FAMENET

What does CLLD bring to coastal and fisheries communities around Europe?

Report 1

Infosys data and surveys of FLAGs on EMFF results and EMFAF set up

December 2024

FAMENET Report

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1 Executive Summary

Community-Led Local Development (CLLD) is a bottom-up, participative approach to fostering sustainable development through projects selected at local level to address local needs. CLLD was funded under the European Maritime and Fisheries Fund (EMFF, 2014-2020) for the second programming period in fisheries and aquaculture areas. Approximately 10% of the EMFF budget was allocated to CLLD - and managed by 348 Fisheries Local Action Groups (FLAGs). Together, these FLAGs financed 14 700 local projects in 19 Member States.

In 2024, FAMENET collected and analysed information to ascertain what EMFF CLLD had achieved in fisheries and aquaculture areas. This report, published in December 2024, is the first of a series of studies on fisheries CLLD undertaken by FAMENET. It presents the data reported by EMFF Managing Authorities in Infosys[1], and information provided by 149 FLAGs that responded to a survey on their achievements under the EMFF. It also includes information provided in a survey to the newly established 2021-2027 FLAGs (under the European Maritime, Fisheries and Aquaculture Fund, EMFAF), related to outreach activities and representativeness of the FLAGs.

The main results of this study are summarized below.

Three common result indicators were used for EMFF CLLD: jobs created, jobs maintained and businesses created. Data reported in Infosys by December 2023 for the EMFF funding period reveals that:

⇨ **CLLD was by far the most effective EMFF measure for job creation.** 4 245 new jobs were reported, almost five times as many jobs created than under aquaculture investments (the second most important measure for job creation, with 880 jobs created).

⇨ **10 325 jobs were reported to have been maintained with FLAG support.** This put CLLD as the second most important measure for maintaining jobs (behind the measure for fishing infrastructure with 19 250 jobs maintained).

⇨ **1 020 new businesses were created with CLLD support**. CLLD was the only measure to report on the creation of new businesses.

Qualitative information collected offers examples of these new businesses, ranging from the development of processing facilities to make use of by-products, to the setting up of one of Europe's first commercial coral farms and the creation of Spain's first sailing school for people with disabilities.

On top of these result indicators that Member States were obliged to report on, FAMENET's survey to FLAGs revealed a range of additional results:

⇨ FLAGs had also **helped local companies to diversify revenue sources**. On average, FLAGs responding to the survey had each supported 12 companies to develop new sources of revenue through diversified activities. Extrapolated to all 348 EU FLAGs, this would imply more than 4 000 companies that had developed new revenue sources.

⇨ **Local supply chains for fish and seafood were strengthened.** On average, FLAGs had supported the creation of two new local sales channels in each area and introduced or

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[1] *Reporting obligation according to EMFF Art. 97.1.*

boosted sales of local fish in three existing local sales channels. In total, just over 600 sales channels had been created or extended their offer of local fish. Extrapolation to the whole FLAG community would put this figure at around 1 400 new or improved sales channels.

⇨ Over **1 300 new and/or improved activities and services** were reported in the responding FLAG areas (on average 10 per local area), helping to improve the quality of life in fishing and aquaculture communities.

⇨ FLAGs reported almost **700 actions to contribute to good environmental status**, an extrapolation to the whole EMFF FLAG community would point to around 1 600 environmental actions.

⇨ FLAGs also reported over **700 local entities that had been supported to improve resource efficiency**. Extrapolated to all FLAGs, this would imply around 1 600 entities that have introduced measures to save water, energy or other natural resources.

Finally, a key achievement of CLLD has been to stimulate local participation in the development and coordination of blue economy activities and **increased collaboration between blue economy stakeholders**. FLAGs estimated to have mobilised around 120 people each to provide input to their local development strategies; extrapolated to all 348 FLAGs, this would imply over 40 000 people EU-wide **mobilised to provide ideas and feedback on how EU funds are spent in their local community**. They also estimated to have mobilised an average of 520 young people each for education and awareness-raising activities, e.g. linked to the local fisheries sector, marine conservation, coastal heritage, etc. (extrapolation to EU level: 180 000 young people mobilised).

The results of FLAG actions to support networking, capacity building and collaboration include:

⇨ Four **new or strengthened networks** reported in each FLAG area

⇨ **24% of all projects involving stakeholders from two or more sectors** (50% of which involve the fisheries and/or aquaculture sector)

⇨ **Small-scale fishers have been mobilised** to play a leading role in developing the blue economy and have implemented approximately 23% of all CLLD projects.

⇨ **Improved local governance in many areas**, though more participative decision-making and/or better coordination of blue economy activities. 64% of FLAGs reported improved governance versus 24% that did not feel governance had improved due to the FLAG (12% no information).

⇨ **Cooperation and transfer of knowledge across the EU** with three cooperation projects per FLAG with *other* fisheries and aquaculture areas

⇨ **1 520 local innovations** enabled (50% of which involving product/service innovation, followed by process innovation, new technologies/digitalisation, and social innovation).

⇨ **New beneficiaries have gained access to EU funding**: 30% of project promotors received EU funding for the first time, thanks to the FLAG.

Despite significant differences from one FLAG to another, the overall picture of CLLD indicates that a relatively small amount of money (just under €2M per FLAG) can go a long way.

FLAGs responding to the FAMENET survey reported funding an average of 44 local projects each and estimated that **15 100 people benefited per FLAG area.** While "persons benefiting" is subject to interpretation, the FLAGs' estimation would imply than over 5 million people benefited EU-wide from CLLD projects funded by the EMFF.

CLLD engaging citizens and making the EU accessible

The study demonstrates the ability of CLLD to engage diverse stakeholders in the development of fisheries and aquaculture areas. Fishers, aquaculture producers and other local businesses, along with NGOs, public authorities and research organisations were among the different groups mobilised to drive forward new ideas for sustainable development in coastal areas.

The report reveals that **on average 17 people, from six different interest groups, sit on the FLAGs' decision-making bodies**. Each FLAG board is composed of a unique combination of local stakeholders, reflecting the different contexts, needs and ambitions of each group. It also reflects the varying capacities of different FLAGs to reach out to and mobilise relevant stakeholders. Indeed, we see that **some FLAGs are more inclusive than others**, with some FLAGs including just four different interest groups in their decision-making body, while, at the other end of the scale, up to 12 interest groups are involved.

However, in terms of ensuring funds reach local citizens, the FLAGs appear to bring a clear added value. 61% of projects were estimated to result directly from FLAG actions such as local information sessions or direct support and encouragement to individuals. Just 39% of projects were presented spontaneously, following a call for projects. Equally, while just 9% of EMFF projects generally had female beneficiaries, under EMFF CLLD, 20% of projects had female beneficiaries. This demonstrates the **value of having a local team on the ground with a specific mission to ensure the funds reach those best placed to contribute to the FLAG strategy, as well new and/or harder-to-reach stakeholders**.

The FLAGs helped local stakeholders navigate the procedures and requirements involved in accessing EU funds. However, the **national delivery systems emerged as an area for improvement** in some MS, with 30% of FLAGs responding to FAMENET's survey indicating that administrative systems hindered their ability to be effective.

Next steps

This study is just the first step to understanding what CLLD can achieve in fisheries and aquaculture areas. The results demonstrate that, in some MS, FLAGs have delivered impressive results with a relatively small amount of money, others appear to mobilise fewer stakeholders and/or produce fewer results. The information provided by the FLAGs will subsequently be analysed in more depth to understand where CLLD can bring the most benefits and under what conditions.

Specifically, FAMENET will undertake eight MS case studies in which the figures revealed by Infosys and the FLAG surveys will be complemented by the results of a survey to local stakeholders in those MS. A synthesis report of these studies will be available early 2025

2 Introduction

Funded by various European Structural and Investment Funds, Community-led Local Development (CLLD) is intended to be a participative, bottom-up approach for involving local communities in project development and decision-making processes.

It is implemented by public-private partnerships, known as Local Action Groups (LAGs) which prepare multi-annual local development strategies for their areas. Members should be representative of the local community and its different interest groups.

Originally launched as "LEADER" in rural areas in the 1990s, the CLLD approach was extended to fisheries areas, funded under the European Fisheries Fund (2007-2013), and the first Fisheries Local Action Groups (FLAGs) became operational in 2010 and 2011.

As the third programming period of fisheries CLLD begins and reflections on the post-2027 maritime fund progress, DG MARE commissioned FAMENET to examine the evidence of what CLLD contributes to local communities supported by the European Maritime Fisheries and Aquaculture Fund.

2.1 Background

As a "measure" at the EU level, CLLD is difficult to evaluate in quantitative terms, partly because each LAG defines its own objectives and targets, tailored to the needs of its area. Much of the added-value of CLLD is understood to come from the participative process itself, helping improve local governance and strengthen social capital as well as obtaining results that cannot be achieved through top-down measures (e.g. mobilising hard-to-reach groups, thanks to the "animation" role of the LAG staff).

Under the European Maritime and Fisheries Fund (2014-2020), three common results indicators were set for Union Priority 4 covering CLLD. However, all three were economic (jobs created, jobs maintained, and businesses created), which shed light on just a fraction of what LAGs aimed to achieve in their areas.

Similarly, reports published by the European Court of Auditors (ECA) on the added value of the LEADER/CLLD approach, [one report in 2010](#) and [another in 2022](#), both struggled to demonstrate the tangible results of CLLD in rural areas.

2.2 Purpose and target groups

This particular report aims to present:

- An analysis of Infosys data on CLLD outputs and results.
- The results of a survey of EMFF FLAGs on their achievements and results from the 2014-2020 period.
- The results of a survey to EMFAF FLAGs[2] regarding their setup and representativeness of different interest groups, along with their capacity to reach and mobilise different stakeholders to implement projects that benefit coastal communities.

This exercise is intended to inform **policymakers at the EU, national and regional levels**, as well as other stakeholders interested in understanding what CLLD is achieving in fisheries and aquaculture areas.

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[2] *For simplicity, this report will refer to LAGs funded under the EMFF and the EMFAF as FLAGs.*

3 Methodology

Research for this report started with an analysis of existing information on EMFF CLLD and its results, including a review of existing literature on EMFF CLLD (see section 2.1) and data reported in Infosys by Managing Authorities (section 2.2). FAMENET then designed two surveys (section 2.3) to obtain additional information directly from all FLAGs operational at the time of the study. The surveys aimed to develop more in-depth, pan-European data on the activities of FLAGs and their results.

3.1 Literature review

Various CLLD-related evaluations and studies with reference to the EMFF were identified[3] and screened for relevance. Those documents that emerged as most relevant for this study included:

- An ex-post evaluation of the eight EMFF FLAGs and local development strategies (LDS) in Galicia, Spain (CETMAR Foundation, 2023).
- An impact evaluation of the European Maritime and Fisheries Fund (2014-2023) in the UK (Logika and Poseidon, 2023).
- The CLLD approach in the EMFF 2014-2020 period in Italy (IZI, 2023).
- Social capital and short food supply chains: Evidence from Fisheries Local Action Groups (Freeman et al., 2023).
- A new hope for small-scale fisheries through local action groups? Comparing Finnish and Swedish experiences (Salmi et al., 2022).
- A FLAG survey on the delivery of fisheries CLLD (FARNET, 2019).

DG AGRI's evaluation support study of the costs and benefits of the implementation of LEADER (Agrosynergie, Ecorys and Metis, 2023) also provided inspiration for FAMENET's report.

The conclusions of the above-mentioned literature, as well as the knowledge gaps identified, were used to inform the questions for the EU-wide survey of EMFF and EMFAF FLAGs, as well as those for a subsequent survey of local stakeholders linked to CLLD activities or opportunities.

3.2 Infosys analysis

Data available in Infosys[4] on operations under the European Maritime Fisheries Fund (EMFF) for 2014-2020 were studied (data from December 2023). The Infosys database contained a total of 145 391 EMFF operations reported by Managing Authorities. The data was first analysed for errors and certain operations were eliminated. This left a total of 143 288 EMFF operations, 10% of which were operations funded under Union Priority 4 (CLLD).

From these EMFF operations, we looked at:

- EMFF support reported (commitments in EUR).
- Gender of the beneficiaries, where available (including comparison between Union Priorities).
- Type of the beneficiaries, for those Union Priorities (UPs) where this is reported.
- Size of the enterprise for private beneficiaries (including a comparison between UPs).
- Vessel size information for operations linked to vessels, in particular for small-scale coastal fisheries.
- Results reported under CLLD (jobs created, jobs maintained, and businesses created) and under other UPs where the same results indicators were reported.

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[3] *It is understood that further studies may exist, but which are not made freely available.*

[4] *Reported by Managing Authorities of operational level implementation data, according to EMFF Art. 97.1.*

3.3 FLAG surveys

Two FLAG surveys were developed to complement the information available in Infosys and previous studies. They were designed to collect a broad set of pan-European data on the activities and representativeness of the FLAGs and their results under the EMFF. This involved:

- Development of tailored questions to understand whether results identified in a few MS evaluations are common to FLAGs in all MS, and to collect information not available elsewhere.
- Consultation and testing with FLAGs before finalising the questions.
- Creation of two online surveys (EMFF and EMFAF) in 8 languages (EN, DE, EL, ES, FR, IT, LT & PL).
- Dissemination of the survey to all existing FLAGs.
- Mobilisation of FAMENET geographic experts to encourage a good response rate (43%; see Table 1).
- Analysis of results by CLLD experts within FAMENET.

Table 1: Response rate of EMFF FLAG survey

MS	Number of FLAGs in MS during the EMFF period	Number of Responding FLAGs	Survey response rate	Comment
BG	9	7	78%	
CY	3	3	100%	
DE	29	12	41%	
DK	10	1	10%	No EMFF or EMFAF FLAGs operational*
EE	8	6	75%	
ES	41	18	44%	
FI	10	5	50%	
FR	23	15	65%	
GR	33	12	36%	
HR	14	7	50%	
IE	7	7	100%	
IT	53	10	19%	
LT	12	3	25%	
LV	6	5	83%	
PL	36	21	58%	
PT	15	6	40%	
RO	22	5	23%	
SE	13	3	23%	No EMFF or EMFAF FLAGs operational**
SI	4	3	75%	
Total	**348**	**149**	**43%**	

Source: FAMENET survey of EMFF FLAGs, 2024

 * Denmark has not programmed CLLD under the EMFAF but some of the FLAGs are operational under a national funding scheme.

** Sweden has also not programmed CLLD under EMFAF, however three LEADER LAGs who used to manage fisheries CLLD answered the EMFF survey.

Table 2: Response rate EMFAF FLAG survey

MS	Number of EMFAF LAGs in MS	Number of Responding FLAGs	Survey response rate
BE	1	1	100%
BG	0 (+/-15 to be selected)	0	0%
CY	3	3	100%
DE	31	17	55%
EE	8	5	63%
ES	44	16	36%
FI	11	6	55%
FR	39	17	44%
GR	14	9	64%
HR	23	8	35%
IE	0 (+/-7 to be selected)	0	0%
IT	30	7	23%
LT	11	4	36%
LV	6	5	83%
PL	0 (+/-24 to be selected)	0	0%
PT	16	7	44%
RO	22	4	18%
SI	6	4	67%
Total	**265** (304 when including BG, IE and PL)	113	**43%**

Source: FAMENET survey of EMFAF FLAGs, 2024

The main results of the literature review, Infosys analysis and FLAG surveys are presented in this first report.

They will be analysed further in a series of Member State (MS) case studies that will also incorporate the results of a survey to local stakeholders. A final synthesis report will subsequently deliver the final conclusions of FAMENET's work packages to identify the value of CLLD[5].

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[5] *The final synthesis report is expected early 2025.*

4   Literature review findings

The literature review pointed to a lack of standardised EU-wide data for EMFF CLLD. However, it did reveal successes in specific countries; qualitative information on FLAG achievements in certain thematic areas; as well as some basic EU-wide information on CLLD in terms of outputs and common challenges.

This chapter summarises the type of information that was already available (section 3.1); presents information on where CLLD could be demonstrated to have worked well (section 3.2), including a special focus on social capital and governance (section 3.3); and, finally, information on CLLD delivery systems (section 3.4), with a view to understanding how the process of CLLD can affect its results.

4.1 Data available on FLAG achievements

No standardised EU-wide evaluation framework existed for EMFF CLLD, nor does one exist for EMFAF CLLD. Evaluations were identified in just four MS (FR, ES, IT, and UK), though sometimes just by certain regions, e.g. Galicia in Spain. In Galicia, a thorough evaluation of EMFF CLLD was undertaken. In MS such as Italy and France, the evaluations were less extensive and focused more on process rather than results or impact. With respect to these four EMFF evaluations with a CLLD focus, none of them had been made accessible to the public. It is possible, therefore, that other evaluations of EMFF CLLD exist but that are difficult to identify or access.[6]

In terms of studies of CLLD under the EMFF, a number exist, including research into the influence of specific FLAGs in countries like Denmark (Thuessen and Nielsen, 2014), Finland (Salmi and Svels, 2023), Sweden (Linke and Siegrist, 2023), Spain (Miret Pastor and Sigalat-Signes, 2019), and Italy (Marcianò and Romeo, 2016; Romeo, Careri, and Marcianò, 2016; Romeo and Marcianò, 2019). Some studies compare CLLD models between MS, such as the experiences of small-scale fisheries in Finland and Sweden (Salmi et al., 2022) and the application of CLLD in Spain and Portugal (Piñeiro-Antelo et al., 2019). Others analyse the differing impacts of FLAGs, e.g. in Spain and Ireland (Piñeiro-Antelo et al., 2018).

Additionally, some research has begun to assess the broader effects of FLAGs and the initiatives they support. Miret-Pastor, Svels, and Freeman (2020) created a typology of projects funded by FLAGs across eight countries. Freeman and Svels (2022) evaluated the impact of FLAGs on women's empowerment in fisheries, including a detailed case study comparison in Croatia, Estonia, and Spain. One study examines the effects of FLAGs by sea basin, focusing on fisheries CLLD in the Mediterranean (Ceccacci, Mulazzani, and Malorgio, 2022).

Some interesting academic studies have been carried out on specific themes, e.g. FLAG potential to revitalise small-scale fisheries (Salmi et al., 2022)); the link between social capital and short fisheries supply chains (Freeman et al., 2023); the role of FLAG managers as reflexive intermediaries (Salmi and Svels, 2023), and access and influence procedures to becoming part of a FLAG (Svels, K., & Thuesen, A. A., 2024)). However, the research did not cover all EU MS.

At the EU level, two notable studies have been conducted directly from FLAGs in all MS by FARNET (DG MARE's previous support unit for CLLD). One assessing the impact of FLAGs on small-scale

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[6] *Managing Authorities and Geographic Experts in all EU MS were consulted but no further evaluations MS or regional evaluations were identified.*

fisheries (van de Walle and van Soetendael, 2017) and another analysing the support FLAGs provide to women in fisheries and aquaculture (Freeman, van de Walle, and Budzich-Tabor, 2018). Both studies underscore the contributions of FLAGs to their regions through EMFF funding, detailing budget expenditures and project counts. EU-wide reports were also undertaken on FLAG actions contributing to the European Green Deal (Posti, van Soetendael and Veronesi, 2020) and the delivery of fisheries CLLD (Budzich-Tabor and Veronesi, 2019). However, data relate largely to *outputs*, such as types of projects and beneficiaries as well as delivery systems (i.e. process) rather than results.

The only EU-wide set of data on CLLD results can be found in Infosys. Results are limited to three indicators: jobs created, jobs maintained, and businesses created. The results reported in Infosys will be presented in Chapter 4.

4.2 Where CLLD has worked well

According to the information extracted from our literature review, CLLD can deliver impressive results. This seems to be the case in Galicia, Spain, where a significant budget was allocated to the FLAGs and an in-depth evaluation of the programme was carried out. This evaluation concluded that the **accumulated socio-economic impact of the local development strategies[7] was more than EUR 215 million, more than five times the total amount of public aid delivered by the eight FLAGs** (EUR 37 million)[8]. Together, these eight FLAGs supported 703 local projects.

In terms of direct results in Galicia, 403 full-time jobs were created. The sectors involved in job generation were tourism (HORECA sector and leisure activities), fishing and aquaculture (including processing), and support services for people and companies.

Moreover, the socio-economic analysis of the LDS shows that the implementation of projects requires manpower, raw materials and services, which means that they will have an impact on the growth of the Galician economy, both in job creation and in the increase of gross value added. Indeed, the evaluation points to more than EUR 48 million GVA (0.08% of Galicia's GDP) and more than 1,015 direct and indirect jobs resulting from the new economic activity developed with FLAG supported projects.

Galicia's evaluation confirms the capacity of CLLD to mobilise private investment in coastal communities: the private sector invested an average of EUR 1.63 for each euro of public aid to "for-profit" projects (56% of projects) and EUR 0.35 for each euro of public aid for non-profit projects (44% of projects) supported by FLAGs. This resulted in an average of EUR 1.06 of private investment for each euro of public support from the FLAGs. In other words, the EUR 37 million of public aid leveraged more than EUR 42.3 million of private investment.

In the UK, the impact evaluation of CLLD activities revealed that 6% of the total EMFF budget (GBP 11.2 million) was spent on CLLD, covering a breadth of activities funded by the 20 FLAGs across the country (436 projects). Though these projects were typically small in value (on average GBP 25 000), the funding was allocated to address specific needs or develop key business areas.

