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Published 14/08/18

## **Select Committee Review Fishing and Fisheries**

Wednesday 22 August 2018

2pm

National Marine Aquarium, Rope Walk, Coxside, Plymouth PL4 0LF

### **Members:**

Councillors Mrs Aspinall, Buchan, Carson, Churchill, Corvid, Fletcher and Morris.

Members are invited to attend the above meeting to consider the items of business overleaf.

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**Tracey Lee**

Chief Executive

# Select Committee Review

## Agenda

### 1. Appointment of Chair and Vice Chair

The Committee will be asked to appoint a Chair and Vice Chair for this meeting.

### 2. Apologies

To receive apologies for non-attendance submitted by Members.

### 3. Declarations of Interest

Members will be asked to make any declarations of interest in respect of items on this agenda.

### 4. Chair's Urgent Business

To receive reports on business, which in the opinion of the Chair, should be brought forward for urgent consideration.

### 5. Fishing and Fisheries:

- |     |   |                 |
|-----|---|-----------------|
| 5a. | Select Committee Review Plan  | (Pages 1 - 2)   |
| 5b. | Fishing and Fisheries Report  | (To Follow)     |
| 5c. | Timetable of Witnesses  | (Pages 3 - 4)   |
| 5d. | Written Evidence  | (Pages 5 - 18)  |
| 5e. | Background Paper: Fisheries White Paper: Sustainable Fisheries for Future Generations | (Pages 19 - 78) |

### 6. Recommendations:

**SELECT COMMITTEE REVIEW PLAN**

Overview and Scrutiny

**SELECT COMMITTEE TOPIC****FISHING AND FISHERIES****Raised by -**

Brexit, Infrastructure and Legislation, Overview and Scrutiny Committee

**Date -**

22 August 2018

**Purpose of Review**

- To make recommendations to Cabinet in relation to the Administration's Manifesto commitment;
- To work with Plymouth's fishing industry to launch a Plan for Sustainable Fishing to secure the industry's future in the city;
- To inform our response to the Fisheries White Paper: Sustainable Fisheries for Future Generations.

**Select Committee Membership**

Councillors Mrs Aspinall, Buchan, Carson, Corvid, Churchill, Fletcher and Morris

**Process**

Methodology/Approach	<ul style="list-style-type: none"> <li>• Open call for evidence supported with specific approach to known stakeholders with closing date of 10 August 2018;</li> <li>• Site visit by committee members to Fish Market</li> <li>• Half day evidence hearing session at the National Marine Aquarium on 22 August 2018.</li> </ul> <p>Recommendations from the Select Committee Review to be submitted to Cabinet at its meeting on 11 September 2018. Submission of the Fisheries white paper: sustainable fisheries for future generations response to DEFRA on 12 September 2018 (11.45pm)</p>
Sources of Information/Evidence	<ul style="list-style-type: none"> <li>• White Paper - Sustainable Fisheries for Future Generations.</li> <li>• Marine Management Organisation – Fisheries Data</li> <li>• Overview paper produced for Brexit, Infrastructure and Legislation Change Overview and Scrutiny Committee</li> </ul>
Consultation Exercises	As noted above
Witness/Expert Participation	<p><b>Witnesses</b></p> <ul style="list-style-type: none"> <li>• Plymouth Trawler Agents Limited, representatives of Newlyn and Brixham,</li> <li>• Relevant regulatory bodies, eg Marine Management Organisation, Devon and Severn Inshore Fisheries and Conservation Authority, Harbourmaster</li> <li>• Interfish, other commercial operators</li> <li>• Plymouth Marine Laboratories and Marine Biological Association</li> </ul>

	<ul style="list-style-type: none"> <li>• Council officers with relevant briefs</li> <li>• Leader (Cabinet Member responsible for Plymouth's Fishing Industries)</li> <li>• Any other interested parties</li> </ul> <p><b>Participants and roles</b></p> <ul style="list-style-type: none"> <li>• Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee – Chair and Vice Chair - key players</li> <li>• Democratic Support Team – key players</li> <li>• Select Committee Members – team members</li> <li>• Potential witnesses as noted above – specialists</li> <li>• Economy, Enterprise and Employment Team, Policy Team, Natural Infrastructure Team – specialist</li> <li>• Communications team – specialist</li> </ul>
Site Visits	Fish Market, Fish Quay and board a trawler.
Resource Requirements	Officer time

<b>Post Review</b>	
Reporting Process	Recommendations submitted to Cabinet on 11 September 2018
Anticipated Completion Date	11 September 2018
Draft Report Deadline	30 August 2018
Meeting Frequency	One occasion
Date of Meeting	22 August 2018
Further Information	Cabinet responses to recommendations to inform Council's response to the Fisheries white paper: sustainable fisheries for future generation

# Timetable

## Fishing and Fisheries



Witnesses will be invite to speak which will be followed by a question and answer session.

Witnesses	Representing	Time
Councillor Tudor Evans OBE	Leader of Plymouth City Council	2pm
Luke Pollard MP	MP for Plymouth, Sutton and Devonport	2.15pm
Andrew Pillar	Interfish	2.30pm
David and Alison Pessell	Plymouth Trawler Agents Ltd	3.00pm
Matt Mander	Devon and Severn Inshore Fisheries and Conservation Authorities	3.30pm
<b>Break (4pm)</b>		
Recommendations		4.15pm

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## PLYMOUTH TRAWLER AGENTS LIMITED

### **Plymouth's Fishing Industry – A plan for sustainable fishing**

We are responding, on behalf of Plymouth Trawler Agents, to the call for evidence by Plymouth City Council's Brexit, Infrastructure and Legislative Change Overview and Scrutiny Committee.

Plymouth Trawler Agents is a private limited company that runs the fish auction and market in Sutton Harbour. It is unique in the UK, in so far as it is run on commercial lines but in many ways has "co-operative" aims and objectives. The make up of the Company is also unusual within the industry. It has approximately 100 shareholders, most of whom are fishing boat owners. In addition, a few of the shareholders are fish merchants/buyers while a few more are philanthropic shareholders just wishing to see the survival and continuation of the fishing industry in Plymouth.

We have grown the business from an annual turnover of £750,000 in 1994 to £18.8m in 2017, despite the market opening when the fortunes of the fishing industry were at a low ebb and having to operate during a protracted period of considerable uncertainty. We are now firmly one of the top fish markets in the UK and among the top three in England. Plymouth is the administrative port for over 500 fishing vessels (second only to Newlyn in the UK) and the administration port with the largest number of fishermen in the UK. In 2017, a total of 365 different fishing vessels sold their catch through our fish market during the year, with up to 120 vessels selling in a single week.

#### **Prospects for the future**

A common misconception is that the UK fishing industry remains in decline (indeed this still appears in some official documentation). Yet, all the evidence points in the other direction. Over the past 10 years the industry has seen a welcome upturn. Profits of the UK fishing fleet have been growing steadily and the most recent figures show the UK fleet profits as being the highest across all EU member states. Independent scientists (including the Chairman of the Advisory Council of the International Council for Exploration of the Seas (ICES)) have pointed to the substantial improvements in many of the key fish stocks in which the UK has an interest. The UK fishing fleet, taken as a whole, enjoyed an estimated increase in profits in 2016 compared to the previous year of 25%. Its Gross Value Added (GVA) contribution was the best economic result for the sector since 2008.

This does not mean, of course, that everyone involved in the industry is doing well; there are some sectors that are still struggling for a variety of reasons and recovery of some of the fish stocks remains a challenge. Fishing is very much



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subject to nature's challenges, uncertainties and fluctuations, and can be seriously affected by external elements such as fuel prices, world-wide fish price movements, geopolitical factors, exchange rates and so on. Looking ahead, in common with other industries, we can expect disappointing years as well as good years. It is important, therefore, to focus on the medium and long-term and not become overly distracted by year on year variations.

In the short term there are some policy and regulatory challenges. We are still, for example, subject to the Common Fisheries Policy, which is notoriously cumbersome and unresponsive as a management framework. Despite the most recent CFP reforms, the system still lacks transparency and continues to throw up practical difficulties and unintended consequences for the industry and regulators alike. In the Fisheries White Paper, the Government has signalled that Brexit affords an opportunity to address these and other issues. We discuss Brexit further below.

Notwithstanding the uncertainties that lie ahead, we believe the industry to be on a long-term upward trend. But, to secure and maximise the potential benefits there is a need for modernisation and investment, both within the catching sector and onshore.

### **Plymouth is of national and regional importance**

Plymouth is very well placed geographically as a major centre for the UK fishing industry. It is conveniently located for a number of important fisheries; some of the most prolific in the EU. The fisheries and the regional industry are highly diverse. Over 80 different species of fish are sold through Plymouth Fish Market with some of the individual vessels in the south west catching between 20 – 30 different species.

All three major fishing ports in south west England – Plymouth, Newlyn and Brixham – have their own characteristics bringing to each particular advantages and disadvantages. There is room for all three to continue to operate successfully and profitably.

What marks out Plymouth is that it has all the benefits of a City and Regional Centre, with a strong and long established marine and maritime heritage. The Fish Market is one of the premier markets in the UK and attracts business across the region and more widely. The City is a centre of excellence for marine science and engineering and has a high quality educational infrastructure with four internationally recognised marine institutes. There are excellent road and rail links enabling rapid transportation of fish products. There are also convenient ferry links to export markets on the Continent. The City Council has demonstrated its commitment and support for the fishing industry, and





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Plymouth is a draw for innovative businesses and employment opportunities. In short, it is Britain's Ocean City and the fishing industry is part of that.

With these multiple strengths Plymouth is exceptionally well positioned to be able to capitalise on the opportunities that lie ahead.

### **The Fisheries White Paper and Brexit**

The Government published its Fisheries White Paper, *Sustainable Fisheries for Future Generations*, on 4<sup>th</sup> July. The Paper makes clear that it is the Government's intention that "access to UK waters will be on our terms, under our control and for the benefit of UK fishermen" when the UK leaves the EU. We welcome, as part of this, the proposal to move from relative stability to a fairer distribution of fishing opportunities based on zonal attachment. We were obviously disappointed that the Government was unable to deliver earlier exit from the CFP, despite strong indications earlier by Ministers that this would happen. The transition period (assuming that agreement is reached on this) must be used effectively to ensure that the fishing industry is equipped to take full advantage of the opportunities presented and is positioned to mitigate any risks when the UK leaves the EU. We support the Government's stated aim of separating negotiations on access to UK waters from negotiations about access to EU markets, though already there have been signs that the EC negotiating team and other member states are unlikely to concede easily. It is possible that there will be trade-offs if a deal is struck.

We agree that sustainability should be at the heart of future management arrangements. The White paper states that the Government aims to manage UK fisheries – and the wider marine environment – as a shared resource, a public asset held in stewardship for the benefit of all. This is an admirable principle, but we need to know what it will mean in practice. How it is interpreted and implemented will be critical and will affect the extent to which Plymouth and other south west England fishing ports and communities stand to benefit.

Fishing remains one of the most dangerous occupations in the UK and the regulatory systems have sometimes exacerbated the problem by adding to the risks. We are pleased that there is the promise to "consider safety throughout the policy development and implementation process for new management systems, practices and technology."

A difficulty we have with the White Paper is that there are few specifics. Nothing is said about how the proposals will be implemented. There are no timescales given other than the UK's exit from the CFP, nor any indication of relative priorities. It is this detail that matters. Experience has taught us that with fisheries management the *how* and the *when* can be more important than high



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level statements of intent. The fishing industry has to operate in a world of business realities and practicalities. It is difficult to sign up to any proposals, beyond in principle agreement, until we have a much clearer idea about how the different sectors within the industry and how we might be affected.

### **What is needed for a sustainable fishing industry**

We have summarised below what we believe to be some the key issues as far as Plymouth Trawler Agents are concerned:

To state the obvious, there have to be fish available to catch and land. This means that stocks have to be well managed, with sound science to support management decisions. At present, there are numerous data deficient stocks where the scientific data are inadequate or non-existent. Some of these stocks are economically important fisheries in the south west, such as cuttlefish. Also, at present, the European Commission and the ICES determine the priorities for fisheries research and monitoring. UK scientists contribute to this collective endeavour, mostly through ICES. Although there are real benefits from co-operation and co-funding, it can mean that the priorities determined centrally do not always coincide with those of UK fisheries management policy or the interests of the UK industry. There are UK fish stocks where better data would help the industry and help ensure that the stocks are managed sustainably. We would like to see the priorities for investment in the research and monitoring reviewed, to ensure that there is a stronger alignment between the needs of industry and the interests of the scientific community, which presently sometimes pull in different directions (especially if, as suggested in the White Paper, industry is asked to contribute more directly towards these costs).

Plymouth, with a supportive industry and four highly respected marine based academic institutions, is well placed to be centre stage in these developments and to work with the fishing industry – the catching sector, traders, processors and others – in developing an innovative programme of science, monitoring, data gathering and analysis that supports the local and regional economies.

The sea is a dynamic environment and there remains considerable uncertainty about fish movements and what is happening under the surface. This requires an adaptive and responsive management regime which delivers prompt decision making. The CFP falls down badly on this score. The Fisheries White Paper recognises this and promises timely policy and regulatory decisions once the UK has control of its waters. The Director General for Fisheries and Aquaculture of Norway has commented that Norway, as an independent state, can achieve in days or a few weeks what can often take many months or years under the CFP. Norway does so in close cooperation with its industry. We would like the industry in the UK to be able to work similarly in partnership with the fisheries



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administrations and enjoy swift, adaptive and responsive decision making by the UK authorities.

The Sutton Harbour Fish Market is operating at beyond capacity. It was not designed as a dedicated fish auction and market. The building was designed for multipurpose use, as there was strong doubt about the viability of the market when it was built. The success of the business has consequently presented us with a major challenge. When the market came into operation in 1995 it was never envisaged that we would have the present level of throughput and an annual turnover approaching £19m. Space is now cramped making handling large quantities of fish difficult and unnecessarily inefficient. There is not the room needed to modernise and introduce more efficient machinery and equipment. It is a struggle to maintain the high product quality on which we have built our reputation without the capacity to modernise. We can expect additional regulatory and data requirements in future; there are hints of this in the White Paper and, on top of this, Brexit is likely to place additional demands upon us when the UK becomes a third country and is exporting to the EU. If the UK is successive in reclaiming a fairer share of the fish stocks in its waters we can expect additional demand on our services. There will be more fish caught by local vessels, more fish landed here and more fish to be sold and transported. To be able to capitalise on this we need extra capacity and a modern infrastructure. Investment in modern premises and equipment should be a priority in Plymouth for a sustainable fishing industry.

Fishing ports play a significant role in the fisheries supply chain. They are the hub connecting the catching sector with traders and processors. They also act as a draw and home for associated support services, such as engineering, electrical equipment suppliers, repairs, boat building, etc. In doing so, they can become the basis of highly effective clusters; aligning and reinforcing geographical location, supply, functional linkages, and institutional presence. As such they serve and benefit not just their immediate location but their reach extends regionally. These inter-connecting forces foster innovation and drive, attract talent and strengthen the local and regional economies. It follows that it is important that the fishing ports should operate efficiently and offer high quality facilities to visiting vessels.

Unfortunately, the Fish Quay in Sutton Harbour falls short. On the Quay, vehicular access and movements are restricted because of lack of space and layout deficiencies, and the moorings, equipment storage and other facilities are not up to expected basic industry standards. There is lack of space for parking, loading and unloading lorries and vans, storing fish boxes and for repairs and maintenance. There is not the room needed for net and gear repairs. These are problems that were identified 20 years ago in a Seafish review of the Sutton Harbour fisheries complex and they remain today.



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There are other problems with the site as well. The commercial units are obsolete and unattractive to prospective tenants. High quality fish products are heavily dependent upon how the fish are looked after on the boats after they have been caught. The supply of good quality ice is vital to enable fishing vessels to keep fish in good condition and to get the best price. The present ice making plant is not ideally located, the quality of ice produced is not satisfactory and the limited capacity of the plant means boats can find themselves having to queue to take on ice, at a time when quick turnaround is paramount. The facilities compare poorly with competing ports.

The water space is also cramped. The water space is part of a fishing port's estate and is just as important as the services and equipment on the fish quay. If there is not enough room for boats to berth, they do not have access to water of sufficient depth or they have difficulty manoeuvring, these are major problems. The port will lose business and vessels will go elsewhere if they have a choice. As the space afforded to leisure craft has grown in Sutton Harbour berthing opportunities for larger vessels has reduced making manoeuvring difficult and potentially hazardous. It has been put to us that some of the deeper water in the harbour has been lost to leisure craft with a small draught, adding to the problem. The lack of space for larger vessels to berth will constrain the number of vessels able or willing to use the Fish Quay. If Plymouth wants to retain its present leading position as a fishing port improvements to the berthing facilities will be required.

The Government's Fisheries White Paper is noticeably silent on fishing port facilities and services. It also fails to mention interconnecting services such as trading and transport. We believe these to be serious omissions.

Plymouth is notable for the variety of fish species landed and sold. This is the product of highly mixed fisheries and a highly diverse fleet landing to the Market. We believe this diversity is vital to the economic viability of the port. There is often debate about the relative merits of large and small vessels. We see both bringing benefits. It is a matter of horses for courses. Offshore fisheries demand larger vessels, whilst smaller vessels are better suited for working inshore. The proposal in the White Paper to remove the arbitrary over and under 10m categorization of fishing vessels seems sensible. It is much better that fishing vessels should be sized and designed to meet the needs of a fishery, with safety, efficiency and environmental sustainability firmly in mind. A balance then needs to be struck when allocating access to fishing opportunities so that the distribution reflects regional as well as national priorities. We would like to see increased opportunities for small as well as large vessels, and some assistance to encourage new entrants.

