FLAGs) on issues that the survey suggested merited a more in-depth look. The follow-up questions were answered by 19 MAs (from 19 Member States) and 14 FLAGs (from 8 Member States). The topics were agreed with the Commission in the first interim report. The third step was a **two-day webinar** with sector representatives to validate the findings of this

study. The webinar was attended by more than 40 participants from the fisheries and aquaculture sectors and provided comments on and validation of the findings of the evaluation.

The e-survey was a cornerstone of the stakeholder consultations and was carried out between November 2023 and February 2024 in the first interim phase of the evaluation. There were 139 responses, as shown in the table below. Of these, just over one third (34%) came from Managing Authorities, 12% came from Intermediary Bodies, 52% from FLAGs and 2% from other. Germany was significantly over-represented with 15% of all responses, largely because of the large number of Managing Authority responses (13 of 21 responses). Relative to their size as countries, but not necessarily the size of the fishing sector, Greece and Spain were also over-represented, accounting for 7% and 9% of all responses. Thus, nearly one-third of the responses (31%) came from these three countries. France accounted for a further 6% of responses. Respondents were able to provide open comments.

Figure 23: Overview of survey responses by type of respondent

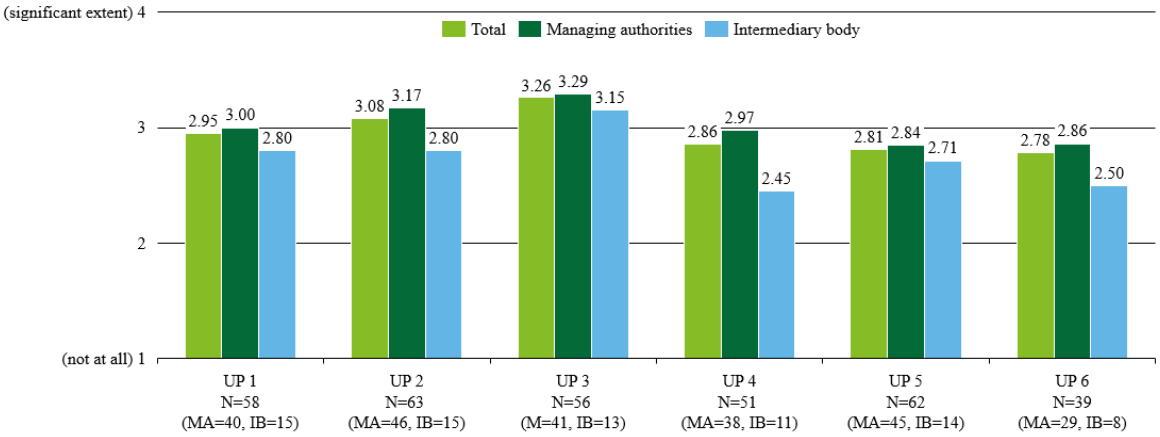


Achievement of objectives

On a scale from 0 to 5, when asked the extent to which the Union priorities were achieved, the overall rating was **highest for Union priority 3** (3.26), supporting the CPF, and the **lowest for Union priority 6** (2.78), supporting the IMP (see figure below), a relatively stark difference between the perception of support for these two policies having been achieve. These ratings were out of 4, so all answers were significantly above the mean of 2.5. The more favourable result in relation to aquaculture (3.08) compared to fisheries (2.95) as opposed is relatively marked.

When broken down by Managing Authorities and Intermediate Bodies, the **Managing Authorities**, as the figure below shows, **were more likely to provide a good rating to achievement of the objectives** of the Union priorities **than were the Intermediate Bodies**. In the case of Union priorities 3, 5 and to a lesser extent 1, the difference is probably not statistically significant. The largest gap is in the perceptions of the achievement of the objectives of UP 4, employment and territorial cohesion.

Figure 24: Mean respondent scores for the achievement of the Union priorities



Looking at whether the Union priorities met a need, and therefore whether the Specific objectives were the right ones, i.e. they aligned with local need, when those who had answered 3 or above to the question on overall effectiveness were asked their views on a scale of 0 to 5, the answers were generally well above the mean of 3[124].

Particularly high scores were the 4.2 for the second Specific Objective under UP2 **on enhancement of the competitiveness and viability of aquaculture** and the first Specific Objective under UP3: **improvement and supply of scientific knowledge as well as the improvement of collection and management of data**. Other high scores were 4 for Specific Objective 2 of UP 5 on the **encouragement of investment in the processing and marketing sectors** and 3.9 for the Specific Objective of UP4 of **territorial cohesion and employment**.

Particularly low scores were the 2.6 and 2.9 respectively for **the development of professional training, new professional skills and lifelong learning under UP1 and UP2, i.e. both fisheries and aquaculture.**

When the responses on the Union priorities are broken down between Managing Authorities and Intermediate Bodies, **the MAs were generally more positive** as to whether the Union priorities for fisheries and aquaculture (UP1 and UP2) were aligned with local needs. **The margin was greater in the case of fisheries than aquaculture**. There were only minor differences in the case of UP3 where the Managing Authorities took an only slightly more upbeat view than the Managing Authorities. The pattern was the same in UP4.

There were two major exceptions to this pattern. The perception of the extent to which a local need was met was **much higher among Intermediate Bodies** in the case of SO5 under UP1, **the provision of support to strengthen technological development and innovations, including increasing energy efficiency and knowledge transfer.** In the case of SO2 under UP5, the perception was also higher than in the case of Management Authorities, but the difference was very marginal.

In the follow-up interviews with Managing Authorities, the dominant topic (because of the topics chosen) tended to efficiency. However, there were also a number of comments about the success of the EMFF in achieving its objectives. Participants in the webinar felt that in future still more attention should be paid to **sustainability, including the circular**

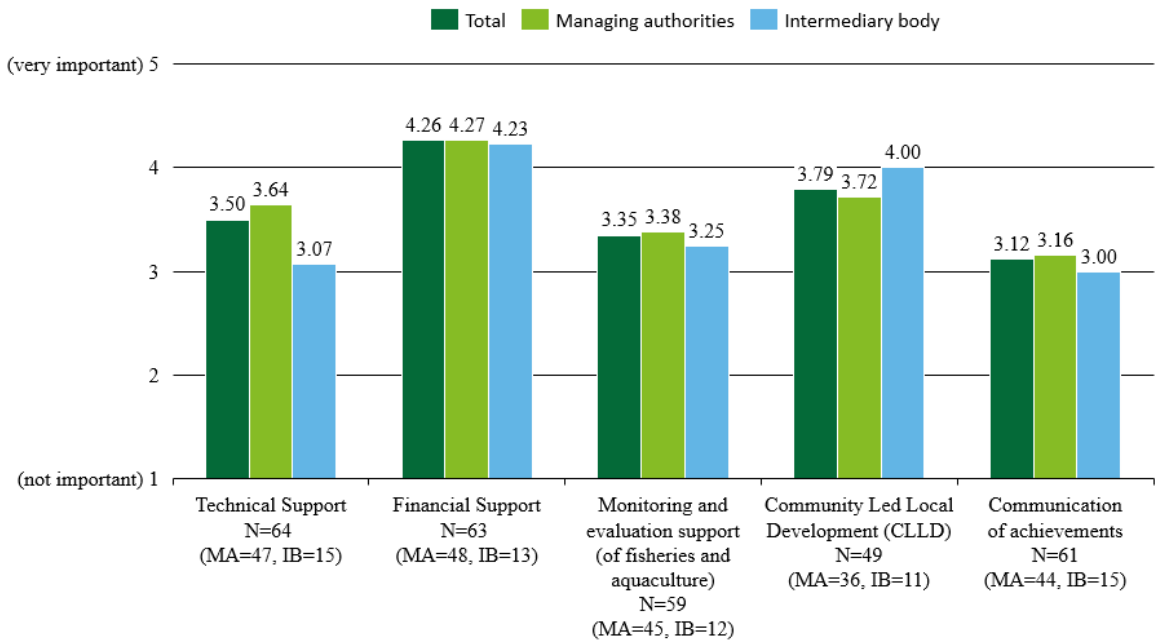
[124] No Figure included

economy. These participants felt that internal coherence had been good – with some exceptions deriving from the sectoral segmentation of the EMFF, an issue that also came up in the follow-up interviews with Managing Authorities and is discussed below.

