



Monterey Bay Aquarium  
**SeafoodWatch.**



# Tropical tuna social risk profile

Forced labor, human trafficking, and hazardous  
child labor risks

France Processing

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SEAFOOD SOCIAL RISK TOOL V2

## **Disclaimer**

The Seafood Social Risk Tool has been prepared for information purposes only, and is not intended to constitute business, legal, market, financial or investment advice. The Seafood Social Risk Tool is designed to serve as an informational resource and does not override legislation or internal policies or procedures. It is recommended that all users of the Seafood Social Risk Tool seek independent legal advice. The Monterey Bay Aquarium Foundation shall not be responsible to any party related to its use or interpretation of the information contained in the Seafood Social Risk Tool.

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# About the Seafood Social Risk Tool

The Seafood Social Risk Tool profiles seafood production systems around the world and identifies areas within those systems that are at higher risk of containing forced labor, human trafficking, and hazardous child labor to help businesses begin to focus their efforts to improve human rights and labor conditions.

The tool includes more than 80 indicators of risk based on publicly available evidence of forced labor, human trafficking, and hazardous child labor abuses in seafood supply chains as well as an analysis of information about risk factors correlated with these abuses. This information is packaged into risk profiles specified by species and country of origin designed to help businesses better identify the potential for human rights abuses in their supply chains so they can take the first steps toward improving conditions for seafood workers.

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The Seafood Social Risk Tool was created in partnership with the Monterey Bay Aquarium, Sustainable Fisheries Partnership, Liberty Shared, and a team of human rights experts.

Monterey Bay Aquarium's Seafood Watch program raises awareness of important ocean conservation issues and empowers seafood consumers and businesses to make choices for healthy oceans.

Sustainable Fisheries Partnership is a US-registered nonprofit that operates globally to rebuild depleted fish stocks and reduce the environmental and social impacts of fishing and fish farming. The organization works by engaging fishery stakeholders and seafood businesses throughout the supply chain to promote the sustainable production of seafood.

Liberty Shared aims to prevent human trafficking through legal advocacy, technological interventions, and strategic collaborations with NGOs, corporations, and financial institutions globally.

To learn more about Seafood Watch, to view our seafood recommendations, or to view the Seafood Social Risk Tool, [visit SeafoodWatch.org](https://www.seafoodwatch.org).

## Overview

The scope of this assessment includes tuna processing carried out in France. It does not include the supplying fisheries or tuna processing in French overseas territories. French workers involved in processing elsewhere are not the focus, but we have included that information when found.

In 2017, the fish processing industry in France was valued at over €4 billion across 311 enterprises and with a total employment of 11,021 workers (full-time equivalent).<sup>i</sup> France is the second-most important seafood processing country in the EU after Spain<sup>ii</sup> and covers salmon, tuna, caviar, and surimi. France is a significant producer of seafood, through both fishing and aquaculture, but is a net importer of seafood, which drives the processing sector and high per capita seafood consumption.<sup>iii</sup> Tuna is one of France's main seafood imports and its top seafood export.<sup>iv</sup>

## Base risks of forced labor, human trafficking, and hazardous child labor in the country in general

France's economic development and strong regulatory structure indicate a low base risk of human trafficking, forced labor, and hazardous child labor. France has a 'very high' human development index, relatively low rates of poverty, and has ratified all eight fundamental International Labour Organization (ILO) conventions and all four priority governance conventions. Most workers in France are covered by collective bargaining agreements and workers' rights are generally respected. France holds a better score than the average vulnerability score for Europe on the Global Slavery Index. However, there are estimated to be over 100,000 people living in modern day slavery in France.<sup>v</sup> Moreover, between 300,000 and 400,000 people were estimated to live in France as irregular immigrants in 2017,<sup>vi</sup> thus making up a significant population of highly vulnerable individuals. Sex and labor traffickers exploit migrants, and to a lesser extent, domestic victims in France. Victims mostly originate from Eastern Europe, West and North Africa, Asia, and the Caribbean.<sup>vii</sup> Sex trafficking, including child sex trafficking, is a serious concern in France, with victims subject to debt bondage, physical force and psychological coercion.<sup>viii</sup> However, there are laws in place to prevent trafficking and a National Action Plan for combating trafficking. France is ranked Tier 1 in the 2020 US Department of State's Trafficking in Persons (TIP) report and fully meets the minimum standards for the elimination of trafficking.<sup>ix</sup>

## Adjusted risks of forced labor, human trafficking, and hazardous child labor in the country's seafood supply chain

Fish is identified as a product imported by France at risk of modern slavery.<sup>x</sup> However, no evidence was found linking France's seafood industry, or more specifically, its tuna processing industry, directly to human

trafficking, forced labor, or hazardous child labor. Also, there was no evidence of correlated illicit activities linked to the country's seafood industry such as drug trafficking or illegal, unreported, and unregulated (IUU) fishing. Statistics on employment and other socioeconomic factors related to the seafood industry in France are not readily available. However, the information that is available suggests that labor and human rights for seafood workers are upheld in France. France was one of the first countries to ratify the ILO Convention 188 'Work in Fishing, 2007,' which came into force on 28 October 2015. The industry and authority are subsequently familiar with worker's rights in fishing and seafood supply chains. Additionally, France has strong fishery trade unions such as Syndicat CFTC-AGRI, which is an ETF Affiliate and FGTE CFDT, which is a member of the IUF<sup>xi</sup> and EFFAT,<sup>xii</sup> representing processing workers. Nevertheless, it was not possible to find data on many aspects of the French tuna processing sector and there were significant data gaps, such as for the number, demographics, and working conditions of tuna processing workers. Data gaps may be associated with the absence of allegations made against the French tuna industry and therefore, lower scrutiny of the industry. These data gaps may represent an increased risk due to the unknown nature of the industry.

## Summary of evidence of forced labor, human trafficking, and hazardous child labor in the seafood supply chain

### Country-level indicators

- There is evidence of forced labor and human trafficking in France. However, limited numbers and data are available.
- The Central Office for Combating Illegal Labour (OCLTI) identified two main categories of persons vulnerable to serious forms of exploitation: (i) persons with physical and/or mental disabilities, and (ii) persons from certain communities or diaspora. For the second category, it is reported that they are mainly exploited in textile workshops, construction, or other industrial sectors.<sup>xiii</sup>
- The most documented and investigated type of trafficking in France concerns sexual exploitation. The Central Office for the Suppression of Trafficking in Human Beings (OCRTEH) reported in 2014, 710 victims of pimping and sexual exploitation, where the majority of the victims were from Romania, France, Nigeria, China, Bulgaria and Brazil. In addition, the Paris Police Unit for the Protection of Minor reported in 2014, 50 child victims for Paris and its suburbs (including 21 for the purpose of forced criminality and 29 of sexual exploitation). It should be noted that the vast majority of the reported victims of sexual exploitation were French girls.<sup>xiv</sup>
- In 2016, the OFPRA (French Office for the Protection of Refugees and Stateless people) reported trends concerning the exploitation of Romanian children who are exploited in forced criminality (such as pickpocketing). In addition, the 2016 GRETA Report concerning the implementation of the Council of Europe Convention against Trafficking in Human Beings by France, mentions a number

of reports of Vietnamese children being trafficked via France, in order to be exploited in cannabis farms or nail bars in the United Kingdom.<sup>xv</sup>

### Seafood industry-level Indicators

- No evidence was found linking France’s seafood industry to forced labor, human trafficking, and hazardous child labor.

