Bagas Gwrians Leel Pyskessa Kernow ha Syllan
Strateji Displegyans Leel

Cornwall & Isles of Scilly Fisheries Local Action Group
Local Development Strategy

Fish Sale on the Slipway by William E Narraway (St Ives Town Council Collection)

Agan Amkan:

Erbynn 2015: meurhe dhe'n ughboynt an chonsyow ha prowyow erbysiethek yw ygor dhe gemenethow pyskessa kernewek yn kerhynnedh kesoberus ha sostenadow, hag a dhrehev dalgh an re na neb a drig hag oberi ynna, owth ynterweytha yn ewn gans 500 den unnik ha kreatya ha diogeli 250 soodh pyskessa.

Y fydh hemma kowlwrys dre wriansow hag a omgolm kemenethow pyskessa yn: displegyans-marhas nowyth; kesoberethow nowyth; TK dhe skoodhya effeythuster ha sawder oberyansek; an kevrennans a venenes yn displegyans nowyth rag avoncya hewulder an diwysyans; ragdres treus-kenedhlek; trenyans ha displegyans; tennvos a entroryon nowyth dhe'n alwesigeth; skoodhyans rag golyow pyskessa; displegyans a hedhas salow dhe borthow; provians a skoodhyans rag negys ha lendyans; avoncyans a hedhas-dowr rag kemenethow dre vras; kevrennans yn governieth ha maters ha ragdresow kerhynedhek hag a alloseg nowythyans teknogel.

Acknowledgements

This strategy is a living document and the basis for Cornwall delivering Fisheries Local Action funding. It is a result of extensive public consultation with the communities which make up Cornwall. It would not have been possible without the help and support of the fishing community, the shadow FLAG Partnership Board, and the many public bodies and key players who gave up their time to shape it. We owe our thanks to all of you.

Contents

Executive Summary

Although the number of people directly employed in fishing in Cornwall is around 1000, the history and geography of Cornwall means that one in three of the inhabitants of the County are touched in some way by the industry. They live amongst fishermen, they find employment from processing and tourism activities upstream from the industry and they inhabit a peninsula landscape and coastal environment which supports fishing.

The geographical distribution of the sector, with almost every cove and coastal settlement having fishermen associated with it, and the wide variety of the sector, both in terms of the nature of fishing activities and the types of fish they catch, make it a very important aspect of the economic life of the County.

Although the sector has a limited number of employees, considered in relation to other sectors in Cornwall, in terms of the number of individuals employed within the sector, (compared to other English locations), the Cornish fishing industry is the largest in respect of employees and the most varied in terms of its catch.

Fishing communities in Cornwall experience significant deprivation and have a high number of working age people who are not economically active. Tourism is a sectoral strength in terms of the business stock across the fisheries areas and should be considered a key opportunity for the economic and social development of the FLAG area. The Isles of Scilly are a unique component of the fisheries areas and whilst they should be seen as a key integral part of the FLAG area their distinctive nature also needs to be recognised within the overall programme.

The Cornwall FLAG area has a range of environmental designations, comprising 11 Special Areas of Conservation and 3 marine SACs (Falmouth & Helford SAC, Isles of Scilly SAC and Plymouth Sound & Estuaries (the latter is partially within Cornish waters).

Consultation with fishermen and wider stakeholders has revealed significant challenges for the industry. These include:

Challenges

- A lack of new entrants into the profession.
- A need for investment in basic facilities at harbours and wharves to underpin their operational viability in the longer term.
- Concern around engagement with the regulatory environmental agenda for fisheries.

Fishing communities are upbeat and enthusiastic about the development of their industry and identified the following opportunities which can be addressed by the Strategy:

Opportunities

- Opportunities to add value to fishing and economic development through tourism.
- Opportunities for technical innovation in fishing processes.
- Opportunities to widen interest, engagement and employment in the industry.

Through an intensive and wide ranging process of consultation, the FLAG Strategy has developed the following Global Objective:

By 2015: to maximise the economic opportunities and benefits open to Cornish fishing communities in a sustainable and cooperative environment, which builds the capacity of those who live and work in them, interacting directly with 500 individuals and creating and safeguarding 250 fishing jobs.

This will be achieved through activities which engage fishing communities in: new market development; new cooperatives; IT to support operational efficiency and safety; the participation of women in initiatives to enhance the viability of the industry; trans-national project; training and development; the attraction of new entrants to the profession; support for fishing festivals; the development of safe access to harbours; the provision of loan and business support; the enhancement of water access for communities generally; participation in governance and environmental issues and projects which enable technical innovation.

A seven objective programme has been established within the strategy covering the following themes:

1. Developing sustainable supply chains and market development
2. Providing infrastructure and communal facilities for fishing communities and cooperatives
3. Capacity building, cooperative development and networking
4. Training, retention and recruitment including diversification
5. Coastal communities, tourism and economic development
6. Advocacy and engagement for fishermen
7. Regional sustainable management engagement

Horizontal themes around equal opportunities, environmental sustainability and innovation have been set out and underpin the operation of the programme.

The Strategy is based on a 75% intervention rate and anticipates the allocation of £2,437,500 of EFF funding.

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Social, Economic and Environmental Context

Introduction

The Fishing Communities of Cornwall have been identified using Cornwall Sea Fisheries Committee (CSFC) data on the location of fishing fleets (2009). Using CSFC datasets on the number of vessels and employed crew in each harbour, a list of Medium Super Output Areas (statistical geographies from the 2001 Census) have been developed as the basis for the analysis of the socio-economic profile of the communities within which the Cornish fishing fleet is based. MSOAs cover population numbers ranging between 5,000 and 10,000 depending upon their specific economic geography. 42 “Base Ports” have been used to develop the Socio-Economic profile of the Cornish fishing communities. A list of all ports and wharves in Cornwall, including this list of base ports and a number of additional ports supporting just one employee, can be found in Appendix A. These base ports have been located within 22 appropriate MSOAs around the coast of Cornwall.

Data has been sourced for each of the 22 MSOAs to provide a profile of the hinterland within which each of the 42 Ports is located. Individual MSOA details have been aggregated up to allow a comparison between all fishing communities across Cornwall. MSOA details have further been aggregated into clusters thus providing statistical profiles for the four mainland areas identified in the section of this report (see description of Fisheries in Cornwall). A separate commentary for the Isles of Scilly has been generated as the statistics concerned are too limited to enable a full and comprehensive comparison.

Datasets have been assembled from the following sources to provide a profile which corresponds with the headings in the FARNET Guidance, namely:

- Resident Population and profile – ONS 2009 Mid-Year Estimates.
- Employment Data – Annual Business Survey 2008 ONS; Economic Activity Data July 2009- June 2010 ONS.
- Skills and Qualifications – Index of Multiple Deprivation Education, Skills and Training domain data – 2010 – Dept of Communities and Local Government.
- Unemployment – Job Seekers Allowance data March 2011 – Department of Work and Pensions.
- Enterprise and Business Base – VAT based business numbers and sectors 2007 ONS, Cornwall Sea Fisheries Information 2009.
- Deprivation and Disadvantage – Index of Multiple Deprivation Composite Indicator domain – 2010 Department of Communities and Local Government.

The datasets have been used to provide a balance between the most up to date information sources available and the need to distil information at small geographical levels. These datasets provide a robust overview of the economic nature of the Fisheries Communities and their hinterlands. It is important to bear in mind that these datasets only go so far in setting out the unique character and circumstances of individual fishing communities. Local narratives and perspectives of the type set out in the community consultation sections of this report form an important supplement to this statistical analysis.

A detailed description of the operation of fisheries in Cornwall follows this section of the strategy.

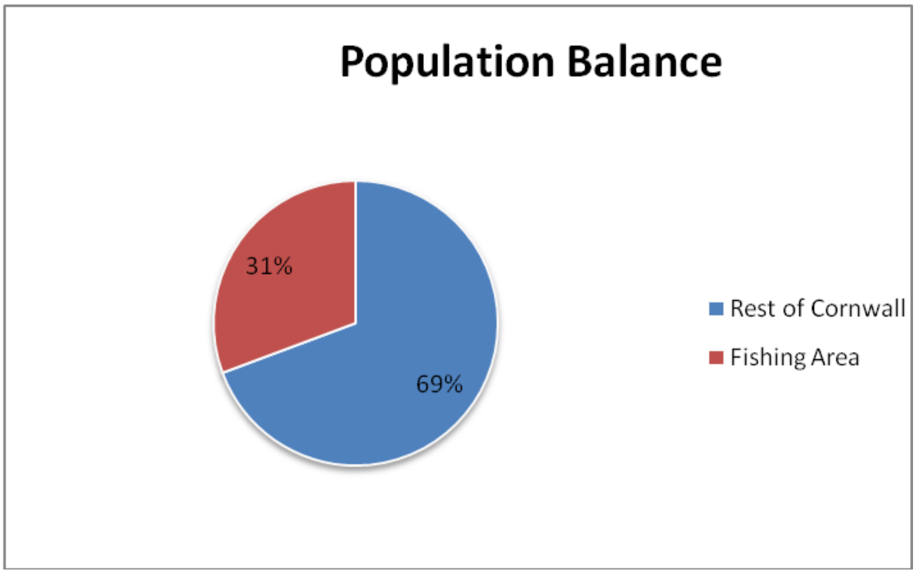
Overview

The scale of direct employment in fishing within fishing communities is small in relation to the overall number of employees in Cornwall. According to CSFC figures, 1028 people were employed in fishing in 2009. The small number of people employed directly in the sector exposes the frailty of a limited number of data sources. Data from the Annual Business Survey (ABS) for example - which is based upon a sample survey- assumes less than 1000 people are employed in fishing and fish processing in Cornwall (the latest dataset covers 2008).The proprietor data source ‘Credit Safe’ (which draws on a number of national company databases), however, identifies 567 individuals employed mainly in activities around fish processing and leisure sea based activities (covering the period 2010-2011). All of these figures are small in comparison to the overall number of jobs in Cornwall.

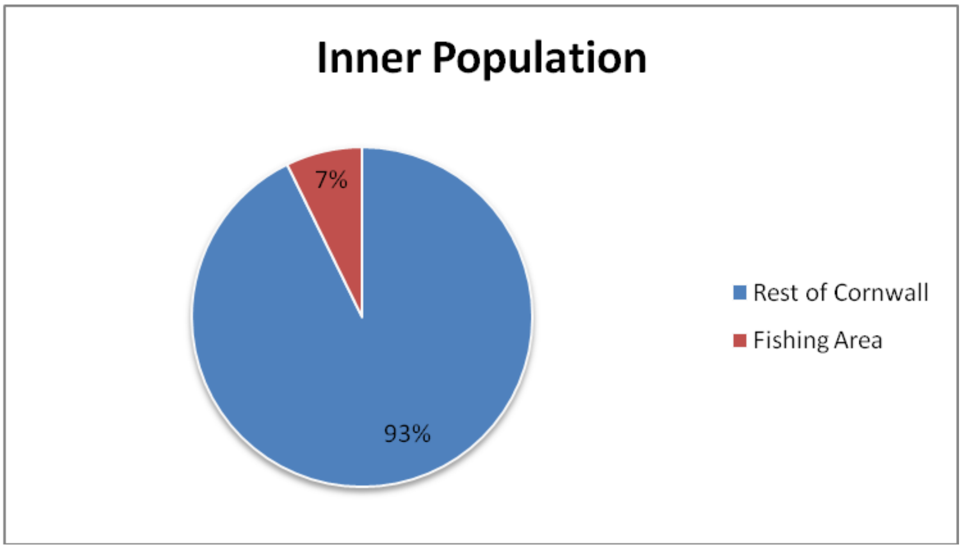
Within the fishing communities themselves, a discussion of the precise numbers involved in the fishing industry is largely academic. This does, however, reflect the need to establish a comprehensive and thorough dataset on employment in fisheries activities in Cornwall, particularly in view of the significant challenges facing the profession.

Population

Communities covering active ports and their hinterlands comprise 162,891 people. This accounts for 31% of the overall population of Cornwall (which at 2009 was 531,109 people).

