



Socio-economic impacts of the winter dolphin closure in the Bay of Biscay (STECF PLEN 26-01)

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Measure at a glance

- **Area:** Bay of Biscay – French waters (ICES Subarea 8)
- **Period:** 22 January–20 February (2024; continued 2025–2026)
- **Fleets/gears impacted:** vessels >8 m using PTM/OTM/PTB/PS/GNS/GTR/GTN



STECF PLEN ToRs

Summarise findings of the ad hoc socio-economic report

Review methodology, scenarios and robustness

Discuss ‘compensation’ patterns (Q1, annual, displacement)

During the plenary week (STECF), compare with IFREMER vessel-level assessment

Reports reviewed

- Ad hoc STECF report: EU databases (FDI + AER) to assess impacts and recovery/compensation by segment–gear for France and Spain.
- IFREMER report (Guyader et al., 2024): vessel-level weekly/monthly monitoring for French fleets, focusing on closure-week losses and recovery up to Aug 2024.
- SWWAC submissions (5 documents): stakeholder evidence from fishers and the supply chain, including Spanish (OPs) and French downstream views.

(1) Ad hoc data & unit of analysis

- FDI: quarterly landings & value
- AER: cost/economic structure
- Unit: segment–gear combinations (DCF framework)
- Main indicator: Real Landings Value (2025 base year)

(2) Screening logic

- Initial identification: 69 potentially affected segment–gear combinations
 - Mostly France (52) and Spain (12)
- Retained after checks: 50
 - France (40) and Spain (10)