### Fishing indicators

*(fishing was not the focus of this assessment)*

- No evidence was found linking France’s tuna industry directly to forced labor, human trafficking, and hazardous child labor, or to ILO indicators of forced labor and hazardous child labor.

### Processing indicators

- No evidence was found linking France’s tuna processing industry directly to forced labor, human trafficking, and hazardous child labor or to ILO indicators of forced labor and hazardous child labor.
- There were significant data gaps on the conditions and demographics of workers in the tuna processing sector in France.

## Summary of factors that affect the likelihood of forced labor, human trafficking, and hazardous child labor in the seafood supply chain

### Factors that increase the likelihood

#### Country-level indicators

- General lack of statistical data related to working conditions, legislation implementation and enforcement.
- The French government has not ratified the International Convention on the Protection of the Rights of All Migrant Workers and Members of their Families.

#### Seafood industry-level indicators

- Recommendations have been made for the government to improve their fisheries control implementation, enforcement, and data availability.

#### Fishing indicators

*(fishing was not the focus of this assessment, however where factors were found these were noted herein)*

### Processing indicators

- Imports of tuna from other countries increase the risk of forced labor, human trafficking, and hazardous child labor being found in the supply chain.
- There is a significant lack of publicly available data on the French tuna processing industry.

## Factors that decrease the likelihood

### Country-level indicators

- Strong legislative framework to protect migrant workers. Migrant workers are included under the French Labor Code.
- High level of ILO convention ratification, including 8 out of 8 fundamental conventions.

### Seafood industry-level indicators

- There do not appear to be any legal impediments for fishers or seafood processing workers to access workers' unions.
- Large, multinational fishing enterprises own the two leading brands of canned tuna in France, which have their own corporate initiatives and programs that include social protections and human rights.
- There are established authorities and legislation related to the seafood industry, including EU-wide regulation and oversight.

### Fishing indicators

*(fishing was not the focus of this assessment, however where factors were found these were noted herein)*

- Not reviewed as part of this assessment.

### Processing indicators

- None found.

## Processing and Trade

France's seafood processing sector comprises around 311 enterprises and employs over 11,000 workers (full-time equivalent).<sup>xvi</sup> Total turnover for the industry was estimated at €2.9 billion and the income at €4.46 billion in 2017.<sup>xvii</sup> Although France engages in tuna fishing, accounting for 28% of the tuna caught in Europe in 2017, like other European countries such as Spain they do not produce enough for the European processing industry and therefore, the raw materials for tuna canning in Europe are usually landed overseas from non-EU countries and then exported as semi-processed product (pre-cooked frozen tuna loins) to the canning

countries.<sup>xviii</sup> Major exporting countries of tuna to France include Spain, the Seychelles, Cote d'Ivoire, Ecuador, South Korea, Ghana, and the Netherlands.<sup>xix</sup> France is one of the top European importers of frozen tuna, behind Spain and Italy. In 2016, France registered a total import value of frozen tuna of €80 million, which represented 11% of total European imports.<sup>xx</sup> Frozen tuna supplies the canning and loin or steak processing industries. France has five to eight tuna processing plants.<sup>xxi</sup> The tuna processing sector in France is largely located in the North, in and around Brittany. There is a mix of tropical (skipjack, bigeye, and yellowfin) and non-tropical tuna (albacore, bluefin) processing factories. Producers include Capitane Cook, Sea Value and Thai Union, the world's largest tuna company. Thai Union also has its European headquarters in Paris at the former MW Brands offices. Three tuna processing companies dominate the canning sector in France: Petit Navire (owned by Thai Union), Saupiquet (owned by Bolton), and Sapmer.<sup>xxii</sup>

# Due Diligence for Tropical Tuna in France

## Important Country-Specific Considerations

- France is the second-most important seafood processing country in the European Union after Spain, and is a net importer of seafood, which drives the processing sector and high per capita seafood consumption.
- All eight fundamental International Labour Organization (ILO) conventions and all four priority governance conventions have been ratified, most workers are covered by collective bargaining agreements, and workers' rights are generally respected.
- The most documented and investigated types of trafficking target sexual exploitation, forced criminality, and industrial labor.

## Suggested Due Diligence Priorities & Questions

### Worker Demographics

There are major data gaps on worker demographics in the French tuna processing sector.

1. Do processing operations employ mostly migrant laborers or ethnic minorities? What countries or parts of the country do the workers come from?
2. Do workers have documented legal work permits? If so, who manages these permits?
3. What proportion of workers are considered low-skilled in the work environment?
4. What is the proportion of temporary and contract workers to permanent workers?
5. What is the proportion of women in the workforce? Are women in managerial roles?

### Processing Activities

The biggest risk for forced labor or child labor within France's seafood supply chains relates to importing seafood for processing from higher risk countries. There is no evidence linking tuna processing in France directly to forced or child labor, but no information was found about related labor practices such as recruitment, contracts, and compensation.

1. Do corporate policies support suppliers' abilities to reduce forced labor, human trafficking, and hazardous child labor in their operations? What strategies or objectives have been developed to incentivize buying practices that reduce the prevalence of forced labor, human trafficking, and hazardous child labor?

2. Is the prohibition of forced labor, human trafficking and hazardous child labor written into contracts with suppliers? Do suppliers have explicit procedures in place to prevent the occurrence of forced labor, human trafficking, and hazardous child labor? If so, what are they?
3. To what extent are corporate policies on forced labor, human trafficking, and hazardous child labor enforced in the supply chain? What verification mechanisms exist to enforce corporate policies on forced labor, human trafficking and hazardous child labor?
4. Do you know where processing companies are sourcing their tuna inputs? Is there traceability back to the vessel, and do you know what working conditions are like on the vessel?
5. Does the processing company own or control its suppliers? How do processing companies monitor working conditions in suppliers' operations?

