SUFISA

SUFISA SUMMARY FISHING REPORT

A CASE STUDY OF CORNWALL'S INSHORE FISHING SECTOR

SEPTEMBER 2018

UNIVERSITY OF GLOUCESTERSHIRE
at Cheltenham and Gloucester

ccri
countryside and community research institute

SUFISA summary fishing report:
A case study of Cornwall's inshore fishing sector

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September 2018

This report can be downloaded from the CCRI website: http://www.ccri.ac.uk/

Sustainable finance for sustainable agriculture and fisheries (SUFISA) Horizon 2020

Call: H2020-SFS-2014-2

Topic: SFS-19-2014

Grant Agreement: 635577

This project has received funds from the EU's Horizon 2020 research and innovation programme under Grant Agreement No 635577. Responsibility for the information and views set out in this report lies entirely with the authors.

This report can be referenced as:

Kirwan, J., Maye, D., Chiswell, H., Bundhoo, D. and Vigani, M. (2018) *SUFISA Summary Fishing Report A Case Study of Cornwall's Inshore Fishing Sector,* Countryside and Community Research Institute Report, University of Gloucestershire.

1. INTRODUCTION

This report is part of the European Union (EU) funded Horizon 2020 project, SUFISA (Sustainable finance for sustainable agriculture and fisheries). This is an extended summary based on the full report, available at http://www.sufisa.eu/. SUFISA aims to identify practices and policies that support the sustainability of primary producers in a context of complex policy requirements, market imperfections and globalization. Knowledge on market conditions and other driving forces exists, but often in a fragmented way. More information can be found on the SUFISA website.

The specific aim of this report is to better understand the key market and regulatory conditions impacting inshore fishers in Cornwall, and the strategies and arrangements that they are utilising to respond to them. As a result of this research, the intention is to better understand the needs of the sector going forward, in order to help ensure its ongoing and future viability. Key to the approach taken is that the perspectives of the primary producers concerned are given primacy. Section 1 provides a brief overview of the UK fishing sector, as well as the importance of fishing to the economy of Cornwall. Section 2 sets out the key policy and regulatory conditions faced by the inshore fishers of Cornwall, as well as a brief overview of the markets available. Section 3 outlines the methodology used, before section 4 reports on the results of the research. Section 5 then looks at the future in terms of Brexit and beyond, before section 6 ends with some final concluding comments.

This summary report focuses on the key market and regulatory conditions that potentially impact fishers in Cornwall, and the key strategies emerging to manage these risks and pressures

1.1 Fishing in the UK: an overview

In 2014, Greece had the highest number of fishing vessels in the EU (15,704), while the UK fleet was seventh with 6383 vessels, down 26% since 1996[1]. Of these 6383 vessels, 5026 were under 10 m and 1357 were over 10 m. There were an estimated 11,845 fishers in 2014, down 12 per cent since 2004. Of these, 5,367 were based in England, 850 in Wales, 4,796 in Scotland and 832 in Northern Ireland. Part-time fishers accounted for 18 per cent of the total, the same proportion as a decade ago. In total, in 2014, UK vessels landed 756,000 tonnes of sea fish (including shellfish), 60% of which was landed in the UK and 40% abroad, with a total value of £861 million. In 2014, the UK imported 721,000 tonnes of fish, while exporting 499,000 tonnes, leaving a trade gap of 222,000 tonnes. Imports were highest for cod, tuna, shrimps, prawns and salmon; while the main exports were salmon, mackerel and herring. Imports into the UK were highest from China, Iceland, Denmark, Germany and Norway; while in terms of exports the largest amounts went to France, the Netherlands, Nigeria and the USA. In 2014, fishing accounted for 4.1 per cent of gross value added for the agriculture, hunting, forestry and fishing sector (at £426 million), down from 4.5 per cent in 2013, but up from 3.9 per cent in 2004. Consumer expenditure on fish rose in 2013 to £4.3 billion compared with £4.0 billion in 2012; while household expenditure on fish as a proportion of overall expenditure on food increased to 5.3 per cent (MMO 2015).

The case study focuses on inshore fishing which involves boats that are less than 10 m long, which are classified in the UK as (Seafish 2015): Under 10 m demersal trawl/seine; Under 10 m drift fixed net; Under 10 m pots and traps; Under 10 m using hooks.

Vessels under 10 m are part of what is known as the '10 metre and under pool' (U10m), managed by the Marine Management Organisation (MMO). The U10m vessels are responsible for relatively small quantities of demersal and pelagic species landings, with around 80% of their catch being shellfish, which typically gain higher than average prices (MMO 2015). Specifically, the focus within this case study is on inshore fishing within the county of Cornwall, in that Cornwall represents one of the key areas where inshore fishing remains a key part of the rural community, both economically and culturally. It is also facing a range of issues that are typically faced by primary producers across Europe, including climate change, globalisation and responding to a 'post-productivist society' in which there are a wide range of user groups with an interest in coastal areas. Symes *et al.* (2015, p. 247) describe these as 'wicked problems' that can best be examined and understood in terms of resilience theory.