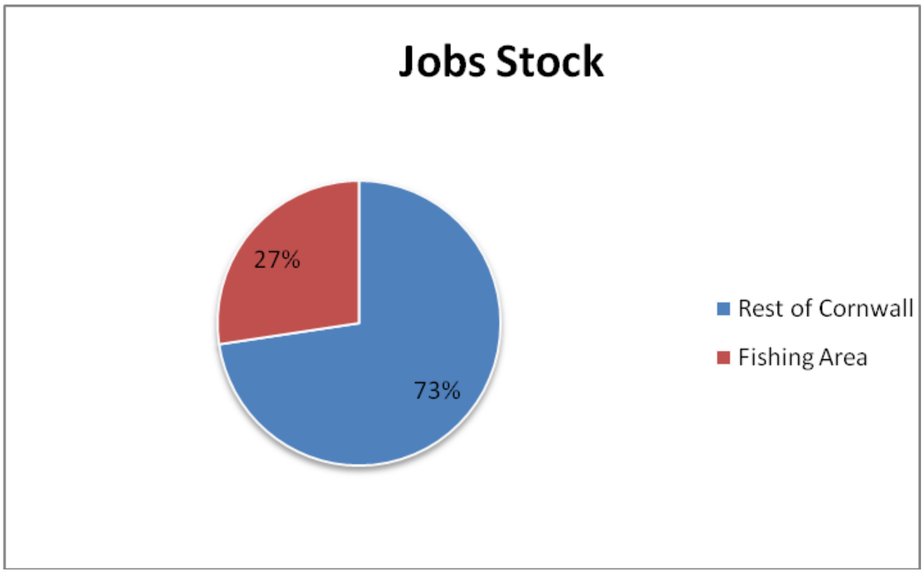


Looking more closely at the inner population of the areas directly connected with ports, harbours and wharves; the population comprises 41,663 people or 7% of the overall population of Cornwall. This is the key population for the purpose of this study. However, it is important to analyse the economic operation of the broader hinterlands of this population base. Doing so will meaningfully reflect the economic areas in which individuals live their everyday lives; particularly in terms of access to key services and facilities (e.g. schools, shops and employment).



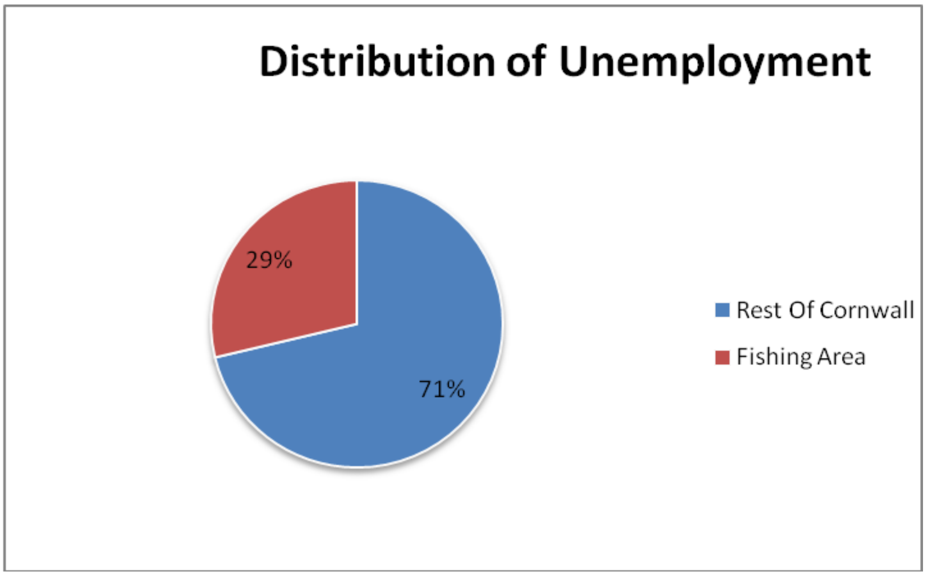
Jobs

Fishing communities and their hinterlands under-perform in terms of their job stock (the total number of jobs located within the area) compared to their population share. Fishing communities support 52,736 of the overall figure of 139,858 jobs in the County – representing 27% of all jobs.



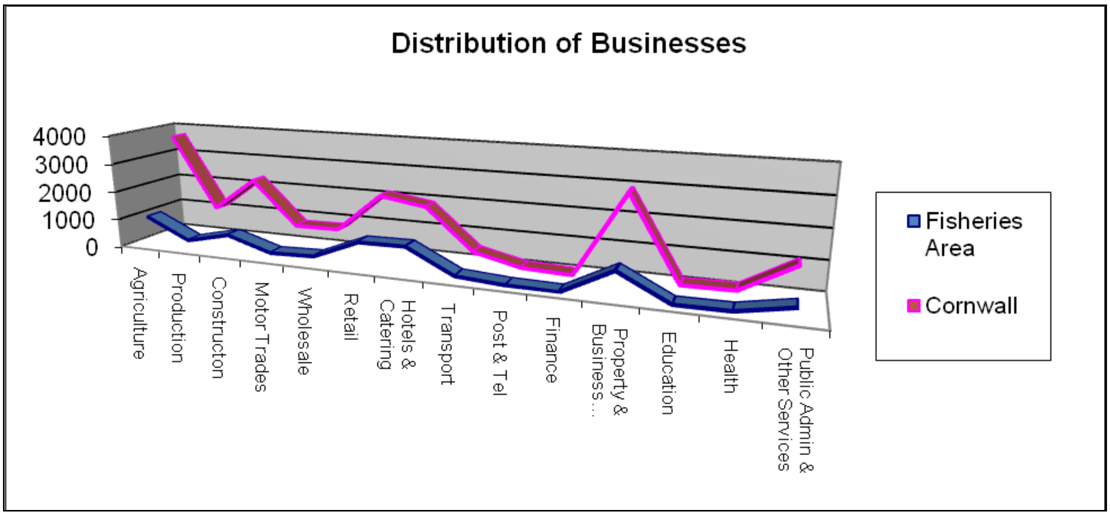
Unemployment

Fishing communities fare marginally better than their population share would suggest in terms of unemployment. Fishing communities host 29% (2,760) of all those on Job Seekers Allowance in the County.



Business Structure

Fishing communities and Cornwall as a whole have a similar distribution of VAT registered businesses by sector. Fishing communities have a higher than expected distribution in relation to production, motor trades, wholesale, hotel and transport activities and a lower than expected performance around agriculture, property and business services. Tourism is a key contributor that illuminates the disproportionately large size of the hotel and hospitality sector. This is drawn out as a key theme in the development of priorities further on in this report.



Economic Activity

Details of the economically active population have been analysed at former district council level (the only small geographical level available). For fishing communities, the figures indicate, - in common with Cornwall as a whole - very low levels of economic activity (in the majority of cases, below 75%). The distribution of economic activity across each port area is as follows

Ports in Caradon – Economic Activity 76.4%
Millbrook, Looe, Polperro
Ports in Carrick – Economic Activity 74.3%
St Agnes, Falmouth, Portloe
Ports in Kerrier – Economic Activity 69.2%
Portreath, Gillan, Porthleven, Cadgwith, Coverack, Helford, Mullion, Porthoustock
Ports in North Cornwall – Economic Activity 74.5%
Bude, Boscastle, Port Gaverne, Port Issac, Port Quin, Padstow
Ports in Penwith – Economic Activity 73.3%
St Ives, Hayle, Portheras Cove, Penzance, Penberth, Sennen, Mousehole, Newlyn
Ports in Restormel – Economic Activity 76.8%
Newquay, Fowey, Charlestown, Gorranhaven, Mevagissey

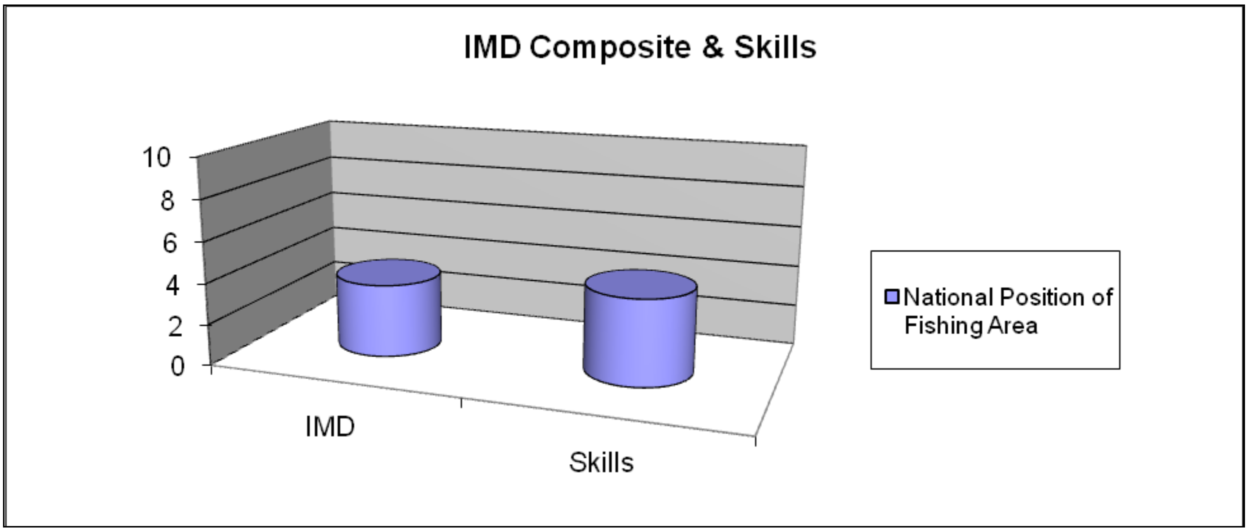
The average level of economic activity for fishing areas is 74.1%, compared to 74% for Cornwall. This is considerably worse than the average level for England, which is set at 77%.

A number of ports with only one employee have been excluded from the list above. The Isles of Scilly have also been removed as there is no official data on economic activity levels for this geography.

Deprivation

Index of Multiple Deprivation (IMD) figures rank every Lower Super Output Area in England in terms of key characteristics called "domains" (there are over 32,000 LSOAs in England). A composite ranking for each of the MSOA areas which form our unit of analysis has been used to develop an overview of relative deprivation in each of the port areas and their hinterlands.

This reveals how fishing communities rank highly in terms of levels of overall deprivation and skills challenges. Cornish fishing communities are amongst the top 30% of all deprived areas in England, and rank amongst the top 40% of all areas in England for skills challenges.



Sub Areas

This section of the socio-economic analysis moves the focus from the characteristics of the fishing community as a whole onto a consideration of its component parts. The sub-areas described are based on the ports identified within the next section which sets out the key operational characteristics of the fishing sector in Cornwall.

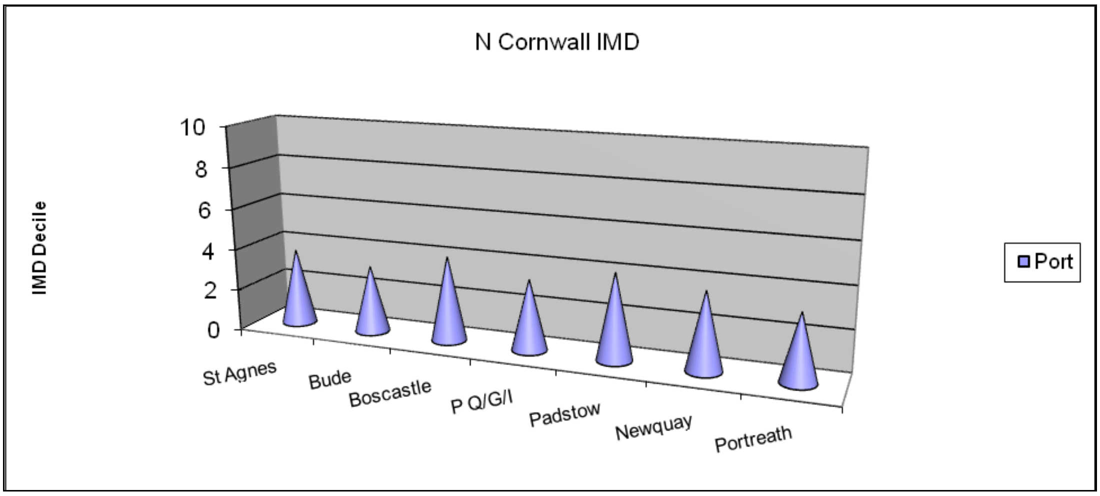
Population

North Cornwall fishing communities and their hinterlands represent the largest proportion of the sample – with a population of 50,965; followed by West Cornwall with a population of 48,194; East Cornwall with 37,820; and South Cornwall with 23,712 people.