## France: Country-level indicators

Indicator	Description	Sources
Poverty levels in a country	<p>Human Development Index</p> <p>HDI Value (2020): 0.901</p> <p>HDI rank (2020): 26.</p> <p>France's HDI value for 2019 is 0.901 – which put the country in the 'very high' human development category – positioning it at 26 out of 189 countries and territories. Between 1990 and 2020, France's HDI value increased from 0.779 to 0.901.</p>	<p><a href="#">UNDP Human Development Index Ranking</a></p> <p><a href="#">UNDP Country Profile: France</a></p>
	<p>Poverty headcount ratio at national poverty line (2018): 13.6%</p> <p>France's poverty headcount ratio at national poverty line for 2018 is of 13.6% of its population. Over the last 20 years it has fluctuated, reaching its lower point at 12.7% in 2004, following a rise beginning in 2005 that intensified after the 2008 economic crisis. It has been relatively stable in the last few years, the 2018 value increased by 0.2 compared to 2017.</p>	<p><a href="#">Insee, Portrait Social France</a></p> <p><a href="#">World Bank Poverty Headcount Ratio: France</a></p>
	<p>Global Hunger Index (2020):</p> <p>Data on France is not available for this indicator.</p>	<p><a href="#">Global Hunger Index (GHI)</a></p>
Country's position in the regional economic power system	<p>Comparing HDI ranking to other countries in the region</p> <p><b>France</b></p> <ul style="list-style-type: none"> <li>• HDI Value (2020): 0.901</li> <li>• HDI rank (2020): 26</li> </ul> <p>France's HDI value for 2020 is 0.901 – which put the country in the 'very high' human development category – positioning it at 26 out of 189 countries and territories.</p>	<p><a href="#">World Bank Open Data: School enrolment, tertiary France</a></p> <p><a href="#">Insee School enrolment by age in France</a></p>

Indicator	Description	Sources
	<p>Between 1990 and 2020, France’s HDI value increased from 0.779 to 0.901.</p> <p>France is indexed closely to neighboring Spain and Italy, both ranked slightly better for Spain at 25 and slightly lower for Italy at 29. Germany was indexed significantly higher than France with a ranking of 6. France scored higher than the regional rating for Europe and Central Asia which is indexed at 0.771 (2017).</p> <p>Neighboring countries:</p> <p><b>Germany</b> HDI Value (2019): 0.947 HDI rank (2019): 6.</p> <p><b>Spain</b> HDI Value (2019): 0.904 HDI rank (2019): 25.</p> <p><b>Italy</b> HDI Value (2019): 0.892 HDI rank (2019): 29.</p>	<p><a href="#">UNDP 2018 Statistical Update</a></p> <p><a href="#">UNDP Country Profile: France</a></p> <p><a href="#">UNDP Country Profile: Germany</a></p> <p><a href="#">UNDP Country Profile: Spain</a></p> <p><a href="#">UNDP Country Profile: Italy</a></p>
	<p>Comparing its recent economic growth to the general economic growth rates in the region</p> <p>France holds a lower GDP growth rate than neighboring Spain as well as slightly lower than the regional average for the European Union at 1.523% (2019). However, France’s GDP growth rate exceeds that of neighbors Germany and Italy.</p> <p><b>France</b> GDP Growth (annual %): 1.509 (2019)</p> <p>Neighboring countries:</p> <p><b>Germany</b></p>	<p><a href="#">World Bank Databank: GDP Growth France</a></p> <p><a href="#">World Bank Databank: GDP Growth comparison France, Germany, Italy, Spain, European Union</a></p>

Indicator	Description	Sources
	<p>GDP Growth (annual %): 0.564 (2019)</p> <p><b>Spain</b> GDP Growth (annual %): 1.979 (2019)</p> <p><b>Italy</b> GDP Growth (annual %): 0.301 (2019)</p>	
	<p>Migration data</p> <p>Total number of international migrants (2019): 8.3 million.</p> <p>Migration inflows (2016): 240.9 thousand</p> <p>Net migration rate (2020): 0.6</p> <p>Neighboring countries also have positive net migration rates, with France holding the lowest rate compared to Germany (6.6; 2020), Italy (2.5; 2020) and Spain (0.9; 2020).</p>	<p><a href="#">IOM Migration Data Portal: France</a></p> <p><a href="#">France's 2019 Immigration Numbers</a></p>
	<p>Regional migration trends and patterns</p> <p>An accurate estimate of the number of irregular immigrants in France is difficult to obtain because of the lack of any official accurate count. One indicator to consider is the number of beneficiaries from the “Aide médicale d’Etat”, a state medical aid which allows undocumented migrant to have access to medical care. The number of beneficiaries from such aid end of 2018 was of 318,106 individuals. Another indicator to consider is the number of asylum seekers in France, which was of 177,822 individuals in 2019. It should be noted that those numbers are not cumulative and might also underrepresent the exact number of irregular immigrant and unregistered asylum seekers in France.</p> <p>However, in light of the recent immigration crisis in Europe, it appears that irregular immigrants represented about 1% of Europe’s population in 2017. While most of Europe’s</p>	<p><a href="#">Pew Research Center, Europe's unauthorized immigrant population peaks in 2016</a></p> <p><a href="#">Proposals on the Aide Medicale d'Etat by the French Government</a></p>

Indicator	Description	Sources
	<p>irregular immigrants live in Germany and the UK, it is estimated that between 300,000 and 400,000 irregular immigrants lived in France in 2017.</p>	
	<p>Known human trafficking routes</p> <p>The 2021 Trafficking in Persons report states that “Sex and labor traffickers exploit foreign victims from Eastern Europe, West and North Africa, Asia, and the Caribbean.” (pg. 2420)</p> <p>More specifically, France has been identified as a destination country for trafficking victims from Albania, Bulgaria, Lithuania, Moldova, Romania, Nigeria, and China.</p>	<p><a href="#">US Department of State (USDOS), 2021, 2021 Trafficking in Persons Report</a></p> <p><a href="#">Freedom Collaborative, No date, Victim Journeys Map</a></p>
<p>Governance practices and systems in a country (measured through indexes)</p>	<p>WGI (2020) Percentile rank</p> <ul style="list-style-type: none"> <li>• Voice and Accountability: 82.61</li> <li>• Political Stability and Absence of Violence: 56.60</li> <li>• Government Effectiveness: 86.54</li> <li>• Regulatory Quality: 85.58</li> <li>• Rule of Law: 87.98</li> <li>• Control of Corruption: 84.62</li> </ul> <p>Across all but one indicator, France ranks higher than the regional average for Europe and Central Asia. It ranks slightly less than the regional average for the indicator ‘Political Stability and Absence of Violence’ (56.60 compared to 60.34). Compared to neighboring countries Spain, Germany and Italy, France ranks similarly or better.</p> <p>Note: Percentile rank among all countries (ranges from 0 (lowest) to 100 (highest) rank).</p>	<p><a href="#">World Governance Indicators (WGI)</a></p>
	<p>Corruption Perception Index (2020) -</p> <p>Score: 69/100</p> <p>Rank: 23/198 countries and territories</p>	<p><a href="#">Transparency International Corruption Perception Index (CPI)</a></p>

Indicator	Description	Sources
	<p>More than two-thirds of countries scored below 50 on this year's CPI, with an average score of 43. France's score of 69 denotes a far lower corruption perception than average and positions it 23rd out of 180 countries and territories. France's score has declined slightly since 2017, when it scored 72.</p> <p>France has been scored higher than neighboring Italy (53/100) and Spain (62/100), but lower than Germany (80/100). France also scored higher than the average CPI regional score for Western Europe at 66.</p> <p>Note: Scores based on 0 = Highly Corrupt, 100 = Very Clean.</p>	<p><a href="#">CPI Regional Analyses: Western Europe</a></p>
	<p>Basel Anti-Money Laundering Index –</p> <p>France is not assessed in the 2021 AML. The 2019 index rank and score are given below.</p> <p>Rank: 108/125</p> <p>Overall score: 4.09/10</p> <p>France scores in the lower risk range of the scale for the Basel AML Index. France was scored as the lowest risk out of neighboring countries Spain (score 4.42; rank 100), Germany (score 4.49; rank 99), and Italy (score 4.99; rank 75).</p> <p>Note: Ranking is out of 125 countries; lowest possible score is 0 (low risk), highest score is 10 (high risk).</p>	<p><a href="#">Basel Anti-Money Laundering (AML) Index</a></p>
	<p>Global Rights Index (2021) –</p> <p>France Rating: 2 (Repeated violations of rights)</p> <p>The ITUC Global Rights Index ranks France better than the regional average ranking of 2.51 for Europe.</p>	<p><a href="#">ITUC Global Rights Index</a></p>