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[7] *In the period 2016-2022.*

[8] *Counting the operational costs of running the FLAGs as well as the project grants, Galicia invested a total of EUR 52.7 million in CLLD.*

Many of the projects contributed to high-tailored impacts such as improved quality of life and health and safety, diversified activities, an increasingly skilled workforce and environmentally/economically sustainable fishing industries. However, many of these impacts are difficult to quantify, particularly when the needs and activities funded in each local area are different. However, stakeholders commented on the positive impacts of FLAGs, stating that they are the best way to dispense small-scale grants to the local communities who are directly involved in the fisheries and aquaculture sector. Respondents consulted during the previous early impact evaluation made it clear that **without the funding made available to FLAGs under the EMFF, the situation in those fishing areas would have been very different and local fleets, plus associated businesses, may have collapsed**. Grant recipients similarly stated that without the FLAG support, their project would not have been possible.

The value and perceived impact of the EMFF funding was not just economic/technical outcomes but has also been the social aspects and cohesion from bringing people together and creating partnerships.

4.3 Connections, social capital and governance

According to the self-assessment of 10 French FLAGs, the dynamism of certain selection committees and the added value of their mobilisation for the emergence of projects seem to have been a factor in the programme's success. This dynamism is reflected in effective exchanges/debates between selection committee members and a high level of mobilisation of local players, favoured by the inter-knowledge of governance members. In this way, **EMFF CLLD has encouraged the networking of stakeholders (in particular, the opening up of the fishing and aquaculture sectors to new partnerships)** and, in some cases, the emergence of maritime and coastal governance in local areas.

Galicia's evaluation also confirmed that the delivery system has managed to involve the fishing sector, with almost 50% of the projects (319 out of 703 projects) implemented by the fishing sector, and the 34% of the FLAG aid allocated to these projects.

A research study in Finland and Sweden explores what new opportunities FLAGs provide for community-based initiatives to support local small-scale fisheries (SSF). It highlights that although most of the world's fisheries are small-scale, "governance failures have contributed to their marginalisation".

The Finnish case shows how, **under favourable circumstances, the FLAG concept is well-fitted to the task of supporting the SSF sector**, due to its grassroots approach and the integration of sectoral and territorial perspectives. However, Sweden's multi-fund approach to the use of LAGs to implement the EMFF has not significantly improved the marginalised position of small-scale fishers and provides limited opportunities for them to use these funds to further their own interests.

Social capital and short supply chains

A research study conducted by Freeman et al. (2023) examines the conditions (in particular, the presence of different types of social capital) that lead to short food supply chains having a higher market share in a FLAG area. Short food supply chains (SFSCs) are often an important element of FLAGs' local development strategies.

A key finding is that several combinations of the conditions used in the present study can make it more likely that SFSCs are present in a given FLAG area. There is no one solution to the creation of SFSCs, and **several combinations of social capital types can lead to higher degrees of short food supply**

chains in an area. However, according to the study, normative-cognitive social capital is the only social capital type that can operate independently without the presence of any other causal conditions. This highlights the **significant role FLAGs should play in developing trust in their areas**, which is a widely noted prerequisite to the creation of SFSCs.

Normative-cognitive is the least tangible side of social capital, and it can often fill in the missing links and gaps in structural and governance social capital. The dimensions of normative-cognitive social capital (i.e., quality of the network, quality of participation in the network and shared values within the network) emphasise the importance of FLAGs in bringing multiple stakeholders in an area together in creating SFSCs.

The research presents a novel way of assessing the impact of FLAGs and social capital on economic objectives such as the creation of SFSCs.

4.4 The importance of delivery

The rules and procedures defining *how* CLLD is implemented and the roles and tasks of the different bodies involved (managing authorities, intermediate bodies, FLAGs, paying agencies, etc.) play a fundamental role in determining the type and extent of its success.

During the UK evaluation of EMFF CLLD, stakeholders praised the positive impact of FLAGs, stating that they are the best way to dispense small scale grants to local fishing and aquaculture communities to meet specific area needs. However, the delivery process was felt to be resource intensive (according to stakeholders in Scotland) even though it was deemed necessary to foster social cohesion and an improved understanding of specific needs and impacts. This approach **allowed a level of engagement and project funding that would not be possible at the national level**.

The process evaluation of 25 Italian FLAGs assessed the "decision-making capacity" and "local development capacity" of FLAGs and derives different types of FLAGs from it. If both aspects are positive, the FLAG develops towards a "development agency" which can become a strategic and effective development actor. However, if both aspects are negative, the FLAG is only a spending centre.

The Italian evaluation recommends that FLAGs should focus on continuous animation in their area if they want to ensure that they play the role assigned to them by the CLLD approach: involving new and old stakeholders, providing new services, and integrating the EMFF with other instruments and/or funds to increase the resources available to the territory. According to the evaluation, **only a small proportion of the total of 25 Italian FLAGs analysed, had developed their capacity towards becoming a local "development agency"**.

A survey of FLAGs in all 20 EU countries implementing EMFF CLLD was carried out by the FARNET Support Unit in 2019, to collect information about the delivery systems of EMFF CLLD, including the different stages of the delivery chain (project application; project selection; approval by the competent authority; implementation; and payment of grant).

Respondents reported a wide range of barriers in the delivery of CLLD. Most were linked with the application process or the approval stage. The most frequently mentioned barrier in delivery is **"national/regional legislation limiting types of projects and/or beneficiaries",** followed by "complicated application forms with a lot of information required" and "long time needed by MA/IB/PA to check and approve projects". In some countries beneficiaries had to wait many months

to get a decision on whether their project had been approved or receive payment once the payment claim submitted. However, large differences were observed between MS, with the average time to approve a project varying from two months or less in Finland and Cyprus to nine months in Slovenia. Relatively few issues were identified at the selection stage.

The **quality of the delivery system impacts the effectiveness of the CLLD programme and complex administrative procedures reduce FLAG staff time available for outreach and animation**.

The most frequently mentioned negative consequence of delivery barriers was, "potential beneficiaries not applying." In other words, a poor delivery system undermines a key added value of CLLD: that of reaching stakeholders that top-down delivery systems fail to reach. Other negative consequences emerging included: the "loss of FLAG credibility in the area"; a "bad image of the EU in the area"; and "shift towards easily spendable projects".

In 2019, **over 40% of FLAGs said they were "constrained" or "seriously constrained" in delivering their local strategy** by the legal framework of their country, while only 28% considered the legal framework "helpful" or "very helpful". Significant disparities were identified among MS, with FLAGs from nine MS assessing their legal framework as primarily constraining. **Systems which were designed with strong FLAG involvement are assessed as significantly more helpful**, especially where the FLAGs were also involved in reviewing the system on an on-going basis.

Among overall comments, the most frequently repeated one stresses the need for simplified and streamlined delivery systems.

## 5   Infosys findings – data available at EU level

5.1 Overview

Of more than 143 000 EMFF[9] operations funded by August 2024, around 14 700 operations were local CLLD projects, accounting for 10% of all operations and 10% of the budget allocation (around EUR 612 million EMFF, which was also co-financed by the Member States with a further EUR 184 million).

Table 3: EMFF operations reported

Union Priority	Number of operations	% number of operations	EMFF support allocated [EUR]	% EMFF support
UP1 (Fisheries)	72 011	50%	1 558 541 504	26%
UP2 (Aquaculture)	14 169	10%	1 046 581 202	17%
UP3 (CFP)	1 908	1%	1 191 476 961	20%
UP4 (CLLD)	14 708	10%	612 077 423	10%
UP5 (Marketing/processing)	37 974	27%	1 295 026 707	22%
UP6 (IMP)	264	0%	61 971 894	1%
UP7 (TA)	2 254	2%	253 774 031	4%
Grand Total	**143 288**	100%	**6 019 449 722**	100%

Of the seven Union Priorities (UPs), CLLD is one of the smallest in terms of budget, ahead of only 'technical assistance' (4% of the budget) and 'integrated maritime policy' (1%). However, in terms of number of operations, CLLD is in third position, surpassing UP2 (aquaculture), which has a significantly bigger budget. This is because CLLD accounts for a **high number of small grants**.

Figure 1: CLLD accounts for 10% of the EMFF budget and 10% of all operations
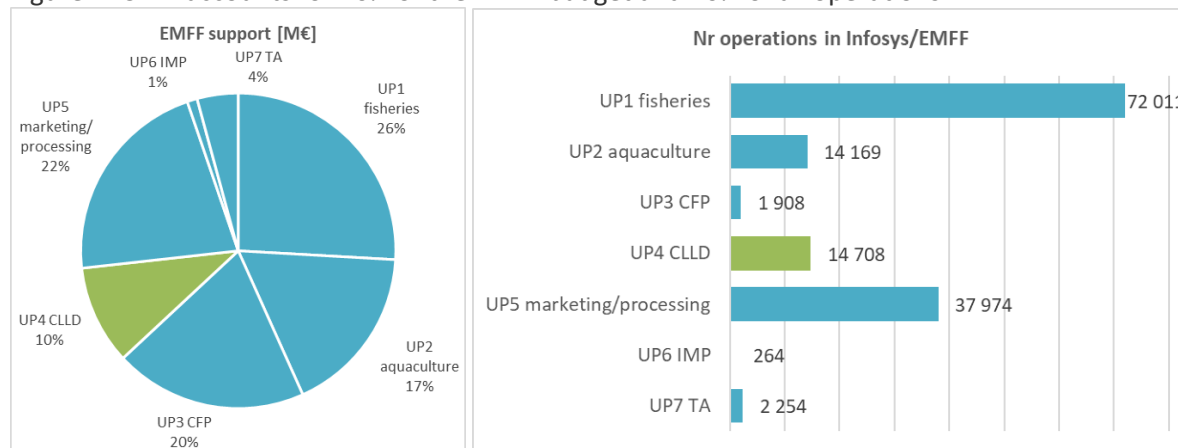
Source: Infosys 2024

At the level of measures, the situation differs. While other Union Priorities include various different Articles/measures, UP4 consists solely of CLLD (including Article 62 - preparatory support for CLLD; Article 63 - CLLD projects and running costs; and Article 64 - FLAG cooperation). Article 63 (CLLD projects and running costs) accounts for 97% of the budget (EUR 595 million of EUR 612 million) and

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[9] *In August 2024, Infosys figures show an overcommitment for all UPs, except for UP2, UP6 and UP7. This can be explained by 11 863 operations with no expenditure or abandoned/interrupted) for a total of EUR 730 million (12% of the total budget). For this analysis it was decided to keep them in the table.*

is what we consider when comparing measures below. Among the 49 EMFF measures, CLLD (Article 63) ranks second in budget allocation, behind data collection and slightly ahead of processing.

Figure 2: The twelve top EMFF measures in terms of budget allocation
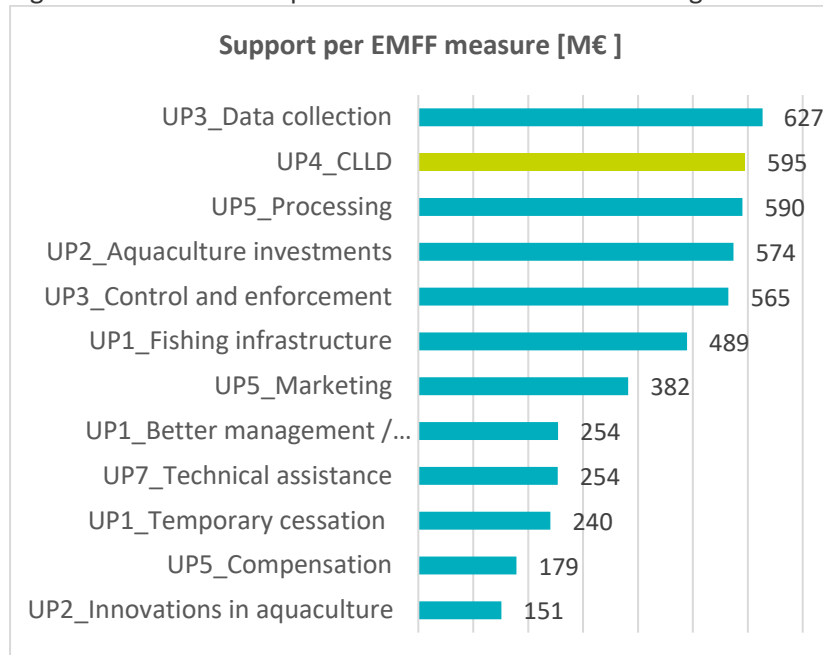
Source: Infosys 2024

Co-financing and private investment

This budget of around EUR 600 million represents just 54% of total CLLD investment. Additional funds were mobilised through MS co-financing as well as private investment. In the case of CLLD, 30% of the total investment was leveraged from the private sector, primarily from small and micro enterprises. UP2 and UP5 were also effective at attracting private investment, while UP3 and UP6 operations were entirely publicly funded.

Figure 3: 30% of total CLLD investment is levered in from the private sector
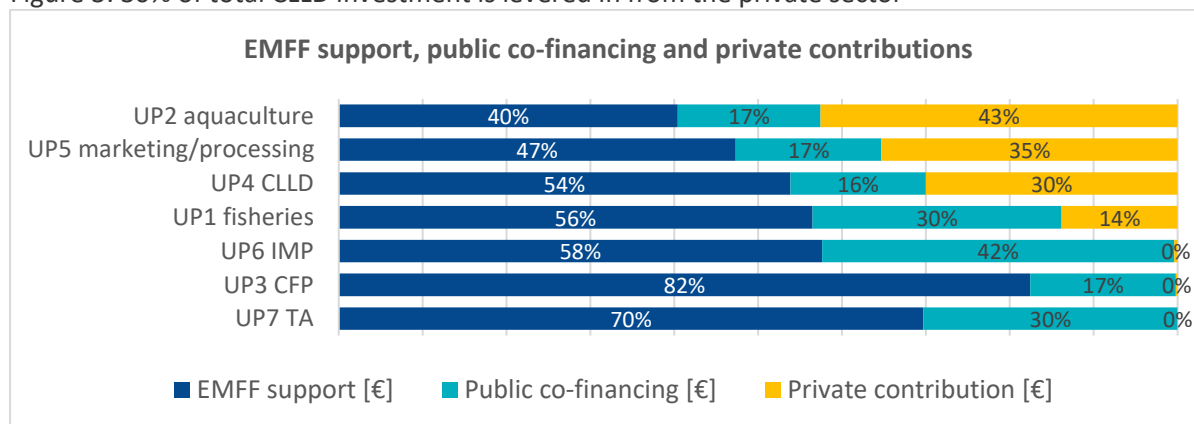
Source: Infosys 2024

The capacity of FLAGs to leverage private investment varies from one MS to another. As noted in our literature review, the Galician evaluation of CLLD revealed that FLAGs there had mobilized more than 50% of total investment from the private sector. When looking at Infosys data by MS, we see that private investment attracted by CLLD projects ranges from 62% in Denmark to just 3% in Croatia.

Types of operations

At EU level, CLLD expenditure was focused on three main types of operations:[10]

- Projects to **add value to fisheries and aquaculture products,** e.g. small-scale processing, product innovations, strengthening short supply chains, etc., (29%).
- Projects to **diversify the revenue sources** of fisheries areas, e.g. new activities or capture species for fishers, new economic activities for the area, etc. (24%)
- **Social and cultural** projects, e.g. to promote local fisheries and aquacultural heritage, and to improve the quality of life in coastal areas (20%).

Environmental projects made up 10% of EMFF CLLD operations, while projects designed specifically to improve local governance (e.g. of fisheries resources of marine-based activities) made up just 2% of operations.

A further 2% of operations involved cooperation between FLAGs (those reported under Article 64) while 12% of the CLLD budget went towards running and animation costs.[11]

Figure 4: A variety of operation types are funded under CLLD
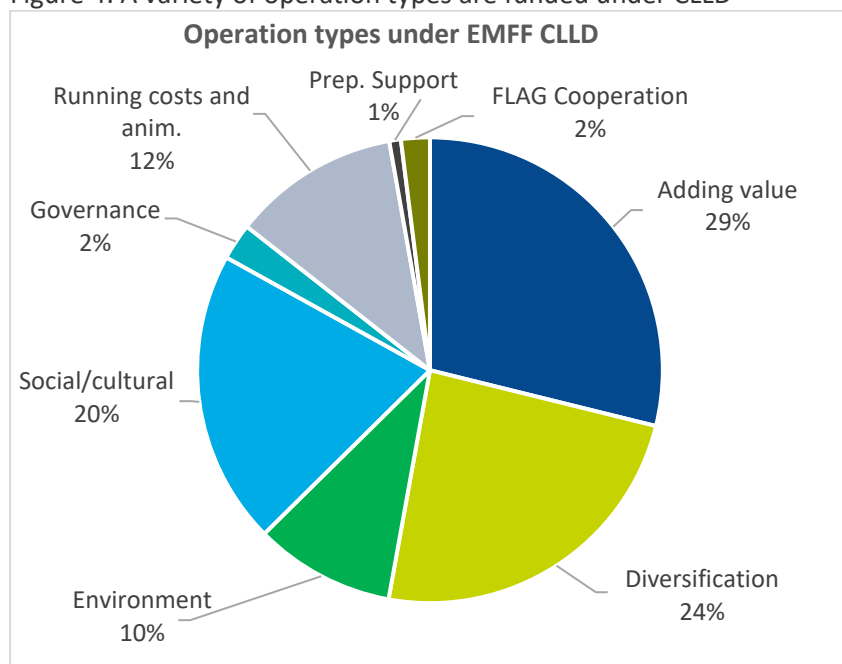
Source: Infosys 2024

5.2 Who has CLLD benefitted?

Under the EMFF, the same organisations or individuals may benefit from various grants. The data indicates that the 14 708 CLLD operations were undertaken by over 9 000 unique beneficiaries (Table 4). This means that, **along with UP5, CLLD reaches more beneficiaries per operation than the other**
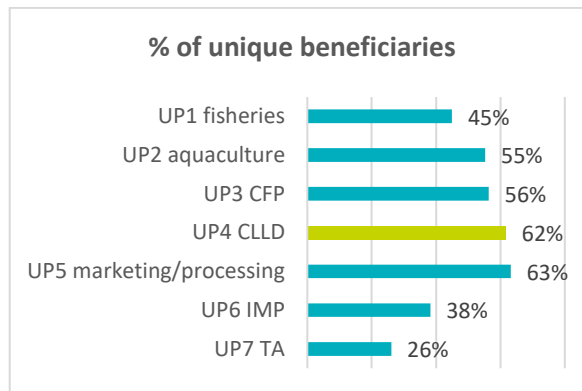
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[10] *Established in CIR 1242/2014*

[11] *Running and animation costs cover the cost of the FLAG office, personnel and those activities linked to promoting the fund, helping candidates apply for grants, networking activities etc. It is the actions of these local teams that differentiate CLLD from the other "top-down" measures.*

Union Priorities. Specifically, 62% of CLLD operations supported unique beneficiaries under the EMFF, compared to 45% under UP1, 55% under UP2, and 38% under UP6.

Table 4: Unique beneficiaries

Union Priority	Number of operations	Number of unique beneficiaries
UP1 fisheries	72 011	32 376
UP2 aquaculture	14 169	7 830
UP3 CFP	1 908	1 076
UP4 CLLD	14 708	9 076
UP5 marketing/processing	37 974	23 994
UP6 IMP	264	101
UP7 TA	2 254	588
Total	**143 288**	**75 041**

% of unique beneficiaries

- UP1 fisheries — 45%
- UP2 aquaculture — 55%
- UP3 CFP — 56%
- UP4 CLLD — 62%
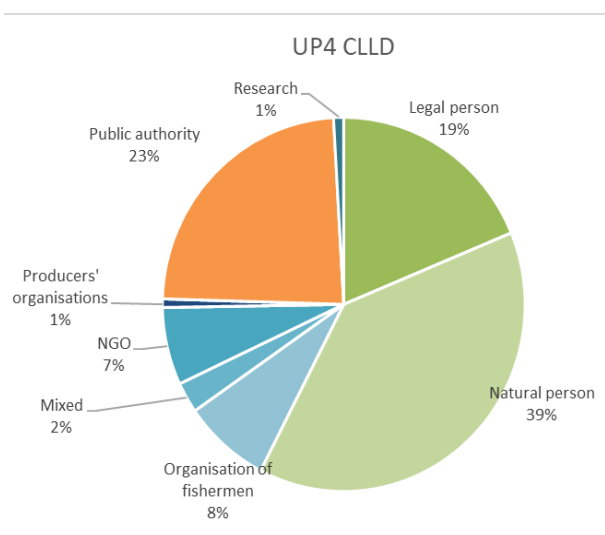- UP5 marketing/processing — 63%
- UP6 IMP — 38%
- UP7 TA — 26%

Source: Infosys 2024

Diverse beneficiary types

Information on the "types" of beneficiaries is reported for 9 957 of the CLLD operations. This pie chart to the right shows that **58% of CLLD projects are implemented by private companies or individuals** (legal persons / natural persons respectively), while public authorities make up 23% of beneficiaries. Fishing organisations (8%) and NGOs (7%) also make up a fair proportion of project beneficiaries. Research organisations and producer organisations have also benefited from CLLD funding but make up only 1% each of the beneficiaries, indicating that they tend to access other UPs for the funding they need. Little information was reported by the other Union Priorities on beneficiary types, but the limited data available points to fewer beneficiary types.