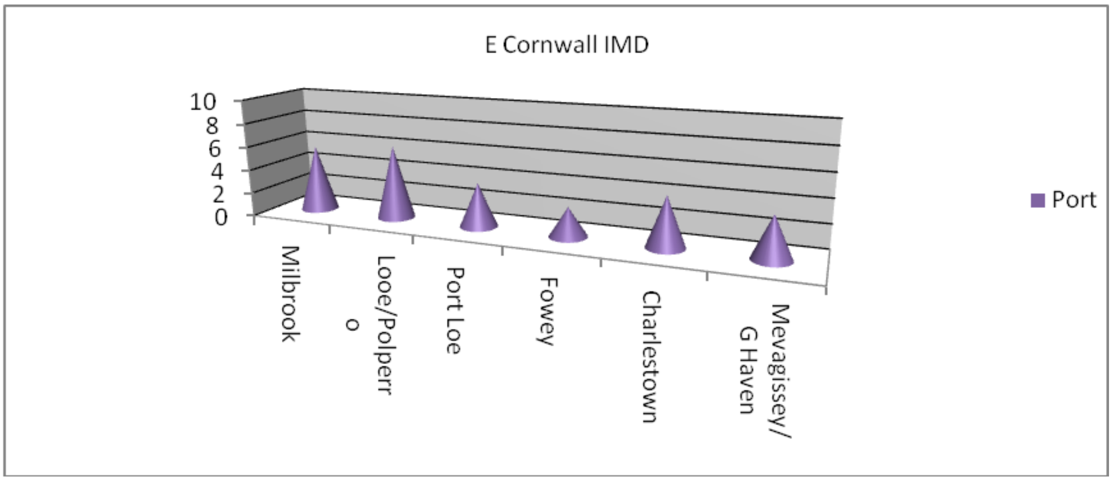
Deprivation

Ports have been grouped according to available geographical data into North, South, East and West Cornwall. The deprivation data for each area is set out below:

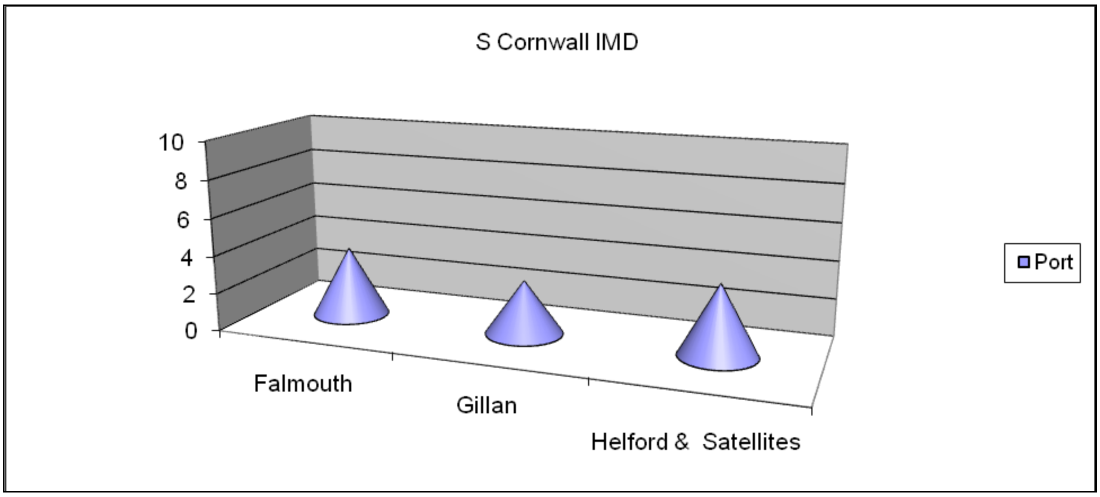
In North Cornwall, all port areas are within the worst 40% of all deprived communities in England.



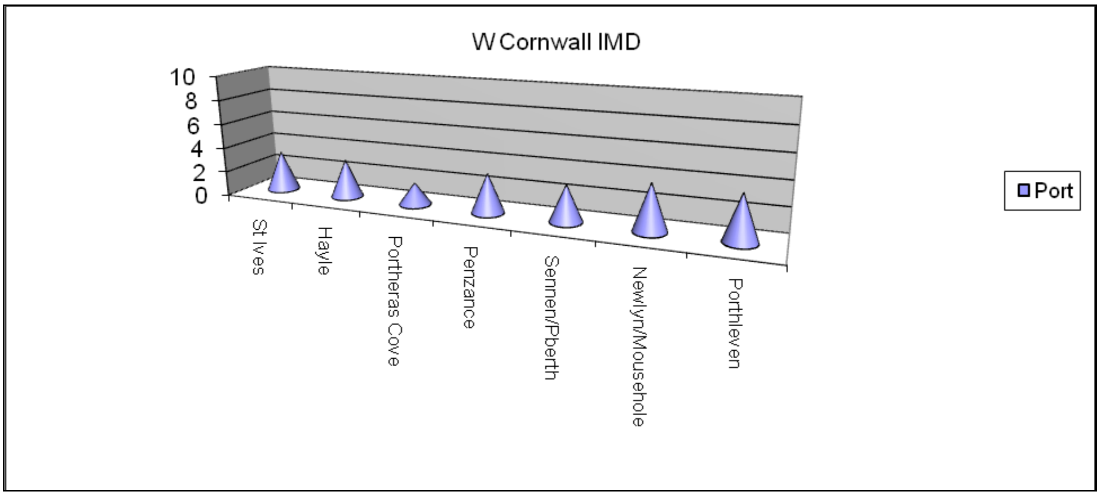
In East Cornwall, the picture is moderately better although Fowey, Portloe and Mevagissey/Goran Haven have deprivation results placing them in the bottom third of all communities in England.



South Cornwall (which includes a number of the ports around Helford grouped into a 'Helford cluster':- Cadgwith, Coverack, Porthousestock and Mullion) is in the top 40% of all deprived areas in England.



West Cornwall is perhaps the most challenged in terms of deprivation; with all of its ports (indeed some with very large hinterlands such as Penzance) exhibiting high levels of relative deprivation.

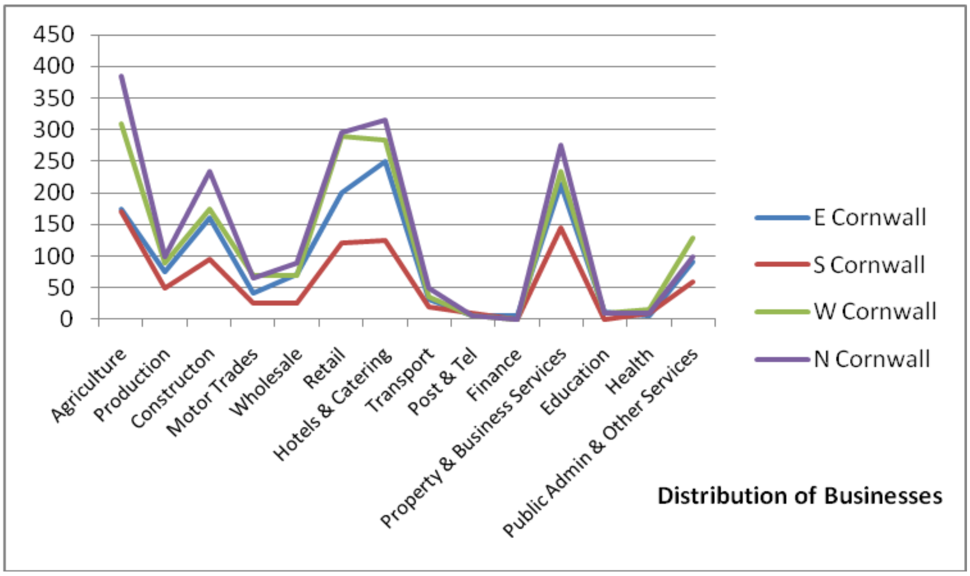


Relative isolation appears to correlate strongly with the levels of deprivation across the port sub-areas. Whilst none of the sub-areas are doing well in terms of deprivation levels, West and South Cornwall are the most remote and most challenged areas.

Businesses

Each of the four main fishing areas has a business base which is proportionate to its overall population size. The South Cornwall area is the smallest and has a stock of 855 businesses; whilst the highest number of businesses is in North Cornwall, which has a business stock of 1935 businesses.

The distribution of enterprises by sector is uniform amongst all four fisheries areas. Agriculture, retail, hotels and catering and property business services are the most significant sectors. It is worth noting that agriculture and property and business services sectors are well represented across Cornwall and that the fishing areas as a whole, whilst well endowed with such businesses, do fall slightly below the level their population share of Cornwall might suggest they should be.



Jobs

The distribution of jobs across the four fishing areas does not follow their population and business proportion shares. South Cornwall has the smallest population size and smallest number of businesses but the second highest number of jobs. West Cornwall, which is second largest in terms of both population and share of businesses, has the smallest stock of jobs. North Cornwall follows its trend for population and business stock having the highest stock of jobs. East Cornwall follows its trend of having the third highest proportion of

jobs alongside the third highest proportions of population and enterprises
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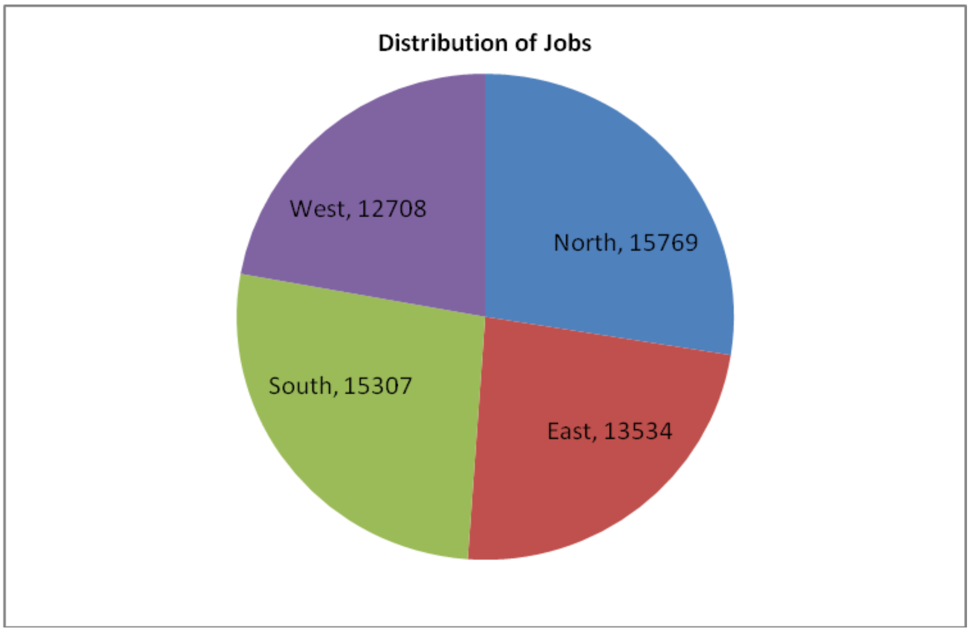
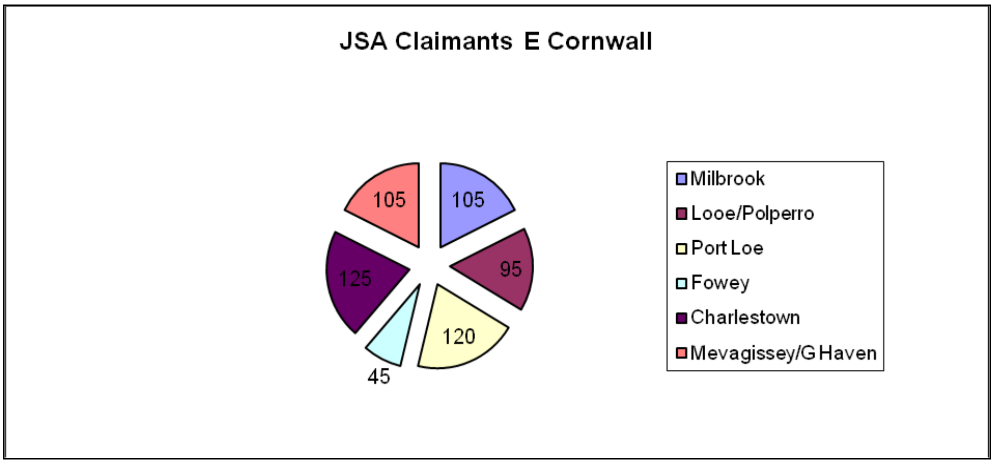
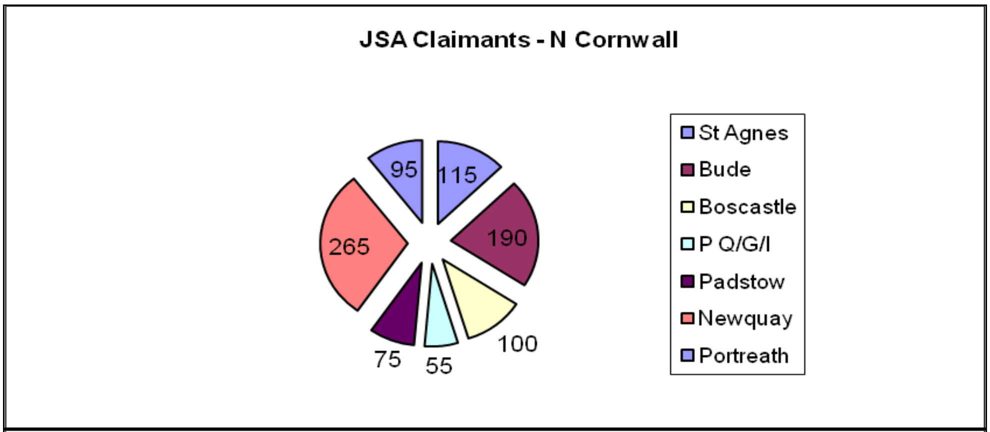
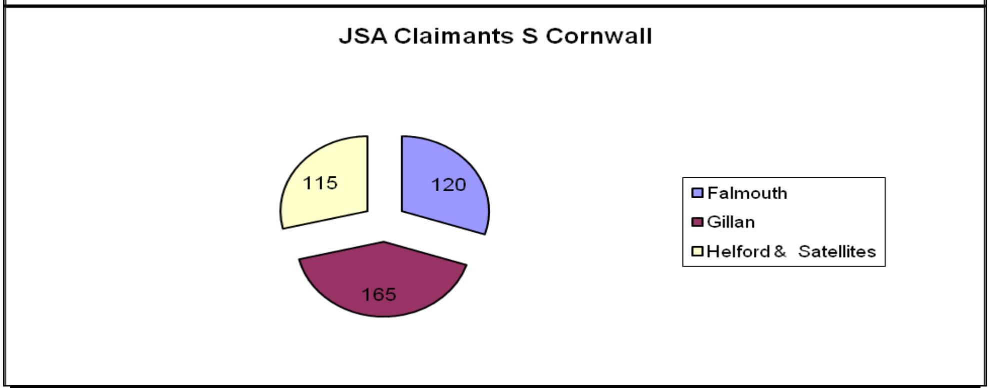