The vessels that supply PTA vary from large beam trawlers to small day boats. The quantities supplied by the smaller boats produce only a small return for the



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Auction, but the quality of the fish can be excellent and contribute to the appeal of the auction to buyers. The combination of fish supplies from small, medium and large vessels is part of the Market's strength; to remain viable and to continue to generate buyer interest the market needs large vessels as well as small.

We provide a service for many of the fishermen landing to smaller ports and landing places in the south west region and beyond. It goes beyond a purely commercial relationship. We see this as part of Plymouth's regional role in supporting small fishing communities, providing jobs in areas where there are few alternative sources of employment. We provide a pick-up service, which on simple cost grounds would often not be economic. Transport or the lack of it can be an obstacle to sustainable fisheries – especially in the smaller landing places and harbours.

All UK registered vessels that catch and land quota-controlled stock are required under the terms of their licence to meet certain economic conditions. The purpose of these particular conditions is to maintain an economic link that will benefit the UK. They mainly affect UK registered foreign owned vessels, which currently account for a substantial proportion of the fish caught by UK vessels that are landed abroad. The Fisheries White Paper states that the economic link conditions are being reviewed. At present, the conditions are ineffective. There have been longstanding concerns that coastal communities and UK businesses are losing out. We believe that the conditions should be much more robust and should be more effectively enforced in order that Plymouth and other fishing ports in the UK should see real benefit.

We started this section of our evidence with the need to be able to catch fish. Our final point is that there also have to be markets in which to sell them. The EU is an important market for fish landed in the UK. A substantial proportion of the fish caught in UK waters are exported to the EU. A large proportion of the fish eaten in the UK are imported from or via the EU. There are also other important and growing exports to other countries outside the EU, such as the USA, China, South Korea, Taiwan and Canada. In 2016-17, the top four export markets were France, USA, Spain and the Irish Republic. Being able to import and export fish with minimum disruption is obviously desirable, as is greater freedom to explore new international markets. The White Paper recognizes this, but contains little firm information about how this will be achieved. From our point of view it would be helpful to have greater clarity about likely future requirements in order that we can be properly equipped and prepared.

10<sup>th</sup> August 2018

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Email: Mr M Gilbert

Comments on the Fisheries White Paper: Sustainable Fisheries for Future Generations  
(submission to Cornwall Council)

I have some concerns with the claimed number of full time jobs of 8,500 at 1.5.

*“Fishing is highly interlinked with the wider marine and maritime sector, which in Cornwall is estimated to generate between £300 and £500 million to the Gross Value Added each year and it is estimated that that the sector supports towards 8,500 full time jobs excluding tourism.”*

Is this the number of jobs within the entire marine & maritime sector including fishing (commercial & resident recreational angling), all boat building (including the high end luxury yachts built at Falmouth), renewables, resident sailing & leisure boating, resident diving, resident seal & cetacean watching, shipping, ferries, scientific research, R.N.L.I, film production, resident surfing etc. or is it being suggested there are 8,500 full time jobs dependent on commercial fishing in the county?

If the later, at 1.3 it states that in 2017 some £46 m worth of fish & shellfish at first sale value was landed in the county. If £46m is divided by 8,500 jobs it suggests that each £5,411 worth of landings supports a full time job. That simply doesn't appear to be tenable.

Moreover, in a report titled Socio-Economic Baseline Study of the South West Fishing Industry (attached) researched by Nautilus & Ekos Consultants on behalf of Pesca & the SWRDA, published in 2003, the number of direct jobs was stated as 1332; indirect jobs were given as 2013 and induced jobs as 614. That's a total of 3,409 for the entire South West including ports like Plymouth & Brixham.

At 3.2 it reads:

*“An alternative approach would be to adopt a more ambitious high stock policy which would lead to a more stable income and better management of fish stocks.”* Might I suggest a little more detail to support a High Stock strategy be included. Something along these lines.

*“An alternative approach would be to adopt a ‘High Stock’ policy so as to provide a buffer against annual recruitment volatility. Additionally, more resilient stocks represented by a more natural age structure would contribute to stability of annual catches and incomes with increased catches per unit of effort (CPUE). It is time to be more ambitious.”*

At 3.14 this sentence *“The recreational sector is also a component of the tourism offer.”* could be replaced with: *“Cornwall enjoys a diverse range of angling species that combined with the County's proven tourism credentials makes the development of a thriving saltwater recreational fishery highly desirable. There are lessons to be learnt from other parts of the globe to guide this process.”*

I was surprised at the content of 4.6. In my opinion we must move towards a 'User Pays' system. It is widely acknowledged that globally, public support for fishing (boats, gear and quay side facilities) has been a major contributor to overfishing. We heard from David Muirhead (commercial handline association) how public funding of pots simply aggravated the situation of there being too many pots being worked. Even Paul Trebilcock (CFPO) accepted the industry should stand on its own feet and not be reliant on subsidies.

I do however accept that the benefits of a healthy marine environment, one in which depleted fish stocks are rebuilt, would be beneficial to the wider society and therefore agree some of the costs of marine management should be met from general taxation. One failing of EMFF funding is that because of the failure of the CFP to officially recognise recreational fishing (the public exploiting public fishery resources for personal consumption) alongside commercial fishing and aquaculture, EMFF funds were never accessible for the development of recreational fishing. If the UK Government are to replace EMFF funding, given the economic and employment impacts from recreational fishing, any such funds should be accessible to all fisheries sectors on a level playing field basis.

I believe the relationship between harbours – fishing and tourism is not as simple as it is made out to be. I moved to St Ives to live in the early 1970s. Since then the number of fishing vessels and the amounts of and volumes of fish landed have plummeted. Simultaneously, St Ives has become one of the leading tourism destinations. If those two scenarios were plotted on a graph, one inevitable conclusion would be that as fishing declined, tourism increased. A couple of years ago whilst visiting Padstow in the height of the summer I was aware that the inner harbour was devoid of fishing boats but instead full of what I'll loosely refer to as gin palaces. The wharf was thronged with tourists! They clearly weren't there for the fishing boats. Later in the evening I walked north up over the footpath and joined a large number of tourists just taking in the incredible view across Padstow estuary towards Rock. The water was full of boats; dive ribs, rowing gigs, kayaks, tripper boats, angling boats returning, water skiing, sailing yachts of all sizes and leisure motor launches. Not a fishing boat in sight and yet the tourists were enthralled.

Incidentally, recreational angling in Southern Ireland has been valued at three quarters of a billion euros. See: <https://www.fisheriesireland.ie/Press-releases/new-study-angling-worth-075-billion-to-irish-economy-and-supporting-10000-jobs-in-rural-ireland.html>

Thank you for seeking the views of all stakeholders to inform Cornwall Council's response to the White Paper. There are great opportunities with regards to marine fisheries across the UK and especially in Cornwall, but realisation of those opportunities requires the courage to adopt a fresh cultural mindset that prioritises the wellbeing of the marine environment.



Email: Mr M Gilbert

My background in marine fisheries is varied. I have fished recreationally for more than 50 years around west Cornwall and during the last 20 years have travelled to a number of global destinations on a regular basis to sportfish. During the late 1970's I started a business catching (I skippered a small inshore commercial vessel for over 25 years), processing and distributing frozen fish products for a specialist market comprising angling bait and feed for sea life centres/aquariums. I sold up and retired in 2007.

I have in the past been a member of the Cornwall Sea Fisheries Committee (prior to setting up of IFCAs); I have represented the interests of recreational sea anglers for many years locally, nationally and at EU level working for the National Federation of Sea Anglers, the Bass Anglers Sportfishing Society and the European Anglers Alliance. I am currently a consultant for the Angling Trust but am slowly winding down the amount of time working at the coalface particularly if it involves international travel.

Fisheries data is fraught with complexities. I have watched with a mixture of incredulity and vexation the annual Fisheries Debate in Parliament for a number of years where the activities of the UK commercial catching sector and the UK seafood sector are regularly confused. The seafood sector is actually a substantial business valued at around £7 billion. The vast majority of this has nothing whatsoever to do with the UK catching sector that only lands £689 million worth of fish/shellfish into the UK, well over half of which takes place in Scotland. The UK seafood sector is mainly reliant on imported fish and aquaculture.

Even the Government's White Paper may be misleading. Paragraph 7 of the Forward reads: *"In 2016, the UK exported £1.17 billion of seafood to the EU."* I suspect the assumption for most readers is that this all derives from UK catches. In fact 25% (£300 m) is farmed salmon. In 2016 UK vessels landed £38m worth of cod but the UK imported £491m of cod. The UK exported £59 m of cod, some of which was patently imported cod.

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## Justification for taking account of Recreational Angling objectives in managing some species.

Extract from latest UK Government Fisheries White Paper:

*"Recreational angling is a popular sport in England bringing both economic and social benefits to the UK. Defra will look at how to further integrate recreational angling into fishery management governance and decisions. This could include managing some stocks specifically for the recreational angling sector only."*

Such suggestions are not new. Very similar sentiments appeared in a report to Government back in 2004 called 'Net Benefits' that was arguably the most comprehensive analysis of the entire marine fisheries sector ever carried out. It was researched and published by the Cabinet Office Strategy Unit led by Professor John Beddington with a team largely comprised of associates of the London School of Economics and the 200+ page report included:

*"The overarching aim of fisheries management should be to maximise the return to the UK of the sustainable use of fisheries resources and protection of the marine environment."*

*"Management to maximise opportunities for recreational anglers means reducing commercial fishing pressure to allow species such as bass, favoured by sea anglers, to grow to much larger sizes. Management for multiple uses is possible."*

Extract from a banking/investment magazine article titled "Big bass, Big bucks" in USA, May 1999.

*"According to the Division of Marine Fisheries, Massachusetts has the largest and most successful recreational striped bass fishery in the country. This enviable reputation is due in part to pressure by sportfishermen for a conservation approach to fisheries management. And it has paid off. "We are a waterfront State and the biggest State for striped bass" says Tony Tolentino, Chairman of the Marine Fisheries Commission which approves State fishing regulations. As a commissioner, Mr Tolentino has been involved in many difficult decisions affecting both recreational and commercial fishing sectors. Many of the arguments surrounding striped bass focus on its economic value to the recreational fishing industry.*

*In terms of the Cape economy, Mr Tolentino says that the impact of recreational fishing is "astronomical". He says blue fish and striped bass have by far the greatest overall economic value from recreational fishing, not the commercial sector. "There's no comparison" he says emphatically. Mr Tolentino says money spent by sport fishermen on the Cape would be sorely missed if we didn't take care of this recreational fishery and the people who come here to do it."*

*That view is shared by conservationists who have fought to limit the commercial harvest of striped bass. Dave Rimmer, executive director of the Coastal Conservation Association of Massachusetts (CCA-MA) says striped bass are far more valuable alive than dead. He added, "Anglers travel to the Cape from all over the world but the common goal they all share is to hook into a striped bass, the king of the surf in these parts."*

Such sentiments, if uttered anywhere within the EU Common Fisheries Policy (CFP) jurisdiction appear to antagonise commercial fishing leaders just as a red flag is said to infuriate a bull.

But why does challenging conventional thinking in the sphere of UK/EU marine fisheries attract such condemnation from some quarters?

Marine fishery resources are Public resources – property of the Commons – societal goods. So why shouldn't the exploitation of marine fisheries be based on 'best value' criteria for the owners – society?

Haven't many farmers recognised that their capital, in the form of agricultural land, can on occasions provide a far superior return as golf courses, camping sites, 4X4 tracks or shooting estates than from food production?

No one is suggesting commercial fishing should end or be replaced with recreational angling, just that instead of managing the entire range of marine fishery resources exclusively for commercial exploitation, consider the evidence that some species may generate a higher return to UK plc if managed for recreational exploitation or indeed managed for both sectors. Management objectives for recreational exploitation can be quite different from those of commercial exploitation but patently it is possible to have sustainable and profitable recreational fisheries alongside valuable commercial fisheries. Despite the sentiments articulated in the above extract from a financial investment magazine in Massachusetts, the State enjoys a highly regulated and valuable commercial fishery for striped bass alongside its thriving recreational fishery.

Here are some English facts and figures.

Commercial fishing in England lands a total of £160 million [ <https://www.gov.uk/government/statistics/uk-sea-fisheries-annual-statistics-report-2016> ] worth of fish comprising shellfish, demersal & pelagic species from cod to cockles. This first sale value is what fishermen earn to spend on boats (buying and maintenance), fuel, fishing gear, specialist clothing, chandlery, moorings, wages, insurance and most of the catch is exported.

Recreational sea anglers in England pump £831 million [ <http://webarchive.nationalarchives.gov.uk/20140305101647/http://www.marinemanagement.org.uk/seaangling/finalreport.htm> ] directly (excludes imports & taxes) into the economy that is spent on boats (buying and maintenance), fishing gear, chandlery, fuel, clothing/footwear, moorings, travel and accommodation, bait, charter fishing and guiding.

The particularly remarkable point to take into account is that recreational sea angling is reliant on only a relatively small proportion of species that only account for £32 million (20%) of the value of commercial landings. In other words, 80% of the value of commercial landings is from species of no direct interest to sea anglers so the requirement for a change in policy and strategy from that of management exclusively for commercial use to that of joint use is only relevant for those species that are targeted by both commercial and recreational fishers and that is just one fifth of commercial landings by value.

The time is long overdue for fisheries managers to be guided by the evidence rather than being fearful of change and intimidated by commercial fishing representation.

Mr M Gilbert



Department  
for Environment  
Food & Rural Affairs

# Sustainable fisheries for future generations

**July 2018**



# **Sustainable fisheries for future generations**

Presented to Parliament  
by the Secretary of State for Environment, Food and Rural Affairs  
by Command of Her Majesty

July 2018



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ISBN 978-1-5286-0640-0

CCS0718988608

07/18

Printed on paper containing 75% recycled fibre content minimum

Printed in the UK by the APS Group on behalf of the Controller of Her Majesty's Stationery Office

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## Foreword

I am delighted to publish today a White Paper on Defra's future fisheries policy.

Our seas and oceans are an integral part of our history, economy and way of life. Delivering a green Brexit centres around three interconnected areas of policy: fishing, farming and our environment. Leaving the EU and the Common Fisheries Policy (CFP) gives us the opportunity to introduce a sustainable, responsive and resilient new fisheries policy.

As an independent coastal state for the first time in over 40 years, access to UK waters will be on our terms, under our control and for the benefit of UK fishermen. Today we are setting out our plans to promote a more competitive, profitable and sustainable fishing industry across the whole of the UK, and setting a gold standard for sustainable fishing around the world.

The allocation of fishing opportunities under the CFP is outdated, and the UK's share does not accurately reflect the resources in UK waters. On average between 2012 and 2016 other EU Member States' vessels landed in the region of 760,000 tonnes of fish (£540 million revenue) annually caught in UK waters; whereas UK vessels landed approximately 90,000 tonnes of fish (£110 million revenue) caught in other Member States' waters per year in the same time period.<sup>1</sup> As we leave the EU, we are committed to working closely with our partners to manage shared stocks in a sustainable way and share fishing opportunities on a fair and scientific basis. We have instigated a comprehensive programme of research to inform this process and provide the evidence to secure a fairer share of fishing opportunities for UK fishers.

There are specific and considerable opportunities for UK fisheries outside of the EU. In 2016, the UK exported £1.17 billion of seafood to the EU, and imported £1.04 billion from the EU. Equipped with a new fisheries policy, the UK fisheries sector will be in a strong position to trade seafood with export markets around the world.

Foremost, this White Paper recognises that healthy fish stocks are the first step to vibrant commercial and recreational fishing industries, and prioritises a healthy marine environment. We will continue to work under the principle of maximum sustainable yield, which has done so much to restore stocks, as well as to help to protect our valuable

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<sup>1</sup> UK data source: <https://www.gov.uk/government/statistics/uk-sea-fisheries-annual-statistics-report-2016> (the datasets underlying the UK landings by EEZ report)

OMS data source: <https://www.gov.uk/government/statistics/announcements/landings-by-non-uk-eu-member-states-fishing-vessels-from-the-uks-territorial-waters-and-exclusive-economic-zone-2012-2016>

marine ecosystems, and we will continue to prevent wasteful discards. In all this, scientific evidence will guide decisions, making sure that we pass a healthy marine environment and profitable fishing industry on to the next generation.

The commercial fishing industry and wider seafood sector are important to many coastal communities across England, Scotland, Wales and Northern Ireland (where particular attention will be given to maintaining cross-border co-operation).

As a dynamic industry, fisheries require rapid and responsive regulation. Bringing control back to the UK will enable greater scrutiny of fisheries policies, and swifter responses to changing scientific advice or circumstances and meeting our international obligations.

This White Paper reflects continuing discussions with the Devolved Administrations, who are responsible for domestic fisheries management in their areas, and stakeholders. I hope that we will continue to work together to take advantage of the many and significant opportunities facing the fishing industry across our island nation.

Together we will cast a future arrangement that is good for fisheries, for the environment, and for consumers.

**The Rt Hon Michael Gove MP**

## Executive summary

### Introduction

This paper sets out the scope of Defra's proposed new approach to fisheries management. Our aim is to build a vibrant and sustainable UK fishing industry by taking responsibility for managing fisheries resources within UK waters, while continuing to protect and improve the marine environment, in line with our recent 25 Year Environment Plan.

### The UK's road to improved fishing opportunities and transition

After leaving the EU, the UK will become an independent coastal state under international law (UN Convention on the Law of the Sea (UNCLOS))<sup>2</sup> and will have the right to control and manage access to fish in UK waters out to 200 nautical miles or the median line. In line with UNCLOS, we will continue to co-operate closely with the EU and coastal states on the sustainable management of fish stocks that cross borders.

In the short term, UK fisheries policy will align with the agreement reached with the EU on 19 March 2018 on an implementation period. This period will serve as a stepping stone to our future relationship with the EU. However, from 2020, we will be negotiating access and fishing opportunities for 2021 as an independent coastal state.