Objectives in function of need

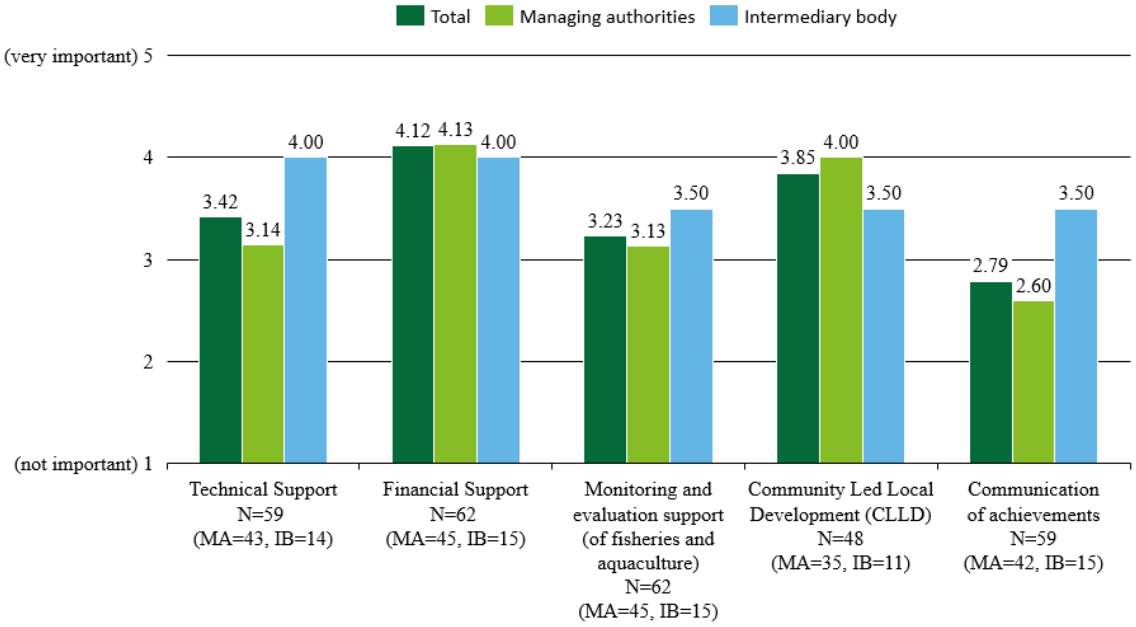
When looked at from the perspective of the **need that these groups most wanted the EMFF** to meet (see figure below), the clear answer is the funding, i.e. **financial support**, with only marginal differences between the MAs and the IBs. The MAs see more need for technical support and communication of achievements than do the IBs, though the difference is not great in the case of **communication of achievements**. However, **this is seen as the least important of the five areas.** Support with monitoring and evaluation the second least important. IBs felt a greater need for Community-led Local Development than the MAs.

Figure 25: Mean respondent scores on perceptions of support needed (MAs and IBs)



When **compared with the support they felt they had actually received, there was a shortfall across all areas.** The gap is widest for Community-Led Local Development and lowest, indeed negligible, for financial support. This suggests that the amount of EMFF funding was about right for what the sector needed. The IBs were slightly less likely to think this. The IBs felt significantly more positive about the support received in the communication of achievement and technical support than the MAs.

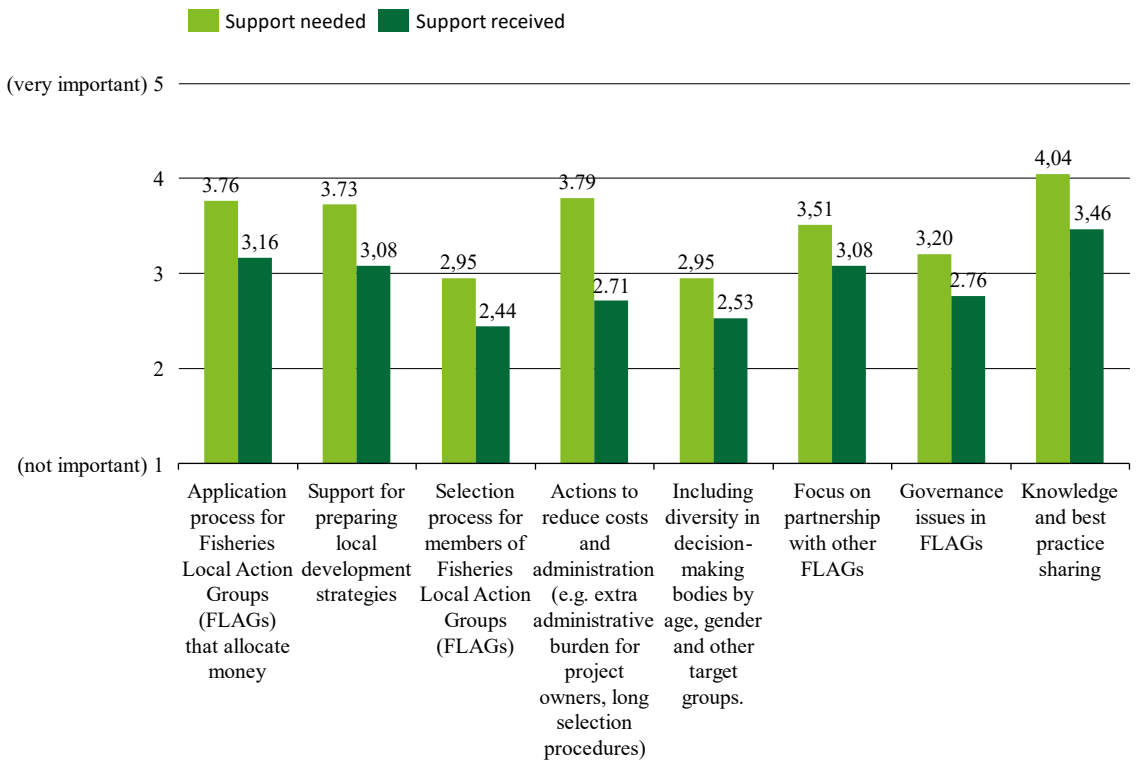
Figure 26: Mean respondent scores on perceptions of support received (MAs and IBs)



In the follow-up interviews by email with Managing Authorities, these generally felt that their Member State's needs had been met throughout the programming period, emphasising the response to COVID-19 and Russia's military aggression against Ukraine. The SWOT analysis in the OP was mentioned several times as having been particularly helpful in identifying needs and target groups.

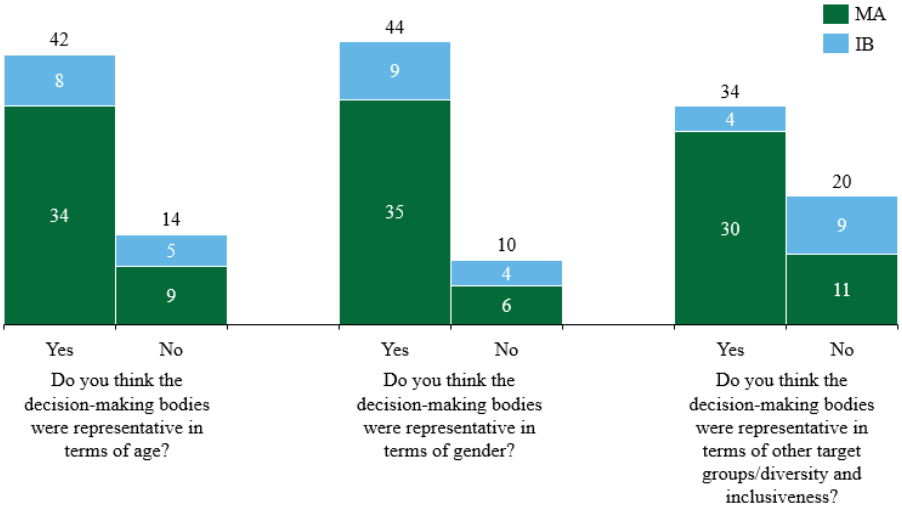
The **gap between perceived need for support and support actually received was much greater in the case of the FLAGs** (see figure below). The greatest need was for knowledge and best practice sharing. The lowest was in the selection process for FLAG members and in representing diversity and gender in decision-making bodies. **The largest gap between need identified and need met was in reducing costs and administration**, the area of second greatest need, just ahead of another need related to administrative burden: the application process.

Figure 27: Mean respondent scores for support needed and received from EMFF by the FLAGs



Not perceiving a need for support with diversity on decision-making bodies does not necessarily mean that these were representative. While there is other data in the survey (see figure below) that suggests they might be, there are no benchmarks to know what the respondents considered a good result or any targets on what gender would be- or age-appropriate in a predominantly male sector with an ageing demographic. In the webinar – as in examples given in the main report – the issue of whether enough efforts were made under the EMFF to promote gender equality and the involvement of marginalised groups was underscored.

Figure 28: Mean respondent scores on representativity issues

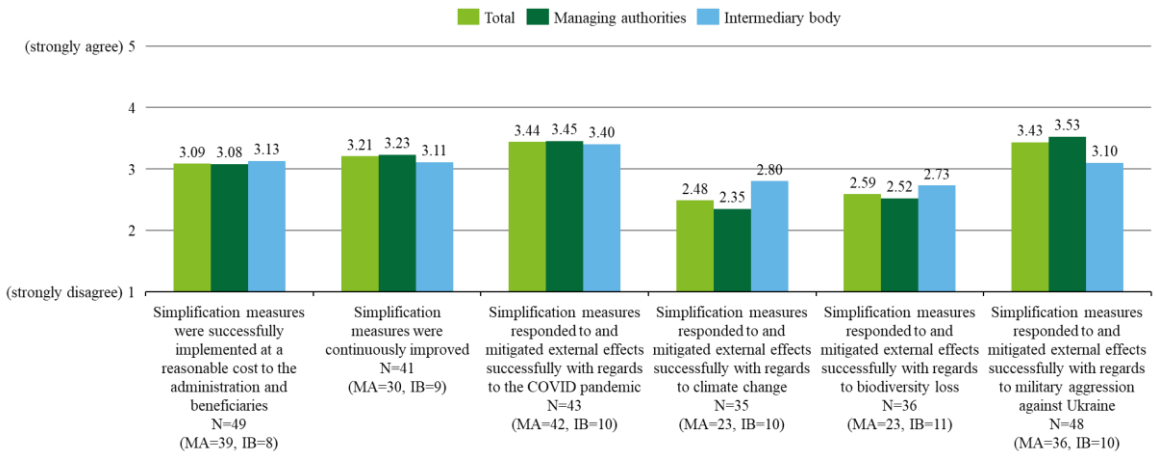


Achieving objectives at a reasonable cost

Ratings on questions on efficiency (on a scale of 0 to 5) were markedly lower than for questions on effectiveness (see figure below). On the issue of whether **simplification measures were implemented at a reasonable cost** to administrations and beneficiaries, **the responses are only just above the mean of 3.** They were only slightly more above the mean on the question of whether simplification measures had been continuously improved. In both cases, there are no significant differences between the views of the MAs and IB.