Figure 5: CLLD benefits a range of beneficiary types

UP4 CLLD

- Research 1%
- Public authority 23%
- Legal person 19%
- Natural person 39%
- Organisation of fishermen 8%
- Mixed 2%
- NGO 7%
- Producers' organisations 1%

Source: Infosys 2024

Micro and small enterprises

The size of the enterprise is reported for 83 376 EMFF operations, or 58% of operations (corresponding to the legal and natural persons) and 44% of the EMFF budget. Of the enterprises receiving CLLD funding, micro enterprises account for the majority of operations funded under EMFF CLLD (74%) and budget allocated under it (71%). **Micro and small enterprises together make up 90% of all enterprises benefiting from CLLD support** under the EMFF, with just 5.5% of projects undertaken by medium sized enterprises and 4.5% by large companies. Figure 6, below, shows that UP4 (CLLD) sees the highest percentage of its budget benefiting micro and small enterprises, compared to the other UPs.

Figure 6: 90% of the CLLD budget absorbed by private companies goes to micro or small enterprises

EMFF investment by company size
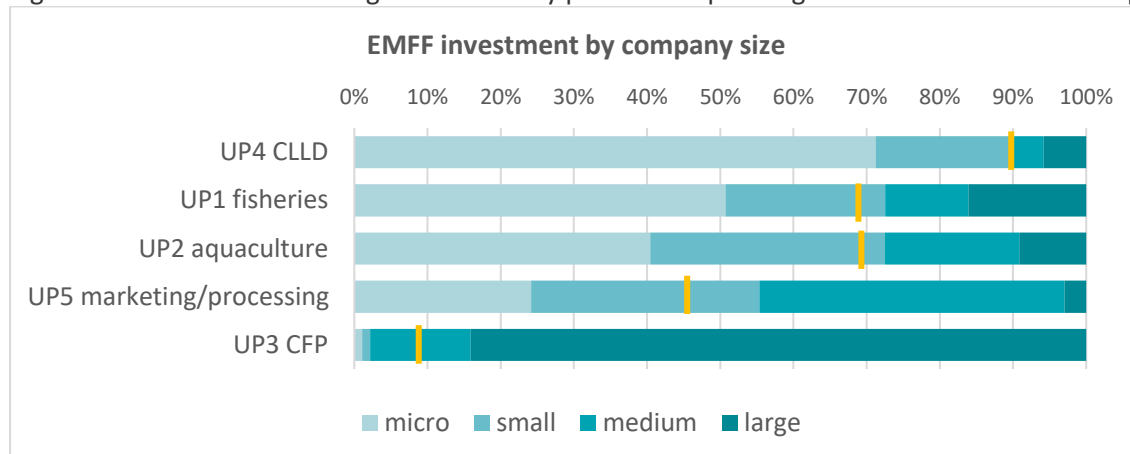
Source: Infosys 2024

Women

The fisheries sector is notoriously male dominated, so it is perhaps not surprising that, where gender is reported, 91% of EMFF beneficiaries are male, while women make up just 9% of beneficiaries. Somewhat better gender balance is reported under CLLD, where the percentage of female beneficiaries more than doubles to 20%.

Figure 7: Male versus female beneficiaries, EMFF generally and EMFF under CLLD
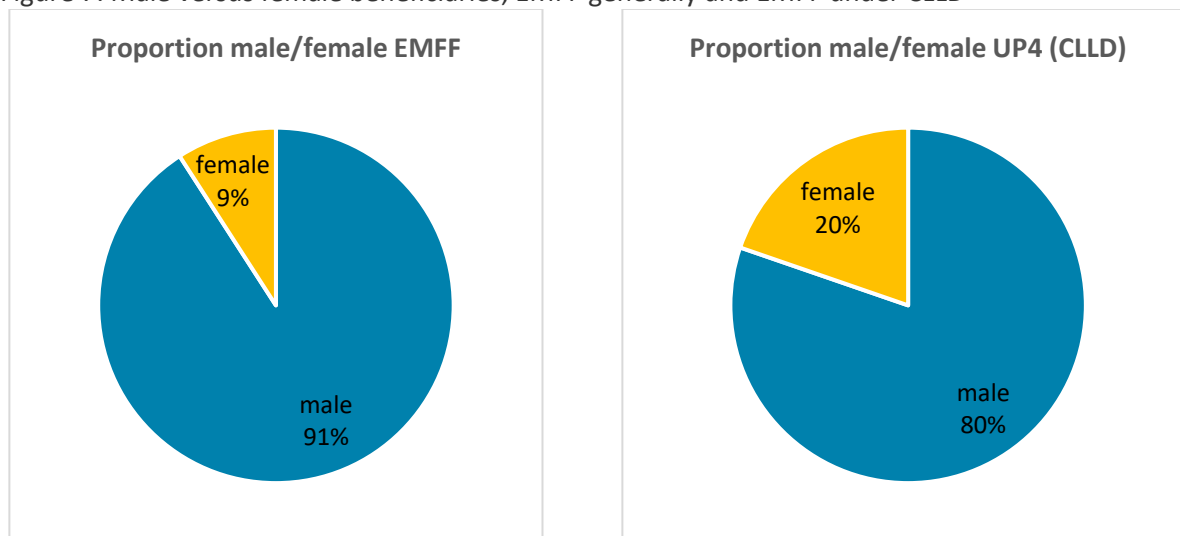
Source: Infosys 2024

Of the EMFF Union Priorities where data can be obtained, CLLD projects demonstrate the highest percentage of **female** beneficiaries, followed in second place by aquaculture. However, at 20% of beneficiaries, female participation in EMFF CLLD remains low and gender will be explored further in the FLAG surveys.

Figure 8: Gender equality under CLLD "less poor" than other UPs
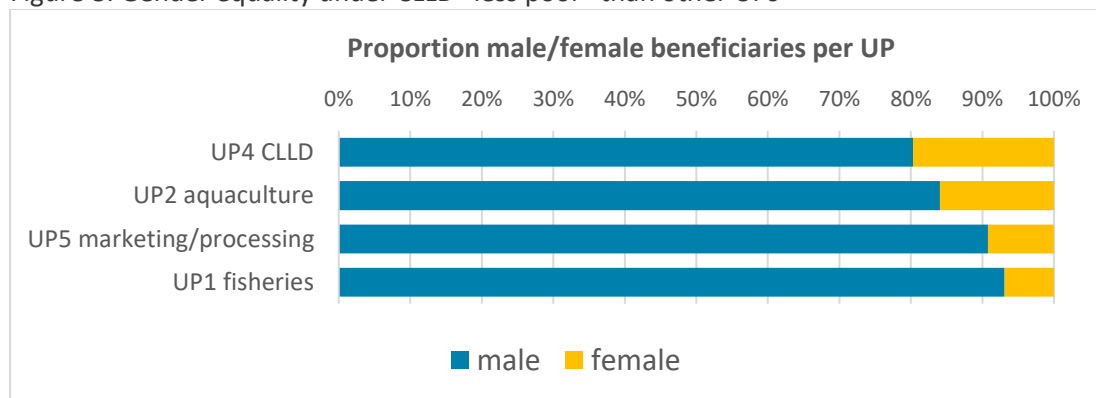
Source: Infosys 2024

Small-scale fishers

Small-scale fishers tend to be a priority target audience for most FLAGs. However, this is **not captured in Infosys with the information reported for the EMFF**; information on "vessel size" is only reported for operations linked to a specific vessel. However, while some CLLD operations are known to support onboard improvements (e.g. trialling more sustainable fishing gear, or adapting boats for pescatourism), most projects focus on land-based activities and collective actions rather than specific vessels. Under the EMFAF, data on SSF is expected to improve.

Figure 9: General EMFF budget for operations linked to fishing vessels
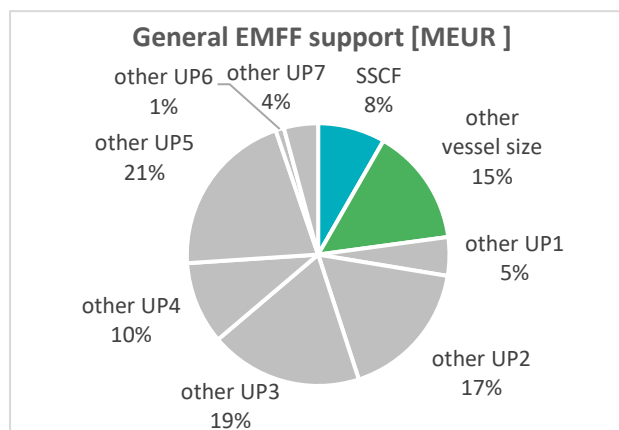
What Infosys data does show is that, according to operations that report vessel information, 23% of the EMFF budget goes to operations linked to a vessel and 8% (around EUR 500 million) specifically to small-scale vessels.

In the meantime, information from the FLAG surveys, in Chapter 6, sheds some light on the extent to which SSF benefit from CLLD (UP4) under the EMFF.

Source: Infosys 2024

5.3 What results were reported for EMFF CLLD?

Under the EFF the FLAGs were seen to produce a diverse range of achievements including involving fishers in direct sales; federating women in fisheries; the launch of new, diversified economic activities; improved systems for detecting and responding to water pollution – to mention but a few. However, no systematic reporting requirements existed in the 2007-2013 period. This meant that there was no common data set which could be analysed or used to demonstrate tangibly what the results of EFF CLLD were at EU level.

Under the EMFF, an effort was made to address this, and **three common results indicators were introduced for CLLD**: jobs created, jobs maintained, and businesses created. While these indicators overlooked the social and environmental achievements of the FLAGs, they offered for the first time a common approach to capturing some of the results of fisheries CLLD.

Data reported in Infosys for the 2014-2020 period showed that CLLD under the EMFF had resulted in the **creation of around 4 250 new jobs; 1 000 new businesses; and the maintaining of around 10 000 jobs in fisheries and aquaculture areas**.

In order to compare these figures with some of the other Union Priorities, we identified which other EMFF UPs used these results indicators:

- ✓ "jobs created" was programmed in UP1, UP2 and UP4
- ✓ "jobs maintained" was programmed in UP1, UP2 and UP4
- ✓ "businesses created" was programmed only in UP4

Jobs created

The table below shows that UP4 (CLLD) was by far the most consequential Union Priority of the EMFF in terms of job creation, with 17% of CLLD operations leading to job creation.

Figure 10: Job creating Union Priorities under the EMFF

Union Priority	Number of operations reporting job creation	Number of operations in infosys	% of projects resulting in jobs	Number of jobs reported [FTE]
UP1 fisheries	472	72 011	1%	1 592
UP2 aquaculture	263	14 169	2%	1 296
UP4 CLLD	2 428	14 708	17%	4 245
Total	**3 163**	**100 888**	**3%**	**7 133**

Source: Infosys 2024

The creation of jobs was used as a results indicator for a total of 12 different measures under the EMFF. Of these, **CLLD was the measure that created the most jobs** in absolute terms. Indeed, the graph below shows that the next most important measure for job creation was aquaculture investments (UP2) with 880 jobs, compared to 4 245 (almost 5 times more) under CLLD.

Figure 11: CLLD resulted in almost 5 times more jobs than any other measure
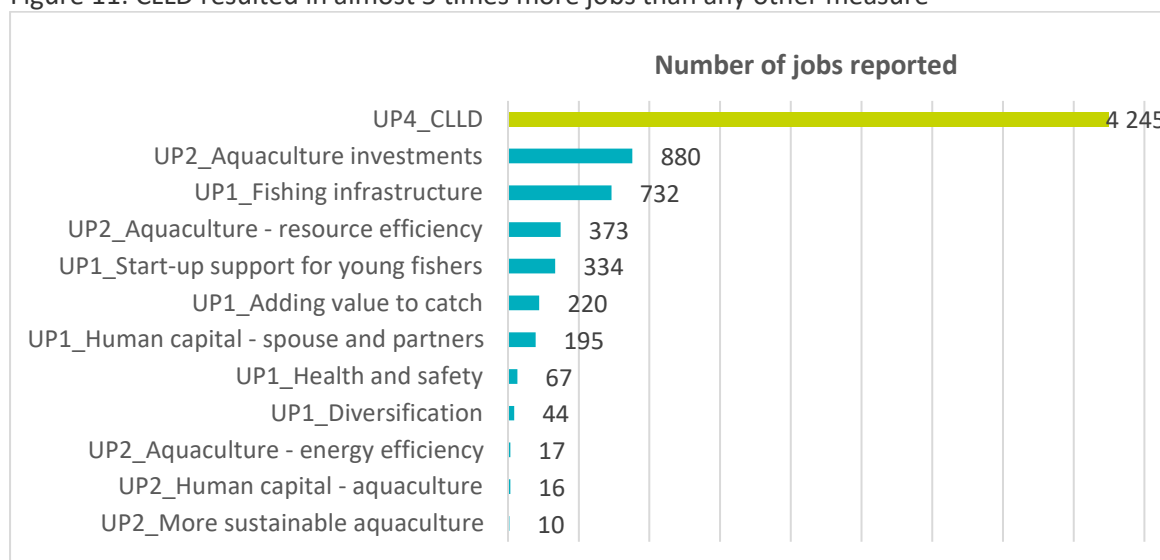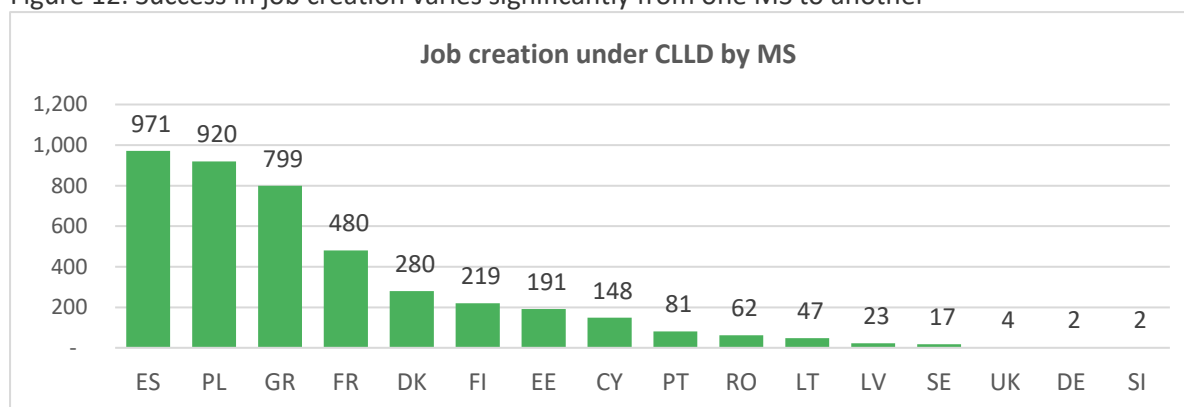

Source: Infosys 2024

In terms of the **cost of creating these jobs**, a little less than EUR 120 million of EMFF money was invested under CLLD in about 2 428 projects that led to 4 245 reported new jobs, in other words an average EMFF cost of around EUR 28 000 per job created.

Variations between Member States

Whether CLLD (or other UPs) resulted in job creation varied significantly from one MS to another. This is partly linked to the objectives laid down in the National EMFF Programme as well as, in the case of CLLD, the priorities of each FLAG. For example, job creation was considered a key priority in many Spanish regions, while in other countries priority was given to increasing quality of life or promoting the consumption of local fish species generally, rather than supporting individual private enterprises.

The graph below shows the total number of jobs created with EMFF CLLD, by MS. We can see that Spain, Poland and Greece score particularly high on job creation with 971, 920 and 799 jobs created respectively. The UK, Germany and Slovenia report almost no job creation under CLLD (despite the benefits cited from the UK impact evaluation in the literature review).

Figure 12: Success in job creation varies significantly from one MS to another

Source: Infosys 2024

When we compare job creation by country to that under the other UPs, we can see that Spain has reported around twice as many jobs created with the EMFF in general. The graph below shows that around 50% of its job creation was achieved under CLLD, and the rest largely under UP1 and, to a lesser extent, with UP2.

Figure 13: The Union Priorities which led to job creation, by MS
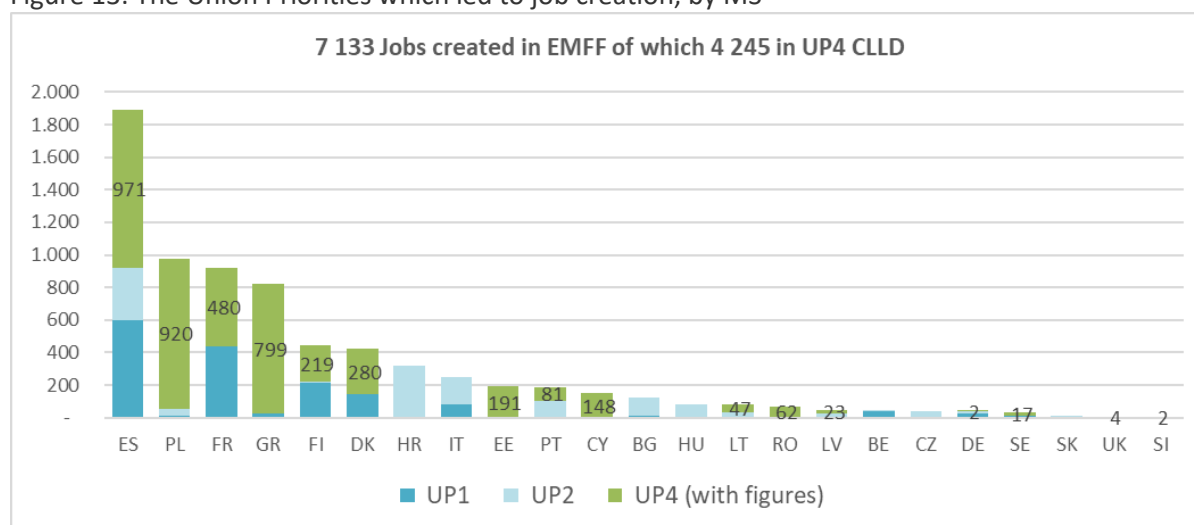
Source: Infosys 2024

In certain countries, job creation under the EMFF has been achieved almost exclusively with CLLD. This is the case for Poland, Greece, Estonia, Cyprus and Romania.

Jobs Maintained

Jobs maintained are reported under UP1 (sustainable fisheries), UP2 (sustainable aquaculture) and UP4 (CLLD). A total of 58 000 jobs were reported to have been maintained by 10 656 EMFF operations: 37 000 jobs maintained under UP1; 10 988 under UP2; and 10 372 under UP4. Broken down by measure, jobs maintained were reported under 19 different measures, as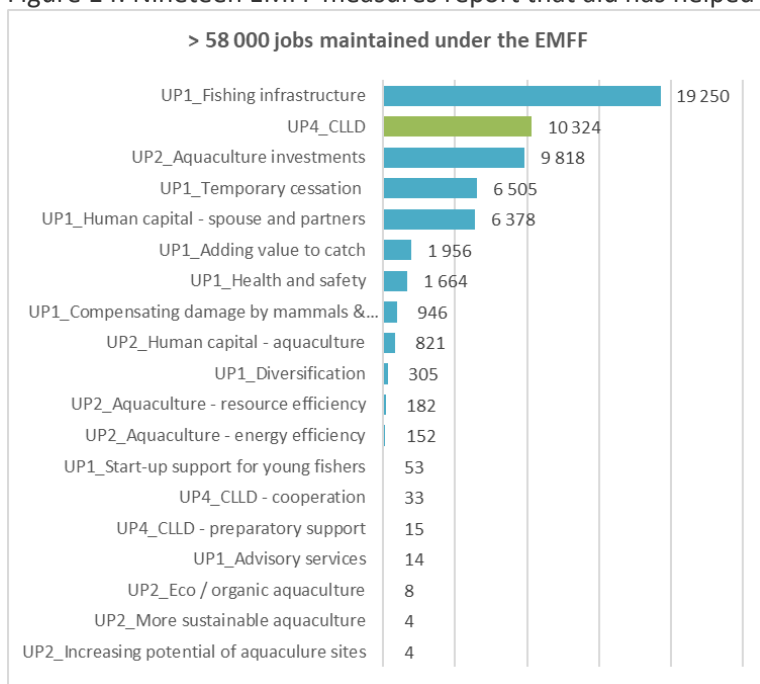 can be seen in the graph below. **CLLD ranks second among measures which have reported "jobs maintained", after fishing infrastructure.**

Figure 14: Nineteen EMFF measures report that aid has helped maintain jobs

Source: Infosys 2024

It is important to note that interpretations of "jobs maintained" can vary significantly among data providers. The subjective nature of assessing potential job losses without EMFF support contrasts with the more objective count of jobs created by an operation.

Comparing jobs maintained under CLLD by MS, again we see substantial differences from one MS to another. Spain, in particular stands out for the number of jobs it has reported to have maintained with more than 2 400 jobs preserved in fisheries communities.