As an independent coastal state, we will decide who can access our waters after 2020 and on what terms, for the first time in over 40 years. Any decisions about giving access to our waters for vessels from the EU, or any other coastal states including Norway, will then be a matter for negotiation.

Fisheries will be a separate strand of our future relationship with the EU. Through the fisheries strand the EU and the UK, as an independent coastal state, will negotiate on access to waters and fishing opportunities on an annual basis. This is consistent with the approach to fisheries taken by other coastal states including Norway.

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<sup>2</sup> The United Nations Convention on the Law of the Sea (1982) sets out the legal framework within which all activities in the oceans and seas must be carried out. It gives legal recognition to the right of a coastal state to jurisdiction over its Exclusive Economic Zone (EEZ) (12-200nm or the median line with other coastal states). A coastal state has the right to exploit, develop, manage and conserve all the natural resources (including fish) found in the waters of the EEZ, on the ocean floor and in the subsoil of its continental shelf. Contracting states must cooperate with other states where the same stock or stocks straddle two or more EEZs, the EEZ and the high seas, or where the stock is a highly migratory species, which is the case for virtually all stocks fished by the UK.

Under the CFP's principle of 'relative stability', the UK receives a fixed share of fishing opportunities based on historical fishing patterns in 1973 - 1978. This is unrepresentative of the fish now in UK waters. On average between 2012 and 2016, other EU Member States' vessels landed in the region of 760,000 tonnes of fish (£540 million revenue) annually caught in UK waters; whereas UK vessels landed approximately 90,000 tonnes of fish (£110 million revenue) caught in other Member States' waters per year in the same time period.<sup>3</sup>

We will be seeking to move away from relative stability towards a fairer and more scientific method for future Total Allowable Catch (TAC) shares as a condition of future access. Initially, we will seek to secure increased fishing opportunities through the process of 'annual exchanges' as part of annual fisheries negotiations. In due course, as part of those annual negotiations we would be open to considering multi-annual agreements for appropriate stocks, as happens currently between the EU and other coastal states.

In negotiating new arrangements with the EU, we will give particular attention to enabling cross border co-operation on fisheries management between Northern Ireland and Ireland, in line with the commitments agreed by the UK and the Commission in the Joint Report (published 8 December 2017).

The UK has long been committed to sustainable fisheries, and we shall continue to work closely with our neighbours to ensure the sustainable management of shared stocks. We will seek to agree a process with the EU for future annual negotiations on access and fishing opportunities, as well as an approach for continued cooperation on fisheries management and on longer term sustainable approaches.

Access to markets for fisheries products will be agreed as part of our future economic partnership, just as with other goods and food products. This is separate to the question of fishing opportunities and access to waters, which consequently will be addressed separately, founded on the UK's legal status as an independent coastal state. This is consistent with fisheries agreements internationally, and with EU-third country precedents. Both the EU and UK have an interest in continued trade for the fisheries and wider seafood sector.

The UK will apply to be an independent member of Regional Fisheries Management Organisations (RFMOs), including the North East Atlantic Fisheries Commission (NEAFC), where we will pursue our interests in negotiations on important stocks such as North-East Atlantic mackerel, blue whiting and Atlanto-Scandian herring. We will also play an active role in other international bodies such as the UN Food and Agriculture Organisation (FAO). Where appropriate, we will work in close cooperation with the Crown Dependencies, who independently manage their fisheries, and the Overseas Territories.

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<sup>3</sup> See footnote 1

## **Promoting sustainable fisheries**

All of the Fisheries Administrations across the UK and the Crown Dependencies champion sustainable fisheries and marine conservation. The UK will project these values in negotiations with our neighbours, making adherence to sustainable practices a pre-condition of any future access to our waters.

We will continue to apply the principle of Maximum Sustainable Yield (MSY) when setting or agreeing total allowable catches (TACs), and we will promote fishing within MSY ranges in line with international scientific advice on mixed fisheries. We will also continue to work towards ending the wasteful practice of fish discards, including through the development of new initiatives with industry and other interests.

We will work with the Devolved Administrations to develop technical measures such as Remote Electronic Monitoring (REM) (including CCTV) on vessels fishing in the UK's Exclusive Economic Zone (EEZ), to ensure compliance with fisheries regulations across the UK.

As set out in the 25 Year Environment Plan, we will pursue an ecosystem approach to fisheries management that aims for more sustainable management and accounts for, and seeks to minimise, impacts on non-commercial species and the marine environment generally.

## **Access agreements and quota allocation**

Our Fisheries Bill includes proposals for powers to deliver what we negotiate with the EU and other coastal states on access to waters and fishing opportunities. This includes powers for the UK Government and Devolved Administrations to implement international agreements reached on access to UK waters, and to set fishing opportunities (principally quota). The principle of universal access to UK waters will continue to apply to all UK vessels.

We are also making plans so that we are ready to implement arrangements negotiated and to meet the different enforcement challenges in our waters after we leave the EU and the CFP.

## **CFP technical regulations**

Under an implementation period, the existing body of EU regulations will continue to apply until December 2020.

The EU (Withdrawal) Act will be used to make EU law part of a new body of UK law, to be known as retained EU law. The Act includes powers to enable corrections to be made to the laws that do not operate appropriately once we have left the EU. In time, this body of law will be replaced with domestic legislation. In fisheries, this will cover about 100

legislative instruments covering issues such as gear types, mesh sizes, minimum landing sizes and other technical standards.

The Fisheries Bill proposes taking powers that will enable this retained EU law to be amended expeditiously by secondary legislation. The marine environment is dynamic and timely decisions are required.

These powers will allow us to make rapid legislative and policy adjustment where this is appropriate, including in cases where measures are currently introduced by the European Commission through Delegated Acts.

### **A new UK framework**

We are working with the Devolved Administrations to develop a new UK framework for fisheries management, which is likely to include both legislative and non-legislative elements. This will respect the devolution settlements and maximise all Fisheries Administrations' power to manage their fisheries while, where necessary, maintaining the overall coherence of the UK's fisheries policy, particularly to ensure compliance with international obligations, protect the UK internal market and manage our shared resources sustainably.

In international fisheries negotiations, the UK delegation will include representatives from each administration of the UK, as is the case now. The duty of cooperation within the delegation will remain and wherever possible consensus will be sought on negotiating priorities. If there is a disagreement within the UK delegation, the Secretary of State will, as now, have the power to make a final decision as the leader of the UK delegation, acting in the interests of the whole country.

The UK Government is responsible for overall compliance with international obligations and the Devolved Administrations are responsible for implementing these obligations in their own areas.

We are also working with the Crown Dependencies to develop new fisheries management agreements which reflect their independence in managing their fisheries while maintaining the overall coherence of the UK's fisheries policy.

This White Paper is a UK Government policy document that discusses a range of fisheries policy matters, subject to the continuing discussions between Defra and the Devolved Administrations. The extent of the different provisions proposed for the new Fisheries Bill will vary depending on what powers already exist in different areas and what is agreed between the Administrations: some will have UK-wide extent; others will apply to England only, others to England and the Devolved Administrations that wish to adopt them. The powers concerning international relations, on access to waters and setting quota, will be exercised at UK level as they relate to reserved matters.

## **Reforming fisheries management**

As we negotiate with the EU and coastal states for a fairer share of the fishing opportunities, we also need to consider how those additional opportunities are allocated across the UK and within England in future.

Leaving the EU provides the opportunity to move towards a fairer and more scientific method for the allocation of fishing opportunities.

We do not intend to change the method for allocating existing quota. However, in relation to any additional fishing opportunities negotiated by virtue of the UK's new status as an independent coastal state, Defra intend to begin a conversation with the Devolved Administrations, Crown Dependencies and stakeholders to allocate these on a different basis, including the potential use of alternative methodologies such as zonal attachment. A new methodology would be in place in time for the allocation of any additional fishing opportunities agreed from December 2020 onwards.

In England, Defra will seek to mirror the approach outlined for UK allocations, by developing with stakeholders a new allocation methodology for additional fishing opportunities agreed from December 2020 onwards, while ensuring the functioning of the UK internal market.

To give us the tools to enable changes, the Fisheries Bill proposes powers that will enable Defra to explore and pilot alternative approaches to the future allocation of fishing opportunities and models to fund future fisheries science in England.

We will consider the establishment of a reserve of quota to be managed and allocated by the Marine Management Organisation (MMO) in accordance with new criteria to meet the future needs of the industry. This could include allocation of some fishing opportunities specifically for recreational angling.

We will consider allocating some fishing opportunity, which could be from within the reserve, through a tendering or auctioning system.

We will also consider allocating part of any new quota in the reserve to underpin a new approach to tackle the problem of choke species, so that the crucial discard ban works in practice as well as in theory.

We will consider the development of new ways to deter fishers from catching or discarding fish caught in excess of quota, drawing on the experience of other fishing states such as New Zealand. Such fish could be subject to a charge related to the market value of the fish landed, with the landings covered by quota retained in the reserve for such purposes. These charges could be recycled back into the sector to help develop measures to help them further change behaviour and thus reduce the need for the scheme over time.



Such an approach would maintain a powerful disincentive to targeting any fish species where quota is scarce since fish subject to a charge would have little or no value to the fishermen who landed them. However, it would avoid the problem of individual Producer Organisations or vessels being grounded through the problem of choke species.

We want an efficient but sustainable industry. Technological advances have driven greater efficiency and modern smaller boats are able to catch far more fish than previously. We will therefore consider new criteria to define low impact inshore fishing vessels to replace the current 'under 10 metre' category.

We will consider a targeted scientific trial using an effort (days at sea) based regime in place of a quota regime for some low impact inshore fisheries.

If evaluation of the outcomes shows that such approaches are successful with the low impact inshore fleet, consistent with our commitment to sustainable fishing, then we will give careful consideration to further selective trials for deployment of effort based regimes or alternative hybrid models in other parts of the demersal fleet.

In considering how fisheries may be managed in future, we will be very mindful of lessons about unintended consequences and importantly, about the implications for fishermen's safety.

We will consider how we can further integrate recreational angling within the new fisheries framework recognising the societal benefits of this activity and impacts on some stocks.

# 1. Setting our course

## 1.1. Introduction

The UK Government's aim is to build a vibrant and sustainable marine fishing industry by taking exclusive responsibility for managing fisheries resources within our own waters.

When we leave the EU, the UK will become an independent coastal state under international law (UNCLOS<sup>4</sup>) with jurisdiction over our territorial sea and **EEZ** – out to 200 nautical miles (nm) or the median line between us and neighbouring states.

This White Paper sets out Defra's new approach to fisheries management after the UK becomes an independent coastal state outside of the CFP, which needs to be science-based, principled and adaptive.

The document discusses a range of fisheries policy matters, subject to continuing discussions between Defra and the Devolved Administrations about a future **UK framework** (section 1.5), and discussions about where powers or competencies returning from the EU should be exercised (consistent with the government's 2017 Manifesto<sup>5</sup>). Domestic fisheries management is already devolved and there is an expectation for an increase in the Devolved Administrations' powers in this area.

We will pursue our new policy approach through action in three inter-related areas:

- **Legislation** centred on the EU (Withdrawal) Act and the forthcoming Fisheries Bill, including new powers to control access to UK waters and to set fishing opportunities, followed up through secondary legislation and executive action (section 1.2 below);
- **Negotiations with the EU and other coastal states**, particularly on access to waters and fishing opportunities (section 1.3);
- **Meeting our international commitments**, notably on sustainability and trade (section 1.4).

The main focus here is commercial marine fisheries, a UK sector which landed £936m<sup>6</sup> of sea fish (including shellfish) in 2016 into the UK and abroad (see **Annex A**). Recreational

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<sup>4</sup> See footnote 2

<sup>5</sup> 'We will respect the devolution settlements: no decision-making that has been devolved will be taken back to Westminster. Indeed, we envisage that the powers of the Devolved Administrations will increase as we leave the EU.' Accessed from: <https://www.conservatives.com/manifesto>.

<sup>6</sup> UK sea fisheries annual report 2016, MMO

fishing, with around 1 million anglers, is also an important sector and we also take account of the implications for the wider seafood industry including processing and aquaculture (section 4). We aim to manage these fisheries – and the wider marine environment – as a shared resource, a **public asset** held in stewardship for the benefit of all.

Defra's recent **25 Year Environment Plan (25YEP)** set out this government's ambition to secure clean, healthy, productive, and biologically diverse seas and oceans. This includes pursuing an ecosystem approach to fisheries management, which aims for more sustainable management and accounts for, and seeks to minimise, impacts on non-commercial species and the marine environment generally. This involves restoring and maintaining the healthy fish stocks and marine environment which underpin a prosperous fishing industry (sections 2.1, 2.6 and 2.7).

Sustainable seafood production contributes to ensuring that the UK has a secure, environmentally sustainable and healthy supply of food. There are exciting opportunities for fishers, as well as the wider seafood sector across the UK, to supply consumers' growing demand for sustainable, resource-efficient and nutritious food.

These are outline proposals, and we want to deepen and strengthen our **partnership** with the Devolved Administrations, as well as industry and other non-governmental stakeholders, to implement them in ways that work best for the seafood industries, coastal communities and the marine environment.

## 1.2. Legislation

We will use both primary and secondary legislation to pursue our new approach, taking account of the wider landscape of domestic legislation concerning EU exit.

At the time of publication of this White Paper, the government is preparing a **Withdrawal Agreement and Implementation Bill (WAIB)** that will ensure a legal framework is in place for the implementation period, under which most EU rules will continue to apply until December 2020.

The **European Union (Withdrawal) Act** enables the government to provide continuity and legal certainty by bringing EU rules into UK law as 'retained EU law'. Retained EU law will then be replaced in time with domestic legislation.

For fisheries, retained EU law will include around 100 pieces of legislation that make up the CFP, and set out the CFP's high-level objectives. This will mean we continue to deliver international commitments on sustainable fishing, as well as provisions on elements including the landing obligation (discard ban), technical measures on matters such as gear types and mesh sizes, measures relating to control and enforcement and the common market organisation (background on the CFP at **Annex B.**) The CFP Regulations also contain specific powers which allow the Commission to make legislation in relation to a

variety of other matters, such as to amend species under conservation measures based on scientific evidence, or to introduce measures to protect marine life.

Our approach will be to use powers under the EU (Withdrawal) Act to correct this body of retained EU law, so that it is operable in the UK, pending future review.

The powers in the EU (Withdrawal) Act to correct retained EU law are time limited.

The government has been clear we will bring forward major policy changes through other primary legislation. The Fisheries Bill, announced in the Queen's speech last year, will deliver a significant change to the way fisheries are managed in the UK. The Bill will restate the UK's commitment to sustainable fisheries and propose provisions:

- To enable the UK to take back **control of access** to our fishing waters (territorial sea extending up to 12 nautical miles and our EEZ extending up to 200 nautical miles offshore) by allowing the UK to decide which countries' vessels may fish in these areas.
- **To preserve equal access for UK vessels throughout UK waters.** The CFP currently provides for access for UK vessels throughout UK waters. The Bill would ensure that this is maintained.
- **To set fishing opportunities** (quota or days at sea) for the UK. This would implement the international agreements on TACs made between the UK, the EU and coastal states like Norway.
- To require the Secretary of State to develop a policy statement, with Devolved Administration ministers, on how to apply specified **sustainability principles and objectives** in fisheries management.
- To allow the UK to respond to scientific advice, protect the marine environment and meet our international commitments by taking a power to **amend retained EU law** (and to make changes to existing UK law) relating to fisheries. This is necessary because of the large number of highly technical regulations which need to be amended regularly in order to manage fisheries sustainably, as well implement international commitments relating to fisheries. The power would be exercisable by the Secretary of State in relation to England, subject to final decisions on the EU (Withdrawal) Act and discussions with the Devolved Administrations on constitutional issues and UK frameworks, and will be as tightly constrained as possible.
- To ensure we can protect the **marine environment**, by extending powers in the Marine and Coastal Access Act to allow for the regulation of fishing activity for the purpose of protecting the marine environment both in the inshore and offshore zones outside Marine Protected Areas. This would be for England only but we are open to discussions with the Devolved Administrations about creating similar powers for them.

- To improve the MMO's **cost recovery**. These will make sure the MMO in England has the same powers as the Devolved Administrations already have. They will ensure we can encourage behaviour change in the industry and a responsible approach to the management of a public asset.
- To allow a scheme to be set up to **tender or auction English quota** linked, for instance, to a proportion of the quota gained as a result of negotiations with the EU and coastal states and to introduce a scheme to enable fishers to avoid the problem of choke species while deterring discards.
- To modernise **grant-making** powers in England.

We do not yet know the outcome of the UK's negotiations to withdraw from the EU or on a future economic partnership. The powers proposed in the Fisheries Bill have therefore been developed to make sure that we can respond flexibly and quickly to a dynamic environment as we approach exit, but also manage fisheries more effectively, for example by responding to scientific advice in the years to come. In doing so, the Fisheries Bill will mean that Parliament has a greater level of scrutiny over future secondary legislation on fisheries than it currently enjoys over comparable EU legislation.

### 1.3. Negotiations with the EU and other coastal states

As an independent coastal state, the UK will work closely with the EU and other coastal states, including Norway and the Faroe Islands, to manage transboundary stocks, including through agreeing TACs, access and shares of fishing opportunities. This is vital for sustainable exploitation. The UK has long championed sustainable fishing and is committed to such cooperation in line with our obligations under **UNCLOS** and the **UN Fish Stocks Agreement (UNFSA)**.

Defra will continue to work closely with the Devolved Administrations and Crown Dependencies in determining and pursuing mutually beneficial UK positions in international negotiations, as reflected in the UK framework process discussed at section 1.5.