Indicator	Description	Sources
	<p>Neighboring countries Germany and Italy received better scores of 1 ('sporadic violations of rights'), and Spain received a similar score of 2.</p> <p>The ITUC report remarks on the French government undemocratically forcing through a reform to the Labor Code and upon weakening of workers' protection by the government.</p> <p>Note: Countries are ranked from 1 to 5+, where five plus corresponds to "no guarantee of rights due to the breakdown of the law" and 1 corresponds to "sporadic violations of rights".</p>	
Education and general literacy levels in a country	<p>Adult literacy rates, among the population aged 15 years and older: No data from World Bank</p> <p>France's National Agency for the Fight against Illiteracy reports the country's illiteracy rate as 7% in 2011, indicating that the literacy rate is above 90%.</p>	<p><a href="#">World Bank Open Data</a></p> <p><a href="#">French National Agency for the Fight against Illiteracy, 2018</a></p>
	<p>Primary school completion rates, total (% of relevant age group) (2000): 92.93%</p> <p>Data from 2017 is available for Germany, Italy and Spain, however the data for France is considerably older (2000), and therefore is not comparable.</p> <p>Data from Insee suggest that Primary school (10 years old) completion rates for 2018 is 100%.</p>	<p><a href="#">World Bank Open Data: Primary School Completion France</a></p> <p><a href="#">Insee School enrolment by age in France</a></p>
	<p>Lower secondary education completion rates (2017): 99.902%</p> <ul style="list-style-type: none"> <li>• Spain 2017: 95.3</li> <li>• Italy 2017: 99.0</li> <li>• EU 2018: 93.2</li> </ul>	<p><a href="#">World Bank Open Data: Lower Secondary Education Completion France</a></p>

Indicator	Description	Sources
	<p>France’s score is comparable to neighboring Italy at 99.0% (2017), and higher than Spain’s score of 95.3% (2017) and the European Union regional average score of 93.2% (2018). The most recent data for Germany is from 2008 and therefore has not been included for comparison purposes.</p>	<p><a href="#">Insee School enrolment by age in France</a></p>
	<p>School enrolment, tertiary (2017): 65.629% gross</p> <p>France scored considerably lower than neighboring Spain at 89% (2017), and slightly lower than Germany at 70% (2017) and the European Union regional average score of 69% (2018). France scored slightly better than neighboring Italy at 62% (2017).</p>	<p><a href="#">World Bank Open Data: School enrolment, tertiary France</a></p> <p><a href="#">Insee School enrolment by age in France</a></p>
<p>Attitudes towards migrant workers in a country’s population</p>	<p>Migrant Acceptance Index (2016) – France: 6.46/10</p> <p>Gallup created the Migrant Acceptance Index to gauge people's acceptance of migrants based on increasing degrees of personal proximity. The index is based on three questions that Gallup asked in 138 countries in 2016 and the U.S. in 2017. The index is a sum of the points across the three questions, with a maximum possible score of 9.0 (all three are good things) and a minimum possible score of zero (all three are bad things).</p> <p>France was indexed lower for migrant acceptance than neighboring Spain, Germany, and Italy, showing a lower acceptance of migrants within France.</p> <p>France holds a higher score than the regional average for the European Union of 5.92 (2016).</p> <ul style="list-style-type: none"> <li>• Germany: 7.09</li> <li>• Spain: 7.44</li> <li>• Italy: 6.49</li> </ul>	<p><a href="#">Gallup Migrant Acceptance Index</a></p>

Indicator	Description	Sources
	<p>The Migrant Acceptance Index score for the world is 5.29. Seventy-seven countries score higher than this average, while 61 score lower.</p> <p>France and its neighboring countries are rated higher in the Migrant Acceptance Index than the world index rating, showing greater acceptance of migrants than the global average.</p> <p>Note: Based on 138 countries surveyed in 2016; top possible score is 9.0. Updated information from 2020 has been published for some countries but France isn't one of them.</p>	
<p>Legislation and regulation to protect migrant workers</p>	<p>Coverage of legal provisions under the labor laws</p> <p>As per the free movements of persons between EU Member States, any national of any EU country residing in France have the right to receive the same benefits that French nationals receive.</p> <p>Eurofound: 'Improved protection for migrant workers, France (June 2013): The <a href="#">law n° 2011-672 of the 16 June 2011</a> on immigration, integration and nationality, which came into force on 2 December 2011, has increased the rights of migrant workers who have been working illegally for employer(s). The law was finalized by <a href="#">a decree of 30 November 2001</a> and an <a href="#">order of 30 November 2011</a>.'</p> <p>The French Office of Immigration and Integration (OFII) is the State operator in charge of legal immigration. Four main missions delegated by the State are:</p> <ul style="list-style-type: none"> <li>• Management of regular procedures alongside or on behalf of prefectures and diplomatic and consular posts;</li> <li>• The reception and integration of immigrants authorized to stay in France for a long time and signatories as such a Republican Integration Contract with the State;</li> </ul>	<p><a href="#">EU: EU Member Nationals Social Security Rights in France, 2019</a></p> <p><a href="#">Eurofound: Improved Protection for Migrant Workers, France, 2013</a></p> <p><a href="#">France: Office of Immigration and Integration (OFII)</a></p> <p><a href="#">Decree related to work permits: Decree n° 2016-1461 of October 28th, 2016</a></p>

Indicator	Description	Sources
	<ul style="list-style-type: none"> <li>• Reception of asylum seekers;</li> <li>• Assistance for the return and reintegration of foreigners in their country of origin. (OFII)</li> </ul> <p>Non-EU migrant workers in France for periods greater than 3 months are required to obtain a work permit.</p> <p>For recent legislation related to migrant workers in France, the ILO provides a registry of such legal instruments available on their <a href="#">website</a>.</p>	
	<p>Access to social protection, health, and education</p> <p>A 2013 EU-supported study found that third-country nationals benefited from the same social protections as French nationals, with a residence permit being the only condition to access for foreign nationals. Access to benefits varied on employment status, and the extent to which they also covered dependents.</p> <p>The study found access for third-party nationals in France under the following areas of social security: healthcare, sickness cash benefit, maternity and paternity benefits, invalidity benefits, old-age pensions and benefits, survivors' benefits, benefits in respect of accidents at work and occupational diseases, family benefits, unemployment benefits (if previously employed), guaranteed minimum resources (under certain conditions), and long-term care benefits (under certain conditions).</p> <p>Undocumented migrants that have been in France for longer than 3 months and that have revenue lower than a set threshold, have access to the AME (<i>Aide médicale d'Etat</i>), a state medical aid which allows undocumented migrant to have access to medical care.</p> <p>In addition, undocumented migrant waiting for a pending asylum claim have access to an asylum seeker state aide (<i>Allocation du demandeur d'Asile "ADA"</i>, that is about 200</p>	<p><a href="#">EU: Migrant Access to Social Security and Healthcare in France, 2014</a></p> <p><a href="#">France State Medical Aid for Undocumented Migrants</a></p> <p><a href="#">France Asylum Seeker State Aid</a></p>