The respondents were uncertain about the way in which EMFF simplification measures had contributed to mitigating external events. They were **more positive about** those where the Commission had the power to intervene directly, both **Russia's military aggression against Ukraine or COVID-19.** Respondents were much less convinced (with answers below the mean) that the simplification measures had contributed to mitigating climate change or biodiversity loss. What stands out is that IBs were much more likely to think that simplification measures had mitigated climate change, but significantly less likely than MAs to think that about Russia's military aggression against Ukraine.

Figure 29: Mean respondent scores regarding simplification measures



Inefficiencies and obstacles to applying for EMFF funding were discussed with representatives of Managing Authorities in the follow-up e-mail interviews. The exception was an interviewee from Austria who said there had been no specific inefficiencies and obstacles (pointing out that Austria had absorbed 100% of its funds and closed its operational programme early.)

Administrations talked of excessive effort and time spent on red tape for reprogramming, amending and reporting (exacerbated by COVID-19 and Russia's military aggression against Ukraine), or mentioned **bureaucracy or too many detailed requirements.** The sectoral approach to the EMFF was also felt to have been inimical to achieving effectiveness and efficiency because of excessive segmentation.

However, a number stressed the **measures they themselves had taken to simplify the administrative burden** using the possibility of simplified cost operations, simplifying

contracting procedures, staggering the timing of calls, speeding up payments, running information sessions and a help line, and digitalisation of processes.

Digitalisation can have its limits, particularly with this target group with many small operators and an ageing demographic: one interviewee pointed out that the e-cohesion tool is complex for beneficiaries. While it was not raised in this context, the low assessment of the training and skills Union priorities in the survey ties in with information in the webinar that not enough attention had been paid under the EMFF to **digital skills,** digital literacy and digital marketing, among others.

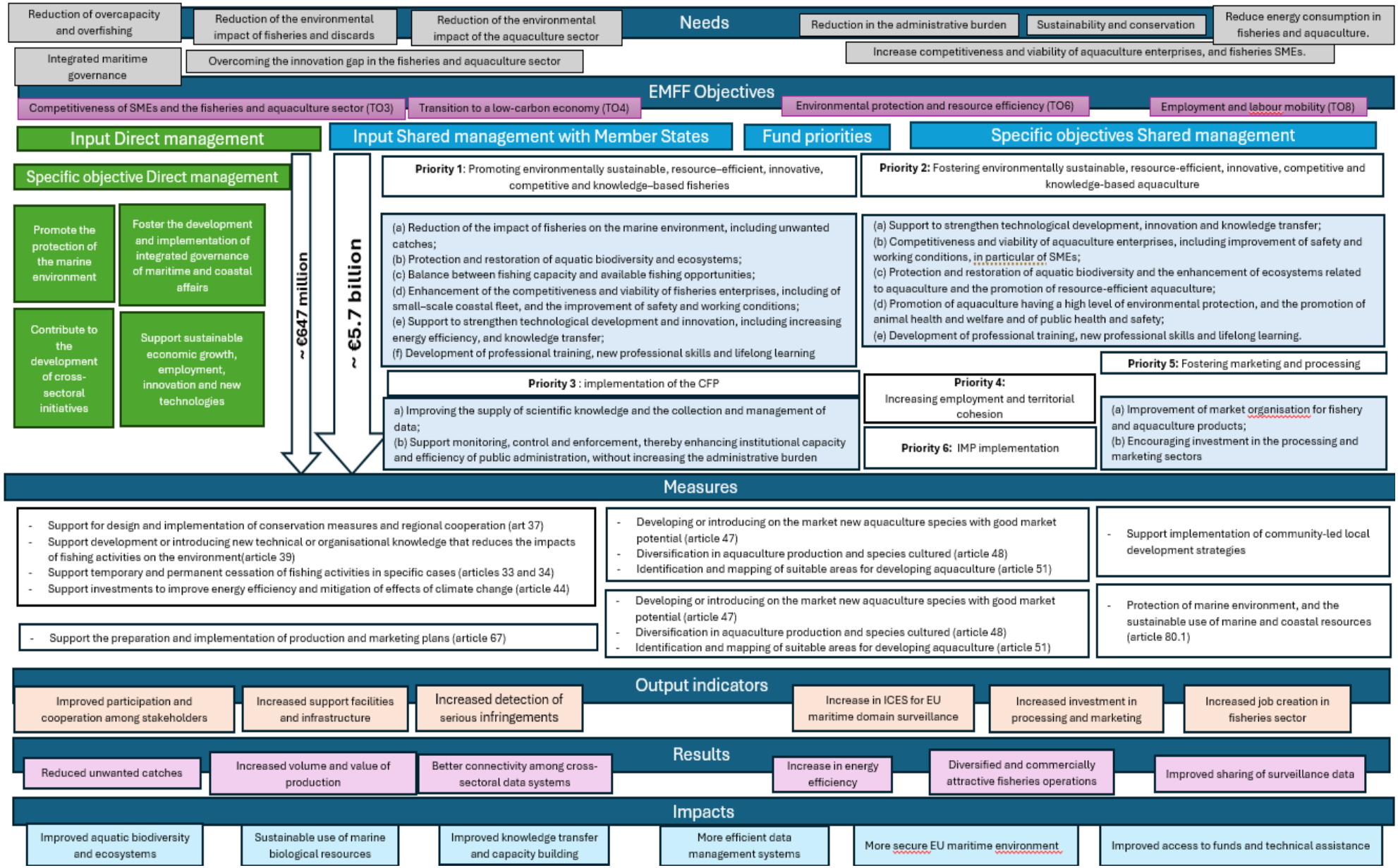
Also mentioned were the **obstacles at national level** from delays in implementing regulatory measures, both to implement the EMFF and the multi-fund approach for CLLD, as well as national procedures, e.g. in public procurement.

In these follow-up interviews, a minority felt that the EMFF was administratively more complex than the EFF. This issue surfaced in the webinar, where it was felt that the increased scope of the EMFF had increased complexity. In the webinar, it was pointed out that the increased cost burden had fallen on small-scale operators and giving larger operators an unfair advantage.

As can be seen from the figure above on the **FLAGs' perception of where their needs lie, administrative issues were among the most important** to them. Issues with the administrative burden also surfaced in the follow-up interviews. There was felt by one FLAG to be an overlap between the documentation that needed to be submitted and information already held by the Managing Authority. One FLAG suggested FLAGs should not need to reapply in the following period but should just be rolled over. In one Member State, deadlines are short because of delays upstream in the administration. In another, fragmentation of the procedures was an issue adding complexity.

There were generic complaints from FLAGs about bureaucracy and specific criticisms that certain criteria do not meet needs and of too many controls (e.g. sales volume and budget distribution). There was also a wish on the part of more than one FLAG for the selection process to be more transparent and be faster. Several raised the issue of capacity-building to help with developing their strategies. A specific suggestion was to implement risk management strategies. Knowledge-sharing (the area of greatest need in the survey) was also raised