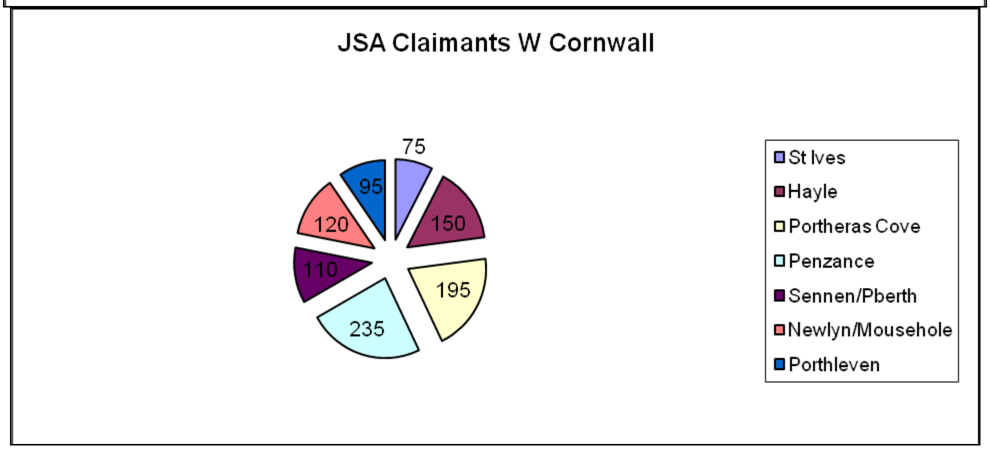
Unemployment

The distribution of Job Seekers Allowance (JSA) claimants for each of the sub-areas and their individual ports and hinterlands is set out below (12 months 2009-10). Newquay, Bude, Gillan, Portheras Cove and Penzance (and their broader hinterlands) have the highest absolute numbers of JSA claimants. Unemployment across all fisheries area represents 29% of unemployment in Cornwall as a whole.









The Isles of Scilly

The Isles of Scilly form a unique component of the fishing community geography. They have:

- A population of 2,200.
- 10 JSA claimants.
- A ranking amongst the top 30% of deprived areas in England and in terms of skills amongst the top 25% most challenged settlements in England.
- 125 VAT registered businesses.

With an estimated 30 people employed in fishing and related industries, the industry is a disproportionately important source of employment when compared to Cornwall in terms of its scale as an overall percentage of the population.

As a result of low population numbers and nature of the local economy, there are significant limitations to any process of economic modelling for the Isles of Scilly.

The face to face consultations with fishermen on the Isles of Scilly provide a useful supplement to the datasets analysed to develop a limited socio-economic profile of its fishing communities. One key factor illuminated by fishermen in Scilly was the higher input costs for the operation and running of facilities on the Islands as a consequence of their physical isolation from the mainland.

Summary

Cornwall has diverse and widely distributed fishing communities. Almost one-third of its population has access to ports, coves, wharves, harbours and fishing businesses within a short travel time. The population of those communities directly associated with ports, coves and wharves, however is much smaller at 7% of the overall population.

Newlyn is the most significant fishing community, being twice the size (in terms of fishermen) as the next port area. Looe, Falmouth, Padstow, St Ives and Mevagissey also have a large proportion of the overall stock of fishermen in the County. There are difficulties surrounding the datasets used to compile actual numbers of people employed in fishing because of the small overall number of people working in the sector., In the Isles of Scilly whilst the overall number of fishermen is small in statistical terms, they do constitute a significant proportion of the entire workforce when compared to ports in mainland Cornwall.

The fishing areas of Cornwall have a lower per capita representation of businesses compared to Cornwall as a whole and a lower per capita number of people claiming Job Seekers Allowance compared to Cornwall as a whole.

In terms of the distribution of businesses, the fishing areas have a similar profile to Cornwall as a whole, with slightly higher per capita proportions of production, motor trades, wholesale, hotel/hospitality and transport businesses; and slightly lower per capita proportions of agriculture and property services businesses. The high representation of hotel/hospitality businesses demonstrates the potential within the tourism sector in these communities and is a key theme picked up further on in this report.

The fishing areas have levels of economic activity comparable with Cornwall, which at 74.1% is lower than the England average of 77%. Ports in Kerrier have a significantly lower economic activity rate: just 69.2% (Portreath, Gillan, Porthleven, Cadgwith, Coverack, Helford, Mullion, Porthousestock, Portreath).

Fishing area communities exhibit significant deprivation. They are within the top one-third of all communities in England and the top 40% of all communities in England in terms of skills challenges.

At sub-area level, the North Cornwall cluster has the highest population (just over 50,000 people) and the South Cornwall cluster the lowest (just under 24,000 people). Individual ports and their hinterlands all fall within the most deprived 50% of all settlements in England apart from Millbrook, Looe, Portloe and Charlestown. In relative terms, the East Cornwall cluster is less deprived compared to the other 3 clusters. The distribution of businesses across the sub-areas and across sectors closely mirrors the pattern for the fishing areas and for Cornwall as a whole. However, this is not the case in terms of the distribution of jobs. South Cornwall has the smallest population size and smallest number of businesses but the second highest number of jobs. West Cornwall - which is second largest in terms of both population and share of businesses - has the smallest stock of jobs. North Cornwall follows its trends for population and business stock, having the highest stock of jobs. East Cornwall follows its trend of having the third highest proportion of jobs alongside the third highest proportions of population and enterprises.

Fisheries settlements with relatively high numbers of JSA claimants include: Newquay, Bude, Gillan, Portheras Cove and Penzance.

This socio-economic component of the study has helped established the following issues:

- *Population/geography*: Fishing as an activity is a distinctive but modest component of economic activity affecting approximately one-third of the population in Cornwall. This provides clear scope for the targeting of resources.
- *Deprivation*: Fishing communities suffer significant levels of deprivation. Priority should be given to addressing deprivation, including tackling real challenges around skills and training.
- *Economic activity:* Levels of economic activity are low and need specific attention if fishing communities are to realise their full potential. Tourism is a sectoral strength in terms of the business stock across the fisheries areas and should be considered a key opportunity for the economic and social development of the FLAG area.

- *The Isles of Scilly;* are a unique component of the area and their distinctive nature needs to be recognised.

Description of Fisheries in Cornwall and the Isles of Scilly

The fishing sector across Cornwall and the Isles of Scilly is truly diverse, from the variety of seafood landed in Cornish ports, an estimated 40 different species, to the range of over 40 ports and coves themselves, varying from the smallest with one fishing boat, to the largest, Newlyn which hosts 156 fishing boats and landed a value of fish of £17.27 million in 2009. But it doesn't stop there; the methods of catching fish are also diverse, from Beam Trawling to hand-lining and potting, all playing their part and all require different facilities, levels of manpower and markets for their landings.

The fishing sector is important economically to the area, in 2008 the "Cornwall and Isles of Scilly Sector Profile: Fishing" was published which calculated the overall GVA for the sector (fish catching sub-sector) to be worth £23.3 million. This added to the benefits fish and fishing bring to Cornwall in terms of tourism means that it is important to support the industry and its communities to build and maintain a sustainable sector into the future.

Catching sector

According to the 2009 Cornwall Sea Fisheries Committee (CSFC) boat survey there were a total of 601 vessels fishing, employing 1028 people in the CSFC district across Cornwall. The type of vessels included ranged from potters; netters; trawlers; beam trawler; scallopers; handliners; oyster dredgers; and ring netters. The fleet is split into 91 over 10m fishing vessels (MMO statistics March 2011) and 510 under 10 metre boats. The majority of the over 10m fleet is based in Newlyn with other significant ports including Looe, Newquay, Hayle, Mevagissey and Padstow.

Most of the over 10m fleet are members of the Cornish Fish Producers Organisation (CFPO), with a small number being members of other POs such as the South West Fish Producers Organisation (SWFPO). A number of the under 10m vessels are also in membership of a Producer Organisation. The CFPO holds responsibility for ensuring good order in the activities of its members, with a particular mandate to help balance supply with market conditions, to monitor (and to some extent manage) fishing quota uptake, and to ensure that fish is landed in the best possible condition.

The fleet divides into a number of groups by gear:

- 20 of the larger vessels are beam trawlers engaged in the capture of a range of demersal species (including monkfish and megrim) in deeper water to the south and west of Cornwall.
- 25 of the large vessel fleet are engaged in static gear fishing – either with gill/tangle nets targeting a range of high value species such as hake, turbot, brill and sole; or, targeting crab and lobster using pots
- 41 of the larger > 10m fleet are engaged in otter trawling for a highly mixed catch of up to 20-25 different species a day.
- 5 of the over 10m vessels in Cornwall are engaged in Scallop dredging.
- The under 10m fleet divides into – inshore trawlers, handliners, gill-netters, ring-netters, scallop dredger and shellfish potters and vessels that deploy a range of gears according to season and fishing opportunities.

Each group demonstrates slightly different operating characteristics:

- a key characteristic of the *small-boat fleet* is that vessels typically fish for no longer than 12-18 hrs at a time, returning to port on a daily basis to land their catch;
- the *large netters* set nets on key grounds or around wrecks, carry ice, are fitted with refrigerated holds, and operate an average trip length of 5 days;
- the *larger trawlers* are also fitted with refrigerated holds, and work trips of 3 or 4 days;
- The *large beamers* tend to work hard rocky ground in deep water; trips average 7 days in length and vessels are fitted with refrigerated holds.

Across the Cornwall and Isles of Scilly FLAG territory, there are five sub mini territories:

North, East, South, West and the Isles of Scilly. These territories are based upon fishing areas rather than local authority or administrative boundaries. It has been possible, in the preceding socio-economic analysis, to collate data which corresponds to these areas to give an accurate feel of the nature and configuration of "actual" clusters of fishing communities in Cornwall compared to relying on a "rough" match of local authority area data against communities.

North Cornwall: This area covers Newquay, Padstow and the surrounding harbours of Bude, Boscastle, Port Gaverne, Port Isaac, Port Quin, Rock, Portreath and St Agnes. There are 78 fishing vessels operating across the area, employing 119 fishermen (CSF 2009). The biggest port is Padstow with a total of 27 vessels (6 classified as charter angler), landing 558 tonnes of fish a year with a value of £1.44 million (MMO 2009). The total landings, across the area, is approximately 1,060 tonnes of fish and shellfish with a value of £2.5 million (MMO 2009).

East Cornwall; this area includes Looe, Mevagissey, Polperro, Millbrook, Polperro, Fowey, Par, Charlestown, Portloe, Gorranhaven. It has a total of 134 fishing vessels, employing 186 fishermen. Mevagissey is the second largest port in Cornwall with 68 registered fishing vessels and 91 fishermen (CSF 2009). Mevagissey also has new entrants coming into and investing in the industry. Looe has 38 vessels with 57 fishermen (CSFC 2009). However, Looe's fish market means that its landings are the highest in this area (866 tonnes valued at £1.8 million) (MMO 2009). The East Cornwall territory lands nearly 2,000 tonnes of fish with a value of £3.8m (MMO 2009).