Figure 15: Spain leads the other MS in maintaining jobs under EMFF CLLD
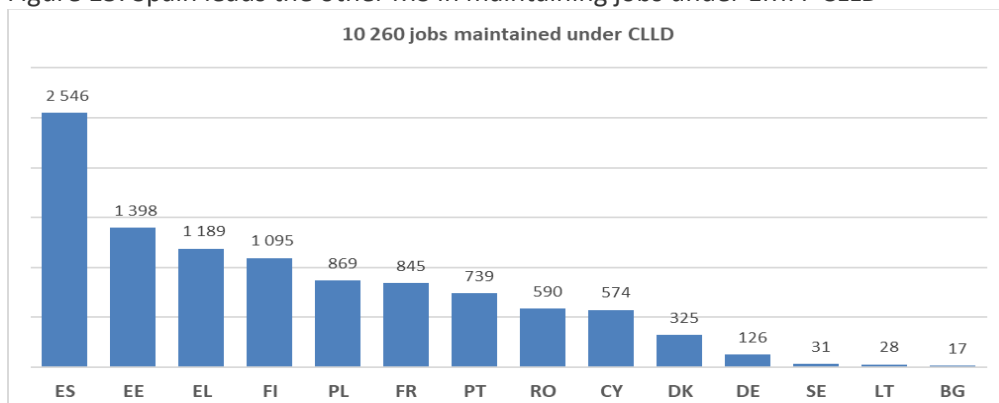
Source: Infosys 2024

Businesses created

CLLD (UP4) was the only Union Priority under the EMFF that used the creation of businesses as a result indicator. A total of 1 019 businesses were reported to have been created under CLLD for an average EMFF investment of EUR 60 000 per business created. Spain and Greece stand out for absolute numbers of businesses created, followed by Finland, Poland and Denmark. No new businesses were reported in Infosys by Latvia, Italy, Croatia, Slovenia, Romania or Bulgaria.

Figure 16: CLLD created over 1 000 new businesses in fisheries and aquaculture areas

1 019 businesses created under CLLD

ES	EL	FI	PL	DK	EE	SE	PT	LT	CY	FR	UK	DE
371	331	105	82	57	22	19	12	10	4	3	2	1
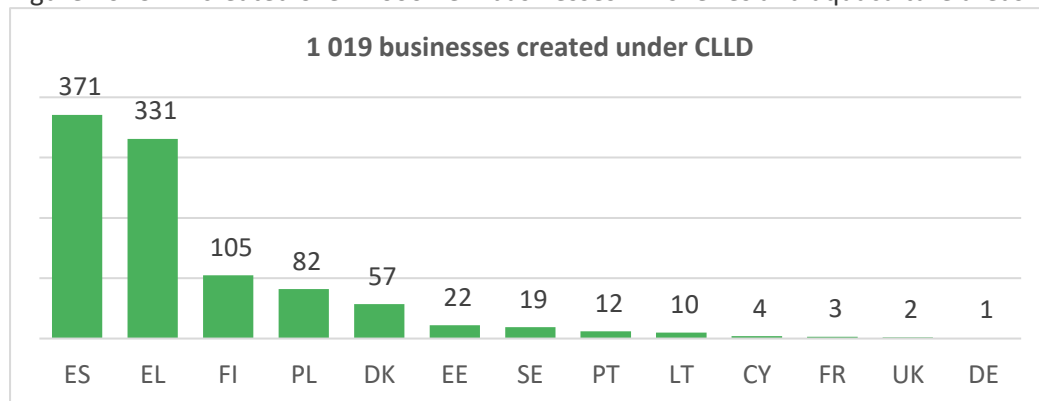
Source: Infosys 2024

The figures above offer just a small glimpse into what new businesses and jobs are bringing to fisheries and aquaculture areas around Europe. Qualitative information collected by FARNET during the 2014-2020 period identified numerous different types of businesses that were created with FLAG support. These ranged from the development of processing facilities to make use of unwanted by-catch, to the setting up of one of Europe's first commercial coral farms and the creation of Spain's first sailing school for people with disabilities.

6 Survey results of FLAG achievements under the EMFF

As explained above, the common results indicators used for the EMFF (jobs created, jobs maintained, and businesses created) showed just part of the picture of what FLAGs achieved. The surveys developed by FAMENET and sent out to FLAGs in April 2024 aimed to complement this data.

The survey to EMFF FLAGs asked a series of questions relating to the number and types of projects funded, as well as the estimated results of these projects. The survey disseminated to EMFAF FLAGs sought information on the set-up and representativeness of FLAGs, and their outreach and communication activities.

The 149 FLAGs responding to the survey on the EMFF period (43% of all FLAGs operational in the 2014-2020 period), indicated that that they had funded a total of **6 605 local projects, or an average of 44 projects per FLAG**. This represented EUR 287 million invested by these FLAGs in their respective fisheries and aquaculture areas.

Figure 17: FLAGs fund an average 44 local projects each
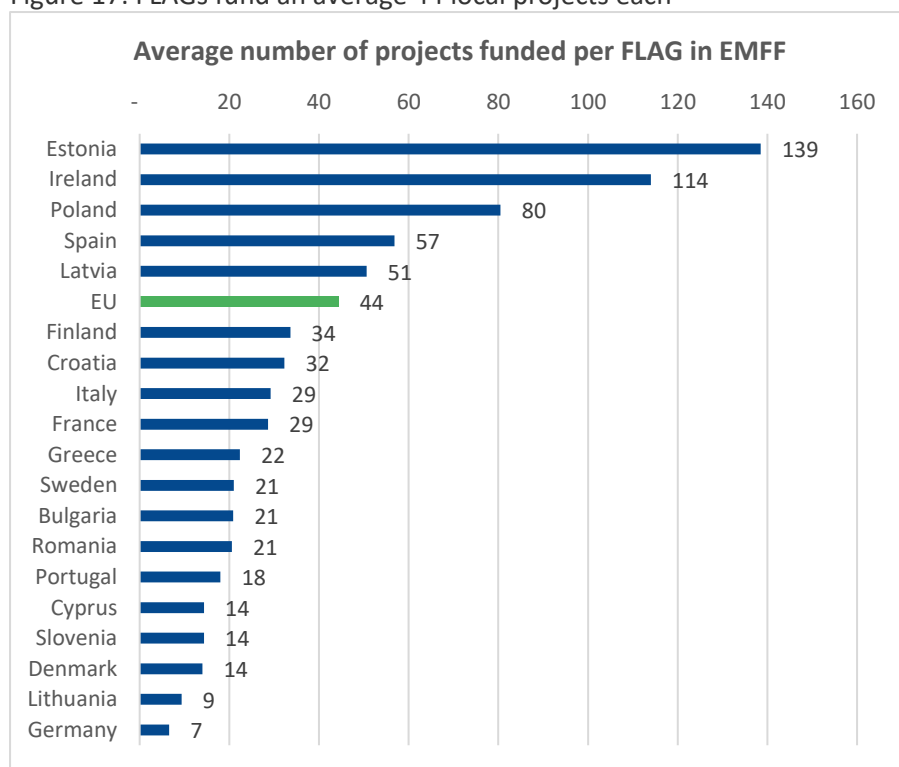
Source: FAMENET survey of EMFF FLAGs, 2024

Table 5: Projects and investments of FLAGs responding to the EMFF survey

Total number of projects reported by 149 FLAGs	Investment by 149 FLAGs / M€	Average number of projects funded per FLAG from the survey sample	Approximate extrapolation for 348 FLAGs	Total number of projects reported in Infosys
6 605	287	44	15 312	14 708

Source: FAMENET survey of EMFF FLAGs, 2024

Almost two extra projects per FLAG were reported in the survey, compared to Infosys (which indicates an average of 42 projects funded per FLAG). This can be explained partly by the final projects not having been reported in the last data submission by certain managing authorities (data from

December 2023) and by the assumption that the sample of FLAGs filling in the survey is likely to be above average in terms of performance, given their motivation to fill in the survey and their capacity to remain operational during the transition period. However, the discrepancy is small enough to assume a satisfactory level of reliability.

The table below summarises the results indicated by the responding EMFF FLAGs against the most relevant[12] of the common result indicators developed for the EMFAF. Although FLAGs had not previously been asked to collect information on additional results indicators, the survey asked FLAGs to estimate their results against the richer set of result indicators developed for the EMFAF.

Table 6: Common Result Indicators requested in survey

Common Result Indicator (CR)	Result from FLAG survey sample (total)	Average result per FLAG from survey sample
Jobs created (CR06)	2 467	19
Jobs maintained (CR07)	4 933	41
Businesses created (CR03)	532	4
Entities benefiting from promotion and information activities (CR16)	2 691	24
Cooperation activities between local stakeholders (CR13)	693	5
Actions to improve governance capacity (CR19)	372	4
Datasets/advice made available (CR21)	331	3
Innovations enabled (CR14)	1 521	15
Actions contributing to Good Environmental Status (CR10)	691	6
Entities improving resource efficiency (CT17)	713	6
Persons benefitting (CR08)	1 510 321	15 103

Source: FAMENET survey of EMFF FLAGs, 2024

As well as information on FLAG achievements against the EMFAF common result indicators, information was also requested against four additional indicators.

Table 7: Additional result indicators requested in survey

Result Indicator	Result from FLAG survey sample	Average per FLAG from survey sample
Number of businesses that have developed new sources of revenue through diversified activities	1 449	12
Number of new channels created to purchase local fish	230	2
Number of existing sales points that have started/increased their offer of local fish	372	3
Number of new activities / services in the community	1 327	10

Source: FAMENET survey of EMFF FLAGs, 2024

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[12] *Based on the CRIs selected by managing authorities for CLLD in their national EMFAF programmes. Eleven out of 22 of the common results indicators established for 2021-2027 were taken up by MAs.*

This overview of FLAG results for the 2014-2020 period points to a range of different achievements, including:

⇨ More than 600 sales channels in the responding FLAG areas where local communities can now buy local fish, either for the first time, or with an improved offer: **five new or improved sales channels for local fish per FLAG area**. Were this to be extrapolated to the 348 FLAGs operation in 2014-2020, figures would point to around 1 740 sales points for local fish around Europe, significantly boosting short supply chains, a key pilar of Europe's Green Deal.

⇨ In the areas of the FLAGs responding to the survey, **around 1 500 businesses have developed new sources of revenue** through diversified activities, making enterprises in Europe's coastal areas more resilient.

⇨ Over **1 300 new activities or services offered in coastal communities** (an average of 10 per local area), helping to improve the quality of life in these communities.

⇨ In responding areas, FLAGs supported **almost 700 actions to contribute to good environmental status**.

As we can see, CLLD supports communities in several ways. The complexity of capturing the value of CLLD is that **not all FLAGs use CLLD for the same purpose**. Depending on the specific needs of their community, some focus more on economic issues, others on their environmental resources and yet others bring largely social benefits to their communities. However, most will foster results under a combination of different subject areas. In the subsequent sections, we explore these results in more detail, including the differences between – and within – Member States.

6.1 CLLD supporting local economies

With regards to the economic benefits that EMFF CLLD has brought to fishing and aquaculture communities, the graphs below provide an overview of four important indicators: jobs created; businesses created; businesses increasing their sources of revenue; and strengthened local supply chains (measured by new channels created to sell local fish and existing sales points that have started offering local fish or significantly increased their offer).

Figure 18: Boosting local supply chains for fish; supporting new and diversified jobs and businesses
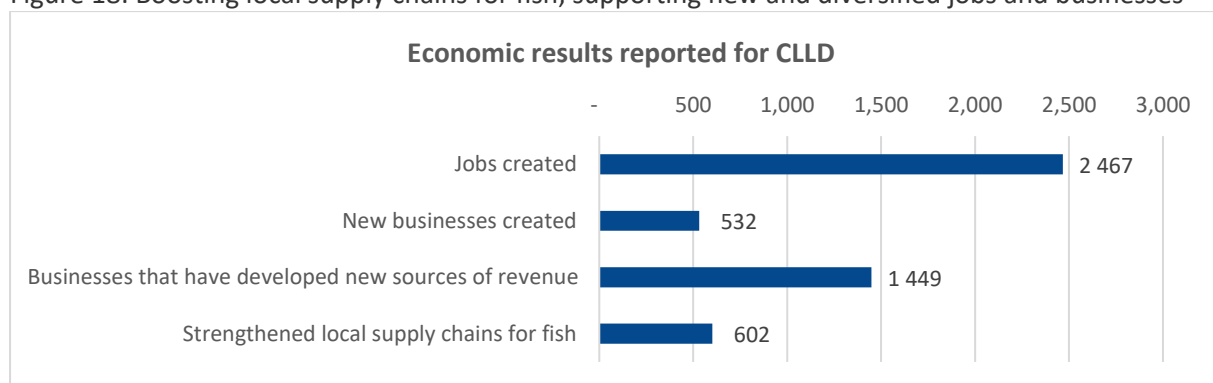
Source: FAMENET survey of EMFF FLAGs, 2024

This confirms the Infosys finding that the creation of jobs is indeed an important result of CLLD. The 127 FLAGs responding to the question, pointed to the creation of 2 467 jobs created by projects they had supported, or **an average of 19 jobs created per FLAG** reporting on that indicator.

Figure 19: On average, FLAGs supported the creation of 19 new jobs and 4 new businesses each
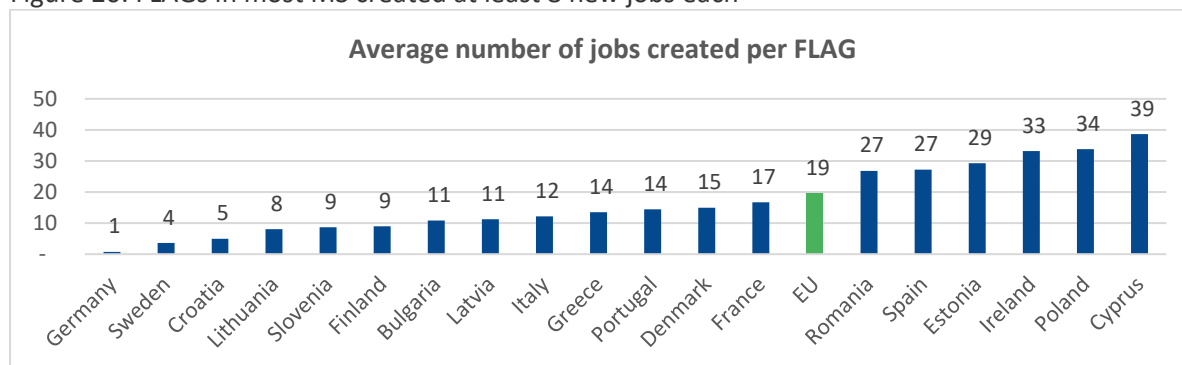
EU average per FLAG surveyed

Jobs created	19
New businesses created	4
Businesses that have developed new sources of revenue	12
Strengthened local supply chains for fish	5
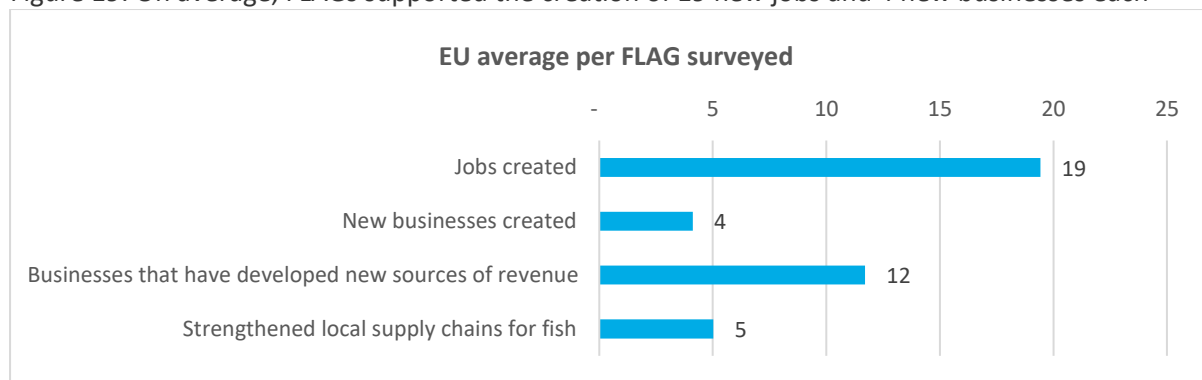
Source: FAMENET survey of EMFF FLAGs, 2024

The creation of new businesses was also reported by 129 of 149 FLAGs responding to the survey, indicating 532 new businesses created, an average of **4 new businesses per FLAG**.

It is, however, important to point out that **the extent to which CLLD results in the creation of new jobs and businesses varies signicantly by FLAG and at MS level**, with FLAGs in Cyprus, Poland, Ireland, Estonia, Spain and Romania delivering particularly strong results (27-39 jobs on average per FLAG). German FLAGs, on the other hand, created very few jobs, on average just one job each - and many German FLAGs created no jobs at all. Following the present report, case studies of eight MS will explore in more depth the specific focus, results and barriers in different countries.
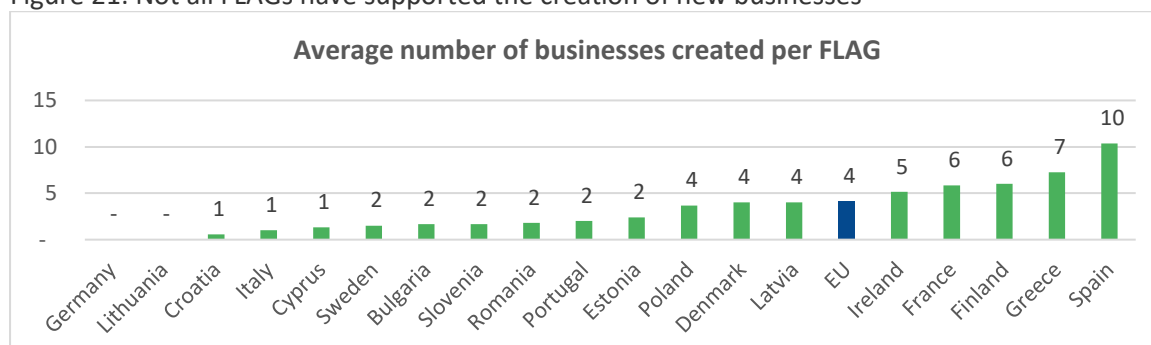
Figure 20: FLAGs in most MS created at least 8 new jobs each

Average number of jobs created per FLAG

Country	Value
Germany	1
Sweden	4
Croatia	5
Lithuania	8
Slovenia	9
Finland	9
Bulgaria	11
Latvia	11
Italy	12
Greece	14
Portugal	14
Denmark	15
France	17
EU	19
Romania	27
Spain	27
Estonia	29
Ireland	33
Poland	34
Cyprus	39

Source: FAMENET survey of EMFF FLAGs, 2024

In terms of business creation, again, we see in the graph below that German FLAGs responding to the survey did not create any new businesses, nor did Lithuania. At the other end of the scale, FLAGs in Spain created on average 10 new businesses and in Greece 7 new businesess.

Figure 21: Not all FLAGs have supported the creation of new businesses

Average number of businesses created per FLAG

| Country	Value
Germany	-
Lithuania	-
Croatia	1
Italy	1
Cyprus	1
Sweden	2
Bulgaria	2
Slovenia	2
Romania	2
Portugal	2
Estonia	2
Poland	4
Denmark	4
Latvia	4
EU	4
Ireland	5
France	6
Finland	6
Greece	7
Spain	10

Source: FAMENET survey of EMFF FLAGs

While we saw big variations between MS in terms of job and buiness creation, **helping existing businesses to develop new sources of revenue** appears as something that most FLAGs have worked on to some extent. The graph below shows that the majority of FLAGs helped between 3-6 businesses to develop new sources of revenue.

Estonia, Latvia, and Poland stand out in terms of diversifying revenue sources of local companies, followed by Spain, Greece and Ireland. It must be noted too that FLAGs also support companies in other ways that do not directly lead to increased revenue sources, e.g. training, networking activities, etc., which can also help strengthen their resilience and performance.

The types of businesses supported to increase their revenue sources can be distinguished between fish-related enterprises (e.g. fishers or aquaculture producers diversifying into processing or tourism; fish processors diversifying their product range; etc.) and non non-fish related companies (e.g. new coastal tourism products, new products from algae, products from recyled marine litter; etc.).