[1] In large part, the reduction in vessel numbers is the result of a series of decommissioning exercises in 2001-2002, 2003, 2007 and 2008-2009, designed to reduce the capacity of UK fisheries and help ensure a sustainable future (MMO 2015).

1.2 Inshore fishing and the Cornish economy

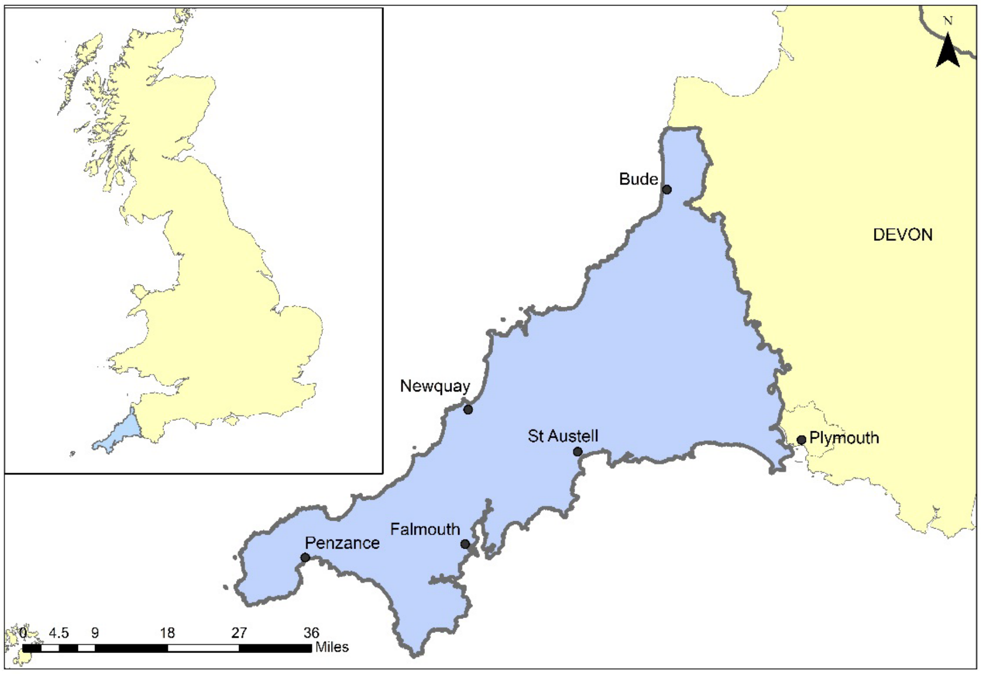
Cornwall forms the westernmost part of the south-west peninsula of the UK (see Figure 1), with a population of just over 530,000 people. It is one of the poorest parts of the UK in terms of per capita GDP, with relatively low average earnings and relatively high unemployment. In 2011, Cornwall's GDP was a little over 60% of the EU average per capita. As such, the county is a European Convergence area, meaning that it has access to both European Regional Development Fund (ERDF) and European Social Fund (ESF) monies. Key to the dissemination of European funds in Cornwall is the Cornwall and Isles of Scilly Fisheries Local Action Group (FLAG). The formal aim of the 2012 FLAG was to "maximise the economic opportunities and benefits open to Cornish fishing communities in a sustainable and cooperative environment". In the second round of FLAG, which started in 2016, a key focus is on innovation and adding value to the fish caught, not least in response to the landing obligation (see below), as well as to maximise the tourist spend in Cornwall. Crucially, the Cornish fishing industry is integral to the county's cultural and social fabric.

Continuation of the fishing industry within Cornwall is important to the county's future prosperity

With a fleet of 619 registered fishing vessels, of which almost 90 per cent are U10m, and 900 active fishers of whom a quarter work part-time, the fishing sector in Cornwall is diverse and versatile. There are two official markets at Newlyn and Looe (as well as Plymouth in Devon), though landings at many of the smaller harbours are usually handled by travelling merchants for onward sale, or sold direct to local outlets. A high proportion of the Cornish catch is exported to mainland Europe (mainly France and Spain), with little value added locally (Phillipson and Symes 2015).

Tourism is the most important industry in Cornwall, representing about 25% of the county's GDP, with 4.5 million visitors to the county every year. The presence of a fishing industry is an important part of the tourism appeal of Cornish coastal towns. As such, the continuation of the fishing industry within Cornwall is important to the county's future prosperity. It is estimated that the Cornish fishing industry employs approximately 3300 people, based on 900 active fishers, plus an estimated 2.75 jobs on shore for every fisher at sea. When tourist jobs created as the direct result of fishing are also considered, it is suggested that the multiplier is 4:1 (Morrissey and O'Donoghue 2012). While it is difficult to get hold of accurate figures, it is estimated that the total value of the seafood sector in Cornwall is in excess of £100 million. Perhaps more important though, is the vital support it provides to Cornwall's £1.8bn tourism industry (Duchy Fish Quota Co 2016).