South Cornwall: In addition to the port of Falmouth, the area covers the Lizard and Roseland peninsulas to include the ports of: Mullion, Lizard, Church Cove, Cadgwith, Coverack, Porthoustock, Porthallow, Gillan, and Helford. There are 125 fishing vessels operating from this area, employing 167 fishermen (CSF 2009). The largest port is Falmouth with 72 vessels (CSF 2009), landing 920 tonnes with a value of £1.6 million. This is followed by Helford with 17 vessels. The total tonnage for the area is approximately 1,560 which has a combined value of nearly £3 million (MMO 2009).

West Cornwall: Newlyn and surrounding harbours and coves including Hayle, St Ives, Portheras Cove, Sennen, Porthgwarra, Penberth, Mousehole, Penzance and Porthleven. Newlyn is Cornwall's largest fishing port, with 8.7 thousand tonnes of fish landed per annum with a value of £17.27 million (MMO 2009). In terms of value, Newlyn ranks fifth amongst UK ports and second in England. Operating across the West Cornwall area are 269 fishing vessels (156 from Newlyn) employing 392 fishermen (255 Newlyn) (CSF 2009). St Ives is the next largest port in the area. The whole area lands approximately 9.3 thousand tonnes with a value of £18 million (MMO 2009).

The Isles of Scilly; 85% of its £200,000 of landings is shellfish. The main port is on St Mary's where 68 tonnes of fish is landed a year (MMO 2009). It is then either sold to local hotels and restaurants or exported by ferry to the mainland.

Markets

The fish markets for Cornwall and Isles of Scilly are diverse. Over the last 20 years the sector has seen a growth in the domestic market for some species which has led to some progress in moving away from the export of the raw products with no added value to European markets (predominantly France and Spain).

Cornwall has some of the highest quality fish and shellfish across the UK. Small processing units are scattered across the county, sending fish to top UK chefs and restaurants, as well as to a wide network of local restaurants, tourist establishments and farmers markets. Some supermarkets are looking to source seafood from the region. However, the majority of shellfish and wet fish are still destined for European markets.

The sector supports two daily port markets at Newlyn and Looe. Landings from the 42+ harbours and coves across Cornwall are either transported directly to these markets (some are also transported to the Plymouth market) or supplied to traders and/or processors. Approximately 25 medium to large sized fish traders and processors service this trade in Cornwall.

A large proportion of the flatfish and shellfish landed at Cornish ports are exported directly to markets on the Continent. There is also a specialist trade in the supply of high quality fish and shellfish to the English restaurant sector, and a strengthening market for supplying the UK multiples and food service sector with a wide range of fresh produce. Over the last few years notable successes have been achieved by the Cornish industry (with support from Seafood Cornwall), in the marketing of handline caught mackerel, handline caught bass and pollack, monkfish and megrim, and Cornish sardines.

Key issues

Information on the Cornwall and Isles of Scilly fishing industry.
The profile of fishing in Cornwall has not been updated since the baseline set out by EKOS in 2003. This means that the social, cultural and environmental value of the sector remains under-developed. The figures compiled for the Sector Profile in 2008 cannot easily be translated across from the EKOS report and can appear contradictory in places. There is a lack of information on where the fish is sold and the prevalent markets.

Fuel prices and other running costs
The rise in fuel prices and other running costs (e.g. bait and fishing gear) are testing the viability of some fishing vessels. Fishermen are unable to pass-on these input costs to their operations because markets and fish auctions determine the product price.

Consistently poor prices for some species
Prices are particularly low for crabs as a result of fishermen selling direct to merchants, abundant supply, and the increased efficiency of large crabbing vessels. Due to reduced competition at Newlyn market, an increasing number of larger vessels landing in Cornwall are selling their fish at auctions elsewhere in the UK (e.g. Plymouth or Brixham) and France (e.g. Brittany) for better prices. In 2010, approximately 50% of wet fish landed in Newlyn was sold there, compared to 90%+ in 2000.

Quota restrictions
Quota restrictions affect the quantity of certain species of fish that vessels can catch and when and where they can catch it. Decisions on quota are made annually at a European level, making business planning difficult. Additionally, scientific research takes time meaning that the data used by decision-makers can be out of date or work-in-progress. In practice, for Cornwall during winter of 2010 and spring of 2011, these decisions meant that despite the abundance of cod, some fishing vessels were unable to fish this species due to restrictions in the cod quota.

Discards
This includes over-quota (as described above), the by-catch of unwanted species, and the catch of species under the legal minimum landing size. DEFRA has undertaken a series of projects to reduce discards. This includes funding gear modifications trials to reduce the capture of otter trawlers at Looe; ‘Fishing for Markets’, an initiative to encourage consumption of under-utilised and sustainable species; and a ‘Catch Quota’ Project which will use CCTV cameras to verify catches and discards. Fishermen are incentivised to participate through access to extra quota. The reform of Common Fisheries Policy (CFP) in 2012 provides a further opportunity to reduce discards.

Inshore Fisheries and Conservation Authorities (IFCAs)
Cornwall and the Isles of Scilly have their own IFCA’s which are comprised of local authorities (who provide funding) and representatives of the local community that are tasked with the management of inshore sea fisheries resources in their area, including up to six nautical miles offshore. Set up under the Marine and Coastal Access Act 2009, and replacing Sea Fisheries Committees from April 2011, the areas IFCA’s will take forward some of the ideas contained in ‘Shaping in the Nature of England’ (DEFRA 2010) to provide the strategic direction to ensure the long-term sustainability of the marine environment.

Community Quota Systems
The publication of a discussion paper to raise the profile of Community Quota Systems (CQS) will build on work already undertaken in Cornwall. CQS will allow local communities to hold fishing rights and lease them to local fishermen, therefore helping prevent fishing activity from leaving the area. Following the lead of Shetland Leasing And Property (SLAP) in the Shetland Isles in 1996 and1997, the Cornish Industry established the ‘Duchy Fish Quota Company’ (a not-for-profit company limited by guarantee in 2000) to set about arresting and possibly reversing the trend of fish quota being sold outside of Cornwall. However, DFQC has been unable to access public funding due to concerns about state aid rules.

Training
Supporting people into the industry (including those with no background or support in fishing) and retaining them are vital to ensure the long-term sustainability of the sector. Although Seafood Cornwall Training has played a role in

providing training across the sector, it has lacked the capacity to tackle this issue directly. Some ports are concerned that skippers will retire over the next ten years and there will be no one to take over. Issues raised during stakeholder interviews included: the cost of buying your own boat, the low pay for acting as crew, the value of apprenticeships but difficulty assigning trainees to sole traders, and the need to work with mainstream training providers.

<u>Marine Conservation Zone (MCZ's)</u>

In 2009, the Marine and Coastal Act created Marine Conservation Zones (MCZs). The identification and selection of sites is being led by Natural England and the Joint Nature Conservation Committee (JNCC). DEFRA's Business Plan includes activities to the help local communities to enhance and protect marine environment by agreeing a Marine Policy Statement and publishing a first draft of Marine Conservation Zones with a deadline of April 2011. It is anticipated that this will be followed by an analysis of impact assessments provided by statutory nature conservation bodies and formal consultation on the proposed Zones (November 2011-October 2012) with the MCZs designated by December 2012. Crucially, a number of MCZs are being designed for the South West.

The 'Finding Sanctuary' Project, a partnership between South West Food and Drink, South West Wildlife Trusts, RSPB, Natural England, JNCC and Cornwall Council, is mapping the use of waters in the South West to inform the creation of a MCZ and intends to send its proposal to Government by June 2011. Some of the latest plans include proposals for conservation zones off the coast of West Cornwall including Mount's Bay, Land's End, Cape Bank, the Isles of Scilly and St Ives Bay (which has been viewed as controversial by some local fishermen).

Although the Isles of Scilly is fully engaged in the process of developing MCZ's; some Cornish fishermen feel marginalised by other stakeholders who have no financial stake or will feel no financial consequences of the decisions that they take using the "Finding Sanctuary" project.

Environmental Assets and Analysis

The coastal and marine environment around Cornwall and the Isles of Scilly contains a broad range of habitats and species including an abundance of rare and threatened species identified under national and international legislation. The following conservation designations therefore apply:

Special Areas of Conservation (SACs)
These are designated under the EU Habitats Directive and are for the protection of specified habitats and species. There are 11 Special Areas of Conservation including 3 marine SACs (Fal & Helford SAC, Isles of Scilly SAC and Plymouth Sound & Estuaries (the latter is partially within Cornish waters). There are management structures, with the involvement of both statutory regulators and stakeholders including from the fishing industry, for the Fal & Helford and Plymouth Sound SACs.

Following detailed survey work, a further three candidate marine SACs have been proposed within the 12 nm limit around Cornwall: Lizard, Lands End & Cape Bank and Prawle Point to Eddystone. Conservation measures are currently being developed for these sites, a process which is engaging with fishermen in the relevant areas. Site selection will be subject to public consultation in 2012.

Marine Conservation Zones (MCZs)
Under the Marine & Coastal Access Act 2009 a network of MCZs are being developed around the south west coast, through the Finding Sanctuary project. The current draft network includes proposals for 13 MCZs and 2 Reference Zones within the 12 nm limit around Cornwall, in addition to further sites within the 12-200 nm area, which may all have an impact on fishing vessels working from Cornish ports. Finding Sanctuary will make a formal submission to DEFRA in September 2011 and, following a period of public consultation, the final network across England will be designated in 2012.

Management measures for MCZs are currently in development and once designated, will be enforced by the Cornwall Inshore Fisheries and Conservation Authority (IFCA) inside 6nm and the MMO from 0-200 nm. For the majority of the sites, there will be restrictions on mobile fishing gear as the sites are designed to protect seabed habitats. This may have impacts on specific vessels from ports adjacent to these MCZs and/or vessels from ports further away

Voluntary Marine Conservation Areas (VMCAs)
There are 6 VMCAs in Cornwall (Fowey, Looe, Helford, St Agnes, Isles of Scilly, Polzeath) which are co-ordinated through Cornwall Wildlife Trust. Although in the case of Helford VMCA, the site is overseen by an active voluntary local partnership which includes representatives from the fishing and shellfish sectors.

The above designations may impact upon a range of fishing activities including the location and management of bivalve mollusc farms (particularly mussel rope farms, which are becoming increasingly popular in both estuarine and coastal waters).

Fisheries and environmental management
Fisheries management responsibilities are shared between the MMO (licensing, quota, EU and national legislation), Cornwall IFCA (EU and national legislation and local byelaws) and the Environment Agency (Salmon & Freshwater Fisheries Act only).

Stock management for quota species is undertaken as part of the Common Fisheries Policy and is administered by the MMO, with devolved responsibility given locally to Cornish Fish Producers Organisation (CFPO) for over 10's, using data gathered by Cefas on behalf of ICES. Research on specific local fish and shellfish stocks is generally undertaken by Cornwall IFCA but increasingly this relates to the environmental impacts of fishing gears and activities on the wider marine environment (which can be undertaken in partnership with other statutory bodies and non governmental organisations).

Specific activities have included: Cornwall Sea Fisheries Inshore Shellfish Stock Survey 2003-2006 involved 7 local inshore potting vessels and, the Cornwall Wildlife Trust Inshore Pinger Trial involved 4 inshore netting vessels.
Marine Stewardship Council (MSC)
There are 2 Cornish fisheries accredited under the Marine Stewardship Council's certification scheme – sardines and hand line caught mackerel. However, the latter is about to relinquish its accreditation due to the costs associated with recertification and wider national and international quota management

issues. . There are also ongoing accreditations for hake, monk, megs and sole. Seafood Cornwall commissioned MSC pre-assessments on the three main crustacean shellfish species, edible crab, spider crab and lobster, but currently, there is insufficient data available to take these fisheries to full assessment. Further, the business case to do so requires more detailed examination.

Community Engagement Description and Summary

The bottom up engagement process for the development of this strategy involved direct structured interviews with 17 fishing community stakeholders and 8 wider community stakeholders. In addition to these one to one engagements five group consultation events were held for those engaged in fishing, covering the areas set out in the description of fisheries in Cornwall, St Mary's (Isles of Scilly), Newlyn, Mevagissey, and Padstow. In total over 40 sector representatives attended these meetings. The notes of these consultations are attached at Appendix B.

The interviews and group discussions were focused around a consultation narrative (which was also sent to over 1000 additional fishing community representatives, sourced from the data base of Seafood Cornwall Training to raise more general awareness of the development of the strategy). This is attached at Appendix C.

The outcomes of the fishing community and wider stakeholder representative interviews are set out below in detail. The outcomes from these discussions and the group consultations have been used to develop a clear community owned sense of the Strengths, Weaknesses, Opportunities and Threats facing the sector.

These are further developed in the SWOT (which follows this section) with reference to the desk review and the outcomes of the description of the sector and the socio-economic analysis.