Indicator	Description	Sources
	<p>euros per month for a single person, 300 euros for a couple. An addition 5.40 euros is allocated to asylum seekers who didn't get access to a place to stay.</p> <p>Once Asylum seekers get the status of refugees, they have full access to France's social benefits.</p>	
	<p>Bilateral MOUs or other agreements specifically designed to protect migrant workers</p> <p>France has numerous bilateral labor agreements on labor migration, including the following countries: Quebec, Russia, Brazil, Burkina Faso, Mauritius, Tunisia, Benin, Republic of Congo, Gabon, and Senegal. France also has Social Security Agreements (SSA) in place with dozens more countries that extend social security coverage to foreign nationals within France.</p> <p>These agreements seek to offer foreign nationals in employment in France the same access to medical services and social protection as French citizens receive and vice versa, however some conditions and exclusions are present.</p>	<p><a href="#">ILO: France Bilateral Employment Agreements</a></p> <p><a href="#">KPMG: France SSA with China, 2016</a></p> <p><a href="#">KPMG: France SSA update, 2014</a></p>
<p>Ratification of relevant international conventions and domestication of conventions into a national legal framework (Forced labor, human trafficking, and hazardous child labor)</p>	<p>Convention No. 29 - In force, 24 June 1937.</p>	<p><a href="#">Forced Labour Convention, 1930 (No. 29)</a></p>

Indicator	Description	Sources
	Convention No. 105 - In force, 18 December 2969.	<a href="#"><u>Abolition of Forced Labour Convention, 1957 (No. 105)</u></a>
	Convention No. 138 - In force, 13 July 1990. Minimum age specified: 16 years.	<a href="#"><u>Minimum Age Convention, 1973 (No. 138)</u></a>
	Convention No. 182 - In force, 11 September 2001.	<a href="#"><u>Worst Forms of Child Labour Convention, 1999 (No. 182)</u></a>
	Protocol 29 - In force, 07 June 2016.	<a href="#"><u>Protocol of 2014 to the Forced Labour Convention, 1930 (P029)</u></a>
	Palermo Protocol - Ratified 29 October 2002.	<a href="#"><u>Protocol to Prevent, Suppress and Punish Trafficking in Persons, Especially Women and Children, supplementing the United Nations Convention against Transnational Organized Crime (the 'Palermo Protocol')</u></a>
	Convention No. 188 - In force, 28 October 2015.	<a href="#"><u>ILO Convention 188 on Work in Fishing</u></a>
	PSMA - France is a party to the agreement.	<a href="#"><u>The FAO Port State Measures Agreement (PSMA)</u></a>
	Domestication into national legislation	<a href="#"><u>ILO Ratifications for France</u></a>

Indicator	Description	Sources
	<p>France has ratified 8 out of 8 fundamental conventions, and 4 out of 4 priority governance conventions.</p> <p>The ILO has made a direct request to the French government against reporting on the 'Forced Labour Convention, 1930 (No. 29)' C029. The 2019 direct request refers to low numbers of trafficking victim identification, and requests to provide further information on the implementation of legislation to combat trafficking, including violations identified by labor inspections and statistics on the judicial procedures initiated in trafficking and forced labor cases.</p>	<p><a href="#">ILO Direct Request to France, Forced Labour Convention C029, 2019</a></p>
Regulation of recruitment	Country's government-sanctioned oversight mechanisms (regulations, accreditation schemes, inspection, etc.) of recruitment agents	
Enforcement of legislation for forced labor, human trafficking, hazardous child labor, migrant worker protections, recruitment and working conditions	<p>TIP Ranking - France (2021): Tier 1</p> <p>The 2021 Trafficking in Persons Report states, "The Government of France fully meets the minimum standards for the elimination of trafficking. The government continued to demonstrate serious and sustained efforts during the reporting period, considering the impact of the COVID-19 pandemic on its anti-trafficking capacity; therefore, France remained on Tier 1." (pg. 239)</p>	<p><a href="#">US Department of State (USDOS), 2021, 2021 Trafficking in Persons Report</a></p>
	According to the US Department of State, the government effectively enforces child labor laws in France.	<p><a href="#">USDOS, 2021, 2020 Country Reports on Human Rights Practices</a></p>
	<p>Global Slavery Index (2018):</p> <ul style="list-style-type: none"> <li>• Estimated number of people living in modern slavery: 129,000.</li> <li>• Prevalence Index Rank: 136/167</li> <li>• Vulnerability to Modern Slavery: 15.25/100</li> </ul>	<p><a href="#">Global Slavery Index's overall ratings</a></p> <p><a href="#">Global Slavery Index 2018 Country Data for France</a></p>

Indicator	Description	Sources
	<ul style="list-style-type: none"> <li>• Government Response Rating: BBB</li> </ul> <p>France holds a better score than the average vulnerability score for Europe at 28/100, with Europe also scoring lower for government response with a ‘B’ rating.</p> <p>The GSI profile for France identified several areas that negatively impacted the country’s score. These issues have been highlighted below:</p> <ul style="list-style-type: none"> <li>• Incidences of police officers not identifying victims of human trafficking and modern slavery.</li> <li>• Insufficient victim support services and shelters available for all victims of modern slavery.</li> <li>• Incidences of victims of modern slavery being treated as criminals for conduct that occurred under the control of criminals.</li> <li>• Judicial punishments not being proportionate to the severity of the crime and culpability of the criminal.</li> <li>• Foreign victims detained or deported for immigration violations.</li> <li>• Reports of officials’ complicity in modern slavery cases not being investigated.</li> <li>• Patterns of abuse of labor migrants being institutionalized or systematic and unchecked.</li> </ul> <p>Note: The GSI ranks government responses from AAA (very comprehensive response) to D (very inadequate), and a higher rating on the GSI is assumed to mean lower risk by the SSRT.</p> <p>BBB Rating Description: The government has implemented key components of a holistic response to some forms of modern slavery, with victim support services, a strong criminal justice response, evidence of coordination and collaboration, and protections in place for vulnerable populations. Governments may be beginning to address slavery in supply chains of government procurement, or of businesses operating within their territory. There may be</p>	<p><a href="#">Global Slavery Index 2018 Data Europe and Central Asia</a></p> <p><a href="#">Global Slavery Index Rating Description</a></p>