Figure 1. Cornwall location map



2. CONTEXT

Section 2 now sets out the key policy and regulatory conditions faced by the inshore fishers of Cornwall, as well as a brief overview of the market structures available.

2.1 Policy and regulatory conditions

The Common Fisheries Policy (CFP) sets out the overarching regulatory conditions for all fishers within the EU. First implemented in 1983, the main challenge for the CFP is to manage a highly heterogeneous fisheries sector and to design optimal policies for multi-ecosystems, multi-species and multi-fleet fisheries (Frost and Andersen 2006). Decisions on what, where, when and how to fish are now very tightly circumscribed, affecting both short-term and longer-term business planning (Symes *et al.* 2015). In the run-up to the 2013 reform of the CAP, Greenpeace and NUTFA (New Under Ten Fishermen's Association), amongst others, produced a 'manifesto for fairer fisheries'. It emphasised the importance and value of inshore fishing, as well as highlighting that the majority of quota (effectively, the right to fish) has been targeted at large-scale fishing operations. In terms of numbers, the inshore sector in the UK comprises nearly 80% of the boats, yet receives only around 6% of the annual quota (MMO 2015). Arguably, therefore, in order to reflect the different orientation between the two fisher groups, there should be different management regimes for large-scale fisheries and small-scale fisheries, with the former focused on economic efficiency, while the latter focuses more on social objectives (Urquhart *et al.* 2011).

In the UK, management of quota for the over 10 m offshore vessels has been largely devolved to Fisheries Producer Organisations (FPOs). However, for vessels U10 m there is a single block of quota allocation, managed by the Marine Management Organisation (MMO) (Le Floc'h *et al.* 2015). The MMO set monthly catch limits for each quota species. Having monthly catch limits means that in 'good' months a vessel's catch may be restricted, leading to the possibility of discards; it also means that vessels are unable to make up for any 'bad months' where catches of a particular species are lower than the allocated quota. At present, the higher catching U10m vessels may lease quota at the start of the year in case they land a valuable catch which would cause them to exceed their monthly catch limit (Defra 2014). There is no quota on crab or lobster at present, both of which are very important to the inshore fishing industry in Cornwall. However, there are concerns that more and more pots are being set out, potentially impacting the sustainability of this part of the fisheries sector.

The discarding of fish is a widespread problem in EU fisheries. As such, the EU is in the process of implementing a discard ban by introducing an obligation to land all catches. This obligation is gradually being introduced on a fisheries-by-fisheries basis between 1st January 2015 and 1st January 2019. At the time of this research, the implications of the discard ban had not really been experienced by those involved. A key concern, however, was in relation to 'choke' species. This can happen where a fisher has fully caught their quota for one species before catching all their allocated quota for another species in the same sea area. If this happens, then the vessel concerned will have to stop fishing in that sea area due to the fact that they cannot guarantee avoiding the species for which they have no quota left.

There is a common perception that fisheries management in the EU, via the CFP, has failed to deliver sustainable fisheries and economic viability, with one of the generally accepted reasons for this being a lack of transparency and the failure to include a wide range of stakeholders and perspectives. A key impetus for change within the UK was the Defra publication Safeguarding our Seas (2002), which resulted in the Marine and Coastal Access Act 2009 (MCAA). Under this Act, the UK Government is committed to implementing a network of Marine Protected Areas (MPAs), which are to be developed via a stakeholder participation process that entails the collaboration of scientists, fishermen and conservationists (Seafish 2013).

There is a widespread perception that fisheries management in the EU, via the CFP, has failed to deliver sustainable fisheries and economic viability

The MCAA also resulted in the formation, in April 2011, of 10 Inshore Fisheries Conservation Authorities (IFCAs) to replace the existing 12 Sea Fisheries Committees (SFC). Membership of the IFCAs is more inclusive than the previous SFCs, with the aim of developing a more open and inclusive governance model that can deliver sustainable fisheries and help instil a sense of trust and legitimacy.

2.2 Markets and marketing

Economic and market performance of the fisheries sector is not only important to the fishers themselves, but also to the wider communities in which they operate. The FLAG in Cornwall has had a part to play in developing the local fishing sector in coordination with the wider food economy, not least by making investments to improve the quality/qualities of locally caught fish, and to give it a 'story' that is associated with traceability and sustainable fishing practices. However, while diversifying market outlets in this way may help to develop resilience for fishers, it also requires additional knowledge, investment and competence (Doeksen and Symes 2015).