This process has set the parameters for the strategy in terms of the balance of its focus on the fisheries sector and, through that, on the fisheries community. A key consideration in this context has been the level of resources already available for wider community development in the majority of the fishing community areas through other sources of European funding including Objective 1 Transitional Funding and Leader funding.

Fishing Community Stakeholders

17 interviews with fishing community stakeholders were carried out between March and April 2011. These included representatives from:

- Cornish Fish Producers Organisation (CFPO)
- Local Harbour Authorities
- Head of Maritime, Cornwall Council
- Cornwall Inshore Fisheries and Conservation Authority (IFCA)
- Isles of Scilly Inshore Fisheries and Conservation Authority (IFCA)
- Seafood Cornwall
- Seafood Cornwall Training
- The fish catching sector
- Small-scale processing sector

The interviews aimed to tap into local knowledge and expertise in exploring the main problems and opportunities facing the fishing sector and its communities. The interviews covered:

1. What was the organisations / persons role in the fishing industry;
2. The key issues facing the fishing industry;
3. Views on the consultation narrative developed by the consultant team; and
4. Views on the themes and projects which might be supported under the initiative.

Summary of key findings

1. What was the organisations / persons role in the fishing industry;

Those interviewed either represented specific sectors of the fishing sector; delivered specific services and support to the fishing sector; or were private businesses actively involved in the fishing sector. They were therefore all part of fishing communities. These included:

- Representative bodies for fishermen from Cornwall and beyond nationally, within Europe and internationally where applicable (Cornwall Fish Producers Organisation);

- Providing facilities and services to fishermen at landing stations and harbours;
- Leading, championing and managing a sustainable marine environment and inshore fisheries (IFCA's);
- Promoting the highest quality standard of fish possible with fishermen, harbour authorities and fish merchants (Seafood Cornwall);
- Providing training across the fishing sector (Seafood Cornwall Training);
- Fishermen actively fishing;
- Small companies selling fish;
- Delivering fish cookery training to the public across Cornwall.

The formal roles and offices of those interviewed comprised:

- Vice chair of the National Association of IFCAs;
- UK EFF monitoring committee;
- Falmouth Harbour Commissioner;
- Looe Harbour Master;
- Looe Harbour staff;
- St Ives Harbour Master;
- Chair and Chief Fisheries Officer for Cornwall IFCA (inshore marine management);
- Chair of shadow FLAG;
- Secretary of the St Mawes and District Fishermen's Association;
- Chairman of Mevagissey Fishermen's Association;
- Chairman of Isles of Scilly Fishermen's Assoc;
- Head of Maritime at the Isles of Scilly Council; Chairman of Newquay Fishermen's Assoc; Chairman Looe Fishermen's Association;
- The Cornish Sardine Fishermen's Assoc,
- The Duchy Fish Quota Company;
- Chairman and Manager of Seafood Cornwall Training (SCT);
- Project officer for Seafood Cornwall;
- Co-ordinator for the Fishing for litter project and secretariat for SW Handline Fishermen's Association;
- Maritime Manager for Cornwall Council
- Chair of the Polperro Harbour Trust;
- Quality advisor for Seafood Cornwall;
- Chief Executive Cornish Fish Producers Organisation;
- Chair of the Newlyn ice company;
- Partner in the fish selling & processing business Kernow Sashimi;
- Owner of fish selling business Fishy Gils;
- Brilliant Fish CIC;
- Project coordinator for the Helford Quay project;
- Chair of Porthscathow regatta.
- Assistant Secretary of the Cornwall pilot gig assoc;
- Founder and member of Newquay fish festival committee;
- Committee member of the Newquay rowing club.

2. Key issues facing people associated with fishing and fishing communities

A range of social, environmental and economic issues were identified by respondents. These included:

Economic Issues

- Cost of Fuel – for some, fishing is becoming less viable due to the cost of fuel. This is especially a concern for the Isles of Scilly who have to import fuel from the mainland. Additionally the increasing cost of transporting fish to markets affects fish prices;
- Low fish prices for some species and limited economic benefits from improving quality;
- High running and maintenance costs of port facilities;
- Reduction in fleet leading to port facilities becoming less viable;
- Price of bait for the shellfish sector (Isles of Scilly and Newquay)
- Brown Crab, Spider Crab & lobster prices are low with contracting markets;
- Access to fish markets
- Lack of support for small businesses and those hoping to start up a business;
- Port viability: due to larger boats moving from Looe to Plymouth, and the recession affecting tourism boats, reducing harbour dues and loss of chandlers and engineers are affecting the viability of Looe;
- Lack of investment in the Looe catching sector due to the uncertainty of fishing. People are diversifying away and / or doing two or more jobs;

- Fishermen fighting for parking spaces and access near harbours especially in the summer.

Socio Economic

- The provision of local on shore and off shore mandatory and non mandatory training;
- Lack of new entrants into the sector, made more difficult by regulations and a lack of structure and support for new entrants. This is worrying as in some ports the average age of fishermen is between 40 and 50;
- There is a general reluctance to pay for any training across the sector;
- There are not many true fishing communities left where fishermen live in coastal villages. The closure of the Mission in Newlyn will have a big impact on Newlyn and housing for fishermen is an issue across coastal areas;
- If the catching sector is thriving so will the community. Some community members are increasingly interested in fishing and sometimes decisions have to be made between whether fishing or tourism is the driver for jobs in a coastal area.

Fishing policy

- Fish quotas are having a negative impact on fishing. For instance a current issue for the inshore fleet is the abundance of Cod but not enough quota, leaving fishermen unable to go fishing or discarding large amounts of fish;
- There is a view that mackerel hand-liners shouldn't be on quota;
- Collectively, for smaller under 10 metre vessels there is a lack of representation and no single point of contact.
- Too much bureaucracy, rules and regulations;
- Diversification into different types of fishing.

Logistics

- Access into ports such as Mevagissey, to collect fish is challenging.

Fishing communities

- There were views that for some fishermen - diversifying from fishing into tourism for a part of the year is a good thing as it rests the fishery;
- East Cornwall up to Looe and Polperro and the North Cornish coast are very isolated in terms of access to key services.

Environment

- There is great concern over the proposed restricted zones in some ports, especially Looe, this is affecting the confidence in the sector;
- MCZs and controls over various areas could be generating conflicts between fishermen as potters, beamers and netters are being pushed into smaller and smaller areas and so end up fishing "on top of each other";

Markets

- There is scope for a strategy for proving fish wholesale, and direct, to the public. It's not easy for the public or tourists to buy fresh Cornish fish.

Safety

- Many ports have fishing boats that are single handed operations, so if anything goes wrong there is no one to help. There are many accidents at sea and there is scope to strengthen approaches to supporting Health and Safety.

3. Consultation narrative

Respondents were asked for their views on the nine themes of the narrative:

NB The following is a reflection of personal and professional opinions gathered during the consultation phase.

Marketing of fish

Respondents greatly welcomed the work by Seafood Cornwall and celebrity chefs, and felt this should be built on to promote Cornish fish. Seafood Cornwall played an important role in bridging a gap by talking to restaurants and the tourism sector about underutilised species, promoting different types of fish, seasonality and locality...

Support to develop local markets, through farmers markets, local delivery and local retail outlets, to maximise the benefits to local residents and visiting tourists alike, with quality leaflets promoting local fish Equipment to sell fish and attend promotional events, like food fairs, should be supported as well as product development for products such as fish preservation, potted herring, and salsing would add value.

The lack of information on how much fish is sold locally or exported should be addresses.

A respondent commented that a healthy market means the industry itself is healthy and sustainable. In other words, if the price is right for the catch, the fishermen will focus further on sustainability. The viability of reapplying for MSC accreditation was questioned as many fishermen aren't seeing an impact on prices for accredited fish. Fish quality has greatly improved but often not reflected in fish prices. Poor prices for shellfish were highlighted with fishermen keen to find ways of marketing and processing crabs to add value to local shellfish.

The Isles of Scilly highlighted specific problems due to the logistics and costs of having to export to the mainland. Although some fishermen are sceptical, there could be benefits from co-operative working and adding value to local fish, especially crabs, perceived as more difficult for fishermen to sell fish direct now, as they need a licence. Many respondents support the idea of the smaller boats building direct better priced markets for their fish, but it's difficult and time consuming. Looe harbour did not support fishermen selling direct as this would affect the viability of the fish market Inshore vessels could develop markets due to low quantities however this would still require the infrastructure provided by the higher volume offshore fleet (e.g. established auction).

Fishing communities infrastructure, access facilities and cooperatives

Many of the respondents identified specific infrastructure requirements for their ports such as cranes to offload fish, fish slush ice bins, shellfish tanks for fishermen to store shellfish, fishermen's stores (due to problems of theft & space); pontoons to moor fishing boats; fishermen changing and shower facilities; an auger to help get the ice onto boats; ice machines; refrigerated fish storage; retail outlets; equipment to sell fish; facilities for sorting and recycling nets etc in the ports; on-line marketing (linking the clock auction online and to smaller ports); weighing machines with ticketing for traceability.

The suggestion of using solar power and renewable energies to power port fishing infrastructure, such as cranes and ice machines, was raised in a number of ports.

Proposed facilities for the wider community, with fishing sector benefits, included training facilities; a fisheries school, infrastructure to support tourism and private boats, disabled access and community clubs, such as the Helford Quay project.

Cooperatives were discussed with concerns about who would organise them as they have had limited success in the past. Some respondents saw cooperatives as an opportunity. It was suggested that there could be initial funding to help the fishermen start and develop a blue print for cooperatives which could be rolled out in a number of communities. Cooperatives would not only sell fish but also bulk buying of fishing gear and equipment.

Training, retention & recruitment

The age profile of fishermen is of concern where there are no new entrants into the catching sector. Although there are jobs available, in some ports it's hard to find crew and in the next ten years some ports will see skippers retiring with no crew to take over. ***The socio-economic analysis has highlighted the challenges facing Cornwall's fishing communities more broadly in terms of education and skills deprivation***.

Reasons highlighted for a lack of new entrants entering the fishing sector included: legislation and regulation restrictions (under 16's can't take the safety courses but can't fish without them); economics (some boats can't guarantee a regular good wage due to tides and quota); there are currently no YTS or apprenticeships encouraging youngsters into the sector; in some areas there is bad press about fishing; there is no capacity on boats to train new entrants due to contraction of crews and pay; the cost of setting up in fishing is prohibitive; other sectors offer better salaries.

Many good ideas were given to help address this issue such as:

- Continuing to provide free training to encourage young people to be fully trained;
- Providing work experience for school children and enable them to spend summer holidays fishing (taster training sessions to the under 16's are being introduced by Seafood Cornwall Training);
- Build on the "Sense of Place" work in primary schools to change the thinking within the education and careers sector and work with education services to highlight opportunities across the sector;
- Providing a professional kit to be used when attending career days at senior schools with professional information for students, including visiting schools and colleges to help them catch, cook and eat fish as the forerunner to working and joining the sector;
- Mentoring projects to support new entrants to the sector;
- Seafood Cornwall Training could help with recruitment and retention;
- Use and pay boats when they aren't fishing to take out trainees;
- Develop a modern apprenticeship type scheme which deals with issues like insurance and funding for youngsters and skippers alike;
- Provide a training centre and fish school to increase skills across the sector and promote the industry, preferably in Newlyn. In Devon there is a new local food project called "The catch to plate" where groups of young fishermen undertake different activities with the public such as gathering mussels and winkles etc, angling, and other different things and then meet up at the end of the day to cook the food. This is a great training and promotion opportunity.

The industry is more responsive to mandatory training, especially while funding is available and boat insurance policies require this. Logistically, though, attending training is often difficult, especially for the Isles of Scilly fishermen. It's difficult to justify the cost and relevance of some training as one respondent raised the question of why a fisherman on a small open 15ft boat has to pay £100 for a day's fire-fighting course?

Fish quality and filleting training courses for the onshore seafood sector were regarded as fantastic and should be encouraged. There was enthusiasm for the development of a training centre which could provide space and storage for equipment for practical training and well as the classroom/theoretical element.

Capacity Building

Capacity building was supported, by respondents, as long it was clearly beneficial with clear outputs. Many respondents believe it is really useful to cross-fertilise and exchange ideas providing increased knowledge and a fresh perspective. Fishermen spoke of the recent trip to a flume tank in Denmark to see new trawls being tested as really valuable giving insights into improving fuel consumption and targeted catch techniques.

Trips to meet fish buyers and potential markets were specifically mentioned especially with regard to ring net pilchards and spider crabs. Some respondents felt it would be good to provide skippers and crew with direct contact with buyers in France and Spain as a means of widening their experience.

Opportunities were identified to look at new fisheries and talk to fishermen about new conservation measures especially with crab and lobster pots. The Lobster Hatchery (in Padstow) was cited as an example of good practice having been set up in response to a biotechnology exchange to Canada.