On 19 March, the UK and EU reached an agreement on the nature and length of the implementation period. This was endorsed by the European Council on 22 March. The agreement clarifies that the UK's share of quotas will not change during the implementation period and that the UK can attend international negotiations as part of the EU delegation. Furthermore, the agreement includes an obligation on both sides to act in good faith during the implementation period.

These arrangements will only apply to negotiations in 2019. The UK will be a full Member State for negotiations in 2018 and, critically, in 2020 we will be negotiating fishing

opportunities for 2021 as a third country and independent coastal state completely separately from the CFP.

As an independent coastal state, we will decide who can access our waters after 2020, and on what terms, for the first time in over 40 years. Any decisions about giving vessels from the EU, and any other coastal states, access to our waters will then be a matter for negotiation.

Fisheries will be a separate strand of our future relationship with the EU. Through the fisheries strand the EU and the UK, as an independent coastal state, will negotiate on access to waters and fishing opportunities on an annual basis. This is consistent with the approach to fisheries taken by other Coastal States including Norway.

To make sure that we are fully able to control UK waters after leaving the EU, the government gave notice on 3 July 2017 to withdraw from the 1964 **London Fisheries Convention** (LFC). This provides for certain arrangements between coastal states allowing access to fisheries in the 6-12 nautical mile zone. Vessels from France, Ireland, Belgium, Germany and the Netherlands have some access to the UK 6-12 nautical mile zone. Withdrawal from the Convention requires 2 years notice.

Given the heavy reliance on UK waters of the EU fishing industry (on average between 2012 and 2016 other EU Member States' vessels landed in the region of 760,000 tonnes of fish (£540 million revenue)), as well as the importance of EU waters to the UK (UK vessels landed approximately 90,000 tonnes of fish (£110 million revenue)<sup>7</sup> in other Member States' waters per year in the same time period), it is in both our interests to reach a deal that works for the UK and the EU's fishing communities.

Under the CFP's principle of relative stability, the UK receives a fixed share of fishing opportunities based on historical fishing patterns in 1973 - 1978. This is seen by many in the sector as unrepresentative of the fish now in UK waters.

We will be seeking to move away from relative stability towards a fairer and more scientific method for future TAC shares as a condition of future access. Initially, we will seek to secure increased fishing opportunities through the process of 'annual exchanges' as part of annual fisheries negotiations. In due course, as part of those annual negotiations we would be open to considering multi-annual agreements for appropriate stocks, as happens currently between the EU and other coastal states.

We have instigated a comprehensive programme of research to inform this process, working closely with Cefas and MMO, to provide the evidence to support a fairer share of fishing opportunities for UK fishers. **Annex C** sets out some indicative charts

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<sup>7</sup> See footnote 1

demonstrating how relative stability provides a poor deal for the UK compared to other potential approaches.

The UK has always been committed to sustainable fisheries and we shall continue to work closely with our neighbours to ensure the sustainable management of shared stocks and the wider marine environment. As part of the negotiations on our future relationship with the EU, we will seek to agree a process for future annual negotiations on access and fishing opportunities as well as an approach for continued cooperation on fisheries management and on longer term sustainable approaches.

Access to markets for fisheries products will be agreed as part of our future economic partnership, just as with other goods and food products. This is separate to the question of fishing opportunities and access to waters, which consequently will be addressed separately, founded on the UK's legal status as an independent coastal state. This is consistent with fisheries agreements internationally, and with EU-third country precedents. Both the EU and UK have an interest in continued trade for the fisheries and wider seafood sector.

In negotiating new arrangements with the EU, we will give particular attention to enabling cross border co-operation on fisheries management between Northern Ireland and Ireland, in line with the commitments agreed by the UK and the Commission in the Joint Report (published 8<sup>th</sup> of December 2017).

The UK will also apply to be an independent member of Regional Fisheries Management Organisations (RFMOs, including the **North East Atlantic Fisheries Commission** (NEAFC), where we will pursue our interests in negotiations on important pelagic stocks such as mackerel and Atlanto-Scandian herring. We will also play an active role in other international bodies such as the UN Food and Agriculture Organisation (FAO). Where appropriate, we will work in close cooperation with the Crown Dependencies and the Overseas Territories.

In addition to taking part in established negotiations on fishing opportunities, we will look to move to longer term sustainable approaches in co-operation with the EU and other countries. The UK will project our commitment to sustainable fisheries and marine conservation in such negotiations and would require compliance with sustainable practices for any access granted to fish in UK waters. This will involve close co-operation between Defra and the Devolved Administrations.

### 1.4. Meeting international commitments

**The UK Government has long championed sustainable fisheries, and is fully committed to achieving sustainable fisheries, including through delivering the commitments and goals we have advocated at international level.**

Our new approach will help us deliver on commitments and principles including those in the **Rio Declaration on Environment and Development** and the **United Nations Sustainable Development Goals** (SDGs), especially SDG 14<sup>8</sup> both at home and abroad.

We remain fully committed to meeting our obligations under UNCLOS, UNFSA, FAO and relevant RFMOs, multilateral environmental agreements, such as the Convention on Biological Diversity (CBD) and Convention on International Trade in Endangered Species (CITES), and the **World Trade Organisation** (WTO) - and will reinvigorate our role in these organisations. By doing this we will maintain trade with other countries and develop a full relationship with the international bodies and committees that oversee control of fisheries and the marine environment. We will also continue to work actively through informal agreements and partnerships such as the UN Clean Seas Campaign and the Global Ghost Gear Initiative.

We are committed to support and implement the WTO ambition to end fisheries subsidies that contribute to overcapacity, overfishing and illegal, unregulated and unreported fishing; this will have significant global and development benefits and fulfil the pledge made by world leaders for the WTO to effect SDG 14.6.

WTO rules also set the framework for bilateral trade negotiations. The government is committed to seeking a deep and special partnership with the EU, encompassing the best possible deal for the seafood sector, including the shellfish, processing and aquaculture sectors, while ensuring that consumers continue to have a wide choice of high-quality food products at affordable prices. We are also committed to seek continuity in current trade and investment relationships, including those covered by EU third country Free Trade Agreements (FTAs) and preferential arrangements, as well as to secure access to new markets globally.

The UK will also work internationally to promote sustainable management of fisheries and the marine environment, drawing on its world class scientific expertise including Cefas, Marine Scotland Science, the Agri-Food and Biosciences Institute, conservation advisors and academic institutions.

In April 2018, the UK hosted the **Commonwealth Heads of Government Meeting**, which provided a platform to highlight the importance of the oceans to all Commonwealth member states. The UK Government supports the Blue Charter for the Commonwealth which addresses a range of environmental and blue economy issues, including through the provision of scientific advice and training to develop sustainable fisheries and aquaculture. The Blue Charter will galvanise action so that member states can move towards delivering the targets set out in SDG 14.

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<sup>8</sup> <http://www.un.org/sustainabledevelopment/oceans/>



## 1.5. Territorial extent of our plans

We are working with the Devolved Administrations to develop a new UK framework for fisheries policy to make sure that the UK meets its international obligations, including under trade agreements, as well as enabling the functioning of the UK internal market (while acknowledging policy divergence) and the management of common fisheries resources. We expect that the outcome of this process will be an increase in the decision-making power of each of the Devolved Administrations.

Under each of the three devolution settlements, fisheries policy is devolved. It currently operates under an EU framework through the CFP. Below this, the four UK Fisheries Administrations, in England, Scotland, Northern Ireland and Wales, are able to make decisions on how to manage their fisheries within the CFP. This means there is some divergence, but also a degree of commonality, assisted by the agreement of a voluntary fisheries concordat on domestic management issues. In addition, there is close co-operation between the UK Government and the Devolved Administrations on international fisheries negotiations.

As the UK leaves the CFP and fisheries management powers return from the EU, we are working closely with the Devolved Administrations to agree where UK-wide frameworks will be required.

These decisions are being guided by the cross-cutting principles for the consideration of UK frameworks agreed by the UK Government and the Scottish and Welsh Governments at JMC (EN) in October 2017:

- i. Common frameworks will be established where they are necessary in order to:
  - enable the functioning of the UK internal market, while acknowledging policy divergence;
  - ensure compliance with international obligations;
  - ensure the UK can negotiate, enter into and implement new trade agreements and international treaties;
  - enable the management of common resources;
  - administer and provide access to justice in cases with a cross-border element;
  - safeguard the security of the UK.
- ii. Frameworks will respect the devolution settlements and the democratic accountability of the devolved legislatures and will therefore:
  - be based on established conventions and practices, including the competence of the devolved institutions and will not normally be adjusted without their consent;

- maintain, as a minimum, equivalent flexibility for tailoring policies to the specific needs of each territory as is afforded by current EU rules;
- lead to a significant increase in decision-making powers for the Devolved Administrations.

iii. Frameworks will ensure recognition of the economic and social linkages between Northern Ireland and Ireland and that Northern Ireland will be the only part of the UK that shares a land frontier with the EU. They will also adhere to the Belfast Agreement.

There is support from some in the UK fishing and seafood industry for a UK framework which provides a degree of consistency across the different parts of the UK, making it easier for them to move, catch and sell fish whilst operating under common rules. Other stakeholders have underlined the need for close collaboration between different competent authorities on cross border issues.

Initial discussions between Defra and the Devolved Administrations suggest that there are a number of fisheries policy areas where common approaches will be necessary or desirable across the UK. Many of these can be implemented through co-operation arrangements but others will require legislation. Joint work is continuing to develop a common framework, including a new memorandum of understanding on non-legislative elements, which will address both international and domestic management issues, as well as maintaining the functioning of the UK internal market. The composition and scope of the framework has not yet been agreed and work continues with the Devolved Administrations.

We are also working with the Bailiwick of Jersey, the Bailiwick of Guernsey, including the jurisdictions of Alderney and Sark, and the Isle of Man. We will develop new fisheries management agreements with the Crown Dependencies which reflect their autonomy in managing their fisheries while maintaining the overall coherence of the UK's fisheries policy to ensure compliance with international obligations.

This White Paper is a UK Government policy document that discusses a range of fisheries policy matters, subject to the continuing discussions between Defra and the Devolved Administrations. The scope of the different provisions proposed for the new Fisheries Bill will vary depending on what powers already exist in different areas and what is agreed between the Administrations: some will have UK-wide extent; others will apply to England only, or to England and the Devolved Administrations that wish to adopt them. The powers concerning international relations, on access to waters and setting quota, will be exercised at UK level.

## 1.6. Setting our course: questions

**Q1: Do you agree with the proposed powers in the Fisheries Bill?**

**Q2: What are your priorities for UK negotiations with the EU on fisheries?**

**Q3. What are your priorities for controlling our waters after exit?**

**Q4: What are your priorities for the UK's international role in fisheries (beyond the EU)?**

**Q5: What are the fisheries policy areas where a common legislative or non-legislative approach (framework) across the UK is necessary?**

**Q6: Do you have any further comments relating to the issues addressed in this section?**

## 2. Pursuing sustainable management

### 2.1. Promoting sustainable fishing

Both within the EU and globally the UK has championed sustainable fishing, including the achievement of Maximum Sustainable Yield (MSY). Building on the general objective including MSY in UNCLOS (1982), we successfully worked to consolidate this as a specific political commitment at the Johannesburg World Summit on Sustainable Development (2002) and a legally-binding one for EU Member States in the reformed CFP of 2014.

The sustainable exploitation of stocks is vital to the existence of the fishing and recreational sectors. Achieving MSY may involve short term costs to these sectors from a reduction in catch for certain species, but results in longer term benefits from a more sustainable level of fishing.

Working together with EU Member States and other coastal states such as Norway, we have seen significant progress in recent years towards setting exploitation rates that are consistent with MSY. Out of 45 stocks that are MSY-assessed and targeted by the UK, 31 are now being exploited in line with MSY<sup>9</sup>. The process of rebuilding stocks to their maximum potential is a gradual one, but it is bearing results.

For example, cod stocks in the North Sea have recovered thanks to better management over the last decade, resulting from close adherence to scientific advice, incentivising of measures that improve selectivity, and involving industry in managing the recovery. Stocks have now risen to safe levels<sup>10</sup>. North Sea cod can now be sold in supermarkets and restaurants, bearing the Marine Stewardship Council's 'blue tick' label, indicating that it is sustainable and fully traceable.

Further to our commitments under SDG14, including its targets for 2020, the UK Government will continue to work with our European partners to regulate fishing and to set harvest rates that restore and maintain fish stocks at least to levels that can produce MSY.

This will mean agreeing catch rates that are based on the best available science. In mixed fisheries, that will include taking account of the interactions between harvested species and with the wider ecosystem, in order to set rates that will optimise MSY across the different stocks and ensure their long term health. Where the data is insufficient to have an

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<sup>9</sup> <https://www.parliament.uk/business/publications/written-questions-answers-statements/written-question/Commons/2018-01-09/121754>

<sup>10</sup> [http://ices.dk/sites/pub/Publication%20Reports/Advice/2017/2017/cod.27.47d20\\_replaced.pdf](http://ices.dk/sites/pub/Publication%20Reports/Advice/2017/2017/cod.27.47d20_replaced.pdf)

MSY-based assessment, we will adopt catch limits or other precautionary management measures that conserve those stocks while data is improved. There will also be close co-operation between Defra and the Devolved Administrations, who have responsibilities for such conservation measures where stocks are concentrated in their territorial sea.

After we leave the EU and the CFP the government will publish an **annual statement on our assessment of the state of stocks** of interest to the UK (mainly from the International Council for the Exploration of the Seas (ICES)) and our approach to setting fishing rates and other management measures for the year ahead. If particular stocks are in trouble and falling below safe biological limits, the government will work with all interested parties to draw up and implement recovery plans, to ensure they are restored to a healthy condition. This will be done in collaboration with the Devolved Administrations, also recognising that some stocks are concentrated in the areas they manage.

Success will ultimately be measured by our ability to rebuild and maintain stocks, while improving the health of our marine ecosystems and adapting to changes including the impacts of climate change. This will require long-term planning on the part of all four Fisheries Administrations and their deployment of the full range of measures within our control including catch limits, discard controls, gear selectivity, spatial and temporal closures, minimisation of by-catch, and a strong compliance mechanism. It will also require continued and close cooperation with our European partners with whom we share these precious resources.

The 25YEP for England looks well beyond the SDGs to 2042, so contains the following goal: Ensuring that all fish stocks are recovered to and maintained at levels that can produce their maximum sustainable yield. This reflects commitments under UNCLOS and the SDGs which apply across the UK.

## 2.2. Managing who fishes in our seas and the amount caught

As an independent coastal state we will pursue negotiating outcomes on access and fishing opportunities that are consistent with the best available scientific evidence.

Any foreign vessels granted access to fish in UK waters will need to meet the same requirements as our fleets across all UK fishing zones, including adherence to sustainable practices.

Commercial fishing opportunities can be managed by the amount of fish a vessel can catch (quota system), or by the amount of time it can spend fishing, (effort system). We currently regulate mainly by quota, which is the system supported by most fisheries scientists, industry representatives and other stakeholders around the world.

We know too that fishing remains one of the most dangerous occupations and that some of the unintended consequences of action can result in implications for fisherman's safety. We therefore intend to consider safety throughout the policy development and implementation process for new management systems, practices and technology.

### 2.3. Reforming fisheries management

Leaving the EU and CFP means the UK will no longer be bound by relative stability, and provides the opportunity to move towards a fairer and more scientific method for the allocation of fishing opportunities. As highlighted in section 1.3 above, there is an imbalance between fish caught in our waters by foreign vessels compared with our fleet's catch in other countries' waters.

The fish in our seas, like our wider marine assets, are a public resource and therefore the rights to catch them are a **public asset**. As we look to negotiate with the EU and coastal states for a fairer share of the fishing opportunities, we also need to consider how those opportunities are allocated across the UK and within England in future.

Currently, opportunities (largely quota) are apportioned administratively to each of the four Fisheries Administrations by the Secretary of State. The apportionment is done using a methodology set out in the UK Quota Management Rules (QMRs) under arrangements made in the 2012 Fisheries Concordat. Each of the Fisheries Administrations is then able to allocate its quota to its industry as it wishes. This methodology uses Fixed Quota Allocations (FQAs). FQAs were established in 1999, based on a reference period of 1993 to 1996, and we recognise that fishermen have invested in FQAs. We will continue to use this methodology for the apportionment of existing quota.

In relation to any additional opportunities negotiated by virtue of the UK's new status as an independent coastal state, leaving the EU allows us to explore other methodologies, such as zonal attachment, to help inform how we might allocate additional fishing opportunities. Defra intends to begin a conversation with the Devolved Administrations and stakeholders to allocate these on a different basis. A new methodology will to be in place in time for the allocation of any additional opportunities agreed from December 2020 onwards.

In England, Defra will take a similar approach to that outlined for UK allocations, by developing with stakeholders new allocation criteria for any additional quota agreed from December 2020 onwards, while ensuring the functioning of the UK internal market.

We will learn from best practice in other fisheries nations, such as Iceland and New Zealand, where the commercial fishing industry and the recreational sector works in closer partnership with government while making a greater financial contribution. We will also look at the establishment of a **reserve** drawing on any additional fishing opportunity in England, to be allocated by the MMO in accordance with the new criteria. We will work with the industry and key stakeholders to develop these, but some early thoughts include:

- That we will retain some fishing opportunities to incentivise the reduction of discards (see 2.6 below).
- To place a value on fish as a sustainable natural resource and raise revenue from the new opportunity. This revenue will be used to support fisheries science, particularly the stock surveys that underpin annual negotiations for the Total Allowable Catch and in year fisheries management. We would work with industry and stakeholders to examine a range of ways to distribute any new fishing opportunities, which may include auctioning or tendering, considering the wider potential benefits, including those which stand to be delivered by applicant Producer Organisations' (POs) plans for sustainable fisheries.
- To consider the needs of different parts of the industry in distribution of the new opportunity, subject to the review of sectoral categories mentioned at section 2.3.
- To consider whether some fishing opportunities should be reserved for the recreational angling sector.