ANNEX VI. EMFF INTERVENTION LOGIC


Needs
Reduction of overcapacity and overfishing
Reduction of the environmental impact of fisheries and discards
Reduction of the environmental impact of the aquaculture sector
Reduction in the administrative burden
Sustainability and conservation
Reduce energy consumption in fisheries and aquaculture.
Integrated maritime governance
Overcoming the innovation gap in the fisheries and aquaculture sector
Increase competitiveness and viability of aquaculture enterprises, and fisheries SMEs.
EMFF Objectives
Competitiveness of SMEs and the fisheries and aquaculture sector (TO3)
Transition to a low-carbon economy (TO4)
Environmental protection and resource efficiency (TO6)
Employment and labour mobility (TO8)
Input Direct management
Input Shared management with Member States
Fund priorities
Specific objectives Shared management
Specific objective Direct management
Promote the protection of the marine environment
Foster the development and implementation of integrated governance of maritime and coastal affairs
Contribute to the development of cross-sectoral initiatives
Support sustainable economic growth, employment, innovation and new technologies
~ €647 million
~ €5.7 billion
Priority 1: Promoting environmentally sustainable, resource–efficient, innovative, competitive and knowledge–based fisheries
(a) Reduction of the impact of fisheries on the marine environment, including unwanted catches;
(b) Protection and restoration of aquatic biodiversity and ecosystems;
(c) Balance between fishing capacity and available fishing opportunities;
(d) Enhancement of the competitiveness and viability of fisheries enterprises, including of small–scale coastal fleet, and the improvement of safety and working conditions;
(e) Support to strengthen technological development and innovation, including increasing energy efficiency, and knowledge transfer;
(f) Development of professional training, new professional skills and lifelong learning
Priority 2: Fostering environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based aquaculture
(a) Support to strengthen technological development, innovation and knowledge transfer;
(b) Competitiveness and viability of aquaculture enterprises, including improvement of safety and working conditions, in particular of SMEs;
(c) Protection and restoration of aquatic biodiversity and the enhancement of ecosystems related to aquaculture and the promotion of resource-efficient aquaculture;
(d) Promotion of aquaculture having a high level of environmental protection, and the promotion of animal health and welfare and of public health and safety;
(e) Development of professional training, new professional skills and lifelong learning.
Priority 3 : implementation of the CFP
a) Improving the supply of scientific knowledge and the collection and management of data;
(b) Support monitoring, control and enforcement, thereby enhancing institutional capacity and efficiency of public administration, without increasing the administrative burden
Priority 4: Increasing employment and territorial cohesion
Priority 5: Fostering marketing and processing
(a) Improvement of market organisation for fishery and aquaculture products;
(b) Encouraging investment in the processing and marketing sectors
Priority 6: IMP implementation
Measures
- Support for design and implementation of conservation measures and regional cooperation (art 37)
- Support development or introducing new technical or organisational knowledge that reduces the impacts of fishing activities on the environment(article 39)
- Support temporary and permanent cessation of fishing activities in specific cases (articles 33 and 34)
- Support investments to improve energy efficiency and mitigation of effects of climate change (article 44)
- Support the preparation and implementation of production and marketing plans (article 67)
- Developing or introducing on the market new aquaculture species with good market potential (article 47)
- Diversification in aquaculture production and species cultured (article 48)
- Identification and mapping of suitable areas for developing aquaculture (article 51)
- Developing or introducing on the market new aquaculture species with good market potential (article 47)
- Diversification in aquaculture production and species cultured (article 48)
- Identification and mapping of suitable areas for developing aquaculture (article 51)
- Support implementation of community-led local development strategies
- Protection of marine environment, and the sustainable use of marine and coastal resources (article 80.1)
Output indicators
Improved participation and cooperation among stakeholders
Increased support facilities and infrastructure
Increased detection of serious infringements
Increase in ICES for EU maritime domain surveillance
Increased investment in processing and marketing
Increased job creation in fisheries sector
Results
Reduced unwanted catches
Increased volume and value of production
Better connectivity among cross-sectoral data systems
Increase in energy efficiency
Diversified and commercially attractive fisheries operations
Improved sharing of surveillance data
Impacts
Improved aquatic biodiversity and ecosystems
Sustainable use of marine biological resources
Improved knowledge transfer and capacity building
More efficient data management systems
More secure EU maritime environment
Improved access to funds and technical assistance

ANNEX VII. EMFF UP, SO, MEASURES UNDER SHARED MANAGEMENT

Union Priorities	Specific objectives	Measures
1. Promoting environmentally sustainable, resource efficient, innovative, competitive and knowledge-based fisheries	1. Reduction of the impact of fisheries on the marine environment, including the avoidance and reduction, as far as possible, of unwanted catches;	Article 37 Support for the design and implementation of conservation measures and regional cooperation
		Article 38 Limiting the impact of fishing on the marine environment and adapting fishing to the protection of species (+ art. 44.1.c Inland fishing)
		Article 39 Innovation linked to the conservation of marine biological resources (+ art. 44.1.c Inland fishing)
		Article 40.1.a Protection and restoration of marine biodiversity – collection of lost fishing gear and marine litter
		Article 43.2 Fishing ports, landing sites, auction halls and shelters – investments to facilitate compliance with the obligation to land all catches
	2. Protection and restoration of aquatic biodiversity and ecosystems	Article 40.1.b-g, i Protection and restoration of marine biodiversity – contribution to a better management or conservation, construction, installation or modernisation of static or movable facilities, preparation of protection and management plans related to NATURA2000 sites and spatial protected areas, management, restoration and monitoring marine protected areas, including NATURA 2000 sites, environmental awareness, participation in other actions aimed at maintaining and enhancing biodiversity and ecosystem services (+ art. 44.6 Inland fishing)
	3. Ensuring a balance between fishing capacity and available fishing opportunities	Article 34 Permanent cessation of fishing activities
		Article 36 Support to systems of allocation of fishing opportunities

Union Priorities	Specific objectives	Measures
	4. Enhancement of the competitiveness and viability of fisheries enterprises, including of small scale coastal fleet, and the improvement of safety or working conditions	Article 27 Advisory services (+ art. 44.3 Inland fishing)
		Article 30 Diversification and new forms of income (+ art. 44.4 Inland fishing)
		Article 31 Start-up support for young fishermen (+ art. 44.2 Inland fishing)
		Article 32 Health and safety (+ art. 44.1.b Inland fishing)
		Article 33 Temporary cessation of fishing activities
		Article 35 Mutual funds for adverse climatic events and environmental incidents
		Article 40.1.h Protection and restoration of marine biodiversity – schemes for the compensation of damage to catches caused by mammals and birds
		Article 42 Added value, product quality and use of unwanted catches (+ art. 44.1.e Inland fishing)
		Article 43.1 + 3 Fishing ports, landing sites, auction halls and shelters - investments improving fishing port and auctions halls infrastructure or landing sites and shelters; construction of shelters to improve safety of fishermen (+ art. 44.1.f Inland fishing)
	5. Provision of support to strengthen technological development and innovation, including increasing energy efficiency, and knowledge transfer	Article 26 Innovation (+ art. 44.3 Inland fishing)
		Article 28 Partnerships between fishermen and scientists (+ art. 44.3 Inland fishing)
		Article 41.1.a, b, c Energy efficiency and mitigation of climate change – on board investments; energy efficiency audits and schemes; studies to assess the contribution of alternative propulsion systems and hull designs (+ art. 44.1.d Inland fishing)

Union Priorities	Specific objectives	Measures
		Article 41.2 Energy efficiency and mitigation of climate change - Replacement or modernisation of main or ancillary engines (+ art. 44.1.d Inland fishing)
	6. Development of professional training, new professional skills and lifelong learning	Article 29.1 + 29.2 Promoting human capital and social dialogue - training, networking, social dialogue; support to spouses and life partners (+ art. 44.1.a Inland fishing)
		Article 29.3 Promoting human capital and social dialogue – trainees on board of SSCF vessels / social dialogue (+ art. 44.1.a Inland fishing)
2. Fostering environmentally sustainable, resource efficient, innovative, competitive and knowledge based aquaculture	1. Provision of support to strengthen technological development, innovation and knowledge transfer	Article 47 Innovation
		Article 49 Management, relief and advisory services for aquaculture farms
	2. Enhancement of the competitiveness and viability of aquaculture enterprises, including improvement of safety or working conditions, in particular of SMEs	Article 48.1.a-d, f-h Productive investments in aquaculture
		Article 52 Encouraging new sustainable aquaculture farmers practising sustainable aquaculture
	3. Protection and restoration of aquatic biodiversity and enhancement of ecosystems related to aquaculture and promotion of resource-efficient aquaculture	Article 48.1.k Productive investments in aquaculture - increasing energy efficiency, renewable energy
		Article 48.1.e, i, j Productive investments in aquaculture - resource efficiency, reducing usage of water and chemicals, recirculation systems minimising water use
		Article 51 Increasing the potential of aquaculture sites
		Article 53 Conversion to eco-management and audit schemes and organic aquaculture
		Article 54 Aquaculture providing environmental services

Union Priorities	Specific objectives	Measures
	4. Promotion of aquaculture having a high level of environmental protection, and the promotion of animal health and welfare and of public health and safety	Article 55 Public health measures
		Article 56 Animal health and welfare measures
		Article 57 Aquaculture stock insurance
	5. Development of professional training, new professional skills and lifelong learning	Article 50 Promoting human capital and networking
3. Fostering the implementation of the CFP	1. Improvement and supply of scientific knowledge and collection and management of data	Article 77 Data collection
	2. Provision of support to monitoring, control and enforcement, enhancing institutional capacity and the efficiency of public administration, without increasing the administrative burden	Article 76 Control and enforcement
4. Increasing employment and territorial cohesion	Promotion of economic growth, social inclusion and job creation, and providing support to employability and labour mobility in coastal and inland communities which depend on fishing and aquaculture, including the diversification of activities within fisheries and into other sectors of maritime economy	Article 62.1.a Preparatory support
		Article 63 Implementation of local development strategies (incl. running costs and animation)
		Article 64 Cooperation activities
	1. Improvement of market organisation for fishery and aquaculture products	Article 66 Production and marketing plans
		Article 67 Storage aid