On the training side a project to visit Whitby fishing school, Shetland and Ireland to learn more about the training centres and also trainer and mentoring programmes was identified as a potential collaboration project. Additionally some respondents felt that inshore fishermen who want to sell direct to restaurants and set up cooperatives could benefit from the development of capacity building activities under this theme.

Finally further capacity building could help inform scientists. If a group of professional fishermen could have a fisheries scientist one day a month allocated to them, taking 12 fishing trips a year, they could feed knowledge and data into fisheries management and help form policy.

Tourism & heritage

Key themes which emerged in relation to this area of development ***– which is an important opportunity area identified in terms of the socio-economic analysis*** - include:

- Celebrating fishing seasons by developing fish festivals to help the public and tourists better understand the fishing industry. Newquay Fish Festival has grown year on year, resulting in visitors coming specifically to Newquay for the event.
- The development of fishing heritage museums, as well as other attractions linked to fishing, such as aquariums. A community / tourism project including a water sports centre was highlighted in Looe.
- Tourism angling trips have reached saturation in some areas but others have capacity. Better organisation and promotion is required for this sector in some areas.
- Greater public interpretation, access to ports and signs to improve knowledge of the fishing sector should be enhanced. Preserving traditional skills is vital, such as net mending, wicker pot making, and should be supported in the context of maintaining tourism interest in these traditional crafts.
- Locals and tourists access to fish to cook should be easier through the provision of retail points in the smaller ports.
- Access to the water for everyone is a key theme which could be used in an overarching way to promote greater public involvement and interest in fishing.
- Diversification from fishing is not as straightforward as farm diversification. Tourism journeys and fishing trips are an area of opportunity. Training could be provided to help fishermen develop this area of potential business enhancement, providing them with a clear overview of the regulatory and health and safety issues connected with the activity.

Economic development

Key themes emerging in conjunction with this section included:

- The provision of funding for business support and the development of business units especially for community businesses / companies;
- Better promotion of the fishing sector could create wider economic development links to related sectors such as the creative sector.
- Respondents saw a broader context to this theme in terms of wider community development for example it was suggested that projects could include supporting the development of community centres.
- Most areas have internet access, and respondents talked of enhancing or creating websites to enhance opportunities for the practical use of up to date information. The CFPO agreed that Next Generation Broadband could help provide advanced notice from boats on fish for markets.

Women in fishing

Responses to this theme were characterised by the view that funding should be open to all, there was also a view however specific support should be provided to wives and partners that need help with finance and the administration of the shore side fishing business.

There are opportunities to support fishing families with training in website development, marketing through websites and social networks. Successful activities linked to women involved in fish processing opportunities, such as new businesses currently being developed by fishermen's partners selling fish could be built on through this aspect of the programme. Opportunities to involve women in the governance of fishing activities where they are currently significantly under represented were raised.

Good governance

Responses to this theme elicited the following points:

- Fishermen are more and more conservation minded and looking to the long term. They generally don't discard and they do use new technologies. However boats need to diversify to different fisheries, which is more and more restricted due to the new licence regime. Selective gears could be funded through other EFF Axes not just Axis 4. Some fishermen are exploring gear changes such as putting escape panels into pots.

- More local involvement in decision making is needed. Some respondents felt it would be good to fund people to go to meetings to represent the sector, to address the cost of this for fishermen in lost time working and travelling to meetings.
- Some respondents feel it is unclear how the arrangements for the management of the proposed MCZs will work
- There are mixed views about the scale and nature of the new IFCA in terms of the representation of fishermen.
- There is a need for more local community quota support and money to buy licences to encourage people into the industry especially where youngsters are seen as “competition rather than the lifeblood.”
- Some respondents felt there is a need for flexible quotas to be used in the relevant fishing seasons.
- CFPO data analysis is restricted by IT systems, but they’d like to produce more statistics and reports from all the data they gather, both quota and non quota. If data could be quantified data it could be fed back to the scientists. If regionalisation moves forwards, and producer organisations (PO's) need to develop sustainable fishing plans, then starting from a baseline of knowledge is essential. There is a need for IT improvements including bespoke software, as boats having electronic log books will provide an enhanced opportunity for data collection.

Marine conservation

Key points arising from the consultation included:

- The Isles of Scilly support conservation and have a good relationship with the MCZ process.
- On the mainland there is a feeling that there is a need for more consultation. There is a perceived lack of information on who is talking to the fishing industry and what is being said. A number of respondents identified that fishermen are pro conservation but they feel that community and economic issues should be taken into account fully as part of the development around this agenda.

Fisheries Community Wider Stakeholder Engagement

8 interviews with wider stakeholders were carried out between March and April 2011. This included representatives from:

- Cornwall Area of Outstanding Natural Beauty (AONB) Partnership;
- Cornwall Council – Children Schools and Families and Inclusion Cornwall directorates;
- Cornwall Rural Community Council;
- Cornwall Wildlife Trust;
- Natural England;
- NHS Cornwall and Isles of Scilly;
- Penwith Community Development Trust; and
- Visit Cornwall.

The interviews aimed to tap into local knowledge and expertise in exploring the main problems and opportunities facing fishing communities. The interviews covered:

- How these organisations support people in fishing communities;
- The key issues facing people associated with fishing and coastal communities;
- Views on the consultation narrative developed by the consultant team; and
- Ideas for themes and projects which might be supported under the initiative.

Summary of key findings

1. **How organisations are supporting people in fishing communities**

Respondents at the majority of the organisations interviewed do not directly support people in fishing communities. They support rural communities more widely, representing rural issues at local, regional and national levels and/or advocate for better conservation of the marine environment.

Indirect support provided to people in fishing communities included:

- Protecting, conserving and enhancing the marine environment, seascapes (Natural England) and landscape conditions (AONB), in addition to tackling specific issues such as by-catch mitigation/strandings (Cornwall Wildlife Trust).
- Providing training and pathways to assist people back into work (PCDT), including meeting the needs of young people/NEETs (Children Schools and Families) and addressing social exclusion (Inclusion Cornwall).
- Addressing health inequalities and increasing life expectancy across Cornwall benchmarked against national averages (NHS).
- Marketing Cornwall as a tourist destination (Visit Cornwall).
- Community buildings, community development/social enterprises and enhancing rural communities (CRCC).

Respondents believed these activities and services presented opportunities for, and impacted upon, coastal communities. Many of the organisations that they represent aspire to see a more joined up approach to project delivery and a broadening understanding of the most pressing rural issues.

From an environmental perspective, this was described as the creation of an ecologically coherent network of Marine Protection Areas (MPAs, Cornwall Marine Network) and Cornish landscape.

From a socio-economic perspective, it was proposed bringing public, voluntary and community sector bodies together (e.g. through initiatives such as Inter-link and Cornwall Works).

2. Key issues facing people associated with fishing and fishing communities

A range of social, environmental and economic issues were identified by respondents. These included:

Environmental issues

- Marine Conservation Zones/Finding Sanctuary Project: respondents were aware that fishermen want to know where these will be located and what it will mean for them in terms of where they cannot fish. However, the sites have not been agreed and there are presently only broad assumptions about management. It is thought that management protocols will depend upon the level of intensity (i.e., whether the area is used by 50 fishermen or 2 and how often etc)(Natural England) with the Finding Sanctuary Project praised for liaising with fishermen and their representative bodies on the sites currently being considered.
- How to minimise the impact of recreational fishing and other commercial activities on the marine environment and reduce waste and litter in sea and washed up on beaches (AONB).
- Discards and quotas – including tackling the lack of spare quota for smaller vessels (Natural England).
- How to encourage sustainable fisheries management (Cornwall Wildlife Trust).
- The relationship between and sustainability of inshore and offshore fisheries (AONB).

Socio-economic issues

- Setting up fish markets and increasing the amount of fish sold and consumed in Cornwall (Natural England, AONB).
- Making fishing a viable career – how young people can be supported getting into the industry (Natural England; PCDT); providing appropriate and ongoing training and support programmes (Children Schools and Families) and changing the perception that fishing is a dangerous job (Inclusion Cornwall, NHS).
- Jobs – public sector funding cuts and lack of private sector employment in Cornwall (PCDT); local services being withdrawn through a Council wide approach to consolidation (CRCC).
- Migrant workers (Inclusion Cornwall).
- Ensuring working fishing ports rather than harbours with no fishing activity (Visit Cornwall).
- Affordable housing (CRCC).
- Transport (lack of buses and fare costs) (CRCC) and rising fuel costs (AONB).

2. Consultation narrative

Respondents were asked for their views on five strands of the narrative with opportunities provided to comment on the other sections:

Capacity building

One respondent suggested this strand should be renamed 'local capacity building' while others referred to the distinctive nature of the Cornish fishing fleet. Sharing best practice and knowledge was identified as important. Some of the respondents had or were involved in trans-national projects. However, they highlighted how this strand could have the least impact long-term unless activities were planned strategically. That is, ensuring that the learning will be valuable and how it will be used afterwards. On the one hand, this was seen to involve changing the mindset amongst some fishermen that 'this is the way we've always done things' and that capacity building activities should not be viewed as "a jolly".

Specific themes for visits, conferences and workshops suggested by respondents included: encouraging fishermen to cooperate and work collectively, fisheries management and not increasing the capacity of actual fisheries, and helping people to enter and exit the industry. On the other hand, respondents identified practicalities around capacity building including the need to backfill fishermen (i.e., pay them and find someone to cover their shift so that they could participate) and whether technology/internet could be utilised as well as or instead of face-to-face activities.

There were also broader discussions around fisheries management and the role of UK and EU policy and a desire to build on existing trans-national projects and established networks by local stakeholders (e.g. Cornwall Interlinks, "Cornwall Works").

Tourism and heritage

Respondents suggested that tourism initiatives should meet the needs of local coastal communities with tourists and visitors invited to share in that experience. Building upon existing community events (e.g. fish festivals) and adding value to the quayside were highlighted as important.

Tourism initiatives were regarded as complementary to rather than a substitution for fishing. Encouraging visitors to spend time in coastal communities as living, working places – avoiding notions of Disneyfication and pristine wilderness - were highlighted as well as the need to involve Visit Cornwall and other bodies in marketing and promoting small coastal communities.

Opportunities around ecotourism without disturbing wildlife and damaging the marine environment and educating fishermen on how to market themselves to tourists were cited as important. Respondents also suggested setting up initiatives to support hoteliers, museums and improve the communication of fishing port heritage (i.e., placing information boards at working and defunct ports).

Economic development

Discussion of this strand focused upon infrastructure – the opportunities created by Superfast broadband, the need to improve the A30, and use Newquay Cornwall Airport to export fish.

Some respondents described how fishing communities do not always benefit from mainstream economic development initiatives including potentially the Wave Hub (where local communities will not gain from renewable energy testing by seeing a reduction in their utility bills despite fishermen being affected by no-catch zones). The marine environment was cited as a priority in the last tranche of ERDF and respondents queried if the initiatives developed under this programme could be linked to this forthcoming tranche of European funding.

Coastal economic development

Respondent suggested this strand could be expanded to focus upon helping fishermen to get the best from their businesses. Providing assistance to women, gay and lesbian groups, fishing families, people with disabilities, young people, and businesses directly and indirectly connected to the fishing industry was seen as important. In addition to fishermen's businesses, respondents suggested business support could be targeted across the fishing supply chain and this combined with an understanding of equality and diversity. Helping people to overcome barriers to enter the fishing industry, challenging perceptions of fishing as a heavy industry and physically difficult and supporting line fishing were also highlighted.

Training, retention and recruitment

Respondents identified a range of challenges preventing or discouraging fishermen from attending training such as cost/funding, location and lack of incentives. In addition to compulsory courses (e.g. First Aid, Health & Safety), respondents suggested training should offer pathways into and out of the fishing industry – for young people and new entrants, how to diversify, and retirement/exiting the industry in addition to supporting those involved in marketing, selling, processing and management. Specific issues around retiring fishermen not having a pension, lack of debt advice for fishing families, and not encouraging too many people to enter the industry leading to oversupply were discussed. Building upon the activities of Seafood Cornwall Training and working with mainstream education and training providers was seen as important. Respondents suggested the format would need to be vocational and outdoor classroom based and the curricula expanded to cover conservation and the capacity of fisheries.

Respondents raised concerns around the removal of public sector funding programmes (e.g. Future Jobs Fund, Train to Gain) and practicalities with working with schools (i.e., health & safety) and establishing apprenticeships involving smaller vessels.