Significantly, approaching 80% of the fish landed in Cornwall are exported, in many cases to France and Spain in Vivier lorries that are able to carry live crab and lobsters, with little value added locally, although this is starting to change. A key issue in developing the (domestic) markets for fish in the UK is to educate the British public about eating a wider variety of fish species. This led one interviewee to suggest that: “A huge amount of fishing economics is around the marketability of the product, rather than the catchability of the species”. Many observers feel that, especially smaller scale fishers, must add value to their catch if they are to survive, actively developing a greater sense of entrepreneurialism. For many fishers, selling their fish at harbour-side is all they really consider in terms of markets, judging that they do not really have the time to go and market the fish themselves, preferring instead to focus their energy on catching the fish in the first place.

The long-term sustainability of many smaller fishing communities has come under pressure, leading to the loss of basic local services and difficulties in recruiting crew members

2.3 Resilience

Understanding the potential for resilience amongst inshore fishers is a key outcome of this case study. Over recent decades, the long-term sustainability of many smaller fishing communities has come under pressure, leading to the loss of basic local services and difficulties in recruiting crew members as young people are unwilling or unable to go into fishing (Symes and Phillipson 2009). Individual fishers and their families often struggle for regular income in that they face a range of risks and uncertainties, many of which are beyond their direct control including seasonality, severe weather, market instability and variability in terms of fish stocks. The risks faced by fishers have been compounded by management restrictions imposed through the CFP, albeit in many cases implemented by DEFRA. Flexibility is seen as a key attribute of fishing sustainably and regulation is seen as "reducing the scope for fishermen to practice many of the attributes associated with being a good skipper, such as using local ecological knowledge to determine what to fish" (Ross 2015, p. 319). Flexibility also involves internalising costs, engaging in pluriactivity, embracing the ethos of self-employment, and reducing the number of crew taken on boats.

Intergenerational continuity is a key issue when addressing the sustainability and resilience of inshore fishing across Europe. Traditionally, many fishers came through the hereditary pathway. However, fishing is no longer seen as the occupation that it once was in terms of status, financial rewards or job security. There is no longer the same pressure within families to persuade sons to follow their fathers, with the result that aspiring fishers increasingly come from outside the fishing community. Gaining experience through working as crew is now less common, as many inshore fishers have adapted their boats to enable them to fish single-handedly in order to reduce crew costs and improve their profitability. The result is that aspiring fishers must increasingly look to buy their own boat, which involves considerable investment in terms of the vessel itself, fishing gear and a fishing license. This is leading to an ever-increasing average age of fishers, with less than 20% being under the age of 30 and the average age approaching 60 (White 2015).

3. METHODOLOGY

Key to the approach taken has been to put the fishers and industry stakeholders at the centre of the research, in order to get their perspectives on the key issues that need to be considered. In the first instance, a media analysis was conducted (which covered national, regional and specialised media from 2005-2016), as well as a desk-based analysis of market conditions and regulations (sources reviewed included: academic publications; government/policy documents; market research and consultancy reports; industry reports and NGO documents). In addition, 17 supply chain interviews were completed with fishers or individuals who were in some way involved in the fishing sector, as well as three focus groups with fishers in three different places (over the period December 2016 and January 2017). Subsequently, a workshop with industry stakeholders was conducted in March 2017, following reflection on the focus group and interview data: firstly, to present the key findings of the research for feedback and comments; and secondly, to discuss a range of scenarios regarding the future viability of inshore fishing in Cornwall, linked to the Brexit negotiations.

Inshore fishing is highly localised and small-scale; therefore fishers feel they are inherently ecologically sustainable

4. RESULTS

The results of the research are presented in this section, using six key themes: reasons for going fishing; what is distinctive about inshore fishing; markets, marketing and institutional arrangements; quota; policy, management and representation; resilience, succession and the future.

4.1 Reasons for going fishing

Discussions at the focus groups (FGs) revealed that fishers are passionate about what they do, and they do not want to do anything else. This is significant, in that they are likely to carry on fishing until the bitter end, enduring difficulties that those involved in other livelihoods might find too much. In this sense, they are innately highly resilient. Nevertheless, this does not mean that they are not facing significant difficulties, which need to be considered when developing fishing policies in the future.

> *"It's just what I've done. It's not a job, it's a way of life, and it's salt water coursing through these veins and it always will. I don't make a fortune, but I make a living. I love going to sea and I love doing what I do. I fish"*

4.2 What is distinctive about inshore fishing?

Firstly, that they are highly localised, tending to fish within 6nm of the coastline (notwithstanding that those with a larger engine/deck size may venture further out). Because they are restricted to a relatively confined geographical area, the smaller inshore boats are effectively embedded in their local environment, giving them an incentive to look after the fishing grounds in their immediate area. Secondly, due to the fact that they are highly localised and are relatively small-scale in terms of their operations, fishers feel that they are inherently ecologically sustainable. In this respect, they are restricted in terms of the distance they can travel from their home port, as well as in terms of the fishing gear they can carry; furthermore, in most cases their gear is static gear. This perspective is encapsulated in the following:

> *"I mean, we're under 10 m boats, we've got a limited distance, a limit to what we can carry, gear-wise and catch-wise. Why not say catch whatever you want, your impact on the overall fish stocks is going to be minimal… If we ruin our own ground, then we're all out of a job" (Padstow FG)*

However, for these distinctions to hold good, there is a need to consider re-categorising what is meant by inshore fishing. At one level inshore fishing boats can be categorised as those under 10 m and fishing out of the common pool managed by the MMO; yet this is only part of the story. In general, the inshore fleet will fish within 6nm of the shore, although some of the more powerful vessels may go out further than that; there is also clearly an issue with what are known as 'rule beaters'. The latter are boats that have been specifically designed to be under 10 m in order to benefit from fishing from the U10m pool, and in many cases has involved cutting down larger vessels to 9.9 m in length. While the difference between a 6.5 m and 10 m boat may not sound that significant, it needs to be thought of in terms of the cubic relationship, with the 'rule beater' boats often having very much larger deck spaces and engines which allows them to carry much more gear. The result is that although they may be under 10 m in length, "they've effectively got the capacity of a 15 or 20 m boat" (Padstow FG), negating the benefits outlined above. The result is that U10 m boats vary enormously in terms of the value of fish they land. At one end of the spectrum it might be as little as £15,000 a year, whereas others might gross up to £200,000. The idea of re-categorisation resulted in considerable debate in the workshop, whereby it seems that any re-definition will need to encompass geographical distance, size of the boat and the type of gear used. In this respect, the 6nm limit is likely to be significant in demarking what might be understood as the inshore sector.

There is currently minimal horizontal coordination between inshore fishers in Cornwall

4.3 Markets, marketing and institutional arrangements

In relation to markets and marketing, adding value was the most critical issue discussed, inextricably linked with the quality of the fish being sold. In this respect, the catch of inshore fishers was recognised as having the potential to be of the very highest quality available (in that is it usually landed on a daily basis), although this necessitates that the fishers involved look after their fish. Linked with 'looking after your fish' is the establishment of a reputation for providing quality fish, as well as the development of personal relationships with individual buyers, such as head chefs or fish merchants. This is recognised as enabling better prices, although it is "very hard to get yourself a good name, but very easy to get yourself a bad name" (Helston FG).

The majority of fin fish landed in Cornwall goes to the harbour markets in Newlyn, Brixham, Plymouth and Looe, whereas Crustacean and Mollusca go either to processors or more usually are sold abroad (mainly to France and Spain) via Vivier lorries. Overall, approximately 80% of the fish caught in Cornwall are exported. There was a strong sense amongst fishers at the FGs that you have to have a strategy in terms of marketing your fish: "otherwise you are at the mercy of what the buyer is going to give you" (Newlyn FG). In this respect, that a degree of entrepreneurship is critical and it is no longer enough to be simply good at catching fish.

A number of fishermen sell their produce to restaurants or dealers in London, such as Dreckly Fish and Kernow Sashimi. In taking this approach, it is possible to get a very considerable mark-up over local market prices, perhaps in the order of 300-400%. Yet, at the same time this requires considerable extra work and know how, which many fishermen are not prepared to do, preferring instead simply to catch fish. For example, developing Dreckly Fish involved travelling to London to make face-to-face contact with potential customers, as well as continuing to develop those personal relationships (based on trust and continued quality) over time.

Selling to local restaurants is another market avenue that adds considerable value to the catch. In order to do this, it is important to develop a good relationship with the head chef, to the extent of calling them every day to tell them about the catch that is available.

In this respect, Cornwall is luckier than most in that there are a number of high-end restaurants and foodie hotspots, such as Padstow. However, it was pointed out in both the FGs and the workshop that in the UK, and even in Cornwall, fish is generally speaking not part of the culinary culture (unlike France for example). There is scope, therefore, to encourage domestic demand with the right incentives and policy initiatives.

In terms of developing new institutional arrangements, it is apparent that there is minimal horizontal coordination between the inshore fishers. Indeed, findings from the FGs suggest that in most cases fishers are highly independent, and indeed secretive, both in terms of what they catch but also where they sell it and for how much. Where coordination does take place, it is likely to be within families. Similarly, in terms of vertical coordination where, despite some evidence of fishers working with local processors (such as Kernow Sashimi), most of the inshore fishers in Cornwall sell their catch directly through the harbour markets. In terms of policy incentives to change how fishers sell their catch, the local FLAG has provided both advice and money, although a key finding of this research is that fishers need to be encouraged to be more entrepreneurial in terms of developing the markets for their catch.