Union Priorities	Specific objectives	Measures
5. Fostering marketing and processing		Article 68 Marketing measures
		Article 70 Compensation regime
	2. Encouragement of investment in the processing and marketing sectors	Article 69 Processing of fisheries and aquaculture products
6. Fostering the implementation of the Integrated Maritime Policy	Development and implementation of the Integrated Maritime Policy	Article 80.1.a Integrating Maritime Surveillance
		Article 80.1.b Promotion of the protection of marine environment, and the sustainable use of marine and coastal resources
		Article 80.1.c Improving the knowledge on the state of the marine environment
Technical Assistance		Article 78 Technical assistance at the initiative of the Member States

ANNEX VIII. EMFF RESULT INDICATORS

Union Priority	Specific Objective	Result indicator code	Result indicator name	Measurement unit
1	1	**1.4.a**	Change in unwanted catches (tonnes)	tonnes
1	1	**1.4.b**	Change in unwanted catches (%)	%
1	1	**1.5**	Change in fuel efficiency of fish capture	litres fuel/ tonnes landed catch
1	2	**1.5**	Change in fuel efficiency of fish capture	litres fuel/ tonnes landed catch
1	2	**1.10.a**	Change in the coverage of Natura 2000 areas designated under the Birds and Habitats directives	Km²
1	2	**1.10.b**	Change in the coverage of other spatial protection measures under Art. 13.4 of the Directive 2008/56/EC	Km²
1	3	**1.3**	Change in net profits	thousand Euros
1	3	**1.6**	Change in the % of unbalanced fleets	%
1	4	**1.1**	Change in the value of production	thousand Euros
1	4	**1.2**	Change in the volume of production	tonnes
1	4	**1.3**	Change in net profits	thousand Euros
1	4	**1.5**	Change in fuel efficiency of fish capture	litres fuel/ tonnes landed catch
1	4	**1.7**	Employment created (FTE) in the fisheries sector or complementary activities	FTE
1	4	**1.8**	Employment maintained (FTE) in the fisheries sector or complementary activities	FTE
1	4	**1.9.a**	Change in the number of work-related injuries and accidents	number
1	4	**1.9.b**	Change in the % of work-related injuries and accidents in relation to total fishers	%
1	5	**1.1**	Change in the value of production	thousand Euros
1	5	**1.2**	Change in the volume of production	tonnes
1	5	**1.3**	Change in net profits	thousand Euros
1	5	**1.5**	Change in fuel efficiency of fish capture	litres fuel/ tonnes landed catch
1	6	**1.7**	Employment created (FTE) in the fisheries sector or complementary activities	FTE
1	6	**1.8**	Employment maintained (FTE) in the fisheries sector or complementary activities	FTE
1	6	**1.9.a**	Change in the number of work-related injuries and accidents	number
1	6	**1.9.b**	Change in the % of work-related injuries and accidents in relation to total fishers	%

Union Priority	Specific Objective	Result indicator code	Result indicator name	Measurement unit
2	1	**2.1**	Change in volume of aquaculture production	tonnes
2	1	**2.2**	Change in value of aquaculture production	thousand Euros
2	1	**2.3**	Change in net profit	thousand Euros
2	2	**2.1**	Change in volume of aquaculture production	tonnes
2	2	**2.2**	Change in value of aquaculture production	thousand Euros
2	2	**2.3**	Change in net profit	thousand Euros
2	2	**2.8**	Employment created	FTE
2	2	**2.9**	Employment maintained	FTE
2	3	**2.4**	Change in the volume of production organic aquaculture	tonnes
2	3	**2.5**	Change in the volume of production recirculation system	tonnes
2	3	**2.6**	Change in the volume of aquaculture production certified under voluntary sustainability schemes	tonnes
2	3	**2.7**	Aquaculture farms providing environmental services	number
2	3	**2.8**	Employment created	FTE
2	3	**2.9**	Employment maintained	FTE
2	4	**2.1**	Change in volume of aquaculture production	tonnes
2	4	**2.2**	Change in value of aquaculture production	thousand Euros
2	4	**2.4**	Change in the volume of production organic aquaculture	tonnes
2	4	**2.5**	Change in the volume of production recirculation system	tonnes
2	4	**2.6**	Change in the volume of aquaculture production certified under voluntary sustainability schemes	tonnes
2	4	**2.7**	Aquaculture farms providing environmental services	number
2	5	**2.8**	Employment created	FTE
2	5	**2.9**	Employment maintained	FTE
3	1	**3.B.1**	Increase in the percentage of fulfilment of data calls	%
3	2	**3.A.1**	Number of serious infringements detected	number
3	2	**3.A.2**	Landings that have been the subject to physical control	%
4	1	**4.1**	Employment created (FTE)	FTE

Union Priority	Specific Objective	Result indicator code	Result indicator name	Measurement unit
4	1	**4.2**	Employment maintained (FTE)	FTE
4	1	**4.3**	Businesses created	number
5	1	**5.1.a**	Change in value of first sales in POs	thousand Euros
5	1	**5.1.b**	Change in volume of first sales in POs	tonnes
5	1	**5.1.c**	Change in value of first sales in non-POs	thousand Euros
5	1	**5.1.d**	Change in volume of first sales in non-POs	tonnes
5	2	**5.1.a**	Change in value of first sales in POs	thousand Euros
5	2	**5.1.b**	Change in volume of first sales in POs	tonnes
5	2	**5.1.c**	Change in value of first sales in non-POs	thousand Euros
5	2	**5.1.d**	Change in volume of first sales in non-POs	tonnes
6	1	**6.1**	Increase in the Common Information Sharing Environment (CISE) for the surveillance of the EU maritime domain	%
6	1	**6.2.a**	Change in the coverage of Natura 2000 areas designated under the Birds and Habitats directives	Km²
6	1	**6.2.b**	Change in the coverage of other spatial protection measures under Art. 13.4 of the Directive 2008/56/EC	Km²

Table 36 List of result indicator codes to be used in the national database structure according to Article 2 of Commission implementing Regulation (EU) No 1243/2014

ANNEX IX. EMFF IMPLEMENTATION PER MEASURE (INFOSYS)

EMFF implementation per measure (Infosys) Source: AIR/Infosys 2023

EMFF Article	Total EMFF Allocation (EUR) (AIR, 2023)	Total EMFF committed by Managing Authority (EUR) (Infosys, 31/12/2023)	Commitment Rate (%)	Total eligible EMFF expenditure declared by beneficiaries to the Managing Authority (EUR)	Absorption Rate %	Number of Operations
Article 26	53 934 256	53 097 429	98.4	37 618 144	69.7	353
Article 27	8 092 212	7 657 739	94.6	6 821 772	84.3	96
Article 28	56 673 756	56 261 431	99.3	44 463 649	78.5	239
Article 29(1)(2)	19 591 098	20 111 274	102.7	15 724 022	80.3	1 445
Article 29(3)	822 127	459 026	55.8	64 330	7.8	56
Article 30	11 996 510	11 207 821	93.4	7 178 923	59.8	382
Article 31	8 768 077	8 814 217	100.5	8 493 041	96.9	298
Article 32	46 423 985	51 260 711	110.4	42 153 963	90.8	3 811
Article 33	233 773 619	240 378 944	102.8	224 805 659	96.2	48 286
Article 34	93 962 155	120 380 331	128.1	92 058 183	98.0	1 825
Article 35	–	–	–	–	–	–
Article 36	8 616 212	9 465 575	109.9	8 294 798	96.3	21
Article 37	33 734 467	36 899 060	109.4	31 582 971	93.6	445
Article 38	25 411 965	24 961 643	98.2	23 129 463	91.0	1 795
Article 39	40 704 817	41 543 280	102.1	30 302 588	74.4	202
Article 40(1)(a)	22 351 825	23 658 743	105.8	21 753 638	97.3	667
Article 40(1)(b-g,i)	222 838 966	254 491 708	114.2	195 453 917	87.7	2 978
Article 40(1)(h)	5 746 948	6 203 333	107.9	6 168 523	107.3	2 931
Article 41(1)(a-c)	14 904 640	17 008 749	114.1	12 995 600	87.2	1 270
Article 41(2)	3 617 638	3 253 130	89.9	2 811 702	77.7	752
Article 42	59 022 712	62 570 673	106.0	53 977 245	91.5	2 910
Article 43(1.3)	376 755 503	489 365 226	129.9	307 328 890	81.6	1 736
Article 43(2)	20 745 710	19 491 461	94.0	17 137 839	82.6	64
Article 47	144 747 209	151 309 539	104.5	108 462 281	74.9	646
Article 48(1)(a-d,f-h)	511 157 320	573 785 035	112.3	449 514 849	87.9	7 191
Article 48(1)(e,i,j)	50 486 338	53 617 910	106.2	32 769 229	64.9	285