Indicator	Description	Sources
	evidence that some government policies and practices may criminalize and/or cause victims to be deported.	
	<p>Documentation from national labor inspection and other law enforcement agencies</p> <p>Comment from the ILO Direct Request to the French Government on ILO Convention No. 29 (Abolition of Forced Labour): ‘In its previous comments, the Committee noted the adoption of certain legislative measures, including Act No. 2013-711, of 5 August 2013, which incorporates into the Criminal Code the crimes of “slavery” and “exploitation of enslaved persons” (sections 224-1A to 224-1C) and supplements section 225-14 of the Criminal Code, which criminalizes the act of subjecting a vulnerable person to working conditions that are incompatible with human dignity (now section 225-14-1) by including two new offences: “forced labor” and “servitude” (sections 225-14-2 and 225 14 3, respectively). It also noted that the Act authorizes associations engaged in action to combat trafficking and slavery, which have been registered for five years at the time of the events, to exercise, with the consent of the victim, the rights granted to the plaintiff.’ (ILO, 2019)</p> <p>In 2016, labor inspection officials were empowered through a widening of their scope of work to report offenses related to trafficking in persons, forced labor and slavery. (Ordinance No. 2016-413) (ILO, 2019).</p> <p>Central Office to Combat Illegal Work (OCLTI) had been dealing with cases of trafficking and labor exploitation (ILO, 2019).</p> <p>Establishment in 2013 of inter-ministerial mission for the protection of women victims of violence and the fight against trafficking in human beings (Miprof) with</p>	<p><a href="#">ILO Direct Request to France, 2019</a></p> <p><a href="#">France MIPROF overview</a></p> <p><a href="#">France MIPROF Activity Report 2013-2017</a></p> <p><a href="#">French National Consultative Commission on Human Rights overview</a></p>

Indicator	Description	Sources
	<p>responsibility for national coordination of measures to combat human trafficking (ILO, 2019).</p> <p>French National Consultative Commission on Human Rights (Commission nationale consultative des droits de l’homme – CNCDH) is the French national institution for human rights, which advises and makes recommendations to the government on matters of human rights, including France’s 2014-2016 National Action Plan to Combat Trafficking in Persons. Recommendations made by the Commission included ‘the need to mobilize the public authorities and allocate financial resources to facilitate the effective implementation the Plan of Action; and improved coordination between the institutions responsible for combating trafficking so as to ensure that all forms of trafficking, not only trafficking for sexual exploitation, but also trafficking for labor exploitation, are taken into account.’ The ILO has requested from the French government a response on whether action has been undertaken in response to the CNCDH’s recommendations on the National Plan of Action as well as confirmation on whether a new Plan of Action has since been adopted. (ILO, 2019).</p> <p>The ILO has supported the CNCDH’s assertion that the French government has not adequately allocated resources for the identification of potential victims of trafficking and as such cases are under-reported. (ILO. 2019).</p>	
	<p>France has ratified several ILO conventions. However, the government has failed to sufficiently report to the ILO against some conventions, such as the ‘Abolition of Forced Labour Convention, 1930 (No. 29)’. In 2019, the ILO has subsequently made direct requests to France related to the insufficient data being provided.</p> <p>France ratified the ILO convention ‘C181 - Private Employment Agencies Convention, 1997 (No. 181)’ on 28 October 2015. The Convention establishes ‘general</p>	<p><a href="#">Direct Request (CEACR) - adopted 2018, published 108th ILC session (2019): C29</a></p> <p><a href="#">Direct Request (CEACR) - adopted 2018, published 108th</a></p>

Indicator	Description	Sources
	parameters for regulation of recruitment, placement and employment of workers engaged by private employment agencies.’ However, in 2019 a direct request was raised by an ILO Committee to the French government to provide more data and information on the implementation of Convention 181, including whether an agency certification system has been established and whether temporary workers have the right to freedom of association and collective bargaining.	<a href="#">ILC session (2019): C181</a>
Evidence of forced labor, human trafficking, and hazardous child labor in the country	Human traffickers exploit foreign victims, and to a lesser extent, domestic victims in France. A large-scale victim survey found that in 2019, most victims (81%) were victims of sex trafficking, while only eight percent were victims of forced labor. Victims are also subject to forced criminality and forced begging. Where labor trafficking does occur, it is most frequently found in domestic work (in which women and children are exploited), followed by construction, small commerce, agriculture, fishing, and livestock.	<a href="#">USDOS, 2021, 2021 Trafficking in Persons Report</a>

Table 1: France - Country-level indicators

## France: Seafood industry-level indicators

Indicator	Description	Sources
Direct evidence of forced labor, human trafficking, and hazardous child labor	The biggest risk for forced labor or child labor within France’s seafood supply chains relates to importing seafood from higher risk countries. There is no evidence linking France’s seafood supply chain directly to forced or child labor.	<a href="#">GSI: Country Studies - France</a>
ILO indicators of forced labor and <a href="#">ILO R190 definition of hazardous child labor</a>	None found.	
Fishing, aquaculture and processing regulations and policies	<p><b>Fishing</b></p> <p>As an EU member state, France is subject to the Common Fisheries Policy and the EU’s fisheries control system.</p> <p>Overall, the Common Fisheries Policy seeks to manage fisheries to: ‘safeguard stock reproduction for high long-term yield; lay the foundations for a profitable industry; share out fishing opportunities fairly; and conserve marine resources.’</p> <p>To enable this for the fishing industry, a fisheries control system has been defined that covers the following: monitoring catch quantities and combating illegal fishing, allowing data collection for fishing management, enabling tracing and checking of fisheries products through the supply chain, and applying EU rules and sanctions.</p> <p>Laws and regulations on fisheries controls and enforcement in France are compiled within the <i>Code Rural et de la Pêche Maritime</i> (‘Rural and Maritime Fisheries Code’).</p>	<p><a href="#">EU: The Common Fisheries Policy (CFP)</a></p> <p><a href="#">EU: Managing Fisheries</a></p> <p><a href="#">EU: The EU’s Fisheries Control System</a></p> <p><a href="#">EU: Common Fisheries Policy - Aquaculture</a></p> <p><a href="#">EU: Communication on Strategic Guidelines for the Sustainable Development of EU Aquaculture</a></p> <p><a href="#">French Legislation: Code Rural et de la Pêche Maritime</a></p>

Indicator	Description	Sources
	<p>The authorities and legal instruments for fisheries controls have been complied within a 2017 ClientEarth report as follows:</p> <ul style="list-style-type: none"> <li>• 'At the national level, the Directorate for Maritime Fisheries and Aquaculture of the Ministry of Ecology, Sustainable Development and Energy ("Direction des Pêches Maritimes et de l'Aquaculture" or DPMA) adopts every two years a national control plan for fishery products.'</li> <li>• 'At the regional level, Interregional Directorates for the Sea ("Directions Interrégionales de la Mer" or DIRM) and Directorates for the Sea ("Directions de la Mer" or DM, competent in overseas departments) define interregional or regional plans for the control of fisheries, based on the general orientations provided in the national plan.'</li> <li>• 'At the local level, the control can be carried out by a large number of authorities, depending on their respective area of competence and on the nature of the controls themselves. The list of the competent authorities, both for administrative and judicial controls, is given in the Rural and Maritime Fisheries Code. In practice, most of the controls are conducted by: (a) the maritime affairs administration (mostly coastal and Exclusive Economic Zone (EEZ) controls); (b) the customs (throughout the supply chain); (c) the French navy (on the high seas and in the Indian Ocean); (d) the national and maritime gendarmerie (in coastal waters).'</li> <li>• A 2017 European Court of Auditors report on EU fisheries controls remarks on coordination between these three levels of control as being 'undermined by the complexity of the administrative organization'.</li> </ul>	<p><a href="#">ClientEarth: The Control and Enforcement of Fisheries in France, 2017</a></p> <p><a href="#">EU: Special Report – EU Fisheries Controls: More Efforts Needed, 2017</a></p>