4.4 Quota

In all three FGs discussions around quota were the most vibrant and heated, with access to sufficient quota being the single biggest issue, often related to the CFP and the opportunities presented by Brexit. There was a strong feeling that there are plenty of fish around and it is just a matter of allocating them more fairly and re-visiting historic 'grandfather rights' and Relative Stability[2]. There were also concerns that the quota system is not managed properly in terms of determining what an appropriate quota is. Likewise, in terms of the "disproportionate allocation between the over 10s and the under 10s", whereby "94% of the quota goes to the over 10s and a measly 6% is shared out between the mass of the boats" (Helford FG). There was also frustration that the U10m boats are only allocated their quota on a monthly basis, rather than on an annual basis which would give them greater flexibility.

The monetisation of licenses and quota was another issue raised in the FGs, as well as the workshop. Originally, both licences and quota were distributed by the UK Government for nothing, but now you have to buy them and there are brokers who sell both licences and quota. U10 m boats are unable to own quota (although they can lease it), which is allocated to them from the U10m pool by the MMO, but the monetisation of licences creates a considerable cost barrier to those wishing to get into fishing. "There's no value to a licence, but I can't go to sea without a licence and I've got to buy a licence of about £280 per kilowatt... You're talking £10,000 plus for a little boat like mine to have a licence, it's ridiculous" (Padstow FG).

4.5 Policy, management and representation

The key issue discussed in relation to policy and management was that legislation and bureaucratic necessities need to be better tailored to the needs of smaller boats, as captured in the following:

> *"One of the main factors in Cornwall is that it's such a mixed fishery in terms of things turning up and things being available to fishermen... What fishermen want to be able to do inshore is take advantage of these opportunities and to be versatile; that's the absolute key to inshore fisheries being successful. There's such diversity of fishing types that trying to find one rule that fits everybody is incredibly difficult" (Workshop)*

Discussions around quota were the most vibrant and heated, with access to sufficient quota being the single biggest issue

[2] The London Convention 1964 established rights for the vessels of certain countries to fish in the 6-12 nautical mile region, if they had 'habitually finished' in the same region between 1953 and 1962. Similarly, article 17 of the CFP framework regulation, EC No. 2371/2002 granted so-called 'grandfather rights', allowing access for certain member states to fish for certain species of fish in UK waters; in turn, the UK was granted access to the inshore waters of a number of other Member States. In 1983, the principle of Relative Stability was established, whereby it was agreed that fisheries and quotas in the EU EEZ would be shared on the basis of who was already fishing in those areas. The intention was to prevent any dramatic consequences for particular fisheries when the EU EEZ was introduced at that time.

There are also concerns that the 'voice' of inshore fishers is not being sufficiently heard and that their access to policymakers is restricted. Even though there is nominal representation on the Inshore Fisheries and Conservation Authority (IFCA), other lobbies are felt to have more sway. Similarly, with the Cornish Fish Producers Organisation (CFPO), which has 200 members (80 of which are inshore fishers) and the potential to be a significant lobby force. In this respect, there was a strong perception amongst the FG attendees that the CFPO is predominantly concerned with the interests of the larger scale fishers: "They should take under 10s into consideration, but they don't at the minute" (Newlyn FG). This perception was endorsed in the workshop, where it was discussed that the PO exists principally to manage quotas and that they don't do much for the inshore fishing sector. Of particular concern to the fishers is representation at the ongoing Brexit meetings: "These big players, like CFPO the other North Eastern POs, they are going to be around the table and we don't have any representation, it's hopeless, we have no salt in the river" (Helston FG). Partly as a response to this feeling of under-representation, one of the FG attendees had visited Defra to attend the inaugural meeting of a new coastal PO whose remit is to support the interests of the inshore fishing sector across the UK. This was felt by those at the FG to be an important step forward, especially in relation to the allocation of quota to the U10m sector[3].

4.6 Resilience, succession and the future

Fishers were concerned about the ability of future generations to get into fishing

The innate passion of fishers means that they are likely to be inherently highly resilient and to continue in fishing beyond the time that makes economic sense. In order to do this, they exhibit a range of different adaptive capacities, including: carrying extra gear and leaving it to lie at sea for an extra day (which means that there is even more gear on the ground, adding to the pressure on particular fisheries); putting more and more pots down (which requires more investment and adds to the pressure on stocks); going further out to sea (which is inherently more risky); fishing single-handed (which reduces the opportunities for new/young fishers to gain experience); adding value and developing their markets (which requires new skills and perhaps additional investment, such as in IT equipment).

Although there was optimism about those currently fishing, remaining in fishing, people were much less sanguine about the ability of future generations to get into fishing:

> *"The people that are in the game, who have been in it for many years are resilient and will probably see it through to retirement. But when it comes to succession… I think we are going to see some ports peter out to nothing. In the future, it's hard to see what will attract enough people. It's never going to be making your fortune – it's a lifestyle choice and it's probably not as popular a lifestyle choice as it was" (Workshop)*

In this respect, cost and opportunity were seen as the two main constraints. Cost in terms of the boat itself, but also the licence and gear, including the monetisation of licences. "When we left school, you could go and buy a boat… The licence didn't have a value… Now if you bought a boat for 10 grand, your licence would be 10 or 15 grand on top of it and then the same again for gear… So the youngster hasn't got a hope in hell" (Helston FG). There were also concerns in relation to opportunities, in that there is an increasing tendency for inshore fishers to go single-handed in order to remain viable, which has reduced the opportunities for aspiring fishers to get into the industry as crew.