Article 48(1)(k)	8 399 135	8 322 722	99.1	5 401 657	64.3	285
Article 49	16 103 921	18 789 601	116.7	12 104 741	75.2	133
Article 50	10 656 179	10 385 206	97.5	8 472 827	79.5	233
Article 51	18 746 980	21 999 458	117.3	14 386 446	76.7	112
Article 52	9 734 942	12 108 886	124.4	4 894 307	50.3	86
Article 53	560 645	9 000	1.6	9 000	1.6	1
Article 54	102 429 752	100 094 307	97.7	96 698 980	94.4	2 104
Article 55	66 235 076	65 533 379	98.9	62 374 392	94.2	2 831
Article 56	20 334 976	23 953 521	117.8	20 171 309	99.2	409
Article 57	5 745 102	6 672 637	116.1	4 864 702	84.7	135
Article 62(1)(a)	5 143 108	4 922 673	95.7	4 452 871	86.6	262
Article 63 (CLLD)	565 689 178	624 200 544	110.3	417 067 691	73.7	14 367
Article 64	12 410 722	12 237 890	98.6	7 808 979	62.9	491
Article 66	128 925 673	127 809 456	99.1	113 467 974	88.0	676
Article 67	25 677 779	16 060 022	62.5	15 895 814	61.9	78
Article 68	427 809 617	382 182 808	89.3	341 317 101	79.8	28 871
Article 69	556 706 650	590 239 519	106.0	485 794 856	87.3	3 655
Article 70	192 500 000	178 734 911	92.8	175 431 845	91.1	4 988
Article 76	472 272 184	559 184 695	118.4	418 009 021	88.5	1 865
Article 77	586 072 784	626 781 402	106.9	550 691 926	94.0	292
Article 78	251 024 173	253 774 031	101.1	209 647 594	83.5	2 273
Article 80(1)(a)	13 011 506	17 375 556	133.5	12 686 690	97.5	35
Article 80(1)(b)	12 955 540	11 940 927	92.2	10 820 823	83.5	81
Article 80(1)(c)	32 789 547	32 655 411	99.6	31 043 311	94.7	162
TOTAL	**5 616 815 235**	**6 048 733 415**	**107.7**	**4 804 580 077**	**85.5**	**145 109**

ANNEX X. CONTEXT INDICATORS BASELINE VALUES

Specific objectives	Context indicator presenting the initial situation[125]	Measurement unit	Baseline year	Value Baseline year
Environmental impact of the fisheries sector	Stocks fished at sustainable levels (MSY)	%	2011	21.5%
	Stocks overfished	%	2011	35%
	Stocks outside safe biological limits	%	2011	43%
	Total stocks fished unsustainably	%	2011	78.5%
	Estimated discard rate in EU fisheries	%	2011	23%
	Uptake of environmental measures (EFF)	%	2011	EUR 25 million
Fishing fleet capacity	1.1.a - Fishing fleet (number of vessels)	number of vessels	2013	60 637
	1.1.b - Fishing fleet (kW)	kW	2013	4 919 333
	1.1.c - Fishing fleet (GT)	GT	2013	1 298 490
Profitability and employment of the fisheries sector	1.2 - Gross value added per FTE employee	thousand Euros per FTE employee	2013	26 906
	1.3 - Net profit	thousand Euros	2013	135 996 075

[125] European Commission DG MARE, Impact Assessment 2011

Specific objectives	Context indicator presenting the initial situation[125]	Measurement unit	Baseline year	Value Baseline year
	1.4 - Return on investment of fixed tangible assets	%	2013	3
	1.8.a - Number of employed (FTE) including male and female	FTE	2013	106 951
	1.8.b - Number of employed (FTE) female	FTE	2017	3 317
	1.9.a - Number of work-related injuries and accidents	number	2013	Killed: 3, Injured: 31
	1.9.b - % of work-related injuries and accidents to total fishers	%	2013	0.024
Profitability of the aquaculture sector	2.1 - Volume of aquaculture production[126]	tonnes	2014	1 035 305
	2.2 - Value of aquaculture production[127]	thousand Euros	2013	2 957 242
	2.3 - Net profit[128]	thousand Euros	2013	769 330
	2.4 - Volume of production organic aquaculture[129]	tonnes	2015	appr 32 000
	2.5 - Volume of production recirculation system[130]	tonnes	2017	21 150
	2.6.a - Number of employed (FTE) including male and female[131]	FTE	2016	40 878

[126] Production from aquaculture excluding hatcheries and nurseries (from 2008 onwards), https://ec.europa.eu/eurostat/databrowser/view/fish_aq2a__custom_16519312/default/table?lang=en
[127] EUROSTAT Production from aquaculture excluding hatcheries and nurseries (from 2008 onwards), https://ec.europa.eu/eurostat/databrowser/view/fish_aq2a__custom_16519544/default/table?lang=en
[128] Based on STECF 24-14
[129] EUMOFA, organic aquaculture in the EU, table 4 and fig 4
[130] STECF_24-14_EU Aquaculture economic sector data tables
[131] 2016: STECF 18-19, table 2.1, p.29 2022: STECF_24-14, table 1, p.13

Specific objectives	Context indicator presenting the initial situation[125]	Measurement unit	Baseline year	Value Baseline year
Marketing and processing to improve the value added of fishery and aquaculture products	Turnover	EUR	2013	22.4 bln
	GVA	EUR	2013	4.2 bln
	Employment (in FTE)	FTE	2013	89 318

ANNEX XI CASE STUDIES

Six Case studies for each shared management Union Priority

Case studies from the UK, Spain, and the Netherlands confirmed that EMFF funding helped de-risk innovation, enabling projects that would not have been feasible otherwise (see text box below). While the results are encouraging, challenges remain, especially for small farms in less developed areas.

Case study: EMFF financial support promotes innovation

The case study conducted during the study underpinning the ex-post evaluation was based on three projects in the United Kingdom[132], Spain[133] and the Netherlands[134], representing an EMFF investment of 0.5, 1 and 2.5 million EUR respectively. The projects included various initiatives aimed at supporting farmers through the development of technical, scientific, or organisational knowledge in aquaculture farms and at improving collaboration with scientists and technical bodies.

In all cases, the EMFF intervention was found beneficial in alleviating the financial risk associated with innovation from the beneficiaries, helping aquaculture farms to innovate and be more sustainable. Besides, all projects would have been piloted at a much smaller scale or would not have been implemented in the absence of EMFF support, as the EMFF provided the largest share of funding in the overall activities related to aquaculture.

Source: EMFF study underpinning the ex-post evaluation 2024

[132] Driving sustainability and increasing capacity for Scottish Aquaculture (2016-2019): https://www.sustainableaquaculture.com/

[133] Agreement for the implementation of the marine sciences programme within the complementary R&D&I plans of the recovery, transformation and resilience plan by the Xunta De Galicia (2022-2025): https://cetmar.org/projects/programa-de-ciencias-marinas-de-galicia/?lang=es

[134] Towards a sustainable production system for robust European eel (optimAAL) (2020-2021) https://www.sustainableeelgroup.org/wp-content/uploads/2022/01/SEG0076-Palingkwekerij-Koolen-Assessment-DP-Dec-2021.pdf

Case study: EMFF financial support promotes market organisation for fishery and aquaculture products

The case study conducted during the study underpinning the ex-post evaluation was based on three projects in Estonia[135], Portugal[136], and France[137], representing an EMFF investment of between EUR 0.07 million and EUR 0.4 million. The projects included various initiatives aimed at supporting storage aid to recognised Producer Organisations (POs) and associations of producer organisations (APOs). One of the projects received storage aid under the EMFF Regulation as originally drafted, two received aid under the amendments introduced to respond to the COVID-19 crisis and the Russia's military aggression against Ukraine.

In all cases, storage aid was an important measure to cope with the challenges that emerged as a result of market disruption. They allowed beneficiaries better access to market, and to reduce quality fish waste that could not be sold due to the disruption of traditional markets. For the Estonian beneficiary this, in turn, had a positive impact on fishing practices, for instance, "avoiding panic". Similarly, for the Portuguese beneficiary, the measure allowed the storage and re-entry into the food supply circuit of fishery products after a period of economic and logistic distress. The French beneficiary observed no change in fishing practices, but the aid made it possible to maintain producers' income despite occasional market difficulties. Therefore, in all cases, the initiatives presented benefits, and the storage aid allowed the beneficiaries to store fish for longer periods.

Source: EMFF study underpinning the ex-post evaluation 2024

Case study: EU helps protecting seabirds in Portugal

Seabirds and fishers have a long-standing, though now often dangerous, relationship; birds once guided fishers but are now frequently killed as bycatch (around 200 000 annually in European waters, a major threat). Gillnets, longlines, and seines are particularly harmful, exemplified by the common murre's decline in Berlenga. While mitigation measures exist, their effectiveness varies.

The EU-funded MedAves project aims to improve this by understanding seabird-fishing interactions and implementing best practices using two innovative methods: FishTek's LED-lit nets, making them visible underwater to prevent entanglement, and SPEA's 'scary bird device' to deter birds. Local fishers, facilitated by the Oeste FLAG, collaborated with SPEA to adapt and test these devices, alongside awareness campaigns on safe practices.

Testing revealed effective techniques for Berlenga, and the project engaged around 60 fishers. EU funding for MedAves supports marine conservation and good fishing practices, with the potential for national rollout in Portugal and replication in other EU regions.

Source: EMFF Study underpinning the ex-post evaluation 2024

[135] Storage aid for fishery products (2020-2021): https://www.estofish.ee/en/home/
[136] Aid for storing fishery products (2020): https://www.propeixe.pt/
[137] STORAGE AID 2018 OPN -- Storage aid for fishery products under Article 67 of the EMFF: https://www.pecheurs-normands.fr/

Case study: Support to fishers to improve data analysis and collection promotes compliance

The case study conducted during the study underpinning the ex-post evaluation examined three EMFF-funded projects in Germany[138], Italy[139], and Denmark[140], representing investments ranging from EUR 5 million to EUR 37 million. These projects focused on supporting fishers through scientific analysis, improvements in data collection and management systems, and the broader implementation of the Common Fisheries Policy (CFP).