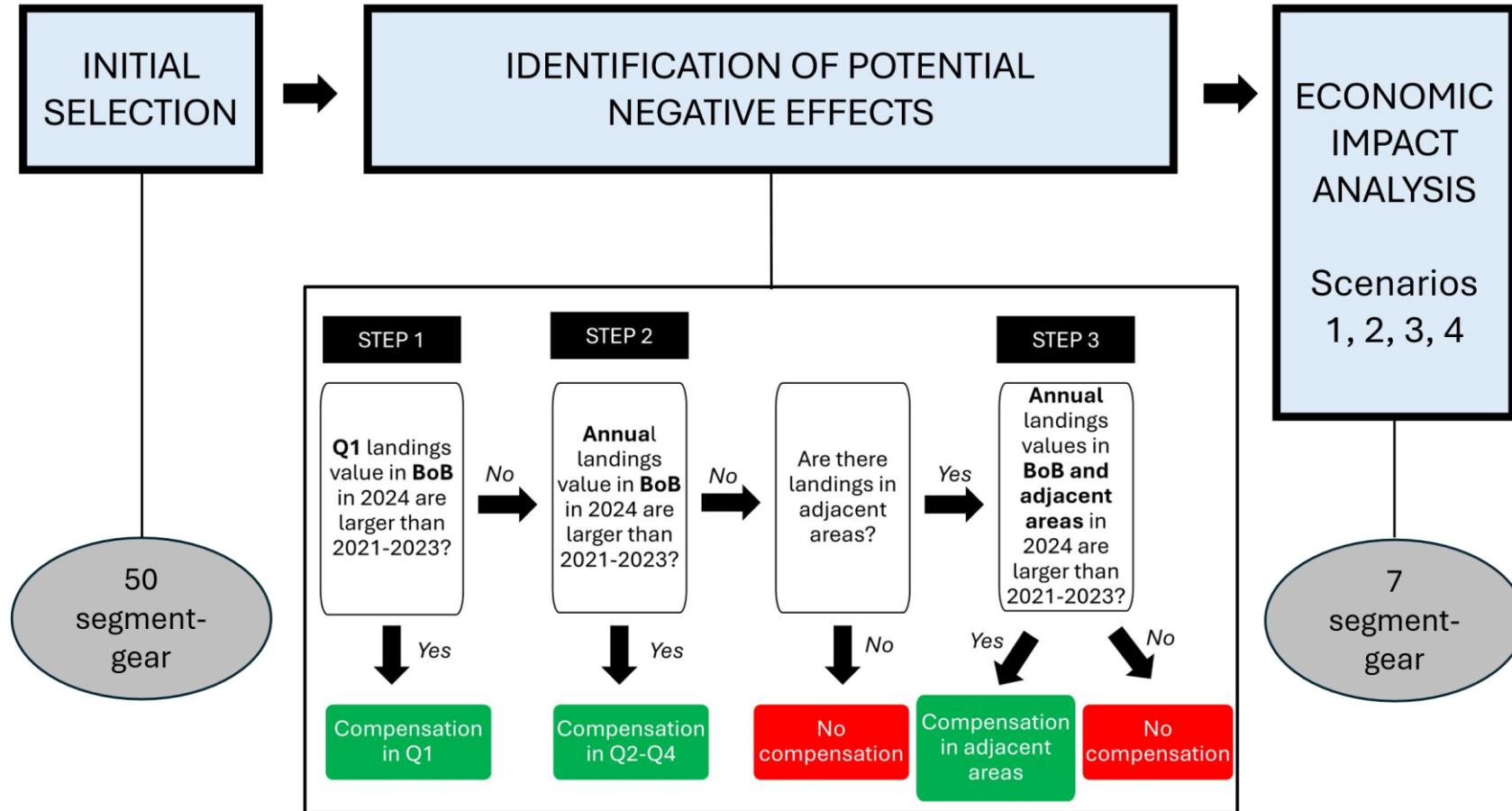
(3) Approximating closure exposure

- Quarterly data → no monthly resolution
- One-month closure $\approx \frac{1}{3}$ of Q1 landings/value
- Vessels ≥ 10 m used as proxy for regulatory threshold (>8 m)

(4) Behavioural screening (scenarios)

- Is the initial loss visible in Q1?
- Is it offset over the year?
- Is activity shifted to other areas?

Methods and results (ad hoc screening)



‘**Compensation**’ is a descriptive screening concept. It only indicates whether observed losses appear to be offset:

- within the quarter
- over the year
- or through activity elsewhere.

It does NOT mean:

- no impact
- Causality
- public compensation payments

Key observations (ad hoc screening)

Compensation ≠ no impact

- Impact exists, but outcomes differ across segments
- Most segments show some annual offsetting
- A limited subset shows persistent non-compensation signals

Impact ≠ causality

Attribution to the closure is not direct

- Quotas
- markets
- environment
- other measures

Segment–gear combinations flagged as non-compensating:

- FRA_DFN_VL1012_GNS
- FRA_DFN_VL1218_GTR
- FRA_DFN_VL1824_GNS
- FRA_PS_VL1218_PS
- FRA_TM_VL1012_PTM
- ESP_DFN_VL1012_GNS
- ESP_DTS_VL2440_PTB

Stakeholder evidence (SWWAC):

- Fr: downstream sector reports short-term supply reductions and limited ability to pass price increases.
- Sp: OPPAO: one pair of trawlers affected, with estimated landing and income losses.
- Sp. OPESCAYA: five trammel-net vessels targeting anglerfish identified as most affected, with limited relocation options.

(1) IFREMER approach (FR only)

- Vessel-level logbooks + VMS
- Weekly/monthly monitoring ('COVID-format' bulletins)
- Analyses distinguish:
 - vessels stopping activity and applying for compensation
 - other vessels mainly active in the Bay of Biscay
- Covers January–August 2024

(2) IFREMER key results (FR only)

- 287 vessels applied for compensation
- Strong short-term losses during closure weeks; partial recovery by August
- Value losses mitigated by price effects (high-frequency data allow clearer decomposition)

(3) IFREMER vs ad hoc

What aligns across approaches

- Passive-gear fleets show vulnerability signals in both analyses
- Price effects can offset part of value losses

What differs structurally

- IFREMER: France only, vessel-level, weekly/monthly → **short-term visibility**
- Ad hoc: France + Spain, segment-level, quarterly/annual → **annual outcome patterns**

(4) Compensation schemes: critical difference

- IFREMER explicitly identifies compensated vessels and discusses payments
- Ad hoc report does not include Member State compensation payments
- Therefore, 'displacement/compensation' in ad hoc is segment-level and not evidence that the same compensated vessels moved or fished elsewhere.

Ad hoc “compensation” ≠ compensated vessels



Conclusions

- Any temporary closure of a fishery will, by definition, have some short-term effect on activity. What we are examining here is whether, and to what extent, those effects persist over the year or are later offset.
- I.e. whether outcomes are offset later in the year through:
 - other periods,
 - other areas,
 - other species,
 - and price effects
- ‘Compensation’ is a screening concept, not evidence of:
 - no impact,
 - or causal attribution to the closure
- Results are heterogeneous:
 - some segments show annual offsetting patterns,
 - a subset shows persistent signals
- IFREMER and ad hoc are complementary, not comparable
- Sector evidence (SWWAC) suggests localised effects, especially for small fleets, ports and parts of the supply chain

Key need going forward

- Clear and harmonised information on public compensation payments
- Vessel-level behavioural data for Spanish fleets
- Better coverage of social impacts beyond employment