Looking to the future, fishers are not looking for handouts, such as being paid for creating community or public good services, but what they do want is: "better legislation, less bureaucracy and more quota" (Helston FG). In other words, there is a strong feeling that the U10m boats need to have legislation and management that is more specifically tailored to their needs.

[3] Subsequently, in July 2017, the Coastal Producer Organisation was recognised by the MMO as representing the U10 m fishers. It covers the whole of the UK, rather than being specific to Cornwall. According to its website (https://fish.coop/about/) it 'exists to give small-scale, sustainable fishermen a big voice in a marketplace too often dominated by industrial-fishing interests'. As yet, it is too soon to assess the effect it is having.

5. THE FUTURE: BREXIT AND BEYOND

Any discussions about the future of fishing in the UK inevitably involve looking at what the Brexit negotiations will result in. As such, Brexit was discussed at length in both the FGs and the workshop. A number of the workshop participants were adamant that the CFP was not fit for purpose and that Brexit offered the opportunity for change: "We need suitable management through fisheries legislation which we haven't got at the moment". Likewise in the FGs, Brexit was often mentioned as being pivotal to the future of the inshore fishing sector in Cornwall, as well as the fishing sector more generally:

> *“This is British fishing's main chance it will ever have. If the Government cock this up we'll never have a chance like it again. We've got to get EU boats out of our waters. We've got to try and take back control of the quota” (Newlyn FG)*

Apart from access to more quota, the key issue discussed was to try and extend the limit of waters that are exclusive to UK fishers. At the moment, EU vessels with 'grandfather rights' are able to fish within the 6-12 nm range (in Cornwall this is mainly French and Belgian boats), with many of the participants arguing that the whole notion should be revisited, including that the rights should cease once a boat is sold. The main reason for pushing for this change, especially from an ‘inshore boat that lays pots’ perspective, is that any pots they lay between 6 and 12 nm are in danger of being towed out by the trawlers (although not explicitly acknowledged in the FGs, there are also UK-based trawlers fishing in this area).

Over the years, many of the fishers have lost hundreds, if not thousands, of pounds worth of gear to this process. As a result, in order to try and reduce this risk, many of the fishers have decided not to lay their pots beyond the 6 nm limit. It was argued that extending the limit to 12 nm would help space out where the pots are placed, because at present they are effectively squeezed into the 6 nm zone. "Opening up to the 12 mile and pushing the foreign boats outside into international waters, would free up everybody's fishery here" (Padstow FG). In the workshop it was suggested that the UK should start by demanding that the UK reclaim its 200 mile EEZ, but more realistically aim to end up with the 12 nm limit.

When asked what would be the impact on the inshore fishing sector in Cornwall should the UK Government fail to get the 12 nm limit imposed, the response was: "Disastrous really: we've got to get that 6 miles back". The moderator then asked: "So from the point of view of the inshore sector it could make the difference between surviving in perpetuity and actually going out of business when this generation of fishers dies off?" A statement that was greeted with a chorus of 'yes!'. In this respect, there was a general sense that things are not going to get any worse post-Brexit in relation to the inshore fishing sector, and hopefully will get better.

Brexit was seen as an opportunity for the industry to shape the future of the inshore fishing sector in Cornwall

Whatever happens in terms of the negotiations, several of the participants emphasised the importance of having accurate science in terms of fish stocks, otherwise it becomes impossible to determine whether something is sustainable or not. In this respect, there was recognition that there will still need to be coordination with those countries fishing under the CFP, or there is a danger that there will be overfishing. This will require negotiation between the UK and the EU in terms of what the stocks of a particular species are, as defined by ICES, notwithstanding that the advice they give is invariably watered down by political processes. In this respect, that there are two separate issues at play in the Brexit negotiations: one is the right to fish within a particular area in the sea; the other is the right to catch a share of the fish available in that area. In other words, fishers may have access to fishing grounds, but they may not have quota to catch the fish once they get there.

Despite a general sense of optimism (or at least hope) that Brexit will result in positive change for the inshore fishing sector, there was also concern expressed at the Helston FG, in particular, about the dangers of the Brexit negotiations, especially in relation to the export markets for fish. For example, that the EU may impose significant tariffs on UK exports of fish, or perhaps even withhold access to certain markets. This could be devastating, in that between 80-85% of fish caught in Cornwall is sold to Europe. Similarly, instinctive enthusiasm for Brexit was tempered by a concern that nothing much will change in reality, not least because fishers are unconvinced that the UK Government will fight their corner. "Our Government doesn't really seem to give two hoots about the fishing industry. I think we will be used as a bargaining chip for something else, like farming" (Padstow café).