Figure 22: Diversifying revenue sources to make local enterprises more resilient
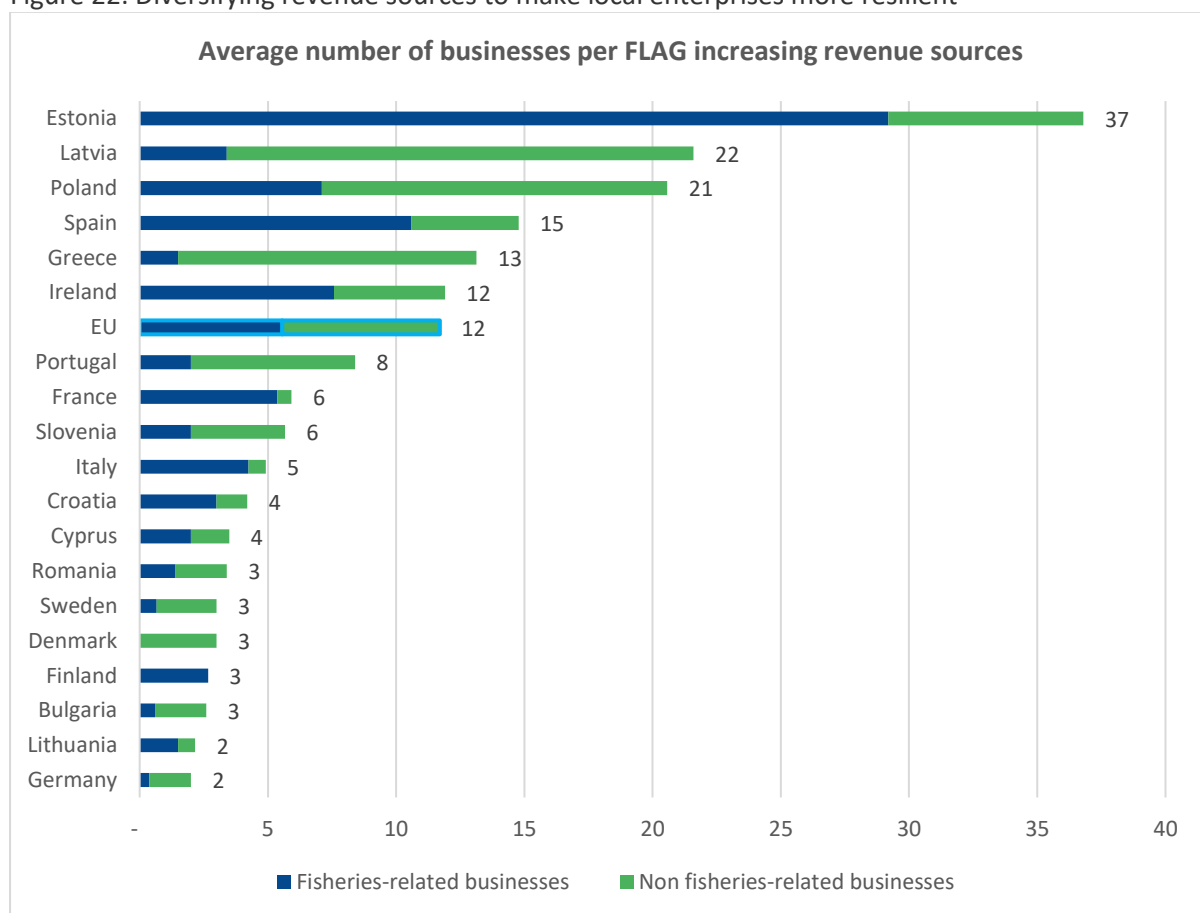
Source: FAMENET survey of EMFF FLAGs, 2024

Here again, we can see a very different focus from one country to another with countries like Finland, France, Italy and Estonia focusing heavily on fish-related businesses, while FLAGs in Denmark, Latvia and Greece have supported primarily, or even exclusively, other types of businesses in their communities. Most FLAGs, however, are somewhere in the middle and have supported a mix of fish-related and other types of local businesses. In total **1 449 businesses were helped to develop additional sources of revenue** (712 fish related and 737 non-fish related).

Short fisheries supply chains

Strengthening short supply chains for local fish emerges as something that FLAGs in all country have worked on. Indeed, **new sales channels for local fish have been created in all MS implementing CLLD** (on average two *new* sales channels created per area) and FLAGs have also worked with existing sales channels to introduce or increase local fish products to their offer (approximately three existing sales channels per area have introduced or boosted their offer of local fish). This means a total of 602 more places to purchase local fish in the 111 FLAG areas responding to the question, or an average of more than five in each FLAG area.

The graph below shows Spain as a leader in boosting opportunities to buy local fish, with an average of three news sales channels created in each FLAG area and 9 existing sales channels which have incoporated locally landed or produced fish. Sweden leads in terms of new sales channels *created* for local fish, with an average of four per FLAG area. Estonia, Croatia and Poland also stand out as MS where FLAGs have strengthened local supply chains for fish.

Figure 23: Average number of sales channels per FLAG area starting to offer local fish

Strengthening local supply chains

Country	Value
Spain	12
Estonia	8
Croatia	7
Poland	6
Italy	6
Sweden	5
EU	5
Latvia	5
Finland	3
Cyprus	3
France	3
Bulgaria	3
Slovenia	3
Greece	3
Lithuania	2
Denmark	2
Portugal	1
Romania	1
Ireland	1
Germany	1

■ New sales channels created for local fish   ■ Existing sales channels incorporating local fish
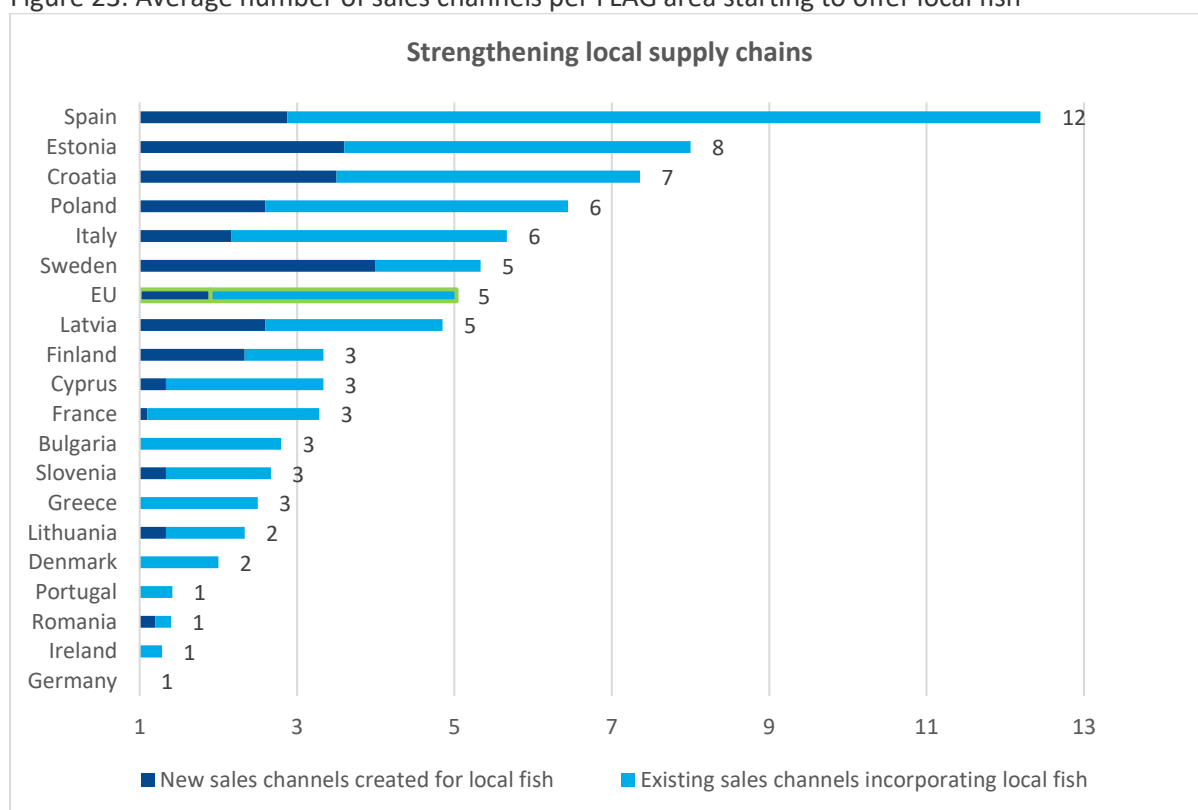
Source: FAMENET survey of EMFF FLAGs

As well as the creation and strengthening of economic activities through new jobs and businesses and diversified revenue sources and sales channels, **FLAGs have also contributed to maintaining employment in fisheries and aquaculture communities**.

Maintaining jobs is harder to calculate but preventing the outflow of jobs from coastal and fisheries communities – especially from the more remote areas and especially jobs in the primary sector – is vital for the resilience of many local economies.

Estimates by the 120 FLAGs reporting on "jobs maintained" indicate that 4 933 jobs have been maintained in their areas thanks to CLLD projects, on top of the 2 467 created. In other words, 7,400

jobs in 120 FLAG areas, or **64 jobs per area, owe a debt to CLLD projects**. Combined with the additional sources of revenue that local companies have developed and strengthened local chains, we can point to clear economic benefits that FLAGs are bringing to fisheries and aquaculture communities.

## 6.2 FLAGs helping protect and preserve natural resources in coastal areas

The European Green Deal aims to make Europe the first climate neutral continent by 2050, with a zero-pollution economy. It aims to boost the efficient use of resources by moving to a clean, circular economy, cutting pollution and restoring biodiversity.

This section provides some information on actions supported by FLAGs that contribute to two key pillars of the European Green Deal: preserving and restoring ecosystems and biodiversity; and circular economy and clean energy. For these, the FLAGs were asked to report on the number of actions they had supported that contribute to Good Environmental Status and on the number of entities that had improved resource efficiency (including reduced use or energy, water or other natural resources).

Of the FLAGs responding to the survey, **72% reported to have supported specific actions that contribute to Good Environmental Status** (GES). In total, these 110 FLAGs supported 691 actions to protect and/or restore their areas' environmental resources. This meant that on average, FLAGs under the EMFF supported around six local projects each to help contribute to GES. Again, this ranges from FLAGs with little focus on environmental issues, to FLAGs supporting over 20 environmental actions each.

As with the economic indicators, the survey results highlight variations between MS. FLAGs in Finland and Latvia gave most priority to environmental actions with an average of 14 and 11 projects respectively per FLAG. Poland, Croatia and France also stand out for their relatively high number of environment related projects. In terms of sea basins, we can see that Baltic FLAGs appear to have focused more heavily on environmental projects with Finland, Latvia, Poland, Sweden, Lithuania and Estonia all in the top half.

Figure 24: FLAGs contributing to Good Environmental Status (GES)
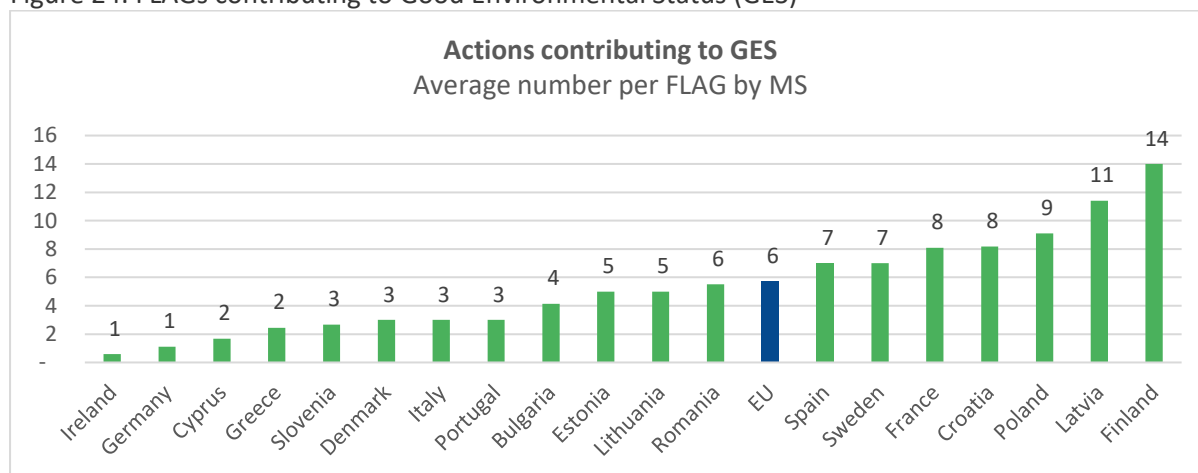
Source: FAMENET survey of EMFF FLAGs, 2024

With regard to resource efficiencies, of responding FLAGs a more modest **56% of FLAGs indicated that they had supported local entities to reduce their use of energy, water or other resources,** e.g. through the installation of renewable energy sources, better insulation, more efficient processes such as recirculation systems in aquaculture, etc. In total 84 FLAGs supported 713 entities to make resource efficiencies. We can see from the graph below that energy efficiency results are concentrated largely in six countries: Estonia, France, Spain, Poland, Italy and, to a lesser degree, Greece.

Estonia stands out strongly for resource efficiency results, with an average of 18 entities per area having made efficiencies with FLAG support. FLAGs in France, Spain, Poland and Italy supported on average 8-11 local entities each to improve resource efficiency, while Greek FLAGs supported 5.5 entities on average. However, this did not seem a key priority in most MS, in fact five countries (Bulgaria, Lithuania, Germany, Ireland and Sweden) had on average less than one entity per FLAG area that had improved resource efficiency with FLAG support, and in the other MS just 1-3 entities that had been supported to do so.

Figure 25: FLAGs supporting local entities to reduce resource consumption
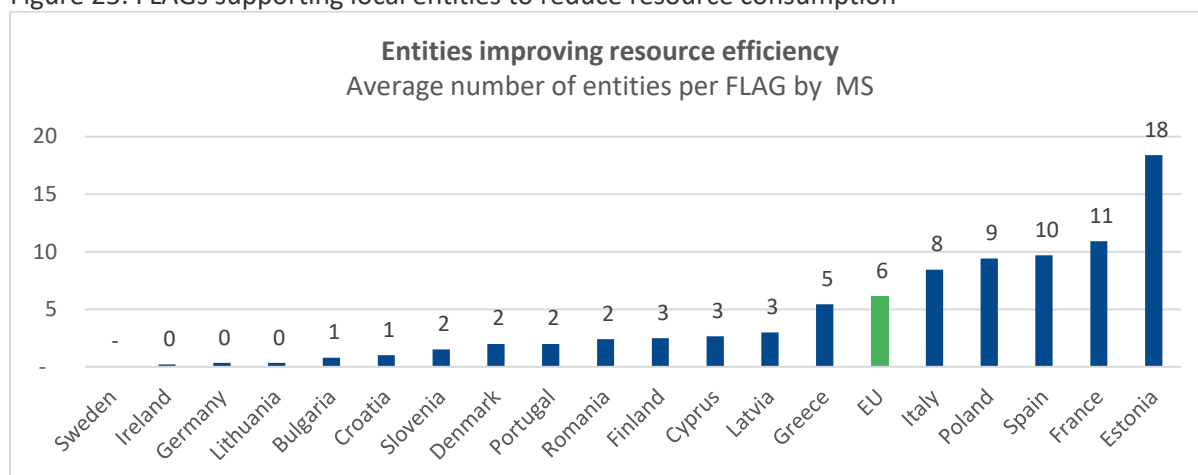
Source: FAMENET survey of EMFF FLAGs, 2024

To conclude our overview of FLAG achievements linked to the environment and reduced resource use, FLAGs appear to prioritise environmental projects to different degrees. A good majority of FLAGs have invested at least to some extent in actions that contribute to good environmental status but operations to improve resource efficiency, however, are less common.

Overall, environmental results are less widespread than economic results, which is consistent with the Infosys finding that 10% of FLAG budgets had been allocated to environmental priorities while 53% of their budget went to adding value and diversification projects.

6.3 CLLD helping to strengthen social fabric, skills and governance

The extent to which local communities can prosper from the natural assets they are endowed with, depends on their capacity to manage and make use of them. For this, knowledge, relevant skills and good governance are all fundamental, as are constructive relationships and collaboration.

Building networks and fostering cooperation

Supporting networking and cooperation are integral to the CLLD approach and are considered to account for a large part of its added value. Indeed, by strengthening contacts and trust between different stakeholders and interest groups, new partnerships, products and solutions to local challenges can often be developed more effectively and with better and more sustainable results.

Examples of networks that FLAGs have supported include networks of women in fisheries, networks of local businesses with services to offer for the offshore wind sector, networks of marine tourism

businesses, processing businesses collaborating on underused fish species, to name but a few[13]. Stakeholders involved in such networks can benefit from knowledge, support and synergies that allow them to realise achievements that would not have been possible by working in isolation.

The FAMENET survey of FLAGs revealed that **187 new networks had been created around Europe and a further 266 networks strengthened** by those providing information. This equates to an average of 2 new networks created in each FLAG area and just less than two existing networks strengthened by each FLAG responding to the survey.

Sweden stands out very strongly with an average of 11 new networks created by the three responding FLAGs. Spain, France and Italy follow for their work to create and strengthen local networks with 8-10 new or strengthened networks reported on average in each FLAG area. No information was provided by Danish, Lithuanian and Irish FLAGs.

Figure 26: Networks can lead to achievements that are not possible by working in isolation
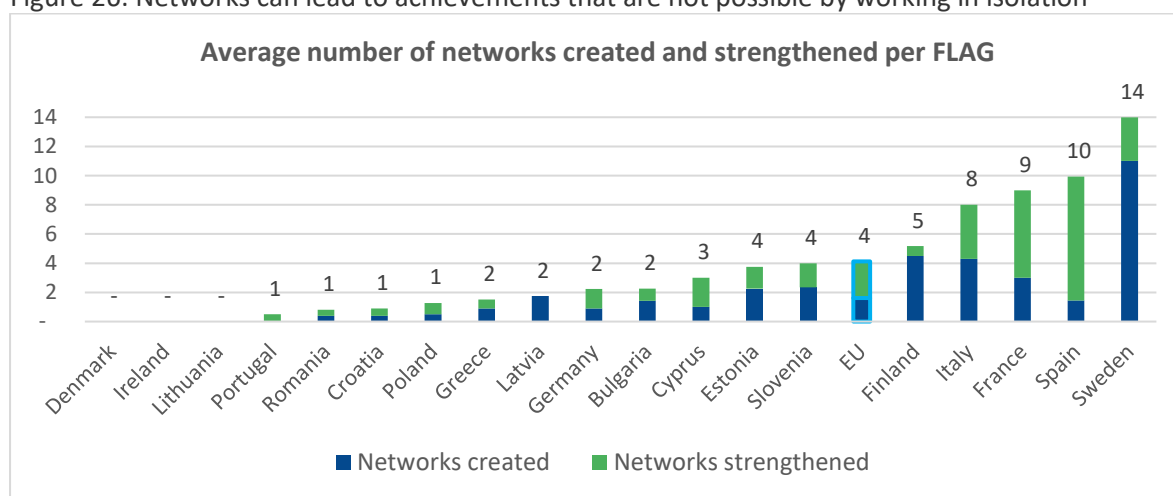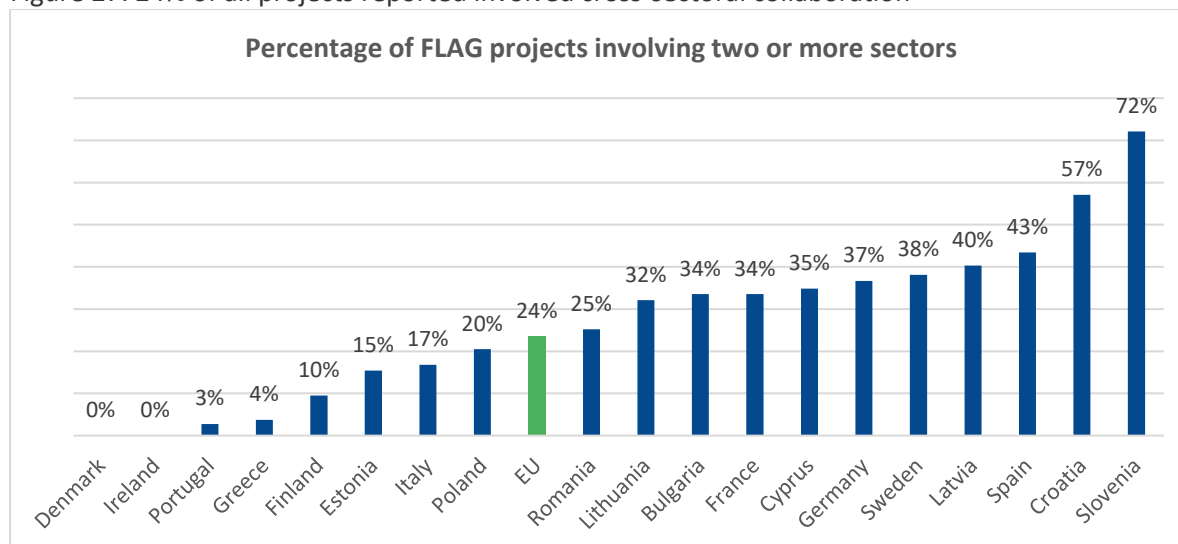

Source: FAMENET survey of EMFF FLAGs, 2024

These networks are one of the ways that FLAGs are helping to strengthen connections between local stakeholders, laying the ground for improved information flow, trust and collaboration between local stakeholders. Indeed, FLAGs reported over 34 800 people to benefit from these networks.

Another contribution of FLAGs to strengthening connections and collaborative working is through supporting **projects that bring together different local stakeholders to work on common challenges or opportunities**, including stakeholders from different sectors. This could involve, for example, collaboration between scientists and fishers around more sustainable gear; collaboration between different stakeholders using port facilities to improve the handling of marine litter; or cooperation between fishers and tourism agencies to launch fisheries-related tourism activities.

Of the 6 605 projects supported by the FLAGs, 1 554 projects were reported to involve two or more different sectors, in other words 24% of all projects supported by the responding FLAGs. As usual, this varies from one MS to another with 70% of FLAG projects in Slovenia emerging as cross-sectoral, and almost 60% in Croatia - while Ireland and Denmark reported no cross-sectoral projects. These two countries also reported no new or strengthened networks.