Fisheries POs have a key role to play in the management of our fisheries in the future, from contributing to quota management to supporting their members in creating added value in their catches. We will work with POs to consider how we can build upon their strengths and identify potential new roles in fisheries management.

We are reviewing the economic link conditions to ensure that UK registered vessels including foreign owned vessels, fishing for UK quota produce genuine economic benefits for UK coastal communities dependent on fisheries and fisheries related industries. Our aim is to ensure that UK communities derive maximum benefit from UK quota.

Defra will review how fishing opportunities are managed in England. Some fishermen advocate a greater use of an effort system, as currently used for some non-quota shellfish, or a combination of the two approaches. We have looked at fisheries management systems in other countries. Where effort only has been used, there are reports that key stocks have not been managed sustainably. TAC and quota systems are used in most other cases. However, while taking account of evidence from previous experiences elsewhere, Defra will consider a targeted scientific trial in English waters to see whether effort controls could provide an effective way to manage some waters or stocks consistent with delivering our commitment to fish at sustainable levels. This would initially be focused on the lowest impact inshore fisheries and would require robust vessel monitoring systems and catch reporting to be in place before any trial could begin in order to evaluate the outcomes and case for any extension of trialling.

Defra and MMO will also work with scientists, stakeholders and industry to develop an effective method for sustainable management of non-quota stocks in the Western Waters. This will include exploring the use of management systems such as catch limits and technical measures in place of the existing effort regime for certain shellfisheries, to

determine whether these would be more appropriate for particular species and fishing methods, and more effective in achieving sustainable fisheries. The outcome overall could be a combination of new multi-species and stock specific management plans, backed up by appropriate control and enforcement including the use of modern technology such as vessel monitoring systems and cameras. We will also discuss these issues with the Devolved Administrations.

We want a diverse fishing fleet using efficient, modern technology (where appropriate) and best practice to help it fish sustainably and safely. We want to explore incentives to fish within sustainable limits and with appropriate regard to the health of the wider marine environment. We want a proportionate approach to regulation which makes sure that those who are compliant are able to fish and those that are not cannot; and that those who have the highest impact on stocks and ecosystems will be subject to the tightest requirements.

We want to use technology to support the collection and use of data and information to develop a much more transparent regime, learning from coastal states such as Norway, Iceland and the Faroe Islands.

Defra and MMO can use this opportunity to review how the English inshore fleet, many parts of which could be viewed as relatively low impact (such as artisan fishers with close ties to their coastal communities), is managed and regulated. Instead of the current 'under 10 metre' category we will consider a variety of potential options including limits to engine power and restrictions on where such vessels can fish. This approach supported by vessel monitoring and electronic catch-reporting could allow us to provide increased fishing opportunities, or lighter regulation, for those involved in low impact fishing activity. At the same time, it would be necessary to monitor the potential cumulative impact of medium impact vessels.

Recreational angling is a popular sport in England bringing both economic and social benefits to the UK. Defra will look at how to further integrate recreational angling into fishery management governance and decisions. This could include managing some stocks specifically for the recreational angling sector only.

Experience has shown that in developing fisheries management policy, there can be unintended consequences. We therefore will need to proceed carefully, considering the best available evidence, safety implications and will work closely with industry and interested parties.

Such measures should help support a diverse, profitable and sustainable fleet that serves the needs of coastal communities and the UK economy.



## 2.4. Being ready to control our waters and preventing illegal, unreported and unregulated fishing (IUU)

Robust systems need to be in place as we leave the EU to protect UK waters from illegal or irresponsible fishing activities. Defra will work closely with the Devolved Administrations, Crown Dependencies, delivery bodies (principally the MMO and the Inshore Fisheries and Conservation Authorities (IFCAs)) and other agencies to make sure that effective and appropriate **control and enforcement** is in place in UK waters and for UK vessels fishing globally.

The Joint Maritime Operations Co-ordination Centre (JMOCC) was established in October 2017, with 12 main partners including the MMO, Royal Navy, Border Force, Marine Scotland, IFCAs, Maritime and Coastguard Agency, National Crime Agency and the National Maritime Information Centre.

The JMOCC will operate as a coordinating authority, including for cross-agency patrol capabilities, information sharing and aerial surveillance, and make sure we can control our EEZ and work with the industry so that the most modern technology is in place to monitor activities of fishing vessels. Together with effective legislation, such measures will help deliver sustainable fishing and enable us to demonstrate compliance with our international obligations.

The UK seafood industry is dependent on international trade and we currently have a trade surplus with the EU. In order to maintain this, we need to use the most reliable possible methods of **ensuring that the fish caught is fully recorded** and make sure that full data informs our management methods, helping to maintain access to EU markets and increase access for our exports to other overseas markets. We will also seek to control our borders to prevent global IUU catches from entering our supply chain, including through continued international cooperation.

Deploying well-resourced, modern systems across our whole fleet to help control our waters and monitor the fish we catch will benefit both the UK economy and global sustainability as we leave the EU. We will monitor and adjust these as we develop our new UK management approach so that the most effective methods are used. We will encourage the use of innovative technology, use our information more intelligently and to create greater transparency.

## 2.5. Collecting the best scientific data by the most modern methods

Flexible, efficient and effective fisheries management needs the best possible scientific data on fish stocks and impacts on the wider environment, so Defra will make sure that our

**monitoring programme** is allied with the most modern equipment and utilisation of all available data, including that used to monitor fishing activity as described in section 2.3.

In England we are looking at how to use technologies and techniques including: Earth Observation (EO) via remote sensing technologies to track plankton eaten by pelagic species, supplemented by surveying and analysis; REM technology; enhancing the data collected from fish grading machines; and software systems that enable fishermen to collect data and meet reporting requirements by using smartphone apps. Learning from other coastal states such as Norway, Iceland and the Faroe Islands, we will ensure greater transparency which will benefit all.

Defra will build on the existing close co-operation with the Devolved Administrations on data collection, while engaging with industry and others including NGOs, to gather the best available scientific evidence to inform policy and delivery.

UK scientists will continue to make a strong contribution to **international co-operation on stock assessment and related fisheries science**, primarily through the ICES as the independent global body for these purposes. In addition, UK scientists will continue to co-operate regionally with EU and other countries' counterparts, on fisheries as well as the marine environment.

## 2.6. Preventing wasteful discarding of a precious natural resource

Historically, the CFP approach to quota management resulted in fishermen discarding some of their catch before they landed at ports, resulting in up to a million tonnes of fish being thrown back into EU waters each year<sup>11</sup>.

UK Ministers successfully worked to introduce the reforms leading to an obligation to land all catch, also known as the 'discard ban'. The EU landing obligation first came into force in 2015 for pelagic species (such as mackerel and herring). Demersal species (such as cod and haddock) were covered from 2016, with additional fisheries being gradually phased in each year until all quota species are covered by 1 January 2019.

**The UK Government remains fully committed to ending the wasteful discarding of fish and wants to work with the industry to address this issue.**

In mixed fisheries common in UK waters, where several species can be caught during fishing activities, there are practical difficulties implementing the current EU landing obligation. In particular there is the problem of 'choke' where the exhaustion of one quota prevents fishing continuing for other species. In England we will work with the fishing industry and NGOs on the introduction of a complementary package of measures that are

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<sup>11</sup> <http://www.fao.org/docrep/008/y5936e/y5936e00.htm>

tailored to work effectively in UK waters. We will also be working closely with the Devolved Administrations on this issue.

We will develop new ways to help fishers manage fish caught out of quota, drawing on the experience of other fishing nations such as New Zealand, Iceland and Norway. One option is for such fish to be landed and subject to a charge related to the market value of the fish landed; the landings could be covered by quota retained in a reserve for such purposes.

The Fisheries Bill will therefore propose powers for the Secretary of State to establish a scheme to encourage compliance with the landing obligation and minimise wasteful discarding. Where fishers are unable to find quota to set against their catch they would be required to pay a charge that was, at least, equivalent to the catch's commercial value (with an allowance for handling costs). This flexibility will be particularly important in mixed fisheries where it is very difficult entirely to avoid by-catch and traditional enforcement methods such as quota penalties and prosecution might not always be appropriate.

This could provide a powerful disincentive to targeting any fish species where quota is scarce since fish subject to a charge would have no value to the fishermen who landed them. However, it would give the sector a mechanism by which they could land the fish and thus avoid the problem of vessels being grounded because of choke species. We will consider whether it could be appropriate for income generated to be recycled into the sector to help develop measures to encourage further behavioural change and thus reduce the need for the scheme over time.

Defra is considering a number of **other measures to reduce wasteful discards as we leave the CFP, including:**

- REM on vessels – not only in the UK fleet but also other vessels accessing UK waters - to promote compliance at sea. Another benefit of REM will be improved data gathering which will strengthen our scientific evidence base (section 2.5).
- Adaptive management measures to promote selective gears and avoid high risk areas, e.g. real time closures.
- In England, further exemptions for high survivability. Where there is strong scientific evidence that species in particular fisheries show a good survival rate after being discarded, we will permit flexibilities for industry, in addition to those currently allowed under the EU landing obligation.
- In England, removal of certain stocks from catch limits (quota). We will carefully consider whether alternative fisheries management measures could be used for certain species instead of catch limits. There would be strict criteria on the removal of catch limits and any proposal would need to be based on strong scientific evidence and consistent with our commitments to sustainability.

- If supported by the science, removing the requirement to land under-size fish of stocks that have little or no value, subject to appropriate control and enforcement and full documentation of the catches, which would be set against quota.

We will establish a joint working party with industry and other interests to help develop the detail of how the schemes and other initiatives could work in practice. We will learn lessons from the implementation of the EU landing obligation to make sure that a new UK approach to discards is practical and effective.

## 2.7. Protecting our marine environment

Sustainable fishing not only requires stock management and protection of vulnerable Marine Protected Area (MPA) features, such as seabed habitats, cetaceans and seabirds, but also taking account of wider marine ecosystem impacts. The marine environment is a shared public asset and the impacts of the fishing industry need to be considered alongside those of other industries, sea users and the wider public. This is why the 25YEP commits us to reversing the loss of marine biodiversity and, where practicable, restoring it.

Effective management is required to reduce, offset, and where possible avoid, those fishing activities which have negative impacts on the health of the marine environment. This will frequently benefit the industry itself by maintaining ecosystems on which it depends, as well as helping achieve our wider objective to have a marine environment that is clean, healthy, safe, productive and biologically diverse.

Our UK Marine Strategy Regulations (2010), require the UK Government and Devolved Administrations to develop a **UK Marine Strategy** that applies an ecosystem-based approach to decisions on activities undertaken in, or affecting, the marine strategy area. The Marine Strategy put in place a comprehensive programme of measures designed to meet the biodiversity targets set to protect marine habitats and species in order to achieve good environmental status (GES) by the end of 2020.

Later in 2018, we will update the 2012 assessment of the extent that GES has been achieved, and update the targets used to characterise GES.

The UK has supported such objectives internationally, regionally, in the North-East Atlantic (OSPAR)<sup>12</sup>, and through interventions on EU fisheries policy, such as the 2016 revision of the EU **Deep Sea Access** regulation. There we successfully championed spatial management, including a targeted 800m depth ban on bottom-trawling, to protect vulnerable marine ecosystems while avoiding unnecessary impacts on the fishing industry.

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<sup>12</sup> OSPAR is the mechanism by which 15 Governments and the EU cooperate to protect the marine environment of the North-East Atlantic.

We are also working closely with stakeholders to develop approaches to tackling the issue of bycatch of marine species such as cetaceans and seabirds, with the aim of identifying and implementing practical and effective risk-based mitigation.

Defra's recent 25YEP underlines the need for decision making processes to take account of effects on the natural environment, including through the natural capital approach, which is reflected in the options for placing value on fish as a public asset set out in section 2.3 above. We will also work through OSPAR to assess the impact of fisheries on our marine environment.

After we leave the EU and CFP, we will retain EU Regulations that allow us to manage the impacts of fishing activity on the marine environment. In addition, we want UK authorities to be empowered to decide what measures are needed to protect the habitats and species throughout our waters (section 1.2). This will enable the government to deliver its commitment to a well-managed, ecologically coherent network of MPAs, in line with its vision for the marine environment and the 25YEP.

### **Progress on creating a 'blue belt' of Marine Protected Areas (MPAs) around our coast.**

We have 299 MPAs in UK waters. Over 24% of UK waters are protected within MPAs and this includes 50 Marine Conservation Zones (MCZs) in England protecting over 20,000km<sup>2</sup> of precious marine habitats. In addition we have 45 Special Protection Areas for seabirds and 39 marine Special Areas of Conservation in England. A third tranche of Marine Conservation Zones will complete the network of 'Blue belt' sites.

Concerns have been raised that when the UK leaves the EU – and irrespective of the new relationship we negotiate with it - there might be a '**governance gap**' which could weaken accountability for the implementation of environmental regulations, including for the marine environment, which would also have implications for fisheries management.

Defra recognises these concerns and on 12 November 2017 the Secretary of State set out plans to consult on a new, independent body to hold government to account on environmental standards after we have left the EU. We have also proposed a new policy statement on environmental principles to underpin future-policy-making to apply after we leave.

On 10 May we published a consultation document on these issues, including how the new body can assist scrutiny of the recently published 25YEP.<sup>13</sup> We will bring forward a new, ambitious Environmental Principles and Governance Bill to deliver these proposals. We will publish a draft Bill in autumn 2018, with introduction of the Bill early in the second

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<sup>13</sup> <https://consult.defra.gov.uk/eu/environmental-principles-and-governance/>

session of this Parliament. We are exploring with the Devolved Administrations whether they wish to take a similar approach.

## **2.8. Pursuing sustainable management: questions**

**Q7: Do you agree with the measures proposed to ensure fishing at sustainable levels?**

**Q8: Do you agree that existing quota should continue to be allocated on an FQA basis?**

**Q9: How should any additional quota that we negotiate as an independent coastal state be allocated?**

**Q10: Do you agree that Defra should run a targeted scientific trial of an effort system in English inshore waters?**

**Q11: Do you agree with our proposals to explore alternative management systems for certain shellfisheries in England?**

**Q12: Do you agree that there is a case for further integrating recreational angling into fisheries management?**

**Q13: Do you agree with the proposed package of measures and initiatives to reduce wasteful discards?**

**Q14: Do you agree with the proposed approach to protecting our marine environment in relation to fisheries including the powers proposed in the Fisheries Bill (see section 1.2)?**

**Q15. What opportunities are there for the sector to become more involved in both the provision and direction of science and evidence development needed for fisheries management?**

**Q16. Do you have any further comments relating to the issues addressed in this section?**

## 3. Resourcing the new approach

### 3.1. Fisheries funding

The European Maritime and Fisheries Fund (EMFF) provides financial assistance to beneficiaries engaged in the catching, harvesting, processing and marketing of sea fisheries and produce from marine and fresh water aquaculture. Additionally it delivers environmental improvements, supports wider research and innovation, and assists coastal communities to adapt to changing circumstances and employment opportunities.

#### **Background: European Maritime and Fisheries Fund (EMFF)**

The EMFF allocation available to the UK between 2014 and 2020 is €243.1m and is split into three main activities;

- Grants for projects (€145.6m)
- Data Collection Framework (DCF) for fisheries monitoring and assessment (€52.2m)
- Control and Enforcement (€45.2m).

The priorities of the current programme include promoting the transition of the UK's fleet to practices to encourage sustainable and discard-free fisheries and to develop IT tools and technologies used for control and enforcement and to improve the traceability of fisheries products.

### 3.2. Future fisheries funding

We will consider whether and how to replace the EMFF, which has supported the sector across the UK.

In the design of any future scheme we could consider the sustainability and productivity of different parts of the sector and of coastal communities. Any funding would need to be consistent with the thrust of our new approach to fisheries management.

Any new scheme would be compatible with state aid rules, consistent with the functioning of the UK internal market and compatible with the WTO ambition to end fisheries subsidies that contribute to overcapacity, overfishing and illegal, unregulated and unreported fishing.

To provide flexibility to introduce a new grants scheme that can deliver better value for money, we are proposing in the Fisheries Bill, a power to replace, modernise and broaden the existing grant-making powers in the Fisheries Act 1981.

We will also use the Fisheries Bill to ensure the MMO in England has the same powers as elsewhere in the UK to recover their costs for fisheries management. This will ensure that they can carry out a process of continual improvement, making the service they provide to the sector as efficient as possible. In line with government's Managing Public Money, certain services provided by public sector organisations are financed by charges, normally reflecting the full cost of providing those services. This may sometimes include services related to compliance and monitoring, subject to Treasury approval. This might also encourage schemes of self-assurance. Cost recovery will also encourage behaviour change in the industry and a responsible approach to the management of a public asset

### 3.3. Supporting our coastal communities

The government's 2017 manifesto<sup>14</sup> committed to establish a **United Kingdom Shared Prosperity Fund**. With this Fund, the government will focus investment towards domestic priorities, reduce inequalities between communities across the country and increase productivity based on our modern industrial strategy.

This will be important for coastal communities across the UK, many of which are situated in rural areas and face particular challenges arising from their geography.

The Industrial Strategy White Paper set out the government's intention to consult widely on the precise design and priorities for the fund in 2018.

Another fund available to support fishing communities is the **Coastal Communities Fund** (CCF) which is a multi-million pound government fund to support coastal communities in the UK. CCF supports projects which will promote economic growth and create more jobs in coastal areas.

Since 2012 the government has invested £174 million across the UK in 295 CCF projects (noting that for Scotland CCF has now been devolved as part of the Smith Commission agreement). Through CCF there will be another £40 million available for spend from April 2019 to end of March 2021; this has now closed for new applications.