Whatever the nature of the Brexit negotiations, there was a perception that change is going to take time, perhaps as long as 10 years, not least because government departments in general, and Defra in particular, have faced considerable cuts over recent years and are short of staff. This perception is captured in the following quote from the workshop:

> *"I think there's going to be so much chaos in the next 5 years. I think the negotiations over quota will be hostile and ongoing for the first few years and we'll be desperately trying to write our own legislation. We will have copy and pasted it by then, but I think we will be looking to change certain parts, but it won't have changed fast enough for the industry and they will be unhappy that change has not been delivered. I think in 10 years' time things will take shape again and markets would have balanced themselves out again. But 5 years' time, I don't think it will be a good place"*

In other words, the idea of transition is central: transition in a temporal sense, but also in terms of what is negotiated. There is an 'ideal' starting position (likely, perhaps to be the UK's EEZ or Median Line), which will be the subject of a hard negotiation, ending up with something that is more, or less, acceptable. However, in thinking about how the future might unfold, it is imperative to consider a number of over-arching factors.

First, the voice of the sector is in danger of not being heard by those making the decisions regarding the future of the fishing industry[4].

Second, that the definition of an 'inshore fishing sector' is insufficiently precise and in need of refinement if policy is to be better targeted to the needs of this sector.

Third, it is important in policy terms to be clear as to the purpose of the inshore sector (howsoever the sector is defined). Is it about catching fish or preserving a way of life; making a meaningful contribution to food and nutrition security, or simply providing a luxury product; or is it primarily in terms of its socio-economic contribution to rural communities, including directly preserving / creating jobs in the fishing industry or in supporting the tourist offer?

Fourth, how best to deal with the monetisation of licences and quota. In both cases, neither had any monetary value when originally issued, but due to their limited availability have been increasingly traded between fishers. One option is for the UK Government to buy back this quota and to allocate it to fishers as they see fit. Inevitably this would be very expensive, but would allow for a different and more policy-targeted approach to be taken in terms of quota allocation.

Fifth, the timescale involved for completing the negotiations resulting from Brexit could be as long as 10 years. Due to the ever-increasing average age of inshore fishers, it is important to consider how best to manage this transition period in order to help ensure the long-term viability of the U10m sector.

Sixth, the fisheries sector as a whole is very small in terms of its contribution to the overall GDP of the UK, with the inshore sector only contributing a very small percentage of that. As such, there are concerns that it may be used as a bargaining chip in the wider Brexit negotiations and effectively become marginalised.

[4] Notwithstanding the recent emergence of the Coastal Producer Organisation.

6. CONCLUDING REMARKS

- The inshore sector is desperate for more quota and there are concerns about the introduction of licence capping. The fishers are hoping that more quota will be available post-Brexit, and that they will end up getting more quota allocated to them.
- The importance of gaining control of at least the 12 nm margin.
- The Government needs to consider buying out licences and quota that have been increasingly traded over recent years, so that they can then be re-distributed by the state.
- Fishers see Brexit as an opportunity for change, but are sceptical that the UK Government will argue the fisheries' position strongly enough in the Brexit negotiations.
- The need to give voice to the inshore fishers, not least because neither 'Fishing for Leave' nor the CFPO do this sufficiently well. In this respect, there is hope that the recently formed Coastal Producers Organisation will help.
- Frustration that much of the regulation developed at the Commission is not necessarily appropriate at a local level, especially in Cornwall where there is such a diverse fishery. In this respect, that 'one size does not fit all' and that there is a need for more appropriate bottom-up regulation that has been developed at a local level.
- Concern about the potential loss of EU markets. Related to this, there is recognition that fishers need to become more entrepreneurial in terms of how they market their catch, and that perhaps there is a need to support this through both policy and monetary support. It is no longer sufficient for fishers to simply catch fish and sell it at harbour-side, they need also to develop ways to add value to their catch if they are to remain economically viable in the future.
- While the inshore fishing sector may be marginal in economic terms, it is of critical value to the wider economy in Cornwall, especially tourism, as well as to the social fabric of many of the communities involved. In this regard, it was discussed that it would be of value to conduct an SROI (Social Return on Investment) analysis of the inshore fishing sector in Cornwall. This would then provide a clearer idea as to the wider benefits of the inshore sector, expressed in monetary terms.
- Ultimately, that if change along the lines suggested above does not come about to some extent, the research suggests that the future of the inshore fishing sector in Cornwall does not look bright, especially after the current generation of fishers die off. In this respect, that existing fishers are inherently highly resilient, but that fishing as a vocation/job has much less appeal these days, as well as providing fewer opportunities than it did a generation ago.

Without change, the research suggests that the future of the inshore fishing sector in Cornwall does not look bright – especially after the current generation of fishers dies off

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