Indicator	Description	Sources
	<p><b>Aquaculture</b></p> <p>The Common Fisheries Policy also includes coordinated EU aquaculture policy.</p> <p>Departments, Codes and Decrees relating to aquaculture production in France can be found within <a href="#">this FAO profile</a>.</p> <p><b>Processing</b></p> <p>Publicly available information on French seafood processing regulations and policies were not found.</p> <p>The processing of seafood is also subject to EU laws. In 2006, a specific regulation issued by the French Government translated EU directives about seafood transport and commercialisation (Le contrôle du transport et de la commercialisation des produits de la mer dans les régions littorales et non littorales).</p>	
<p>Enforcement and implementation of industry-specific regulations and policies</p>	<p>Monitoring of fisheries:</p> <ul style="list-style-type: none"> <li>• In 2015, 2,734 inspections by air or land were conducted on fishing vessels and a further 2,518 landing checks (total for all species, gear types).</li> <li>• ERS coverage was 93% in 2015 and VMS equipment was on 96% of vessels (947 vessels).</li> </ul> <p>Sanctions for breaking regulations can either be administrative (fines) or criminal, which may be actioned through non-criminal sanctions (21.4% of all cases, such as a request to observe rules going forward), fines, confiscation of goods, out-of-court settlements, or imprisonment.</p> <p>The ClientEarth report remarks on the lack of publicly available data on the exact number of infringements as well as inconsistencies between figures from different departments, a possible result of different reporting scopes and approaches. Recommendations made to the French</p>	<p><a href="#">CROSSA ETEL: Bilan D'Activites, 2015</a></p> <p><a href="#">ClientEarth: The Control and Enforcement of Fisheries – France, 2017</a></p>

Indicator	Description	Sources
	<p>government to improve fisheries control include the following: increase the number of controls at sea and improve controls on landings; enable the application of both fines and imprisonment; simplify control and enforcement procedures and increase coordination across the relevant authorities; adjust the level of sanctions to act as a deterrent, and; increase publicly available data on implementation and infringements of the controls.</p> <p>No publicly available data found for the enforcement and implementation of seafood processing regulations and policies.</p>	
<p>Access to workplaces for third-party monitors (trade union representatives, on-board observers, etc.)</p>	<p>The European Transport Workers' Federation (ETF) is active in France. A 2012 report found a high (80%+) collective bargaining coverage for employees in sea fisheries; data for 2009-2010 showed an estimated 100% coverage. Of the 6 unions that cover sea fisheries employees, 5 are affiliated to the ETF.</p> <p>High VMS coverage on French vessels (96%), although data are not available per species/ gear type. Data on the prevalence of human observers working on-board vessels are not available.</p>	<p><a href="#">Representativeness of the European Social Partner Organizations: Sea Fisheries, 2012</a></p> <p><a href="#">CROSSA ETEL: Bilan D'Activites, 2015</a></p>
<p>Worker access to a functional grievance mechanism</p>	<p>No publicly available data for this indicator.</p>	
<p>Access to join a trade union</p>	<p>The right to union participation is enshrined within France's Labor Code and amended through decrees. Fishers are free to join workers' unions and there are several organizations available, most of which are affiliated to the ETF.</p>	<p><a href="#">ETUI: Industrial Relations in France: Background Summary, 2019</a></p> <p><a href="#">Representativeness of the European Social</a></p>

Indicator	Description	Sources
		<a href="#">Partner Organizations: Sea Fisheries, 2012</a>
<p>Participation in voluntary schemes and implementation of comprehensive corporate policies and strategies to combat forced labor, human trafficking, and hazardous child labor</p>	<p>The Thai Union Group, which owns the leading canned tuna brand in France ‘Petit Navire’, has numerous global initiatives aimed at combating forced labor, human trafficking, and child labor. Due to the low-risk status of France’s seafood industry, Thai Union’s initiatives do not focus on the region but Petit Navire operates within Thai Union’s sustainability framework, which seeks to provide ‘safe, legal and freely chosen jobs in our own structures and logistics chains’ and is integrated through their SeaChange strategy. Thai Union is also an active participant in the UN Global Compact Initiative, of which 6 out of 10 principles relate to human rights and labor.</p> <p>Saupiquet is another leading canned fish brand in France and part of the Bolton Group. The Bolton Group have a Code of Conduct for Tuna Suppliers (Vessels) and 100% of suppliers have signed the Group’s human rights policy, which is currently monitored through self-assessment with compliance audits to be used in verification.</p>	<p><a href="#">Petit Navire: Our Sustainable Development Commitments</a></p> <p><a href="#">SeaChange: About SeaChange</a></p> <p><a href="#">UN: Thai Union Company Information</a></p> <p><a href="#">UN: The Ten Principles of the UN Global Compact</a></p> <p><a href="#">Bolton Food: Code of Conduct for Tuna Suppliers (Vessels), 2019</a></p> <p><a href="#">Bolton Group: The Rights of All – Our Commitment to Human Rights</a></p>

Table 2: France - Seafood industry-level indicators

## France: Processing indicators

Indicator	Description	Sources
Direct evidence of forced labor, human trafficking, and hazardous child labor	The biggest risk for forced labor or child labor within France’s seafood supply chains relates to importing seafood from higher risk countries. There is no evidence linking France’s seafood processing sector directly to forced or child labor.	<a href="#">GSI: Country Studies – France</a>
ILO indicators of forced labor and ILO R190 definition of hazardous child labor	None found.	
Processing Characteristics	<p>Processing stage</p> <p>The French seafood industry is extremely diverse, representing many species and types of processed products (fresh, refrigerated, prepared dishes, canning, smoking, etc.). These activities are undertaken by 291 enterprises, representing 8% of the EU total (2015).</p> <p>Processing represents the most significant sector of France’s seafood industry, compared to fish catching and trade (data from 2013-2015).</p> <p>France is the second most important processing country by value of sales in the EU, after Spain (2016).</p> <p>Net sales from seafood processing in 2017 were broken down as follows:</p> <ul style="list-style-type: none"> <li>• 32% Canned products (not including cooked meals)</li> <li>• 32% Salted, smoked and dried products</li> <li>• 18% Cooked meals and fish sticks</li> <li>• 16% Fresh, frozen and whole products</li> <li>• 1.2% Co-products</li> <li>• 0.7% Liquid products, including soups</li> <li>• 0.03% Other products.</li> </ul>	<p><a href="#">EU: Research for Pech Committee – Seafood Industry Integration in the EU, 2016</a></p> <p><a href="#">EU: The Economic Performance of the EU Fish Processing Sector 2017</a></p> <p><a href="#">FAO: France Fisheries Statistics: Production, Consumption and Trade</a></p> <p><a href="#">EU: Research for PECH Committee – Seafood Industry Integration in the EU: All 22 Members with a Coastline, 2018</a></p>