Across all three cases, EMFF support contributed to increased trust and mutual understanding, enhanced information exchange, and a stronger sense of stewardship among participating stakeholders. While no formal indicators were in place to measure improved compliance with the CFP, both the German and Italian projects reported positive perceptions of this outcome. In particular, the involvement of fishers in shaping data requirements and knowledge creation was viewed as a clear benefit.

In contrast, findings from the Danish project highlighted that although fisher engagement improved data quality, collaboration could be strengthened further. Over time, some resistance from fishers emerged as occasionally cooperation resulted in reduced fishing opportunities—especially regarding observer-based data collection.

Additionally, administrative challenges were noted, particularly delays in accessing funds. This issue was flagged in both Germany and Italy, while Denmark did not report similar problems. The administrative burden primarily related to the time-consuming funding procedures, which were seen as a barrier to smoother project implementation.

Source: EMFF study underpinning the ex-post evaluation 2024

---

[138] Implementation of the national fisheries data collection programme (DCF) 2014-2021 - The project consisted in the German implementation of the EU Data Collection Framework (DCF) which regulates the collection, management and use of data, in line with the CFP. It was carried out by the Thünen-Institut which is the research institute included in the portfolio of the German Federal Ministry of Food and Agriculture (BMEL) in charge of collecting biological data by sampling commercial and recreational fisheries and by conducting research surveys at sea. It also collects economic data on the fishing fleet, aquaculture and fish processing industry.

[139] Application for participation in the public notice for the implementation of the Work Plan for data collection in the fisheries and aquaculture sector for the period 2017/2019 - The grant funded the collection of biological, fishing activity and socio-economic data of Italian fisheries according to the Italian Work Plan for data collection of the fisheries and aquaculture sectors during 2017-2019. The project mainly aimed at evaluating the socio-economic performance of the Italian fisheries and assessing the status of main commercial species to inform the CFP. Data collected were used for stock assessment of main commercial species and for the evaluation of the status of the marine communities exploited by fisheries.

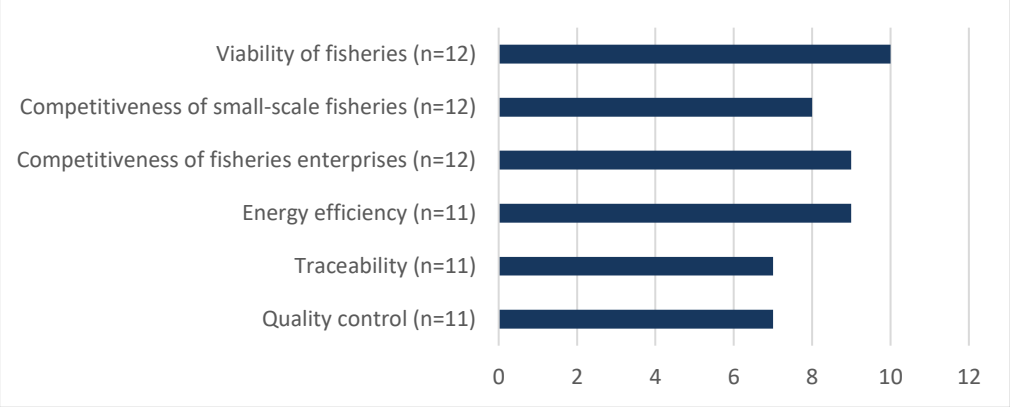
[140] DCF data collection 2020 for DTU Aqua - The Danish data collection programme is an initiative of the Danish Ministry for Agriculture, Fisheries and Food with the aim of ensuring compliance with CFP and DCF that has delegated the activities to the National institute of Aquatic Resources (DTU Aqua), Statistics Denmark (DST) and Department of Food and Resource Economics (IFRO). DTU Aqua coordinates across the three institutes. The overall activities carried out as part of the project include: survey activities (commercial and recreational fishery) on Danish and foreign vessels alongside commercial vessels, data collection and analyses, laboratory work, ICES participation (more than 80 working groups), regional coordination of data collection activities (including protocols, data analyses etc), testing of new data collection methods (AI, eDNA etc.).

Case study: The results of improvements in quality control, traceability and energy efficiency

The validity of the hypothesis in the Theory of Change, i.e. that port improvements improve competitiveness because it can be assumed that they improve quality control, traceability and energy efficiency was tested by looking more closely at the results of Articles 43.1 and 4.1.3 of the EMFF Regulation on investment in the improvement of fishing ports and facilities in inland waters.

The case study looked at 13 projects in four Member States (Bulgaria, Croatia, Malta and Portugal) and representing an EMFF investment of between EUR 0.5 million and EUR 7.5 million. There was a strongly held view on the part of the beneficiaries that quality control, traceability and energy efficiency had improved. The findings were based on a survey of the projects. Of the 11 projects which answered questions on these aspects, seven considered that the investment had led to better quality control and had improved traceability of fish landed great or very great extent. Nine said their project had made a positive or very positive contribution to greater energy efficiency. Of 12 who answered questions on the impact on competitiveness, nine said that the investment had enhanced the competitiveness of fisheries enterprises in their area, eight said that it had enhanced the competitiveness of small-scale fisheries, 10 said it had enhanced the viability of fisheries in their area, as shown in the figure below.

Figure 30: Variations in revenue and profits for the EU active fleet (based on 2013=100) - Note: Positive or very positive contribution in the case of energy efficiency



Not only has port investment improved quality control, traceability and energy efficiency, and competitiveness of fisheries, but it has brought additional benefits to some or all ports according to the survey which it would be reasonable to assume have improved competitiveness: moorings are of higher quality and safer; larger boats can be accommodated and the port can operate year round; port infrastructure has been improved, including fire safety and waste management measures; the organisation of vessel reception has improved; roads and settlements have led to increased economic activity; harbours have become more attractive to tourists, including allowing fishers to sell their catch directly from their boats; public lighting benefits everyone who visits the port; working and safety conditions have improved.

Case study: EMFF supports promotes bottom-up territorial cohesion

This case study aimed to test the hypothesis in the Theory of Change that support for relevant community-led development strategies results in greater territorial cohesion, because the strategies are relevant to the community. It looked in particular at implementation of community-led local development strategies under Article 63.The assumption is that through the bottom-up approach of FLAGs (Fisheries local action groups), local stakeholders, including fishers and public entities, would be empowered to guide their own development, addressing specific community needs and priorities. This bottom-up approach enabled FLAGs to create jobs, promote sustainable fishing practices, and preserve local cultural heritage.

The case study analysed three operations in Germany, Spain, and Croatia representing an EMFF investment of between EUR 0.6 million and EUR 1.12 million. Two operations pertained to specific local projects in Germany and Spain, while a third operation in Croatia provided funding for both local projects and the operational costs of the local Fisheries Local Action Group (FLAG). The projects included various initiatives for supporting community-led local operations across four dimensions: environmental sustainability, socioeconomic cohesion, cooperation governance, and morphologic polycentricity (i.e. reinforcing and establishing a more polycentric urban system).

The projects in Croatia and Spain significantly enhanced all four dimensions through e.g. supporting more sustainable practices, enhancing social cohesion by engaging local communities, and preserving heritage. For instance, the FLAG in Croatia implemented initiatives that boosted local fisheries' market positioning, created jobs, and enhanced environmental awareness.

In Germany, the project improved environmental sustainability and socio-economic cohesion through maritime heritage awareness which should increase tourism, but it had a limited effect on cooperation governance and polycentricity.