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[13] *See good practice section of* [FARNET's archived website](#)

Figure 27: 24% of all projects reported involved cross-sectoral collaboration

Percentage of FLAG projects involving two or more sectors

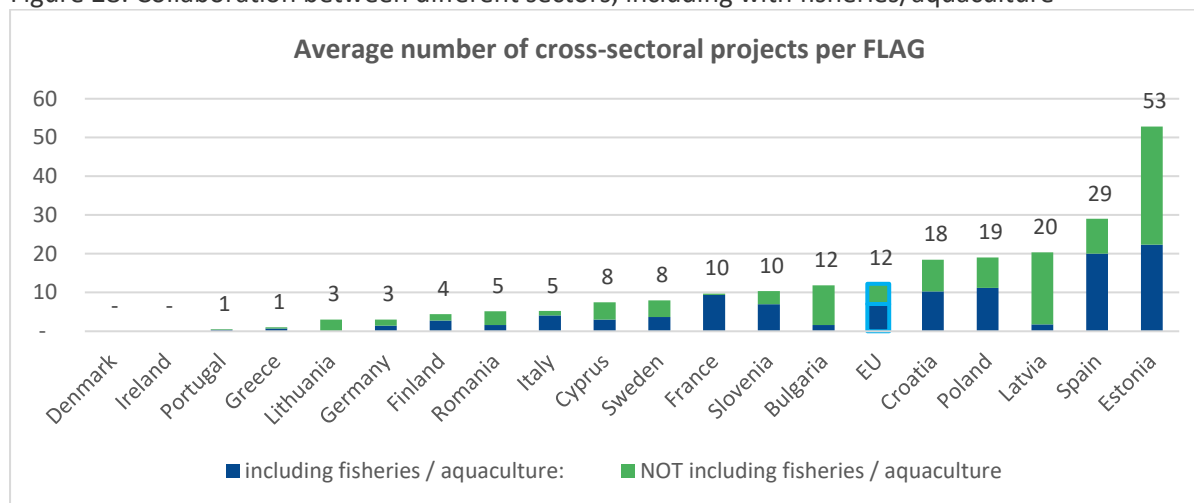| Country	Percentage
Denmark	0%
Ireland	0%
Portugal	3%
Greece	4%
Finland	10%
Estonia	15%
Italy	17%
Poland	20%
EU	24%
Romania	25%
Lithuania	32%
Bulgaria	34%
France	34%
Cyprus	35%
Germany	37%
Sweden	38%
Latvia	40%
Spain	43%
Croatia	57%
Slovenia	72%

Source: FAMENET survey of EMFF FLAGs, 2024

However, with the exception of Ireland and Denmark, all MS reported an average of at least 1 cross-sectoral project per FLAG, and on average FLAGs reported 11 cross-sectoral each (see graph above).

A high percentage of cross-sectoral projects supported involve the fisheries and/or aquaculture sector in working with other sectors such as the public sector, environmental stakeholders or research organisations. **Working with other sectors can be valuable in terms of making fisheries and aquaculture more visible in the local community as well as ensuring them a leading role in developing activities which affect them**. **It can also facilitate innovation.**

Of the 1 554 cross-sectoral projects reported, 60% (929 projects) involved the fisheries and/or aquaculture sector, while 40% (625 projects) involved collaboration among other sectors in the community (e.g. tourism and public authorities; or research and environmental NGOs, etc.). From the graph below we can see that in most MS fisheries and/or aquaculture play a particularly strong role in cross-sectoral projects, this is especially true in France where more than 90% of the cross-sectoral cooperation involves fisheries or aquaculture stakeholders. In a few MS, however, such as Lithuania, Bulgaria and Latvia, cross-sectoral projects have mainly involved other sectors.

Figure 28: Collaboration between different sectors, including with fisheries/aquaculture

Average number of cross-sectoral projects per FLAG

Country	Total
Denmark	-
Ireland	-
Portugal	1
Greece	1
Lithuania	3
Germany	3
Finland	4
Romania	5
Italy	5
Cyprus	8
Sweden	8
France	10
Slovenia	10
Bulgaria	12
EU	12
Croatia	18
Poland	19
Latvia	20
Spain	29
Estonia	53

■ including fisheries / aquaculture: ■ NOT including fisheries / aquaculture
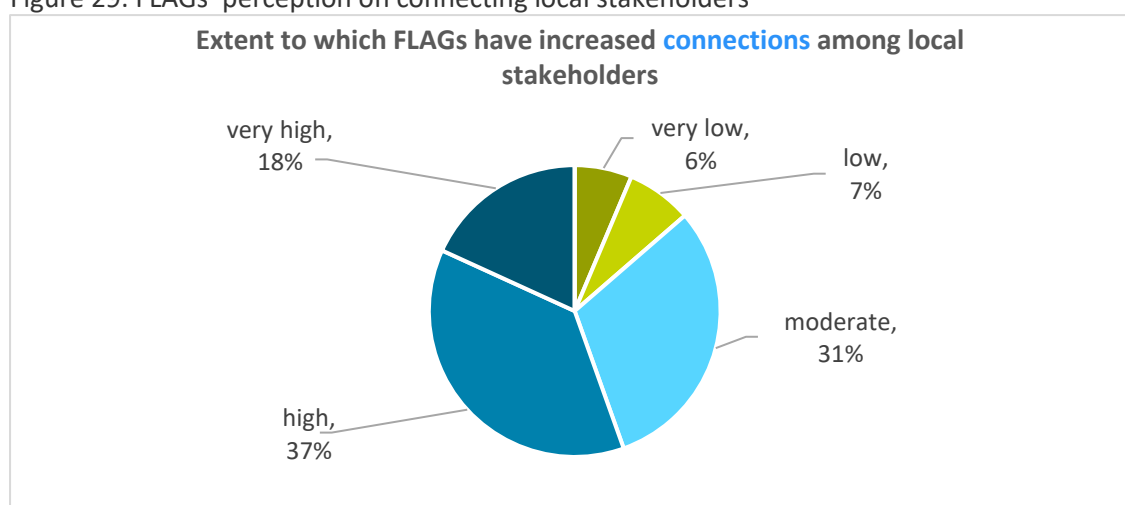
Source: FAMENET survey of EMFF FLAGs, 2024

Whether such collaboration involves the fisheries/aquaculture sector or other local sectors, along with networking, cross-sectoral projects can be a powerful tool for developing connections, collaboration and trust among local stakeholders. Cross-sectoral projects can complement or strengthen relationships built up through networking. They can also emerge because of networking.

Building connections and trust

The assumption is that such networking and cooperation actions, help strengthen the social fabric of a local community through increased connections and trust among local stakeholders. FLAGs were asked to what extent they had had an impact on connections and trust between local stakeholders.

The results can be visualised below. **86% of FLAGs felt they had noticeably increased connections among local stakeholders**, 54% to a high or very high extent.
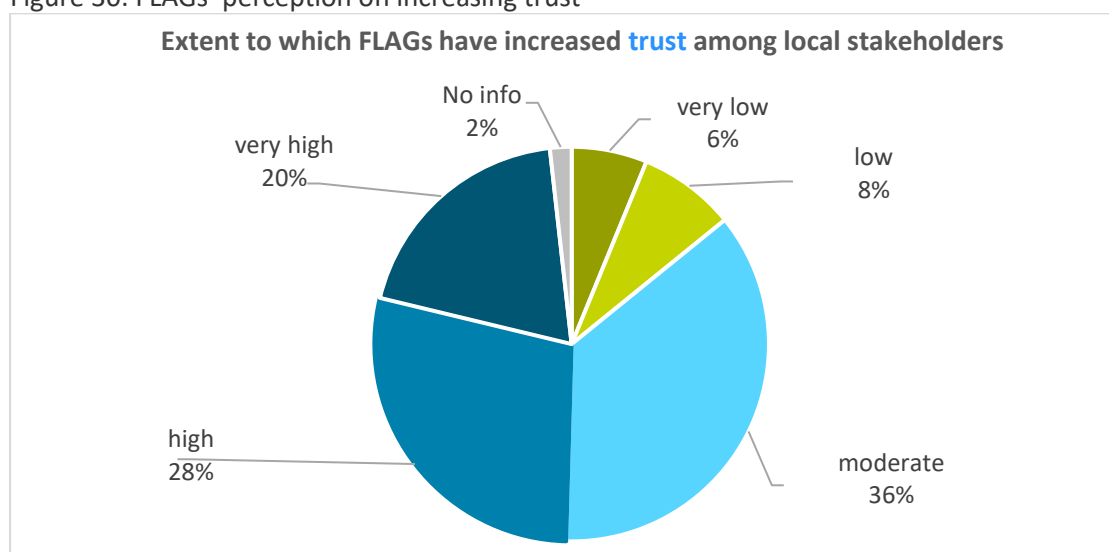
Figure 29: FLAGs' perception on connecting local stakeholders

Source: FAMENET survey of EMFF FLAGs, 2024

FLAGs also believed that they had increased trust among local stakeholders. **94% felt that had had a noticeable impact on increasing trust**, with 48% pointing to a high or very high impact.

Figure 30: FLAGs' perception on increasing trust

Source: FAMENET survey of EMFF FLAGs, 2024

The same questions have been asked in a subsequent survey disseminated to local stakeholders in June-July 2024. The responses of FLAGs and local stakeholders will be compared, and further analysis offered, in our final report on the value of CLLD.

Building and transferring knowledge

Cooperation does not only serve to build connections and trust. It is also a valuable tool for developing and transferring knowledge. As well as cooperation between local stakeholders, FLAGs also have the possibility to cooperate with stakeholders from *other* FLAG areas. This can include working with FLAGs in the same MS, or in other countries, including outside Europe, and can bring specific knowledge into the area that was previously lacking.

A large proportion of cooperation projects between FLAGs involve **study visits and the transfer of existing knowledge and working practices from one area to another**, e.g. more sustainable fishing gear, managing invasive species, or diversification opportunities for fishers, such as pesca-tourism. Others involve **joint reflection and problem solving** for a shared challenge, as was the case of Baltic FLAGs faced with the impact of seals and cormorants on local fishing and aquaculture businesses.

FLAGs responding to the FAMENET survey reported 407 cooperation projects, or almost 3 cooperation projects each. Around **two thirds of responding FLAGs reported at least one cooperation project with stakeholders in other FLAG areas.** Estonia stood out for the number of cooperation projects with other FLAGs, with an average of almost 20 cooperation projects per FLAG. Estonian FLAGs are, in particular, very active in cooperating with each other, often with multiple Estonian FLAGs cooperating on the same project.

Figure 31: FLAGs funded on average three cooperation projects each
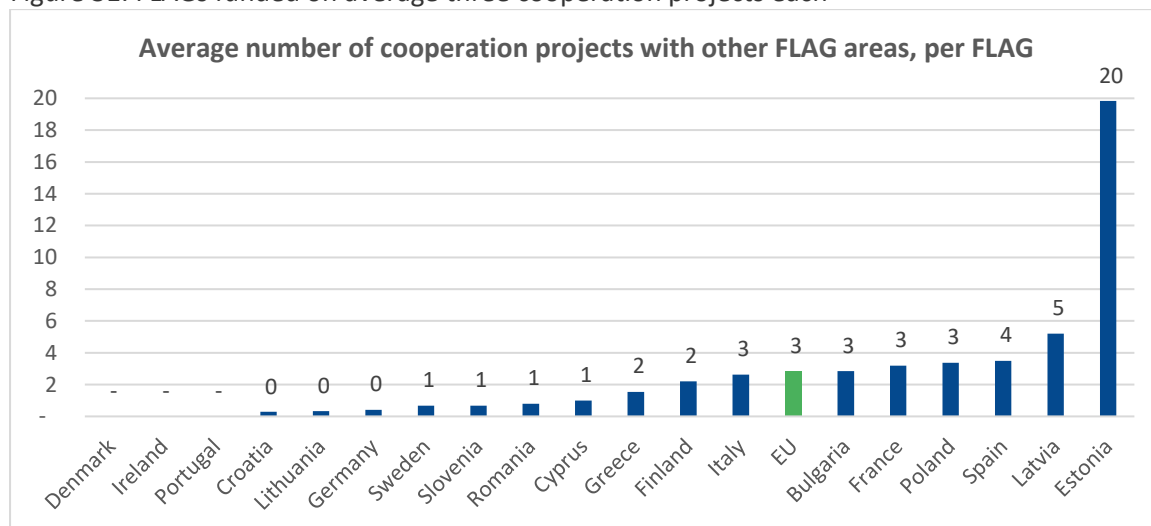
Source: FAMENET survey of EMFF FLAGs, 2024

As mentioned, cooperation projects allow local stakeholders to learn from other areas and gain inspiration for adapting and improving local practices. **Many FLAGs are active in mobilising or facilitating their local stakeholders to learn from other areas**, some through study visits, but also through other actions such as support for local stakeholders to participate in regional or international fairs (e.g. for the fisheries sector, gastronomy events, etc.).

Already in 2023 when the EMFAF programme was still getting launched in most MS, 37% of respondents to the FAMENET survey for the new EMFAF FLAGs reported to have supported local

stakeholders to exchange with stakeholders from another area that year. These 42 FLAGs had supported 843 local stakeholders to exchange with people in other areas. On average, **FLAGs estimated that they had mobilised eleven people per area to exchange with stakeholders in other areas in 2023**. This is expected to increase significantly as all FLAGs get fully operational. Counting just the FLAGs who had facilitated exchanges with other areas, 20 people per area had been supported to exchange with external stakeholders in 2023.

Figure 32: Levering in knowledge from outside the FLAG area
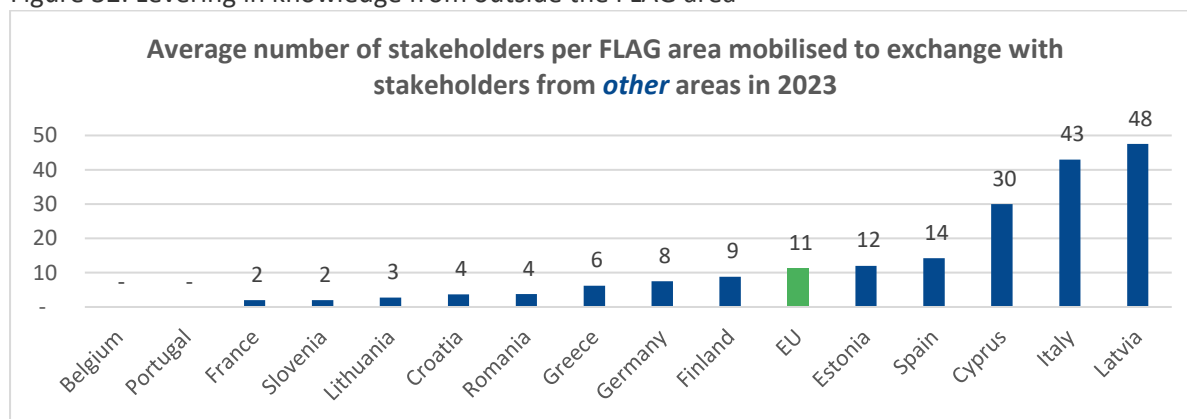
Source: FAMENET survey of EMFAF FLAGs, 2024

Boosting knowledge and skills among the young

Training, direct support and awareness-raising are other ways that FLAGs often help to develop knowledge and strengthen skills in their communities, including among the young. The FAMENET survey of EMFF FLAGs, asked how many young people had benefited from professional training during the EMFF period, as well as how many had benefited from educational and awareness-raising activities. **FLAGs reported that they had supported a total of 5 242 young people to receive professional training**, an average of 35 people trained per FLAG area. Four countries had not supported professional training for young people, while in the other 15 MS implementing EMFF CLLD, the number of people ranged from an average of just two people per FLAG in Portugal and Greece to over 150 people trained per FLAG area in Slovenia.

Figure 33: Investing in the young
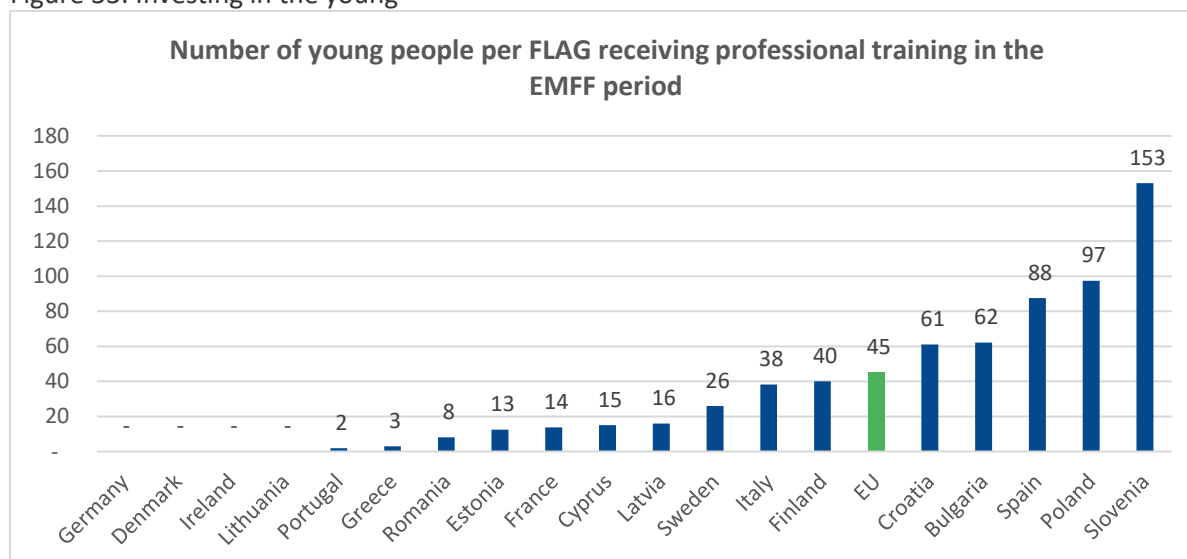
Source: FAMENET survey of EMFF FLAGs, 2024

In terms of educational and awareness-raising activities, **FLAGs pointed to 77 609 young people mobilised**, **or 520 young people per FLAG area.** These sorts of activities include school trips or events to provide information to young people on themes such as careers in the fisheries sector; gastronomy based on local fish species; and the importance of conserving the marine environment. Portugal, Sweden and Poland stand out for the number of young people for which they have supported educational activities.

Figure 34: Ensuring the young are better informed
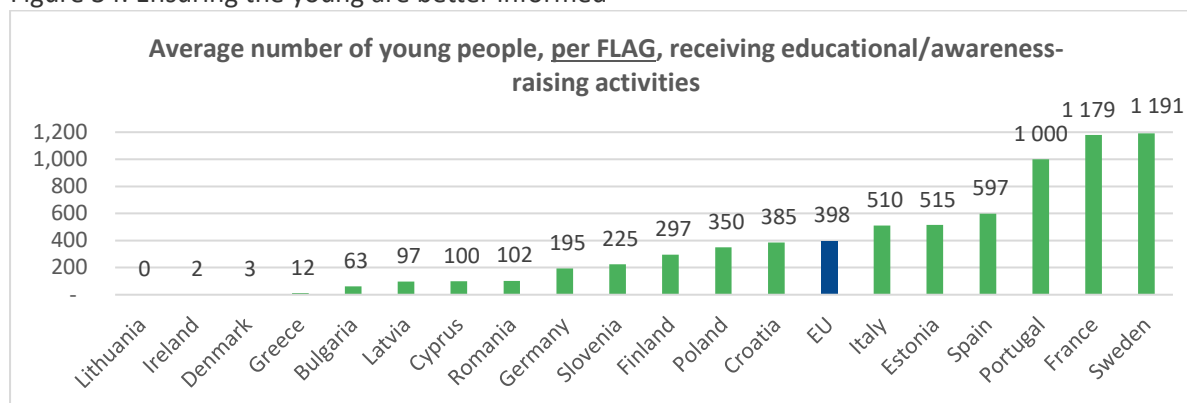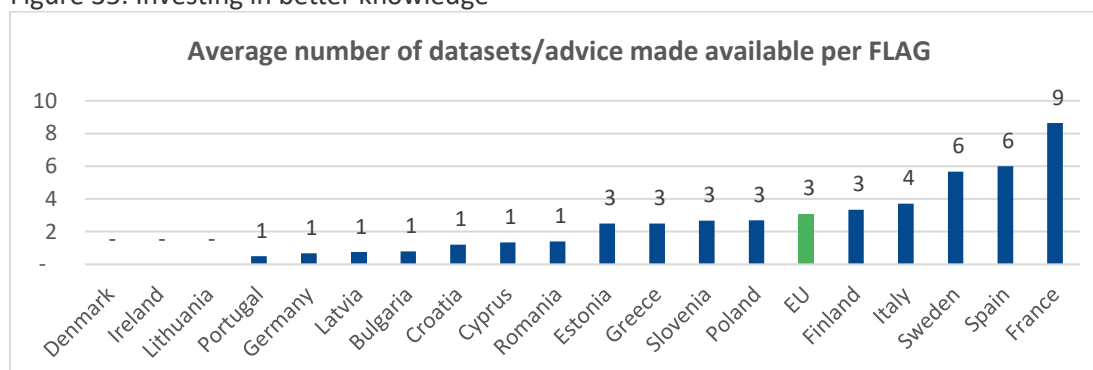

Source: FAMENET survey of EMFF FLAGs, 2024

Of course, plenty of the local events organised by FLAGs have a broader reach that just the young, often aiming to reach the community as a whole, and even tourists and visitors, when it comes to raising awareness of certain issues or promoting the area's fisheries and marine resources. However, the young remain an important section of the population that many FLAGs are investing in.

Better understanding local resources and their potential

Beyond promoting knowledge and raising awareness, many FLAGs also invest in developing a better understanding of important issues and, in particular regarding local resources, how best to manage them and how to capitalise on their potential.

Of the FLAGs responding to the question on data sets, 65% confirmed that they had made at least one data set available, with **a total of 331 datasets or advice available**. These sorts of projects include scientific studies and reports, the mapping or monitoring of natural resources and fish stocks, mapping of potential service providers for different activities, market studies for new products, etc. On average, FLAGs reported three different datasets each, with Spain, France and Sweden leading in terms of bringing datasets into the public domain.

Figure 35: Investing in better knowledge

Source: FAMENET survey of EMFF FLAGs, 2024

This knowledge is a vital ingredient for improving the management and governance of local resources as well as for developing innovative practice and new products. Thus, FLAG investment in new knowledge lays the ground for a series of new economic activities as well as better conservation of natural resources.