	<p>Consolidation and vertical integration</p> <p><b>Structural Integration</b></p> <p>Limited levels of vertical integration, with a few exceptions.</p> <p>Limited levels of horizontal integration, with some integration domestically and a growing trend for Spanish marine capture companies investing in France.</p> <p><b>Non-structural Integration</b></p> <p>Limited levels of vertical integration due to varied catch composition. Majority of harvest sold at market.</p> <p>No quota trade and quota leasing are illegal, quota swapping is present. (Quotas are attached to the specific vessel and are not transferable).</p> <p>In the 2016 EU report, only one example of full value chain integration was identified in France.</p> <p><b>Definitions from the EU report:</b></p> <p>Structural vertical integration: ‘the process of investing in businesses further up or down the value chain.’</p> <p>Structural horizontal integration: ‘The first form could be simply called expansion through the addition of new vessels to a fleet. The second form is the acquisition of or investment in peers. These peers could be members of the same Producers’ Organization (PO), other Pos domestically, or internationally.’</p> <p>‘There are a number of informal arrangements that can be considered as non-structural forms of integration to the extent that they are used to generate economic efficiencies by corporations.’</p> <p>Non-structural vertical integration: ‘firms may develop off-take agreements. These are agreements between a supplier</p>	<p><a href="#">EU: Research for Pech Committee – Seafood Industry Integration in the EU, 2016</a></p>
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	<p>and a buyer that the buyer will acquire a certain value of a commodity supplied by the supplier.’</p> <p>Non-structural horizontal integration: An example is ‘when fish catching companies choose not to buy or sell their quota, but rather borrow, rent or lease quota to either gain access to quotas or to generate capital to be used for other business activities.’</p>	
	<p>Domestic versus export</p> <p>France operates a trade deficit for seafood products, with a deficit of 19% for prepared or preserved products and 3% for dried, salted, or smoked fish.</p> <p>In 2018, by value, France imported €662million worth of tuna and exported €232million.</p> <p>France’s 2015 canned tuna export destinations: €27 million value, mainly sold to UK, Belgium and Germany.</p> <p>Data on the domestic market were not publicly available.</p>	<p><a href="#">FranceAgriMer – Key figures from the Fishery and Aquaculture sector in France 2019</a></p> <p><a href="#">EU: The Economic Performance of the EU Fish Processing Sector 2017</a></p>
Workforce Characteristics	<p>Skilled versus low-skilled</p> <p>No specific data for the tuna processing industry was available. Due to the nature of tuna canning work, the minimum practical expectations may include a secondary education for reading notices and completing forms, as well as on-the-job training.</p>	
	<p>The proportion of women in the workforce</p> <p>No specific data for the tuna processing industry were available. Since 2015, male employees have filled most of the workforce in the French fish processing sector, with previous data showing a female majority prior to this.</p>	<p><a href="#">EU: The Economic Performance of the EU Fish Processing Sector 2017</a></p>
	<p>The proportion of migrant versus local workers</p> <p>No specific data for the tuna processing industry were available. A 2016 report estimated 659 non-local workers in</p>	<p><a href="#">MRAG-EC: Study on the Employment of</a></p>

	<p>the French processing sector in 2013, including EU and non-EU nationals and all species. A 2015 figure given for the total workers employed in the French fish processing industry is 15,716 people (full time equivalent).</p> <p>The 2017 report remarked on the growing trend for non-local labor across fishing, aquaculture, and processing, although a break-down for each sector was not available. A 2013 figure for the EU noted 6.3% non-local labor for the processing sector.</p>	<p><a href="#">Non-Local Labor in the Fisheries Sector, 2016</a></p> <p><a href="#">MedFAR: On Overview of the Seafood Consumption and Processing Sector in Some Mediterranean Countries, 2017</a></p>
	<p>The proportion of minority or indigenous workers</p> <p>No publicly available data for this indicator.</p>	
	<p>The proportion of temporary and contract versus permanent workers</p> <p>No specific data for the tuna processing industry were available. According to an EU report, part-time work in French seafood processing is marginal and decreasing, although still present.</p>	<p><a href="#">EU: Summary of the 2014 Annual Economic Report on the EU Fish Processing Industry, 2014</a></p>
	<p>Workers' origins</p> <p>Publicly available data were not available on the nationality of migrant seafood processing workers in France.</p>	
	<p>Migrant worker language (vs. dominant language in the industry)</p> <p>Publicly available data were not available on the nationality of migrant seafood processing workers in France.</p>	
	<p>GDP per capita of processing country and main worker source country</p> <p>Publicly available data were not available on the nationality of migrant seafood processing workers in France.</p>	
	<p>Legal presence (regularity) of migrant workers</p>	<p><a href="#">Pew Research Center, Europe's unauthorized</a></p>

	<p>Migrant workers in France who have obtained a work permit are extended the social protection of French citizens and are covered by its Labor Code.</p> <p>No publicly available data on the legality and status of tuna processing workers in France are available. However, it was estimated that between 300,000 and 400,000 irregular immigrants lived in France in 2017, which represent a significant risk, including for the seafood industry.</p>	<a href="#">immigrant population peaks in 2016</a>
	<p>The ability of migrant workers to change jobs</p> <p>Workers from the EU or EEA are free to work in France without a permit and will be able to change jobs. Non-EU workers may be bound to the company with whom they applied for a work permit.</p>	
Recruitment and Contracts	<p>Use of contractors and recruitment agents</p> <p>No specific data for the tuna processing industry were available.</p> <p>However, France’s fishing industry uses both direct hire and recruitment agencies. In addition to general recruiting agencies, used for all industry sectors or a group of sectors (Axemploi, Ouest France Emploi), specialized recruiting agencies exist, specific to the fishing industry sector (Diveintar Marine).</p> <p>As part of a new law promoting professional future, a specific state agency dedicated to the promotion of apprenticeship and developing qualifications was created in 2019 (OCAPIAT). They also act a recruiting agency and reference job listings related to the fishing industry.</p>	<a href="#">Axemploi</a> <a href="#">Ouest France Emploi</a> <a href="#">Diveintar Marine</a> <a href="#">OCAPIAT</a>
	<p>Compensation method</p> <p>No publicly available data for this indicator.</p> <p>However, France has strong fishery trade unions such as Syndicat CFTC-AGRI, which is an ETF Affiliate and FGTE CFDT, which is a member of the IUF and EFFAT, representing</p>	<a href="#">European Federation of Trade Unions in the Food, Agriculture and Tourism sectors</a>

	processing workers. In addition, most workers in France are covered by collective bargaining agreements.	<a href="#">The Food, Farm, Hotels and more Union</a>
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Table 3: France - Processing indicators

# References

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