Working alongside CCF, government has also provided £1.46 million to help establish 146 Coastal Community Teams (CCTs) bring together local businesses, councils and communities to develop and take forward strategic economic plans for local areas, making better use of other private and public investment, including the CCF.

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<sup>14</sup> <https://www.conservatives.com/manifesto>



### **3.4. Resourcing the new approach: questions**

**Q17: What would be your priorities for any future funding for the sector or coastal communities?**

**Q18. Do you have any further comments relating to the issues addressed in this section?**

## 4. Partnership working

We have been listening to a range of stakeholders as we have developed the approach to fisheries management laid out in this White Paper (summary of engagement at **Annex D**).

The UK Government wants to see a diverse, profitable and sustainable fishing fleet, while recognising that its structure, opportunities and challenges vary across different parts of the UK. We remain fully committed to working with a wide range of partners to introduce a management regime that works for the catching sector, coastal communities, the seafood sector, consumers, NGOs and the wider public.

Among our closest partners are the Devolved Administrations and we have outlined current discussions on how we work together at section 1.5. Working closely with the EU and other overseas Fisheries Administrations is also essential for the management of shared stocks.

Our commitment to work with the wider industry was shown when in May 2016 the Fisheries Minister George Eustice invited stakeholders to be part of a **Seafood Industry Expert Working Group** with a membership that spans sea and farm to plate. The Group was tasked with helping to deliver the Seafood 2040 vision by identifying actions to support the long-term sustainable growth and future economic success of the seafood chain in England, taking into account its workforce, the communities in which it operates and the needs of the consumer.

The Expert Group has recently launched Seafood 2040: A Strategic Framework for England<sup>15</sup>. It contains twenty-five recommendations for a range of organisations including the industry, Seafish, government and the third sector which will help to develop, support and grow the whole seafood value chain. Whilst the Strategic Framework's focus was on England, many of the recommendations are likely to be applicable and beneficial to the Devolved Administrations and, where this is appropriate, we will work with them to deliver greater benefits for the UK as a whole.

Our future vision is that industry should take a greater, shared responsibility for sustainably managing fisheries, while making a greater contribution towards the costs. This can include, for example, work to develop new management practices and contributing to fisheries science, being part of the delegation in the negotiations, being more actively engaged in fisheries management decisions and co-designing future policy. We are examining cases where other countries have pursued this partnership approach, including through putting a value on fishing opportunities to incentivise sustainable management.

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<sup>15</sup> [http://www.seafish.org/media/1726762/seafood\\_2040\\_lo\\_singlep\\_041217.pdf](http://www.seafish.org/media/1726762/seafood_2040_lo_singlep_041217.pdf)

This White Paper is a first step in setting out our future approach but we remain committed to working closely with the industry, the NGOs and other stakeholders as we pursue legislative and other methods to implement reform. This will help us to refine proposals so that they deliver for the economy, the environment and society. As we develop plans further we will engage further with stakeholders and enable proper Parliamentary scrutiny of any future changes to legislation.

### **4.1. Partnership working: questions**

**Q19: How far do you agree with our future vision to pursue a partnership approach with industry and others for sustainably managing fisheries?**

**Q20. Do you have any further comments relating to the issues addressed in this section?**

## 5. Next steps

We will continue to develop and deliver our new approach to fisheries management for the benefit of industry, fishing communities and the marine environment across the whole of the UK. As explained in Section 4, we have been speaking to stakeholders and will continue to engage with them through both formal and informal consultation mechanisms, as we introduce different elements of the reform package over a number of years. We would welcome views on the initial outline approach in this White Paper.

We want to hear from as many people and organisations as possible – from industry, NGOs, academia and others.

Many of the questions posed in this White Paper are open. We encourage respondents to provide not just their opinions but also the supporting facts and reasoning to inform the evidence base for the development of final proposals. Respondents do not have to answer all the questions and so can choose those of specific interest. Questions which you do not wish to respond to can be left blank.

**Response due date:** Please respond by 12<sup>th</sup> September 2018.

**How to respond:** Please respond via citizen space accessible via the following link <https://consult.defra.gov.uk/marine/sustainable-fisheries-for-future-generations>. Feedback can also be sent to us by email ([FisheriesEngagement@defra.gsi.gov.uk](mailto:FisheriesEngagement@defra.gsi.gov.uk)) or by Post to:

Fisheries White Paper Consultation team  
Department for Environment, Food & Rural Affairs  
First Floor,  
Seacole Block,  
2 Marsham Street  
London  
SW1P 4DF

## Annex A: The UK fisheries industry

The marine fisheries industry is of totemic importance for specific parts of the UK, particularly in coastal areas, including in Scotland, Wales and Northern Ireland, so it is essential to pursue reforms that will enable it to continue on a sustainable basis.

**The UK Fisheries Catching Sector:** in 2016, the UK fishing industry had 6,191 registered fishing vessels, of which almost 80% was made up of vessels of 10 metres and under in length. Whilst being larger in numbers these smaller vessels accounted for only 9% of the fleet's capacity

There were an estimated 11,757 fishers in 2016. Of these, 5,306 were based in England, 753 in Wales, 4,823 in Scotland and 875 in Northern Ireland. Part-time fishers accounted for 19% of the total.

The most important ports, by volume and value of all landings by UK vessels, are Peterhead, Lerwick and Fraserburgh. The main ports in England are Plymouth, Brixham and Newlyn. On an annual basis in 2016 - UK vessels landed 701,000 tonnes of sea fish (including shellfish) into the UK and abroad with a value of £936m<sup>16</sup>.

Marine fisheries are part of **the wider seafood supply chain**. Our current seafood consumption patterns mean that trade is vital, including for the aquaculture and processing sectors, so it is important that our new fisheries regime enables industry to trade with current and new markets.

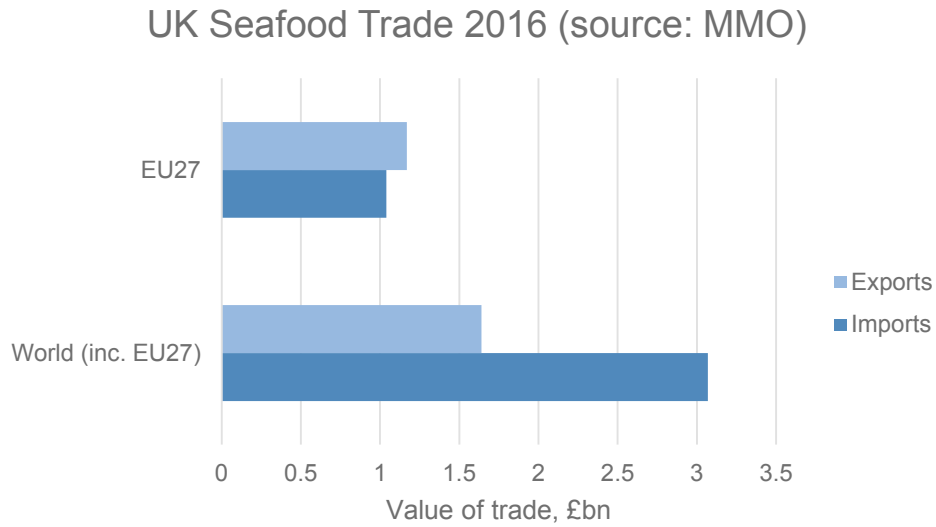
The ONS' Annual Business Survey for 2016 estimated the fishing and aquaculture sector's approximate gross value added (aGVA) to be £788m. The processing and preserving of fish, crustaceans and molluscs was estimated to be £653m (aGVA). The total contribution to the economy was approximately £1.4bn<sup>17</sup>. **On Trade**, in 2016, the UK imported £3.07bn of seafood and exported £1.64bn worldwide, leaving an annual trade

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<sup>16</sup> UK sea fisheries annual report 2016, MMO. Available at: <https://www.gov.uk/government/statistics/uk-sea-fisheries-annual-statistics-report-2016>

<sup>17</sup> ONS UK Non-Financial Business Economy (Annual Business Survey). Available at: <https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/datasets/uknonfinancialbusinessseconomyannualbusinesssurveysectionsas>.

gap of £1.43bn<sup>18</sup>. However, the UK was at a trade surplus with the EU, with exports at £1.17bn and imports at £1.04bn in 2016<sup>19</sup>.



Sustainable management of marine fisheries is also beneficial for the wider **marine environment** and consequently for tourism and the recreational fishing sector, which contribute economically and socially to the UK.

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<sup>18</sup> Chapter 4: Supplies, overseas trade and marketing. Available at: <https://www.gov.uk/government/statistics/uk-sea-fisheries-annual-statistics-report-2016>.

<sup>19</sup> [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/647486/Chapter\\_4\\_Supplies\\_overseas\\_trade\\_and\\_marketing.xls](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/647486/Chapter_4_Supplies_overseas_trade_and_marketing.xls)

## Annex B: The CFP and the need for fisheries reform

Historically, the UK only managed a narrow band of sea close to its coast: a maximum of 12 nautical miles was under our control. After we joined the EU, international law changed and independent coastal nations have been able to manage the seas in their Exclusive Economic Zone (i.e. waters out to 200 nautical miles).

Even within the UK's 12nm territorial sea, the UK has arrangements with certain countries allowing them to fish. Under the **1964 London Fisheries Convention**, vessels from France, Ireland, Belgium, Germany and the Netherlands fish in the 6-12 nm zone. UK vessels also have access rights to fish in some other states' territorial sea. These historic arrangements are recognised by the Common Fisheries Policy.

Key elements of the **EU's CFP**,

- Shared access for EU vessels to EU waters – other Member State (MS) vessels have access to UK waters and UK vessels have access to other Member State waters
- Total Allowable Catch (TAC) and quota for key fish stocks for each MS are agreed annually in December between EU Member States. For fishing activities in waters external to the EU the Commission represents the EU in negotiations with third countries and in international fisheries agreements. Under the CFP's principle of 'relative stability', Member States receive a fixed share of fishing opportunities based on historical fishing patterns from 1973 to 1978.
- Directly applicable fisheries management legislation, including on detailed technical measures and control and enforcement

The UK played a key role in securing radical reforms which entered into force on 1 January 2014. These included provisions on decentralised decision making (regionalisation), sustainable fishing (Maximum Sustainable Yield (MSY)) and elimination of the wasteful practice of discarding (discard ban/landing obligation).

Despite reforms to the CFP, leaving the CFP provides opportunities to develop a system better suited to the UK fisheries sector, and in particular to move away from the relative stability towards a fairer and more scientific method for the allocation of fishing opportunities.

Concerns over the sustainability of the CFP remain, as it is still the case that 40% of fish stocks in the Atlantic, North Sea and Baltic Sea are being fished at unsustainable levels<sup>20</sup>.

There are also concerns about whether different CFP provisions are sufficiently coherent or adaptable to new evidence. The new UK regime needs to be fleetier of foot.

UK waters border several independent fisheries nations that are not members of the EU, including Norway, the Faroe Islands and Iceland. We share several key fisheries stocks that are important to the UK with these non-EU coastal states. Under the current system, the EU negotiates with these nations on our behalf, so we can only influence the outcome indirectly. As an independent coastal state, the UK will negotiate on its own behalf.

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<sup>20</sup> Available at: <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2017:368:FIN>



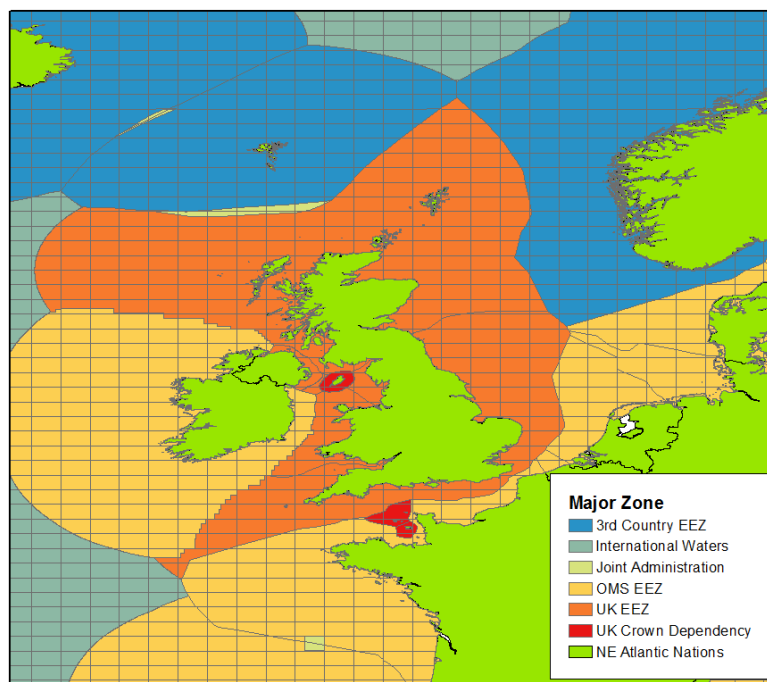
## Annex C: Zonal Attachment Evidence

Under the Common Fisheries Policy, fishing opportunities for quota stocks are divided amongst EU Member States using the principle of relative stability. Once a Total Allowable Catch (TAC) is determined for a given stock, the relative stability key is used to allocate shares to individual Member States based on their fishing activity over the reference period of 1973-1978. Although the TAC may change annually, the percentage shares for each stock are fixed.

The UK's overall share of fishing opportunities under relative stability does not accurately reflect the quantity of fish found and caught within the UK's Exclusive Economic Zone (EEZ), which extends out to 200 nautical miles or the median line with other states. Relative stability therefore results in a poor deal for the UK.

A chart showing the UK's EEZ is provided below for reference. Note for this purpose we have included UK territorial sea (0-12 nm) as part of the EEZ.

Major zones in NE Atlantic waters surrounding the United Kingdom  
Superimposed onto ICES statistical rectangles



Leaving the EU provides an opportunity to move away from relative stability towards a fairer method for the allocation of fishing opportunities. We have instigated a comprehensive programme of research to inform this process, working closely with Cefas and MMO, to provide the evidence to support consideration of a future fairer share of fishing opportunities.

The indicative stock examples below illustrate cases where the UK's current share of fishing opportunities does not reflect the fish present in UK waters. The examples compare different

zonal attachment<sup>21</sup> measures to the UK's 2018 quota share<sup>22</sup> for each stock (under relative stability). The zonal attachment information provided for each stock is explained below.

Zonal Attachment Measure	Table	Chart
<b>Landings</b>	The percentage of a given stock that was caught and landed from within the UK's EEZ on average over the 2012-2016 period.	Blue rectangles show parts of the stock area from which there were no landings.  Density of landings from other rectangles is indicated in the chart key.
<b>Bathymetry</b>	The percentage of a given stock's total habitable area, based primarily on depth and latitude/longitude, that lies within the UK's EEZ.	Orange shading defines the habitable area for the stock.  Blue shading indicates parts of the stock area that are outside the depth range considered suitable for that species.  Purple shading shows areas within the relevant depth range but considered outside the stock's biogeographic limits.
<b>Swept-area biomass</b>	The percentage of a given stock that lies within the UK's EEZ based on scientific trawl survey data.	No charts currently available.

The zonal attachment figures based on landings statistics have been provided by the Marine Management Organisation (MMO) and are provisional. The MMO will be publishing final form statistics on Thursday 27th September 2018. A short *ad hoc* statistical release<sup>23</sup> has been published by the MMO to describe the data sources and methods that were used to derive the statistics published here.

Other zonal attachment figures, based on bathymetry and swept-area biomass, have been provided by Cefas. This work is ongoing and is being updated continually; an interim report containing details of the methodologies used to calculate the figures below, alongside similar data for other stocks, will be released later in the year.

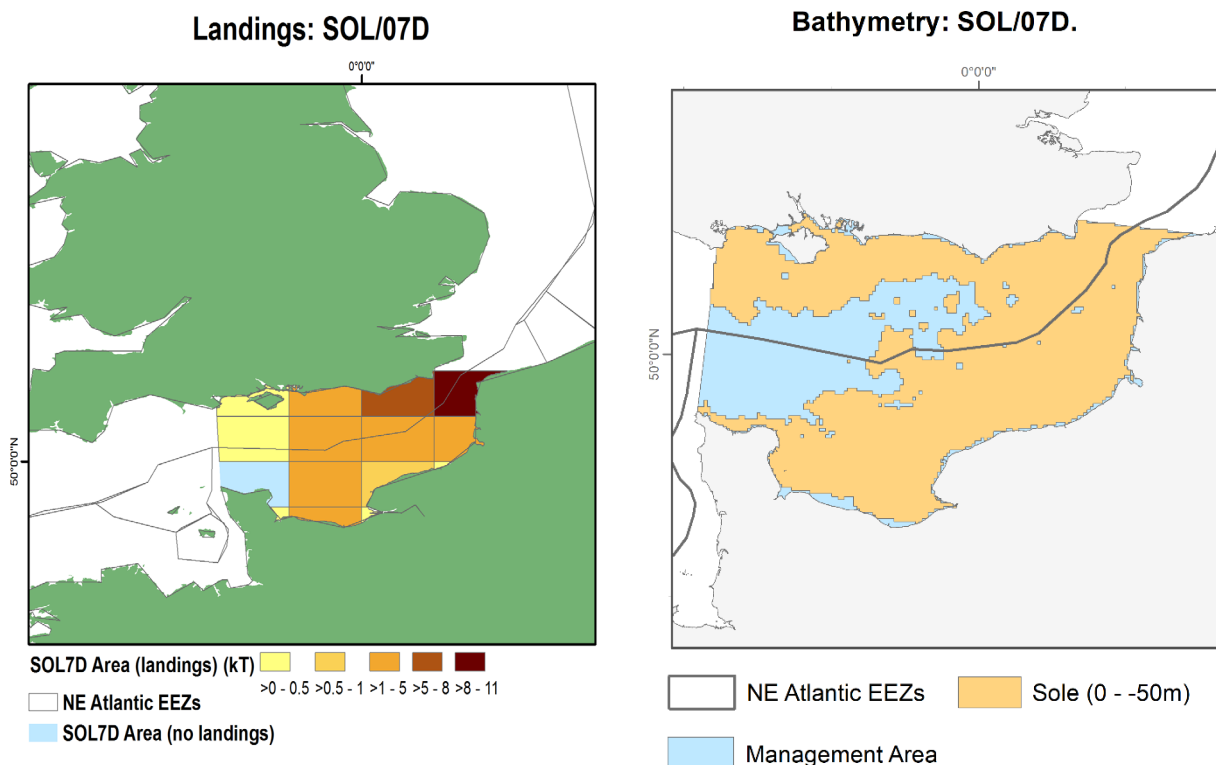
<sup>21</sup> Zonal attachment is a general term used to describe the spatial distribution of fish stocks: there is no single agreed definition of how zonal attachment should be measured.