Fostering better governance

Supporting the development of improved knowledge regarding local resources, as well as building stronger connections and a culture of cooperation among local stakeholders, can all lead to better governance of local resources, based on more collaborative and enlightened decision-making. FLAGs are also examples in themselves of multi-level governance, linking policy decisions made at EU and national level to concrete action on the ground.

Many FLAGs have also funded specific projects aimed at improving local governance. This covers projects that increase the institutional capacity of local stakeholders to express their interests and/or mediate their differences to manage public affairs in a collaborative manner, e.g. projects that bring different stakeholders together to improve coordination between different coastal activities or improve decision-making.

Examples of projects to improve local governance include the creation of inshore fisheries forums around the coast of Ireland to ensure small-scale coastal fishers' direct involvement in decisions related to fisheries management; the participative development of a resource management plan for the Italian region of Emilia Romagna, involving fishers, aquaculture producers, marine biologists and other experts; and a collaboration in Brittany, France, between shellfish producers, farmers and other stakeholders to improve the detection and reduction of water pollution from on-land sources.

Of the 149 FLAGs taking part in the survey, 101 provided information on governance actions. These FLAGs have supported **400 actions to improve governance, an average of 4 actions per FLAG**. Italy, Romania and Latvia stand out in terms of the number of different governance-focused projects supported, with on average nine or more actions per FLAG. Ireland is among the MS with no information, even though FAMENET is aware of projects such as the inshore fisheries forums.

Figure 36: FLAGs in most countries funded specific actions to improve governance
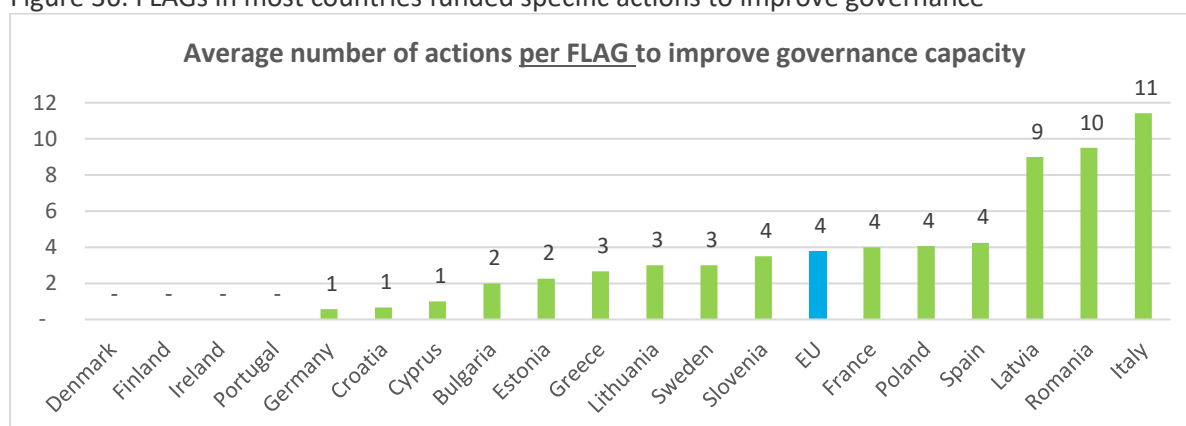
Source: FAMENET survey of EMFF FLAGs, 2024

When it comes to the *results* of these actions, and indeed the presence of the FLAG in general, we asked FLAGs whether they believed that the existence of the FLAG had led to improved governance in their area. **Sixty-four percent of responding FLAGs reported that the FLAG had improved governance**, 24% did not feel the FLAG had improved local governance and 12% did not have the

relevant information to respond to the question. To corroborate this information provided by the FLAGs, the same question was put to 900 local stakeholders around Europe in a subsequent survey. The answer will be explored in our final synthesis report. At this stage, however, there is already a degree of evidence to suggest that FLAGs do indeed contribute to improving governance at local level.

Figure 37: 64% of respondents felt that local governance had improved thanks to the FLAG

FLAGs contributing to better local governance

No Info
12%

no
24%

yes
64%
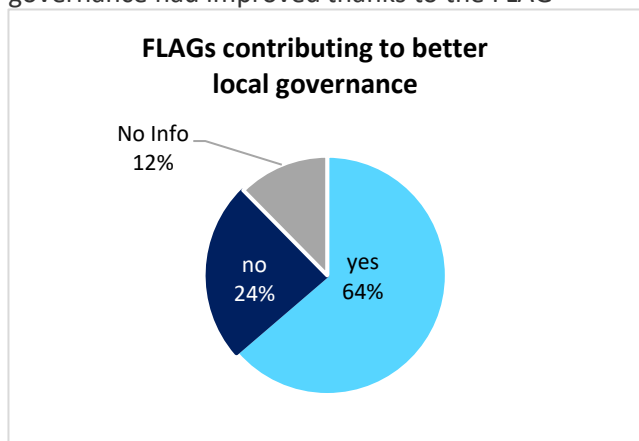
This chapter offers initial evidence that through proactive support to developing knowledge and cooperation, FLAGs contribute to strengthening social fabric, skills and governance in fisheries and aquaculture areas. This is expected to have a positive impact on the ability of these communities to look after their environmental resources, target economic resources to the most relevant needs, and to innovate.
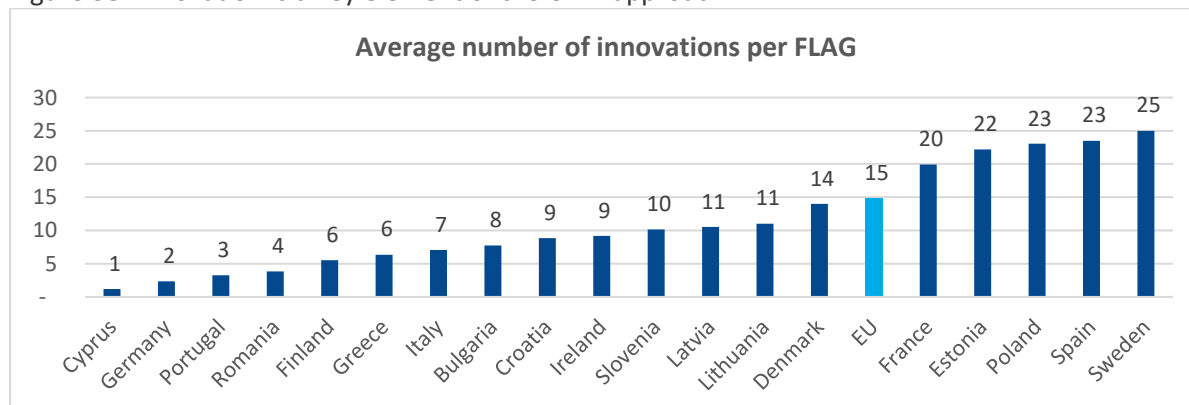
Source: FAMENET survey of EMFAF FLAGs, 2024

6.4 Innovation in the local context: FLAGs bringing change to coastal communities

Innovation is among the seven principles of the CLLD approach. The CLLD method is designed to mobilise new people and new partnerships to propose and implement new solutions to local challenges. Innovation can include new products or services; new processes, business models and ways of working; it can be social innovation or technological. Importantly, innovation is understood to be in the local context, in other words the new product or process can be invented in the area, or it can be transferred from elsewhere, adapted to the local context, and implemented in the area for the first time.

FLAGs responding to the survey question on innovation reported 1 520 innovations that they had supported in their areas, or an average of 15 innovations each. Sweden, Spain, Poland, Estonia and France stood out with an average of 20 or more innovations per FLAG in those countries. All MS reported an average of at least one innovation in every FLAG area.

Figure 38: Innovation is a key element of the CLLD approach

Average number of innovations per FLAG

Cyprus	Germany	Portugal	Romania	Finland	Greece	Italy	Bulgaria	Croatia	Ireland	Slovenia	Latvia	Lithuania	Denmark	EU	France	Estonia	Poland	Spain	Sweden
1	2	3	4	6	6	7	8	9	9	10	11	11	14	15	20	22	23	23	25

Source: FAMENET survey of EMFF FLAGs, 2024

FLAGs were also asked to categorize the innovations supported into five different types: new products or services; new processes; new technologies or digitalisation; social innovation; and "other" innovations. Fifty percent of innovations were reported to be new products and services (771 in total), for example, new uses for fish by-products (for cosmetics, fish meal, leather from fish skin) or new types of coastal tourism (e.g. swimming with tuna), among many others.

Figure 39: Innovation in FLAG areas

1 521 innovations enabled by responding FLAGs

- Other 4%
- Social innovation 14%
- New technologies/ digitalisation 15%
- New processes 17%
- New products/ services 50%
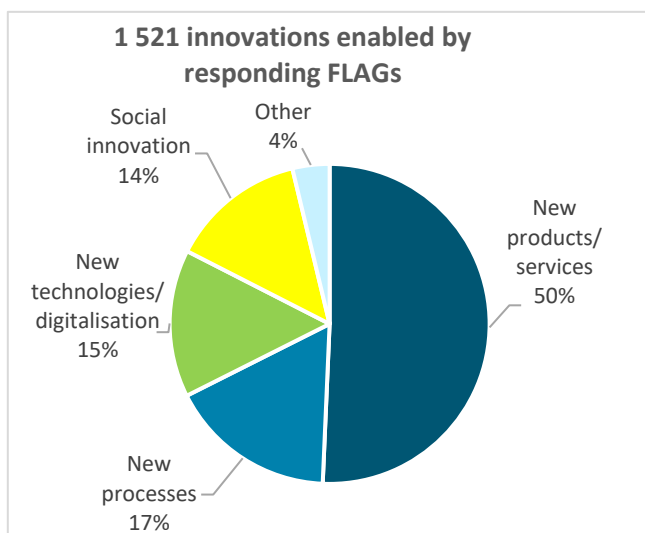
Source: FAMENET survey of EMFF FLAGs, 2024

The 257 new processes reported made up the second biggest category of innovations (17%). This can include more participative approaches to managing fish stocks or developing new systems for managing marine litter and waste brought back to land by fishing vessels. Close behind (227 innovations) came new technologies and digitalisation, including projects to develop apps for shellfish gathers, digital traceability systems for small-scale fishers and an app to facilitate the new leisure activity of "plogging", picking up beach litter while jogging.
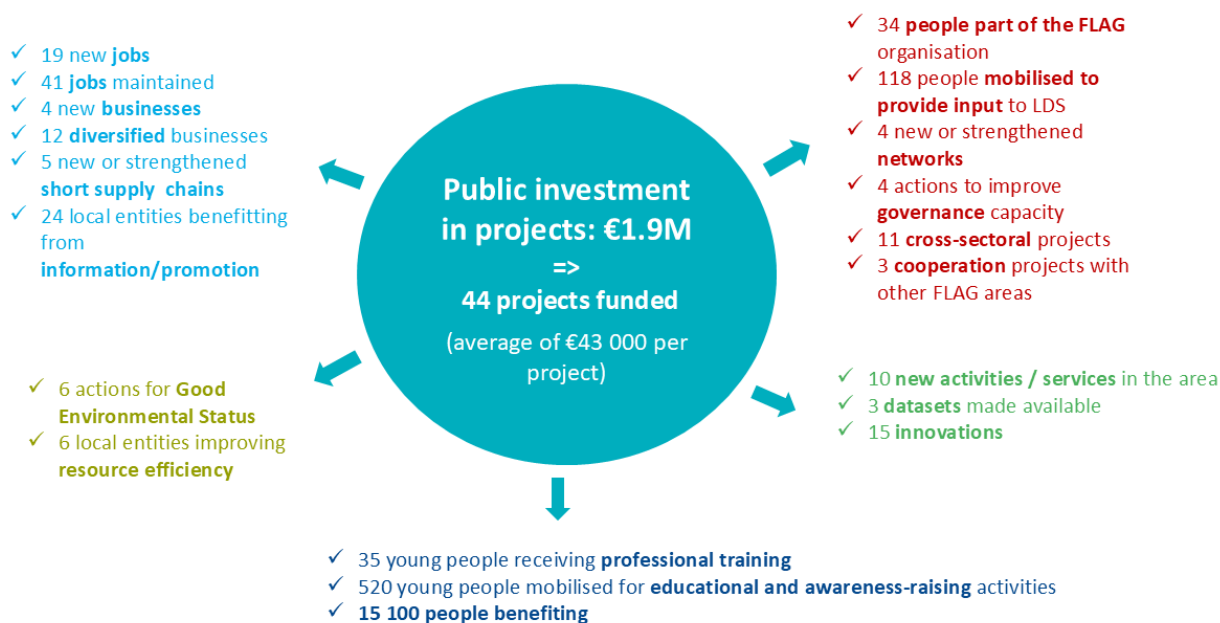
Over 200 social innovations were also reported, such as new models to help the disabled into adapted work in the aquaculture sector or circular economy activities linked to marine litter; blue care services offered by fishers; and the launch of community aquaculture gardens in city harbours.

Many of these projects will plant the seed for gradual change and improvements for work and life in coastal communities. Others will bring considerable change to working conditions, quality of life and opportunities in fisheries and coastal areas.

Overview of FLAG survey results

The survey to FLAGs revealed a range of different results, achieved by CLLD in the 2014-2020 period, from economic, to environmental to social. While all FLAGs are operating in different contexts with different priorities, figure 40 offers an illustration of what a typical FLAGs has achieved on the ground. The next chapter will look at *how* FLAGs are doing this and some of the value that comes from the process.

Figure 40: A broad approach to developing fisheries and aquaculture areas: results of an "average FLAG" under the EMFF.

- 19 new **jobs**
- 41 **jobs** maintained
- 4 new **businesses**
- 12 **diversified** businesses
- 5 new or strengthened **short supply chains**
- 24 local entities benefitting from **information/promotion**

- 6 actions for **Good Environmental Status**
- 6 local entities improving **resource efficiency**

Public investment in projects: €1.9M
=>
44 projects funded
(average of €43 000 per project)

- 34 **people part of the FLAG** organisation
- 118 people **mobilised to provide input** to LDS
- 4 new or strengthened **networks**
- 4 actions to improve **governance** capacity
- 11 **cross-sectoral** projects
- 3 **cooperation** projects with other FLAG areas

- 10 **new activities / services** in the area
- 3 **datasets** made available
- 15 **innovations**

- 35 young people receiving **professional training**
- 520 young people mobilised for **educational and awareness-raising** activities
- **15 100 people benefiting**

Source: FAMENET survey of EMFF FLAGs, 2024

7 Fisheries LAGs: a tool for mobilising and empowering local stakeholders

Up to 25% of the budget allocated to each FLAG may be used for running and animation costs (CPR Article 34). An important part of this budget is used for community outreach, or "animation", to engage with local stakeholders, understand their needs, ideas and skills and mobilise them to participate actively in bringing solutions to local issues. It also covers supporting candidates to develop and present their projects, meetings between FLAG members, strategy discussions and the selection of local projects.

A survey of the FLAGs selected for the EMFAF period[14] (some starting operations for the first time and others launching work for their third programming period) aimed to capture the **representativeness of FLAGs and offer insight into their outreach and communication activities.** It also aims to provide information on the FLAGs' **ability to mobilise local stakeholders and make EU funds accessible**.

This survey complements the information gained from the survey of EMFF FLAGs which shed some light on the topic, indicating the numbers and types of beneficiaries supported with project funding in the past period and FLAG satisfaction with the delivery system in place in their country or region.

7.1 Bringing together different interest groups

The newly set-up EMFAF FLAGs indicated that, on average, 17 people sit on their board or decision-making body. This ranges from just 3-4[15] people in MS such as Romania and Portugal to as many as 50 in France and over 80 in Estonia. As for the number of people sitting on the FLAG General Assembly, this was reported by 80 FLAGs (not all FLAGs have both a separate board and a General Assembly). Where reported, FLAG General Assemblies comprise between five and 100 members.

These figures in themselves highlight the capacity of CLLD to mobilise local stakeholders around a common aim. Indeed, the 80 FLAGs providing information on their General Assembly have a total of 2 687 members (an average of 34 members each). Extrapolated to EU level[16] this would imply **almost 11 700 people mobilised and dedicating time to driving forward local development in fisheries and aquaculture areas,** with the support of the EMFAF. While the figures also reveal large differences between the number of different stakeholders that FLAGs mobilise to be part of the FLAG, all responding FLAGs with just two exceptions,[17] involve a minimum of 11 people in the formal structure of the FLAG (i.e. on the board and/or general assembly).

In terms of the different interest groups represented on the decision-making bodies, the graph below illustrates the different types of interest groups mobilised. These stakeholders decide which projects will receive funding and are responsible for ensuring the FLAG's local development strategy is implemented.

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[14] *113 FLAGs from 15 MS responded to the survey. PL and BG had not yet selected FLAGs and therefore responses were not obtained in these countries. SE and DK do not fund CLLD under the EMFAF.*

[15] *Those FLAGs reporting just three board members, all had General Assemblies (GA) with 20-65 members – with the exception of one, which had GA 8 members.*

[16] *300 FLAGs expected in the 2021-2017 period.*

[17] *One Portuguese FLAG with just 5 board members and no information on a general assembly, and a new Spanish FLAG (Ceuta) which reported 4 board members and no information on a General Assembly.*

Figure 41: The fishing sector is present on 86% of FLAG boards
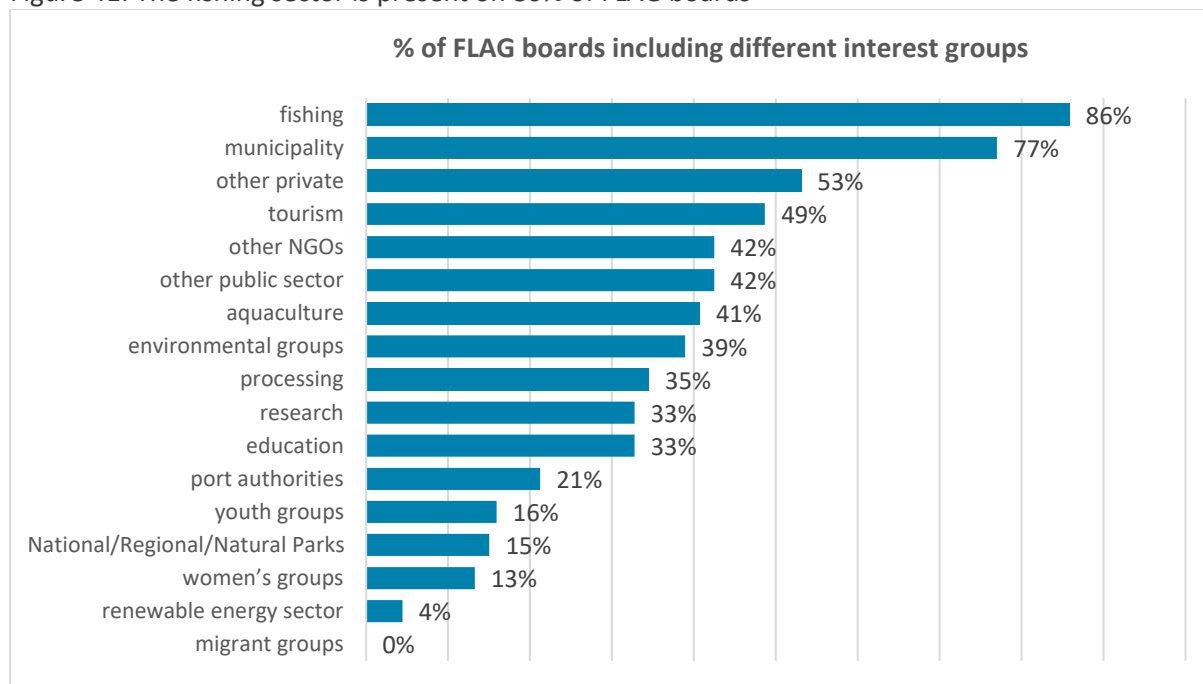
Source: FAMENET survey of EMFAF FLAGs, 2024

We can see that the fishing sector is the most heavily represented interest group, with 86% of responding FLAGs indicating that they were present on the board. The second largest interest group are local municipalities which were represented on 77% of FLAG boards. A variety of private sector representatives came in third place, followed by tourism stakeholders which sat on the board of 49% of FLAG boards in the sample.

On average, FLAGs counted six different interest groups on their decision-making body. The presence of 10 or more sectors were reported by 21 FLAGs, of which 11 from France. Low representation of different types of interest groups (less than 4) was reported by 17 FLAGs, from a mix of countries (EE, EL, ES, FI, HR, IT, PT and RO). What stands out is the diversity in numbers and types of interest groups on the FLAGs boards, four of which are illustrated below.