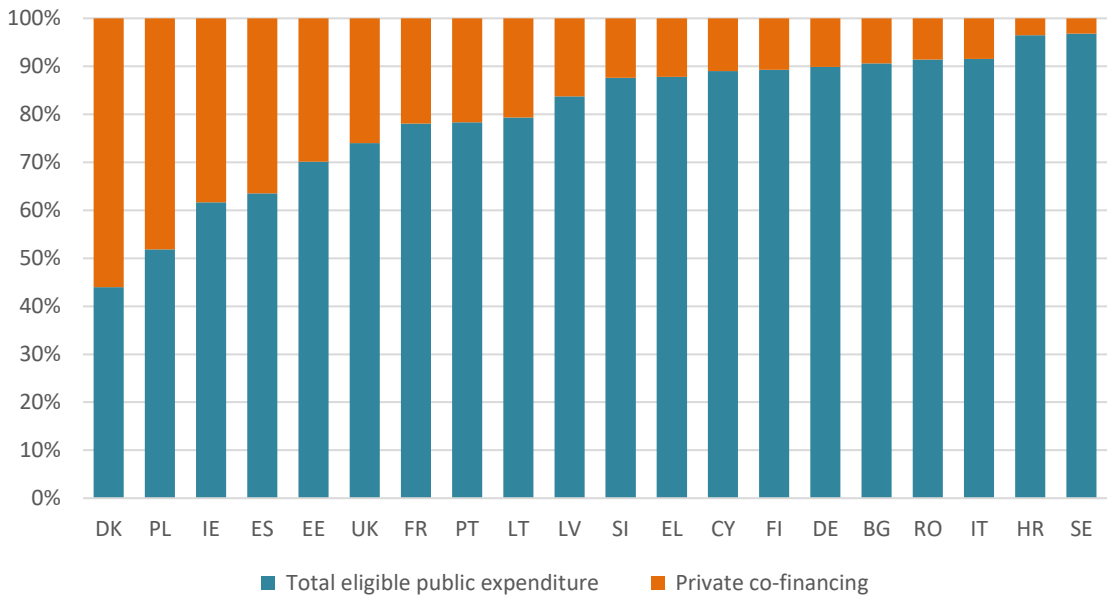
ANNEX XII ADDITIONAL DATA, GRAPHS AND TABLES

EMFF implementation per UP under shared Management

UP	Total EMFF allocation (EUR) (AIR, 31/12/2023)	Total EMFF committed by Managing Authority (EUR) (Infosys, 31/12/2023)	Commitment rate %	Total eligible EMFF expenditure declared by beneficiaries to the Managing Authority (EUR)	Absorption rate %	Number of operations
UP1	1 368 489 197	1 558 541 504	113.9	1 190 318 862	87.0	72 562
UP2	965 337 576	1 046 581 202	108.4	820 124 720	85.0	14 451
UP3	1 058 344 968	1 191 476 961	112.6	968 700 946	91.5	2 157
UP4	583 243 009	641 361 107	110.0	429 329 541	73.6	15 120
UP5	1 331 619 720	1 295 026 717	97.3	1 131 907 590	85.0	38 268
UP6	58 756 593	61 971 894	105.5	54 550 823	92.8	278
TA	251 024 173	253 774 031	101.1	209 647 594	83.5	2 273
Total	**5 616 815 235**	**6 048 733 415**	**107.7**	**4 804 580 077**	**85.5**	**145 109**

Source: AIR/Infosys 2023 (state of play 31/12/2023)

UP4: Total public expenditure and share of private co-financing of UP4 in Member States implementing it



(EUR, total public and private contribution)

Source: EMFF monitoring data 2023

ANNEX XIII: EMFF ARTICLES RELATED TO THE CONSERVATION OF THE MARINE ENVIRONMENT AND RESTORATION OF BIODIVERSITY

Article	Name	Types of operations per selected article[141]
Article 28	Partnerships between fishermen and scientists	Networks
		Partnership agreement or association
		Data collection and management
		Studies
		Pilot projects
		Dissemination
		Seminars
		Best practices
Article 37	Support for the design and implementation of conservation measures and regional cooperation	
Article 38	Limiting the impact of fishing on the marine environment and adapting fishing to the protection of species	Selectivity of gear
		Reduce discards or deal with unwanted catches
		Protecting gears and catches from mammals and birds
		Eliminating impacts on ecosystem and seabed
		Fish aggregating device in outermost region

[141] Types of operations are listed in the Commission Implementing Regulation (EU) No 1243/2014 of 20 November 2014 laying down rules pursuant to Regulation (EU) No 508/2014 of the European Parliament and of the Council on the European Maritime and Fisheries Fund with regard to the information to be sent by Member States, as well as on data needs and synergies between potential data sources.

Article 39	Innovation linked to the conservation of marine biological resources	Developing new technical or organisational knowledge reducing impacts
		Introducing new technical or organisational knowledge reducing impacts
		Developing new technical or organisational knowledge achieving sustainable use
		Introducing new technical or organisational knowledge achieving sustainable use
Article 40 (1)(a)	Protection and restoration of marine biodiversity – collection of lost fishing gear and marine litter	
Article 40 (1)(b)-(g),(i)	Protection and restoration of marine biodiversity – Natura 2000 sites	Other actions enhancing biodiversity
		Management of resources
		Management of MPAs
		Investment in facilities
		Management of Natura 2000
		Management plans for Natura 2000 and SPA
		Increasing awareness
Article 40 (1)(h)	Protection and restoration of marine biodiversity – schemes for compensation of damage to catches caused by mammals and birds	
Article 54	Aquaculture providing environmental services	Aquaculture operations including conservation and improvement of environment and biodiversity
		Aquaculture in Natura 2000 areas

		Ex-situ conservation and reproduction
Article 80 (1)(b)	Promotion of the protection of marine environment, and the sustainable use of marine and coastal resources	MPA
		Natura 2000
Article 80 (1)(c)	Improving the knowledge on the state of the marine environment	Establishment of monitoring programme
		Establishment of measures for MSFD

ANNEX XIV. COST-EFFECTIVENESS- DIRECT MANAGEMENT MEASURES

To what extent has the measure been cost-effective? Could results have been achieved with fewer resources?

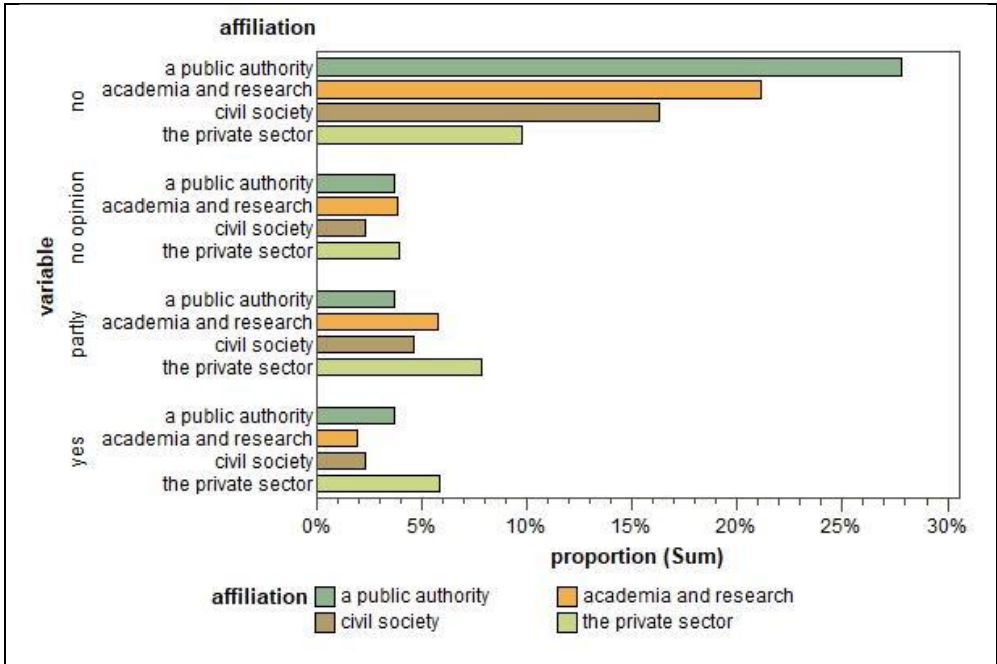


Figure 31: How efficient were the measures that you participated in? Could results have been achieved with fewer resources? Results are expressed as proportion of those of total number of that category (public authority etc.). Only those receiving EMFF funding were asked this question.

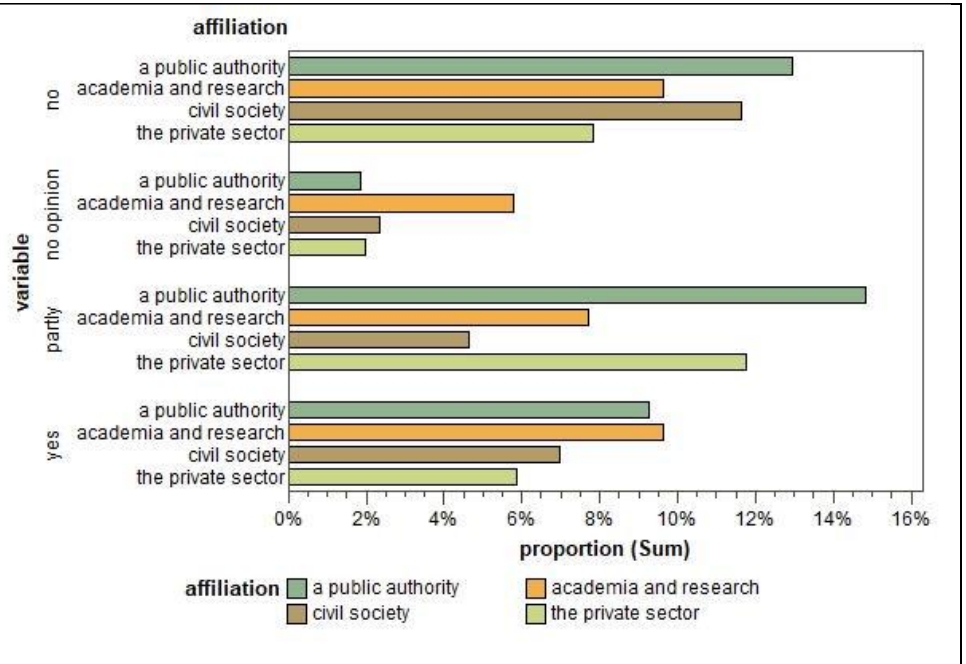


Figure 32: How efficient were the measures that you participated in? Was the administrative burden in participating in the measures proportionate? Results are expressed as proportion of the total number in that category (public authority etc.). Only those receiving EMFF funding were asked this question.