<sup>22</sup> Calculated from EU Council Regulation 2018/120. Link: <https://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX:32018R0120>

<sup>23</sup> Available at: <https://www.gov.uk/government/statistics/announcements/landings-of-selected-shared-quota-stocks-from-uk-waters-2012-2016>

# Sole (Eastern Channel)

Spatial distribution of stock based on zonal attachment measures:

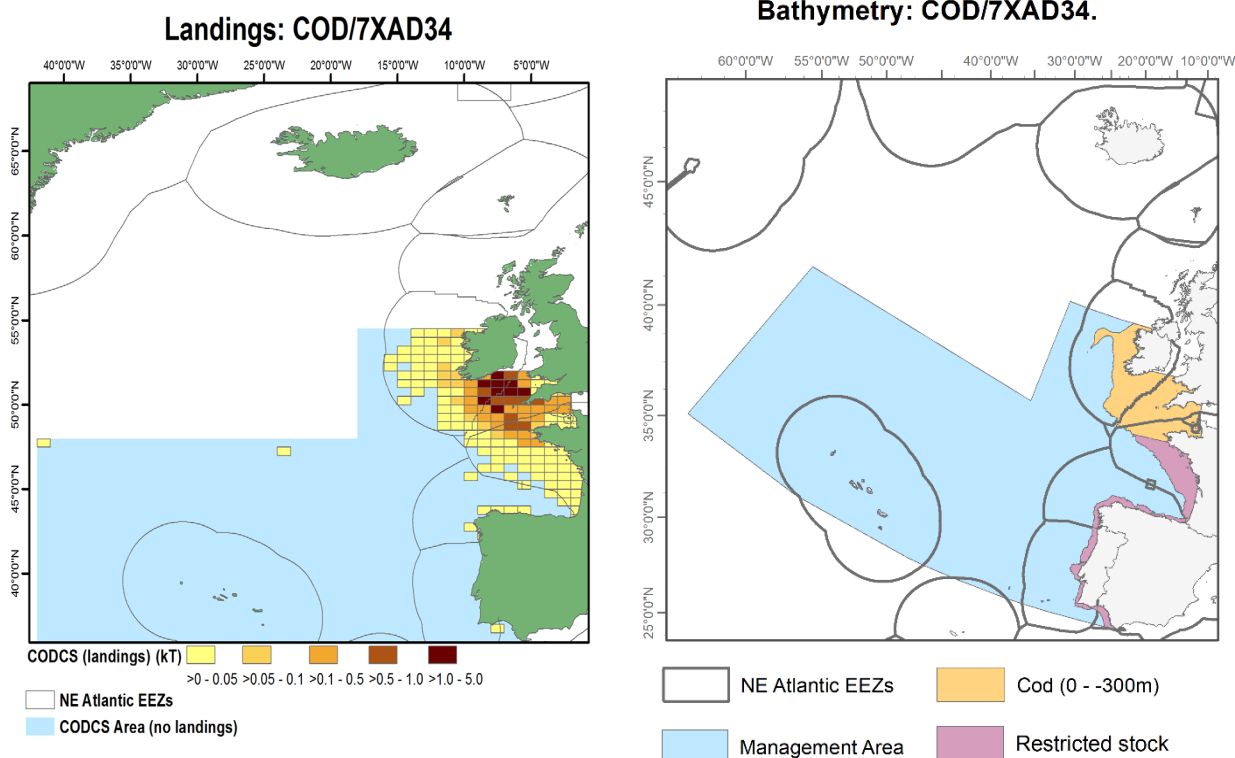


		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
<b>UK Share</b>	<b>19%</b>	<b>40%</b>	<b>40%<sup>24</sup></b>	<b>39%</b>

<sup>24</sup> Waters deeper than 50 m were excluded, as sole is most abundant on the inner continental shelf.

# Cod (Celtic Sea)

Spatial distribution of stock based on zonal attachment measures:

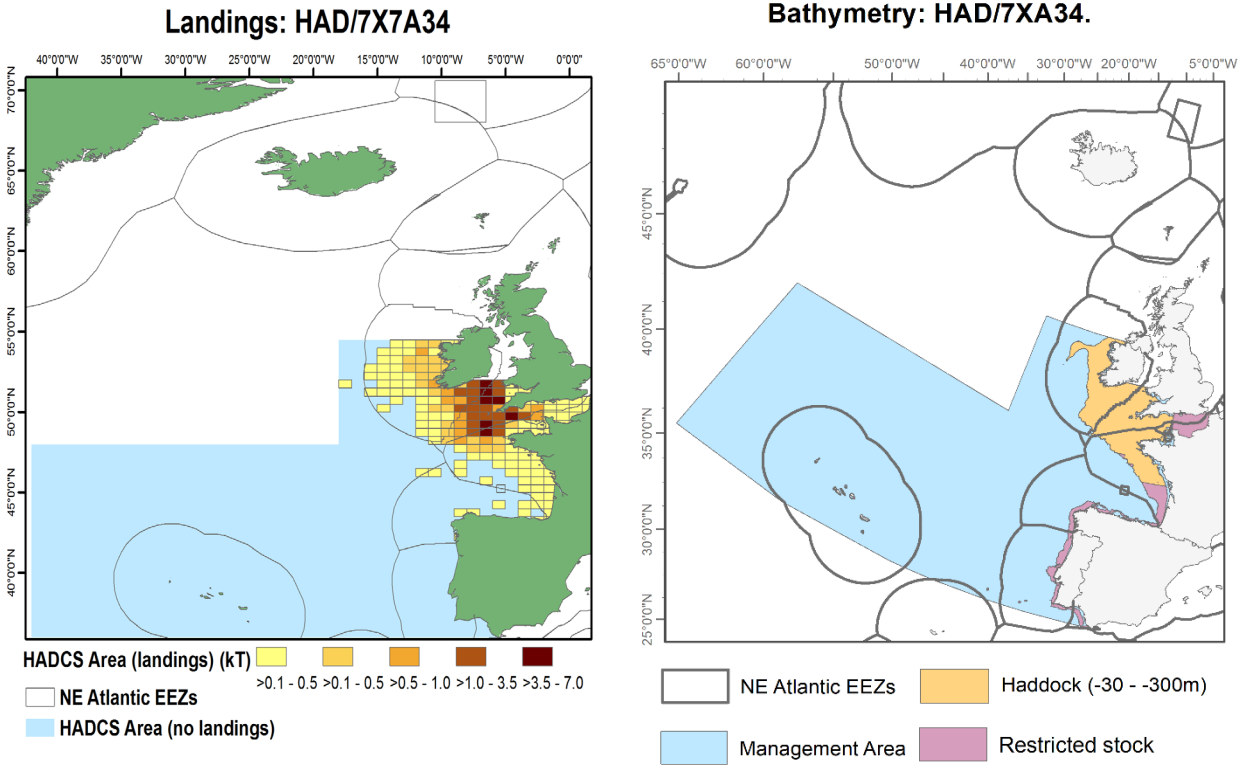


		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
<b>UK Share</b>	<b>7%</b>	<b>51%</b>	<b>38%<sup>25</sup></b>	<b>43%</b>

<sup>25</sup> Waters deeper than 300 m were excluded, as Atlantic cod is not expected to occur in commercial quantities in these areas. Areas south of 48°N were also excluded, as these are considered outside the biogeographical limits of cod.

# Haddock (Celtic Sea)

Spatial distribution of stock based on zonal attachment measures:

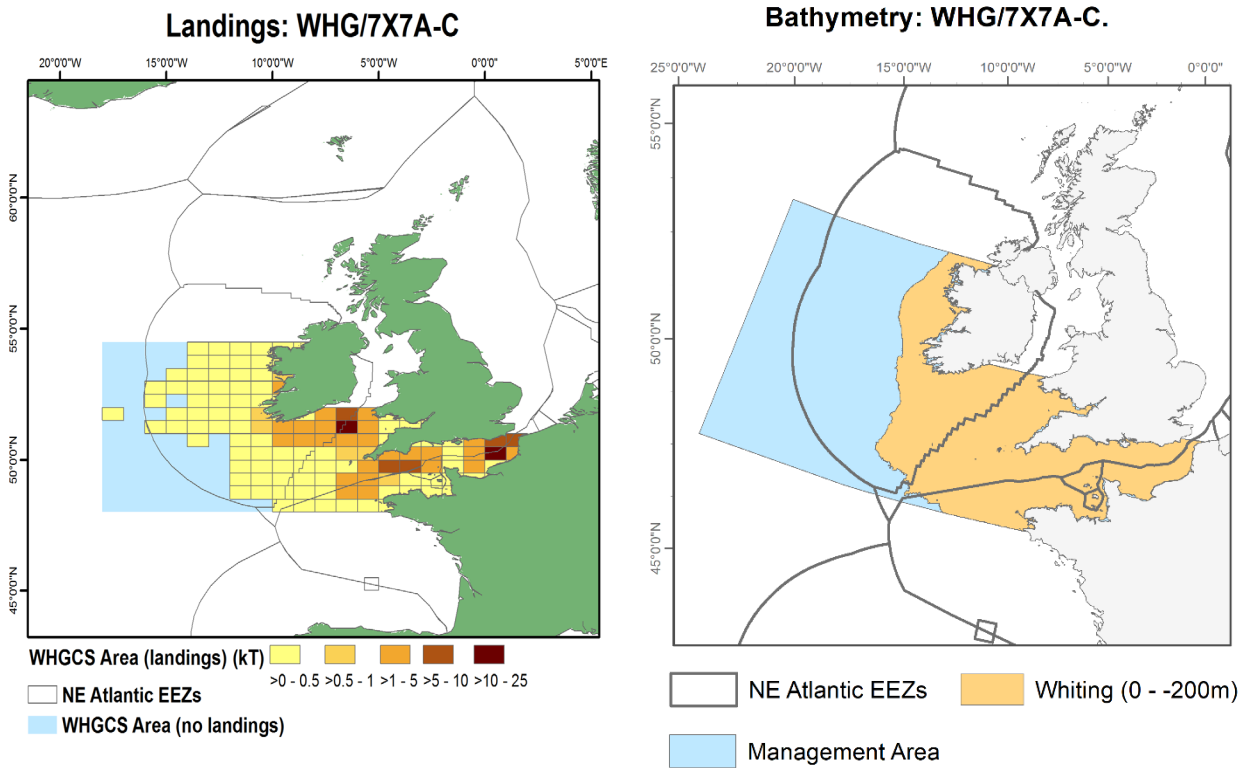


		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
<b>UK Share</b>	<b>10%</b>	<b>51%</b>	<b>31%<sup>26</sup></b>	<b>36%</b>

<sup>26</sup> Waters outside the 30–300 m bathymetric range were excluded, as haddock is not expected to occur in commercial quantities in these areas. Areas outside ICES Divisions 7b-c, 7e-k and 8a were also excluded, as these are considered outside the biogeographical limits of haddock.

# Whiting (Celtic Sea)

Spatial distribution of stock based on zonal attachment measures:

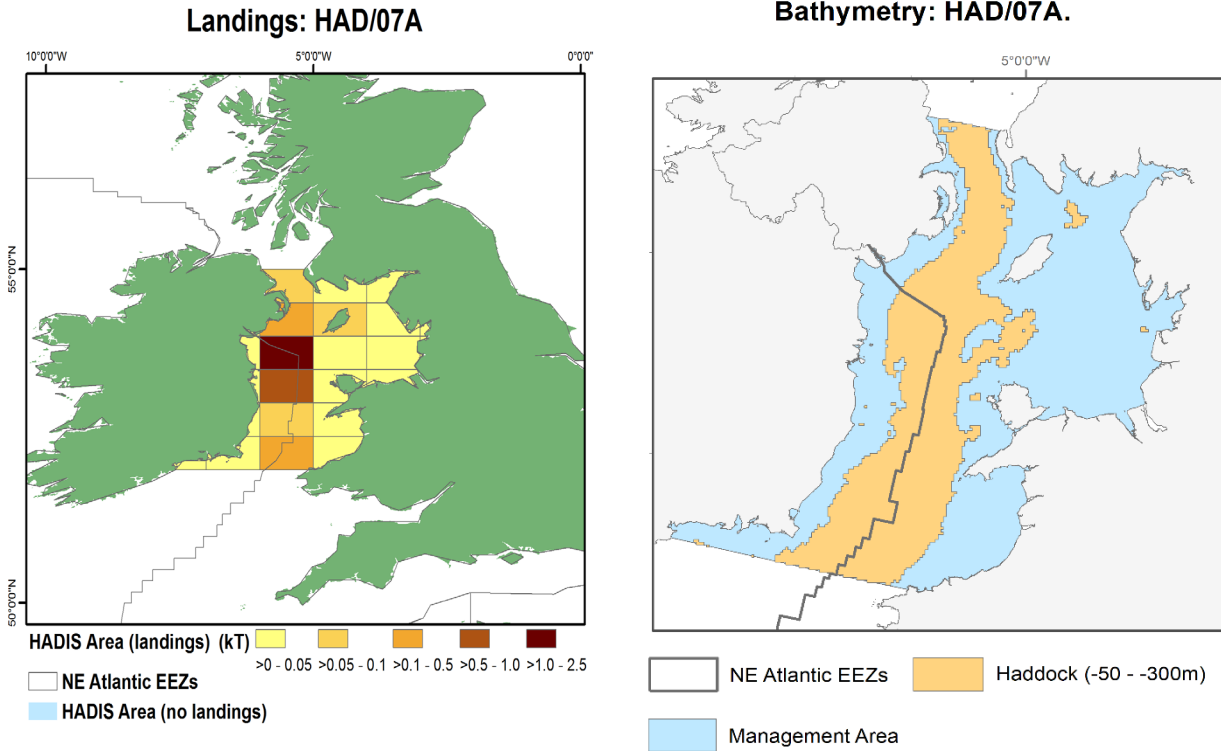


		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
<b>UK Share</b>	<b>11%</b>	<b>48%</b>	<b>41%<sup>27</sup></b>	<b>49%</b>

<sup>27</sup> Waters deeper than 200 m were excluded, as whiting is not expected to occur in commercial quantities in these areas.

# Haddock (Irish Sea)

Spatial distribution of stock based on zonal attachment measures:



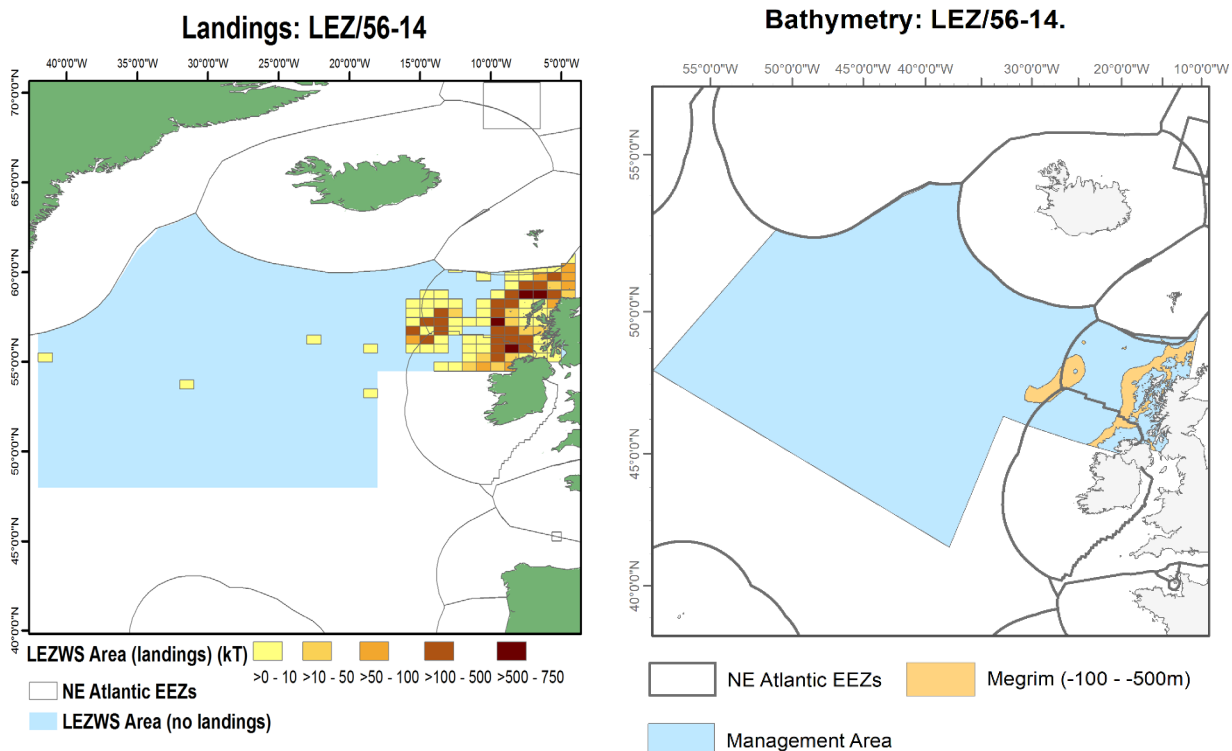
		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
UK Share	48%	56%	68% <sup>28</sup>	80-83% <sup>29</sup>

<sup>28</sup> The distribution of haddock in Division 7a is largely concentrated in the north-western Irish Sea, and for this reason a minimum depth of 50 m was used for this stock.