Figure 42: Every FLAG has its own unique mix of interest groups represented on the board

Malaga FLAG, Spain

North Kurzeme FLAG, Latvia
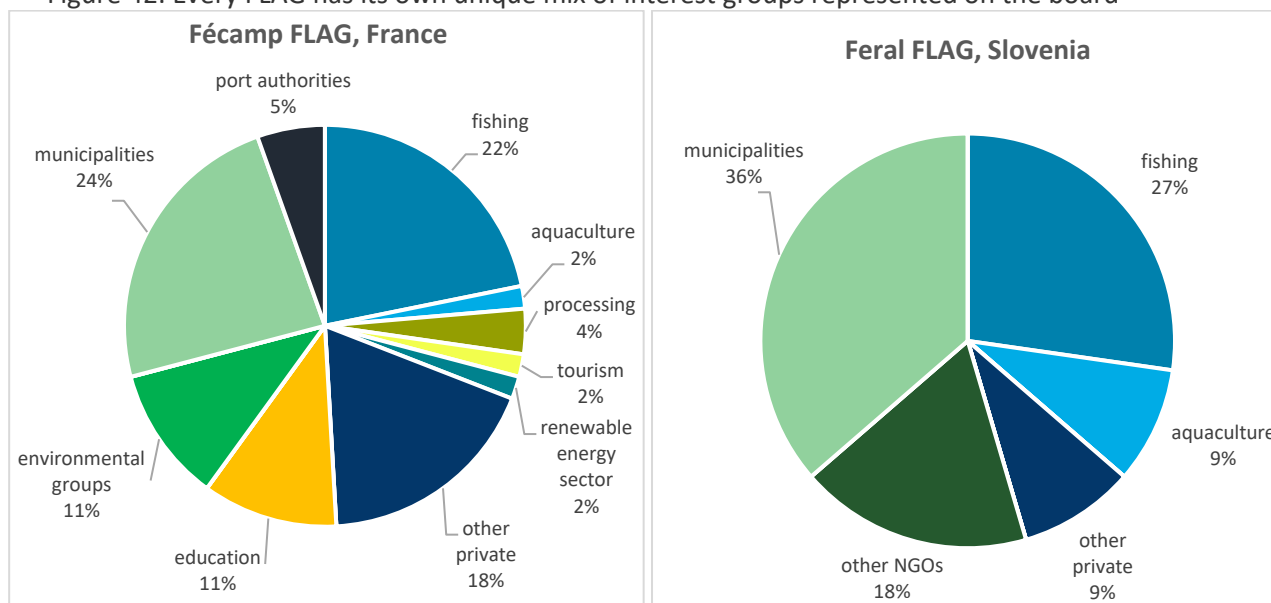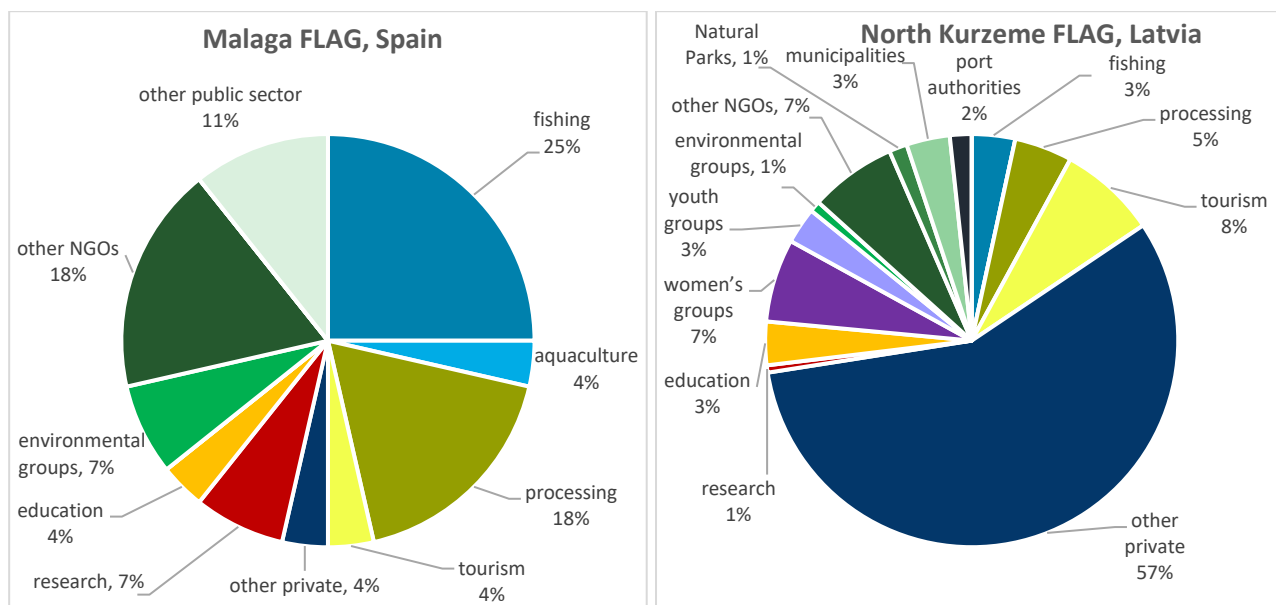
Source: FAMENET survey of EMFAF FLAGs, 2024

Finally, in terms of female representation on the FLAG boards, we see that 25% of board members are women. This is a little higher than the percentage of female beneficairies (according to the Infosys data presented in Chapter 4, just 20% of CLLD beneficiaries were female). However, it is still quite some way from reaching gender equality.

Figure 43: Women make up 25% of FLAG board members around the EU

Female and Male representation on FLAG boards
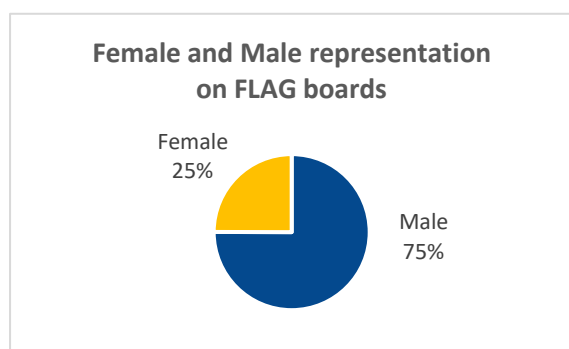
Of course, this reflects to a large extent the male dominance of the fishing sector which is the biggest interest group represented on FLAG boards. More worrying perhaps is the fact that 13 FLAGs (out of 103, or 13%) have no female representation at all on their decision-making bodies, 5 of these from Portugal. At the other end of the scale, five FLAGs have 60-86% female board members, all five from France or Spain.
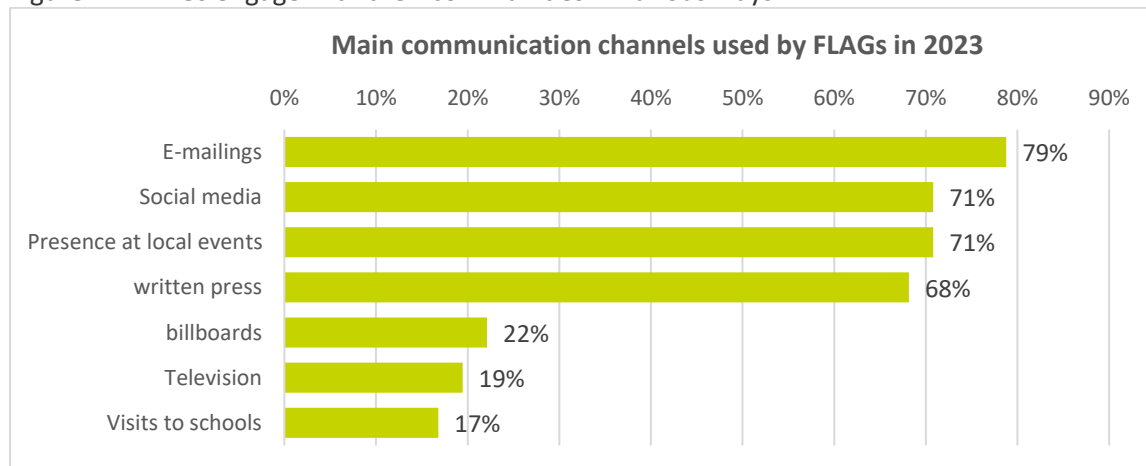
Source: FAMENET survey of EMFAF FLAGs, 2024

7.2 Bringing the EU to local communities

Besides involving local stakeholders as active members of the FLAG General Assembly and/or board, local stakeholders were also mobilised to give input to the local development strategy. The 105 FLAGs responding to the survey question, reported to have mobilised over 12 400 people to provide input for the FLAG's local development strategy, an average of 118 people per area. Extrapolated to the 300 FLAGs expected in the 2021-2027 period, we are talking about **the mobilisation of over 40 000 local stakeholders to provide ideas and feedback into how EU funds are spent in their local community**. This can help make the European project more tangible to citizens and involve them directly in rethinking the future of their area.

The presence of the FLAG team in the local area also means that **stakeholders that are eligible for funding are more likely to hear about the opportunities brought by the EMFAF**. Once the FLAG strategy has been developed, FLAGs invest time and resources in promoting their strategy and

ensuring that potential beneficiaries are aware of the opportunity for funding and receive the support needed to apply. This is done through a variety of communication channels as can be seen below.

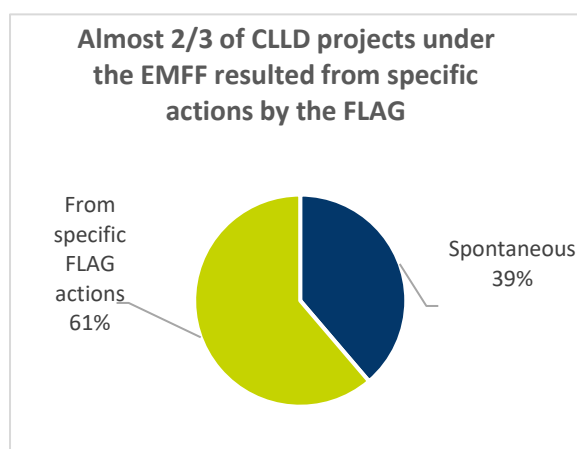Figure 44: FLAGs engage with their communities in various ways

Main communication channels used by FLAGs in 2023

Channel	Percentage
E-mailings	79%
Social media	71%
Presence at local events	71%
written press	68%
billboards	22%
Television	19%
Visits to schools	17%

Source: FAMENET survey of EMFAF FLAGs, 2024

Information sessions and events for the public are also a common tool that FLAGs use to present funding opportunities and to foster thematic exchanges. In the year of 2023 alone, 113 FLAGs from 15 MS organised **545 information sessions for the public**, almost 5 events each that year. A total of **393 thematic exchanges** were also organised by these FLAGs, or around 3 per FLAG.

These averages hide considerable variety from one MS to another. It should also be noted that 2023 was a year for preparing the strategy in some countries, while in others, strategy preparation had already been completed and meetings focused more on support to implement projects. Despite the peculiarity of 2023, a total of over 12 000 people attended meetings organised by the 98 FLAGs responding to the question, including 1 580 informal meetings, such as bilateral meetings with potential project promoters. **Around 1 660 project ideas were discussed in 2023 with the FLAGs** that provided information on these activities.

These outreach activities explain why FLAGs estimated that two thirds of the projects they supported in the EMFF period (4 344 of 6 605 projects reported) resulted from specific actions and support from the FLAG, while just one third were presented spontaneously by candidates, e.g. following a call for proposals being published on a website. This demonstrates the **value of having a local team on the ground** with a specific mission to ensure the funds reach local citizens.

Figure 45: FLAGs are instrumental in helping local stakeholders access EU funds

Almost 2/3 of CLLD projects under the EMFF resulted from specific actions by the FLAG

From specific FLAG actions 61%

Spontaneous 39%

Source: FAMENET survey of EMFF FLAGs, 2024

Besides helping community members access the EMFF/EMFAF from their CLLD budget, many FLAGs are also active at helping project promoters access other EU funds, when relevant. This might involve directing a candidate to a more relevant fund or supporting them to access such funds in a follow-up project, e.g. to upscale a pilot or to carry out additional activities. As can be seen in the graph, FLAGs estimated that as well as funding around 6 500 projects with their own budgets, they facilitated a further 3 000 projects, which accessed other funds.

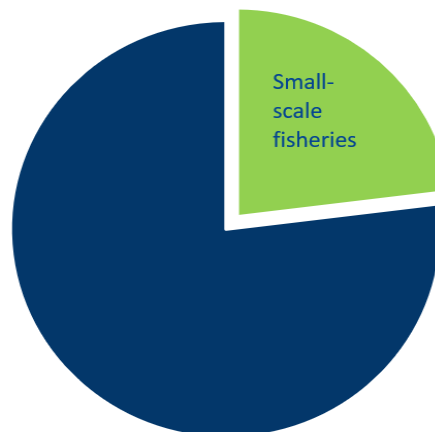Figure 46: Accessing alternative funds
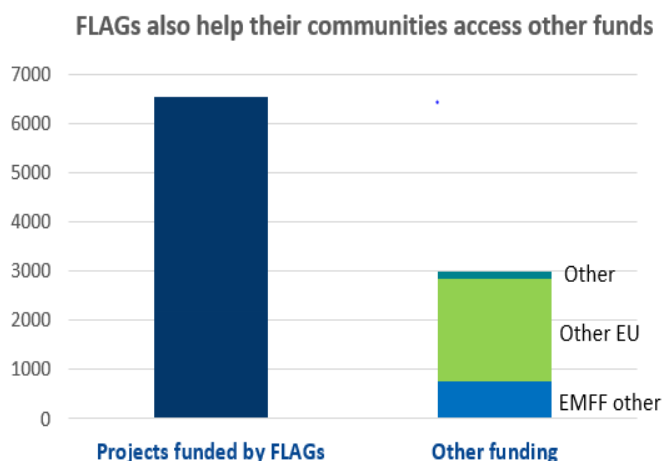
Source: FAMENET survey of EMFF FLAGs, 2024

Reaching the hard to reach

FLAGs play an important role in **ensuring the funds reach those that most need support**, as well as mobilising **those best placed to realise the objectives of the FLAG strategy,** and **new stakeholders** that can improve development potential and adaptability.

Small-scale fishers are a key target audience of most FLAGs, and the survey results point to 23% of FLAG-funded projects going to small-scale fishers or projects that directly involve and benefit small-scale fishers. Such projects range from basic machinery and equipment to improve working conditions, to more complex projects involving new activities and ways of working for fishers (e.g. apps to digitize reporting and information relevant to their work; the development of direct (including online) sales for their fish, and other new revenue sources for fishers. Many projects involve the promotion of local fisheries products, e.g. through the creation of quality labels, promotional events or collaboration between fishers and local canteens to make local fish a staple product of the menu.
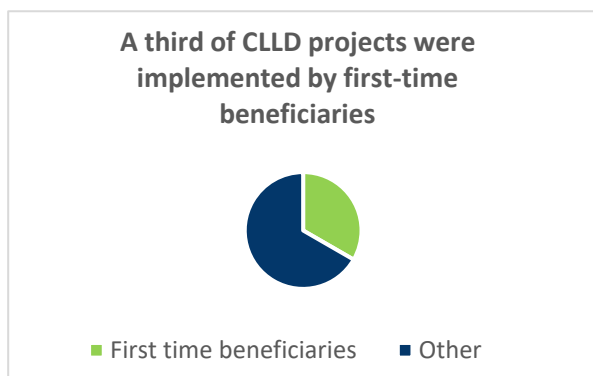

Source: FAMENET survey of EMFF FLAGs, 2024

The mobilisation of small-scale fishers can be challenging for several reasons: the fact that the work takes place out at sea is an obvious constraint to engaging with development stakeholders. A poor culture of collaboration and low levels of literacy among fishers are additional challenges. The fact that a **local team exists to encourage and support fishers and others who might not have experience in accessing EU funds appears to make a difference**.

The analysis of FAMENET's subsequent survey to local stakeholders will explore further the extent to which project promoters would have undertaken their project without FLAG support. In the meantime, we can already point to a few figures:

➢ 23% of projects were undertaken by or for small-scale fishers,
➢ 14% of projects involved collaboration of fisheries or aquaculture stakeholder with other sectors
➢ 90% of companies supported were small or micro companies
➢ 30% of project promoters received EU funding for the first time thanks to the FLAG
➢ 16% of projects were implemented by young people (40 years or younger)

Figure 47: FLAGs bring EU funding to new stakeholders

A third of CLLD projects were implemented by first-time beneficiaries

■ First time beneficiaries   ■ Other

Source: FAMENET survey of EMFF FLAGs, 2024

The ability of FLAGs to mobilise stakeholders who have not previously accessed EU funding is an important feature of CLLD. It makes the European project accessible to more people and it mobilises more diversity in response to local challenges: new perspectives, new ideas, new skills and knowledge. It can mean more informed decision-making as more points of view are taken into consideration and, as we have seen, can bring innovation and change to fisheries and coastal areas.

7.3 Delivery systems

As mentioned above, community outreach ("animation") is an important part of the FLAG's work which makes it possible to mobilise new and harder to reach stakeholders. However, this is only possible if there is sufficient time and resources to do it. Two elements are key: sufficient human resources and a delivery system that does not place too much administrative burden on beneficiaries or the FLAG staff. Easy and constructive communication with the national or regional administration also facilitates efficient implementation of CLLD, as does the provision of support by a national network or the relevant administration.

While 60% of FLAGs rated communication with their national or regional administration as positive or very positive (4/5 or 5/5) and 55% rated the support they received from them at 4/5 or 5/5, only 30% of FLAGs considered that the administrative systems put in place for CLLD facilitated their work. A further **30% of FLAGs surveyed considered that the delivery systems actually hindered or *seriously* hindered** their ability to implement their local development strategy.

Figure 48: Some administrative systems hinder FLAGs' work
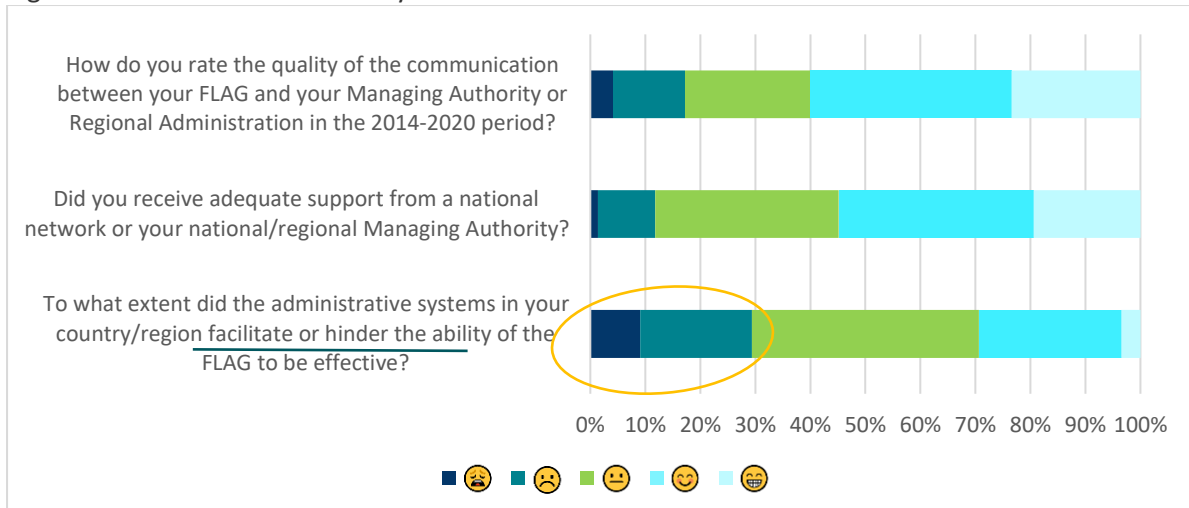
Source: FAMENET survey of EMFF FLAGs, 2024

This is something for national and regional administrations to bear in mind when trying to maximise the results that FLAGs can bring to fisheries and coastal communities. Complicated or lengthy administrative procedures can undermine the ability of FLAGs to make the most effective use of EU funds or ensure they reach those that could most benefit.

In our analysis of the results of the FAMENET survey to local stakeholders, we shall examine the perception of local stakeholders regarding the FLAGs, their support and the ease of accessing EU funding.

8 Conclusions

This first report highlights that while CLLD delivers impressive results in certain thematic areas and especially in certain MS, in-depth EU-wide analysis of fisheries CLLD is not widespread.

Data reported in Infosys by December 2023 for the EMFF funding period demonstrates very clearly that EMFF-funded **CLLD was by far the most effective EMFF measure for job creation**, a key concern in many fisheries communities. Information reported by the FLAGs in the 2024 FAMENET survey corroborates this conclusion, along with the CLLD's contribution to maintaining jobs in these communities and (to a more limited extent) creating new companies.

More prevalent than the creation of new enterprises, were the examples of **companies supported to diversify revenue sources** – both of fisheries-related companies and non-fisheries-related. Moreover, FLAG support to strengthen local supply chains for fish and seafood had yielded results in all MS implementing EMFF CLLD, with **new sales channels created locally and existing sales channels increasing their offer of local fish**.

While 91% of FLAGs had funded at least one environmental project, this theme emerges as a **secondary priority for most FLAGs**. Equally, the presence of women and young people as project promoters was relatively low, even if CLLD mobilised twice as many female beneficiaries as the EMFF average.

What stands out is the **ability of CLLD to build connections and foster cooperation between stakeholders at local level, including with the small-scale fisheries sector** which has benefited from almost a quarter of projects. This collaboration between different sectors may explain the improved local governance and improved trust among stakeholders that FLAGs point too. It may also explain much of the **innovation being supported in FLAG areas**.

However, while the results demonstrate that FLAGs in some MS have delivered impressive results with a relatively small amount of money, others appear to produce fewer results – or at least they do not appear to be captured with the indicators used in this study.

To further analyse the initial results presented in this report, and to understand why CLLD yields different results in different MS, FAMENET will undertake a series of eight MS case studies in which the figures revealed by Infosys and the FLAG surveys will be explored in further detail. This information will be complemented by the results of another survey: a survey to which over 900 local stakeholders in those MS responded. A synthesis report of these studies will be available early 2025.