<sup>29</sup> Range represents survey variation between Q1 and Q4.

# Megrim (West of Scotland)

Spatial distribution of stock based on zonal attachment measures:



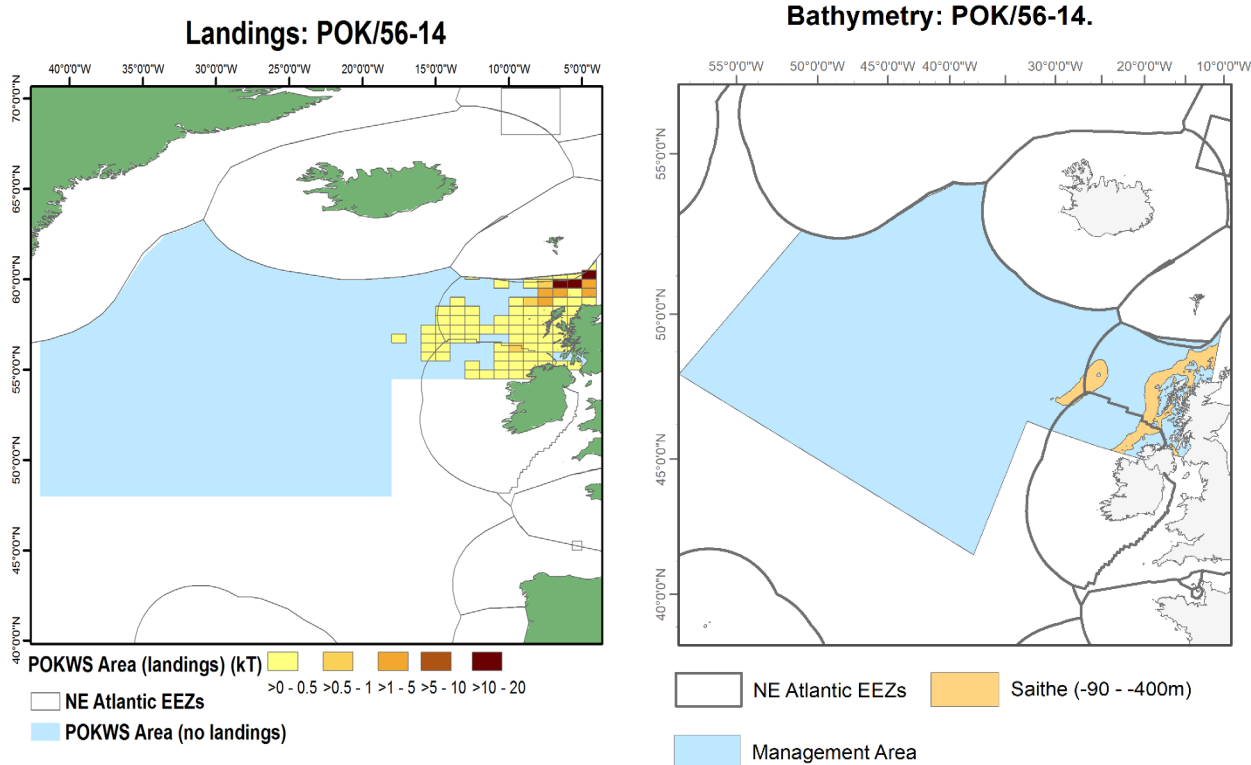
		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
UK Share	31%	75%	69% <sup>30</sup>	93%

<sup>30</sup> Waters outside the 100–500 m bathymetric range were excluded, as megrims are not expected to occur in commercial quantities in these areas.



# Saithe (West of Scotland)

Spatial distribution of stock based on zonal attachment measures:



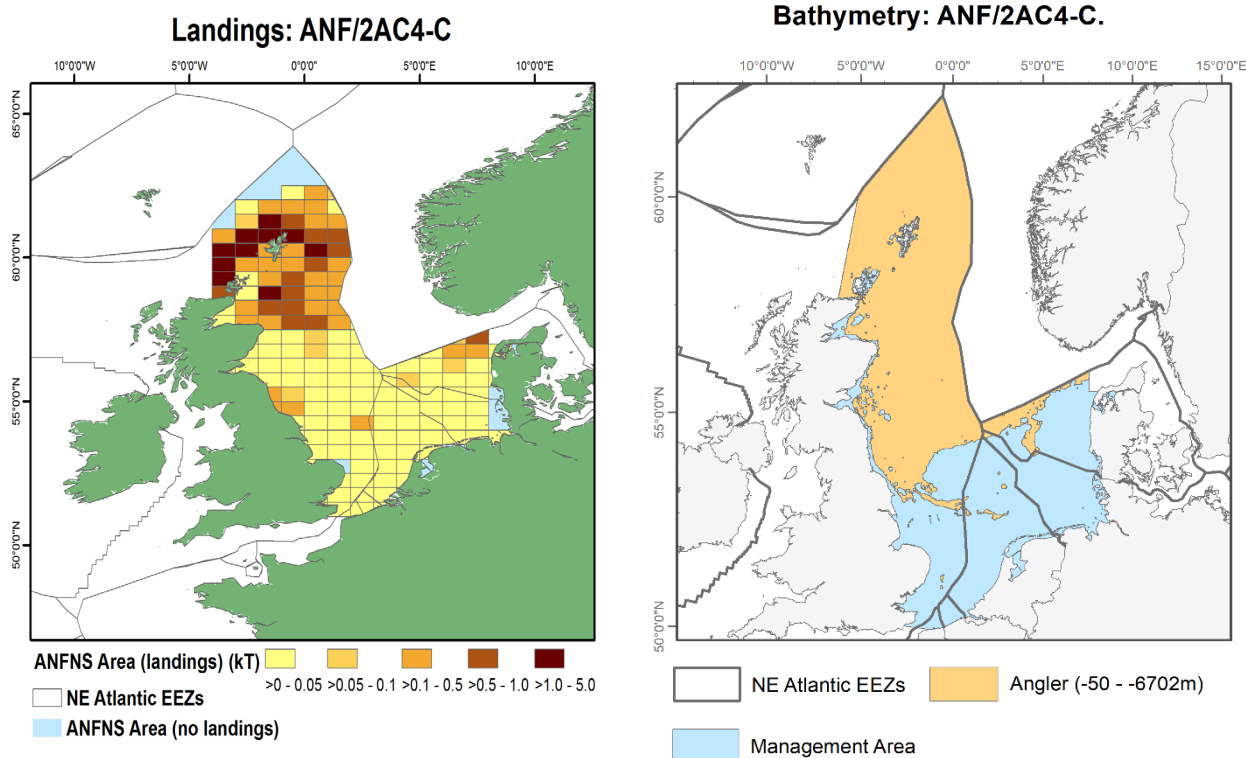
		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
UK Share	32% <sup>31</sup>	96%	73% <sup>32</sup>	93%

<sup>31</sup> This is the UK share of the total TAC, including Norway. UK share of EU quota in 2018 is 35%. Note that the Hague Preference was invoked in 2018 – UK relative stability share of EU quota is 18%.

<sup>32</sup> Waters outside the 90–400 m bathymetric range were excluded, as saithe tend to be less frequent in waters >400 m, and shallower waters contain mostly juveniles.

# Anglerfish (North Sea)

Spatial distribution of stock based on zonal attachment measures:

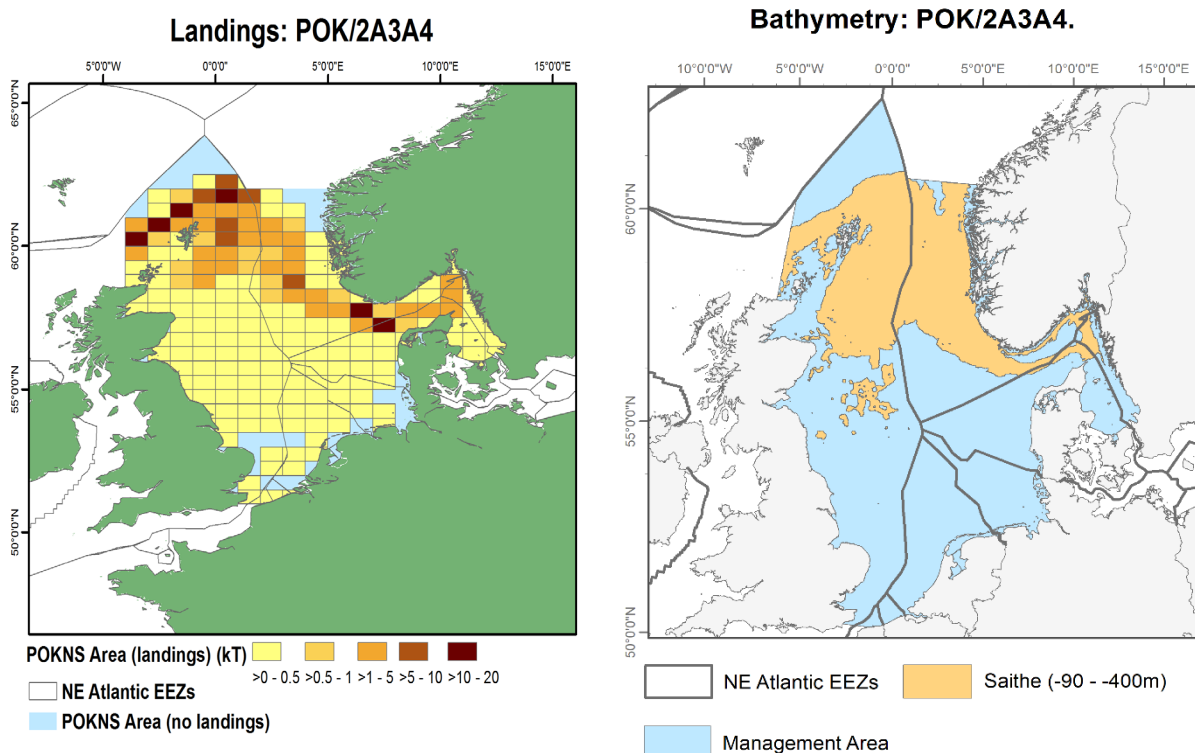


		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
<b>UK Share</b>	<b>81%</b>	<b>94%</b>	<b>95%<sup>33</sup></b>	<b>95%</b>

<sup>33</sup> Waters shallower than 50 m deep were excluded, as anglerfishes are generally found in deeper waters. Within the North Sea, anglerfishes are found mostly in northern areas.

# Saithe (North Sea)

Spatial distribution of stock based on zonal attachment measures:



	Zonal Attachment Measures			
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
<b>UK Share (excl. Norway)</b>	<b>17%</b>	<b>88%</b>	<b>95%</b>	<b>86-87%<sup>36</sup></b>
<b>UK Share (incl. Norway)</b>	<b>8%</b>	<b>52%<sup>34</sup></b>	<b>54%<sup>35</sup></b>	<b>33-41%<sup>36</sup></b>

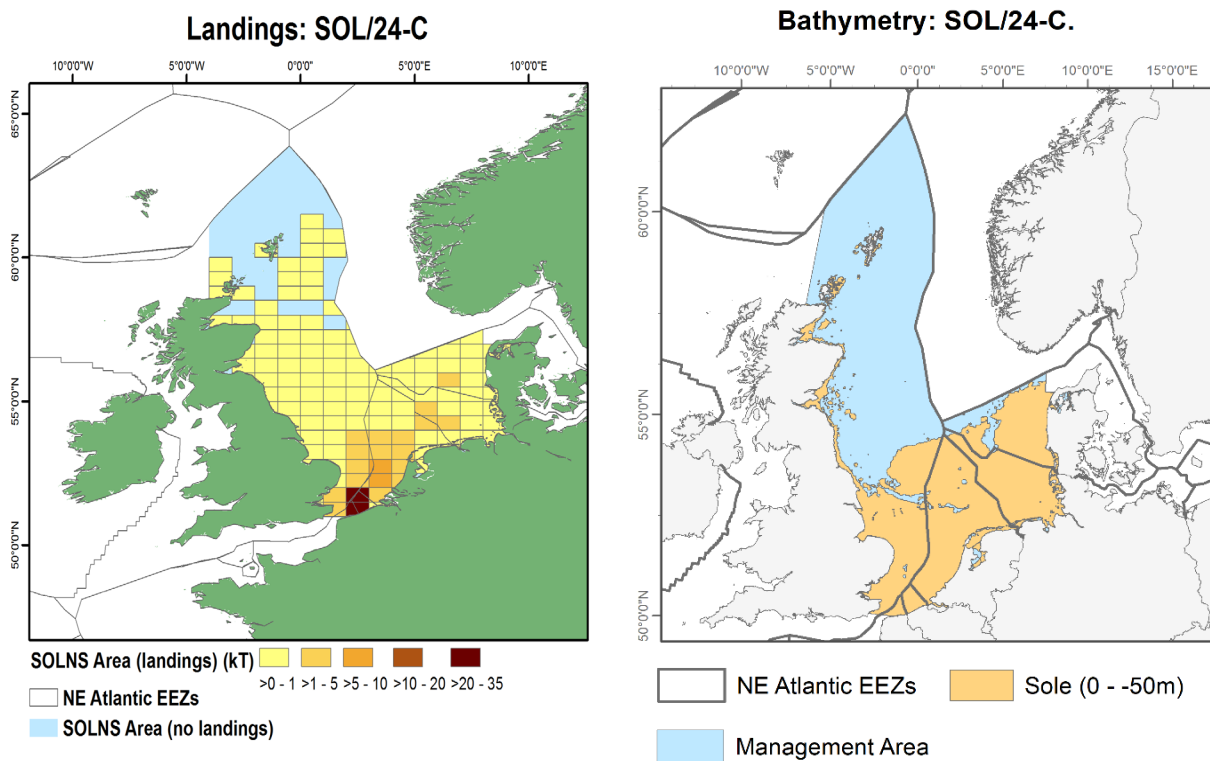
<sup>34</sup> Includes Norwegian landings.

<sup>35</sup> Waters outside the 90–400 m bathymetric range were excluded, as saithe tend to be less frequent in waters >400 m, and shallower waters contain mostly juveniles.

<sup>36</sup> Range represents survey variation between Q1 and Q3.

# Sole (North Sea)

Spatial distribution of stock based on zonal attachment measures:



		Zonal Attachment Measures		
	2018 Quota	Landings	Bathymetry	Swept-area Biomass
UK Share	4% <sup>37</sup>	31%	34% <sup>38</sup>	31-63% <sup>39</sup>

<sup>37</sup> This is the UK share of the total TAC, including Norway. UK share of EU quota in 2018 is also 4%.

<sup>38</sup> Waters deeper than 50 m were excluded, as sole is most abundant on the inner continental shelf.

<sup>39</sup> Range represents survey variation between Q1 and Q3.

## Annex D: Stakeholder engagement

Defra has undertaken a wide-range of stakeholder engagement since the EU referendum.

At Ministerial and official level, this has included visits to fishing ports, roundtables and meetings with various bodies. Those spoken to include individual fishermen, importers, exporters, retailers, producer organisations, academics, independent consultants, charities as well as representative organisations, interested parties and environmental Non-Governmental Organisations (eNGOs).

A full range of views have been expressed across a very wide range of issues and there is no consensus. Different sectors within the fishing industry (catching, processing, and trading) have different priorities. Within each of those sectors, there is a range of views. There is also a regional variation in views, reflecting specific local concerns. There is more consensus within the eNGO community. In academia, priorities reflect academic specialisms.

Key themes coming from the engagement are described below, considerations on these issues are included in the White Paper:

- The theme that the UK should secure a fairer share of the natural resources in its waters is consistently mentioned. For many in the catching sector, this is the priority
- There is less consensus about what should happen to the additional resource, with views ranging from a preference to share it out under the same arrangements as now, to suggestions that the government should keep at least some of any additional quota and give it to new entrants or the under 10 metre pool. It could be converted into 'effort' (also known as days at sea). It could be sold, auctioned or leased.
- Access to UK waters is another common theme. Some stakeholders think very strongly that UK waters (out to 200 nautical miles) should be for the UK fishing industry only. Others think either just to 0-6 nm or 0-12nm should be exclusive to UK boats. Still others think that access should be negotiated with other countries, while at the other end of the spectrum some think there should be no change to current arrangements
- Access for UK vessels into EU waters has been raised as something of importance to some but not all
- The place of fisheries in relation to the wider exit negotiations has also been a theme, including concerns that it may be used as a bargaining chip.
- Fishing sustainably and the government's continuing commitment to protecting the marine environment have been raised, particularly but not exclusively by the eNGOs.

Certain eNGOs have mentioned that fishing opportunities are a publicly owned asset, so a wider consideration must be given to its sustainable use

- Trade is of great interest. For many directly involved in trade, the priority is frictionless trade with the EU. However, there are some who feel this is not necessary as markets can be developed elsewhere. For others, the continuation of seamless trade with third countries, such as Norway and Iceland, is important. Tariffs are of concern to some but not all. There is a similar range of views on non-tariff barriers, with some noting particular concerns about the effects on live and fresh products
- The border arrangements between Northern Ireland and the Republic of Ireland have been raised, given concerns about the impact on fish as food, as have the local fishing arrangements
- Devolution and a UK framework have been raised, with a wide range of views expressed
- Future funding and whether the European Maritime and Fisheries Fund (EMFF) will be replaced have been raised. Some think the EMFF must be replaced, while others think it is less of a priority