Additional themes

Respondents identified the following additional themes:

- Sustainability – respondents felt this was interwoven in the narrative and needed to be standalone and include specific references to sustainable fishing methods.
- Health and safety – in particular highlighting the number of deaths and injuries in the fishing industry and the issues of sickness and ill-health amongst fishermen.
- Expand the marketing strand to highlight multi-strand micro businesses.
- Equality and diversity rather than focusing solely on women in fishing.
- Management – including whether the governance of fisheries should be at UK and/or European levels and include reference to the 'effort day time' method of fishing.
- Wider environmental contexts where they impact on the marine environment.
- Sea fisheries resources – some respondents felt there was scope to expand the narrative from fishing to encompass other issues such as harvesting seaweed.

5. Ideas for themes and projects which might be supported

Respondents suggested that the following initiatives could be funded:

- Funding for vessels to monitor marine conservation sites (e.g. SAC Lizard Peninsula and forthcoming MCZs) (Natural England, Cornwall Wildlife Trust). By-catch reduction devices such as pingers on test vessels (Cornwall Wildlife Trust).
- Money to fund mentoring, induction and training programmes including apprenticeships (Natural England, PCDT) – building on Seafood Cornwall Training's work but expanded this to include people diversifying from fishing (PCDT). Targeting people to purchase Cornish fish (Natural England) by creating new markets (AONB, CRCC) and advertising the health benefits of eating fish (NHS).
- Quota, governance and sustainability of inshore fisheries (Natural England).

A consistent theme raised by respondents throughout the interviews related to the activities already taking place that have an imprint on coastal communities and the need for them to be joined up properly to ensure sustainability. Some respondents suggested that their organisation would have specialisms to offer (e.g. Cornwall Works initiative). Supporting local initiatives and bringing local places to life (AONB) were seen as important.

Key findings from the consultation, description of the industry and socio-economic analysis

This section brings together perceptions of the strengths, assets, needs and opportunities facing the area – these have been summarised against four broad headings which arise from a synthesis of the consultation and desk research underpinning the strategy

Fishing Industry: keeping the fishing industry alive and seeing it thrive, maximising its links to and influences on other sectors such as tourism and the creative sector; fishermen being able to fish and having enough fish in the sea; comprehensive choices over where they sell their fish and their ability to get a good price for their product; challenges around attracting new entrants to the industry, minimising the risks of deaths and injuries; managing the relationship between inshore and offshore fisheries management.

Infrastructure: enabling the fishing industry to have the infrastructure it needs in harbours, on vessels and on shore; investing in infrastructure to help the industry and communities to grow and become more sustainable (including links to mainstream economic development, tourism, and distribution networks).

Governance/Policy: the UK has had four fisheries ministers in five years; how to create a level playing field through reform of the Common Fisheries Policy (CFP); is there adequate representation for small fishermen and for wider fishing communities?

Environment: Marine Conservation Zones/Finding Sanctuary Project; understanding the capacity of fishing activities and minimising their environmental impacts; fishing waste and litter; small scale fishing gear sustainability adaptations.

The perspective from which the strategy is to be approached and addressed.

Respondents felt that the strategy should focus on the fisheries sector but also take account of other socio-economic and environmental perspectives because the strategy/actions will impact upon families, communities and the local economy in fishing communities. These themes include:

- Transport.
- Fabric of fishing villages.
- Health and well-being (diet, nutrition and life expectancy).
- How to open up access to help people into and out of the fishing industry (e.g. young people, older people).
- The impact of public sector cuts (Police, NHS, Cornwall Council) and lack of private sector employment in Cornwall).

Key issues which have informed the development of the strategy measures in this context are:

- How fishermen can work together and cooperate rather than being in competition; how to overcome barriers and encourage local capacity building. Identifying the costs, benefits, and usefulness of activities and how it fits into the strategy before they are undertaken.
- Assisting the fishing sector to work across sectors and form partnerships rather than feeling threatened.
- Considering if any of the lessons from farm (diversification) can be translated to fishing.
- How to incentivise fishermen to engage with and develop opportunities within the sector but not encourage dependency on public funding– this has included a consideration of how to join up what is already happening so things become more sustainable.

- How to re-establish onshore support for fishermen that was traditionally provided by the community and family.

- Opportunities around harbours as transport hubs, consideration of how communities can benefit from the Wave Hub project, IT opportunities and no-take zones?

- Opportunities to make a distinctive fisheries related contribution to broader activities around: transport, fabric of fishing villages, health and well-being and the impact of public sector jobs cuts where they impact on fishing communities and are not addressed through other resources.

The focus and balance of the strategy, its measures and how it will be delivered:

- Projects that do not have a link to the fishing sector principally and secondly their communities should not be supported;

- Projects should follow sustainable development principles, be grounded in equality of opportunity and rooted in innovation

- Measures should encompass those in the consultation narrative, which with certain amendments set out further on in the strategy, was validated through the consultation;

- The strategy should have its strongest focus on: a) coastal communities, tourism and economic development, b) training recruitment and retention, c) infrastructure and communal facilities (including for cooperatives) and d) sustainable supply chains/market development.

- There should be local involvement and ownership of the decisions on which projects should go forward and support from an animateur to help develop projects on the ground.

SWOT analysis of the Cornwall and Isles of Scilly fish local action group.

The SWOT analysis below brings together the outcomes of the consultation, desk research and socio-economic analysis to provide a framework for the strategy objectives and rationale. Following this, seven specific objectives are set out within the strategy linked to the opportunities in the SWOT.

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STRENGTHS

- Proximity to key fishing grounds.
- Good marine environment
- Good status of key stocks
- Diversity of fishing methods / adaptable fleet.
- Over 40 different species of fish landed.
- High quality fish and shellfish.
- Established continental markets.
- Natural deepwater harbours.
- Strong tradition of fishing.
- Fish consumption is growing – the healthy food option
- Established track record in funding delivery for fisheries support agencies.
- Experience of project delivery within fisheries support agencies.
- Outstanding natural environment.
- Recognition in top 10 UK holiday destinations.

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WEAKNESSES

- Lack of understanding of market opportunities amongst fishermen.
- Aging infrastructure (including vessels).
- Aging fishermen.
- Cost of transport / distribution to markets – particularly in terms of the Isles of Scilly.
- Limited baseline information of the industry & its benefits (difficult to develop action plan).
- Lack of trained workforce & new entrants.
- High capital cost to enter the catching sector.
- Lack of consistent supply of some species of fish making added value difficult.
- Perceived over regulation.
- Limited auction markets
- Difficulty of raising finance for the profession
- High prices of retail, work space.
- Restrictions/ understanding in legalisation.
- Ability to attend important meetings or comment on legislation directly affecting fishermen's livelihoods

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OPPORTUNITIES

- Develop new higher value markets including less favoured fish & build established markets (1).
- Improve quality & develop environmentally friendly products (7).
- Continue to develop a quality brand (1).
- Invest in infrastructure (including IT) (2).
- Common Fisheries Policy Reform (6).
- Scope to develop a multi-purpose processing facility for small fisheries co-ops (2).
- Improved fisheries management (7).
- Clear training and development agenda (4).
- Clear information and dissemination agenda (3).
- Scope to gain more economic benefit from fish waste and add value to caught fish (1).
- Maximise economic synergy with tourism (5).
- Retain quota / support new entrants (3/2).
- Clear cooperation agenda for fishermen (3/2).
- Clear agenda around technical innovation including more engagement with scientists (1/2).
- Alternative energy opportunities i.e. ice manufacture) (2).
- Changing consumer demands

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THREATS

- Reduction in fish stocks (volumes constrained).
- Common Fisheries Policy Reform
- Quota sold out of Cornwall (appox. 60% of fish landed in Cornwall is under quota).
- Lack of new entrants into the catching sector.
- Globalisation (cheap imports).
- Industrial fishing.
- Global warming & pollution affects on fish stocks.
- Changing consumer demands of main markets in Spain and France.
- Lack of match funding to deliver projects.
- Communities' ability to work together.
- Implications of wind farms and other renewable at sea.
- Restrictions of no take zones.
- Rising prices of fuel and petroleum derived products.
- Inflation and rising cost of all inputs.
- Rising cost of bait and gear.

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Strategy Main Objectives and Rationale

There are four overriding objectives to the Cornwall FLAG strategy, which are supported by the seven key specific objectives and actions. These have been developed from the analysis of the fishing sector and the consultation process and are set out below.

4 Overriding Objectives:

A. To engage with the fishing community and produce sector projects that support sustainable development;
B. To maximise economic opportunities and benefits to the fishing community;
C. To bring together the public, private and community sector as a partnership to lead sustainable development of the fisheries sector; and
D. To facilitate project development and support projects that have come forward from the fishing community.

These can be combined into a global objective as follows:

By 2015: to maximise the economic opportunities and benefits open to Cornish fishing communities in a sustainable and cooperative environment which builds the capacity of those who live and work in them interacting directly with 500 individuals and creating and safeguarding 250 fishing jobs.

This will be achieved through activities which engage fishing communities in: new market developments, new cooperatives, IT initiatives to support operational efficiency and safety, the participation of women in initiatives to enhance the viability of the industry, trans-national projects, training and development, the attraction of new entrants to the profession, support for fishing festivals, the development of safe access to harbours, the provision of loan and business support, the enhancement of water access for communities generally, participation in governance and environmental issues and projects which enable technical innovation.

We have set out a proposed structure for the FLAG Partnership Board to oversee the strategy at Appendix G

Specific Objectives and Measures

In light of the consultation, the following specific objectives and measures, have been identified which flow from the global objective and its four over-riding objectives.

1. Developing sustainable supply chains and market development

To develop sustainable supply chains and markets to ensure at least 30 fishermen receive better overall fish prices of 5%.

Rationale

Seafood Cornwall have been commended for their work on improving quality across the catching sector, promoting the seasonality of fish and underutilised species, however, in many cases, these improvements in quality, sustainability and markets have not been reflected in fish prices. In order to maximise economic opportunities and benefits to fishing communities, and recognising today's climate of rising fuel and running costs, improved fish prices at first point of sale are key to the long-term viability of the sector as a whole. In order to help address this Axis 4 proposes the following measures and actions for support.

Measures and actions

- Improve access to retail opportunities creating four new retail premises and moving 20 fishermen up the supply chain. By enabling fishermen to prepare and sell fish direct to locals, visitors and tourists they can generate better fish prices. This will also include access to farmers markets, food promotional events and distribution.
- Engage 20 fishermen in selling directly to 50 local and national restaurants and the wider food chain. This will generate improved fish prices.
- Provide five "step up" fish processing facilities for fishermen and those engaged in small scale and start up activities. Such facilities will provide fishermen with the capacity to prepare fish for retail and wholesale markets, thus adding value at source.
- Engage 50 fishermen in the branding and marketing, incorporating quality assurance, of Cornwall's fish, developing three sub-regional brands, thus ensuring promotion across potential markets and the wider public.
- Promote three under-utilised species across markets to assist fishermen gain improved prices for fish that is either discarded or sold to low value markets.
- Support four new fisheries with relevant accreditations, such as the Marine Stewardship Council, which will lead to improved prices and markets for locally landed fish.

Complementarity and demarcation

This objective will build on the work of Seafood Cornwall which continues to promote quality across the industry and ties in with national strategies are being developed to support the promotion of under-utilised fish species. This objective is complementary to the following objectives promoting fishing cooperatives, providing infrastructure, and building the capacity of the fishing sector.

2. Providing Infrastructure and communal facilities for fishing communities and cooperatives.

To support eighteen projects, benefiting 100 fishermen, which provide infrastructure, communal and IT facilities for fishing communities and cooperatives across Cornwall and the Isles of Scilly,.

Rationale

As fishing cooperatives are supported and developed within the FLAG strategy, many of Cornwall's smaller fishing ports, which share physical infrastructure with the local community, will require facilities and equipment to improve efficiencies, fulfil health and safety requirements, provide economic savings, introduce renewable energies to cover the running costs of machinery, improve fish quality and accessibility to ports. This infrastructure such as, business units, changing areas, slipways, fish storage, and gear storage, will provide added benefits to the wider community thus engaging with the fishing community and producing sector projects that support sustainable development and maximise economic opportunities and benefits to the fishing community.

Measures and actions

- Six projects, which include the purchase of equipment, to facilitate cooperative endeavours between fishermen.
- Support for the identification and adaptation of four business units for fishing related activities, thus ensuring that cooperatives, which embrace the idea of selling their fish direct, have facilities to do it.
- Development of four IT initiatives to enhance the operation, safety and sustainability of fishing, supporting 100 fishermen. These IT initiatives will support and add value to areas such as management, science, marketing and safety to ensure fishing communities have access to the latest technology to maximise opportunities.

Complementarity and demarcation

This objective links closely with the developing sustainable supply chains and market development objective and the objective supporting capacity building and cooperative development. Additionally the objectives promoting regional sustainable management engagement and advocacy and engagement for fishermen are relevant here.

3. Capacity building, cooperative development and networking

To build capacity across fishing community through the development of six cooperatives and promotion of at least six networking and study visits.

Rationale

Many of Cornwall's fishermen are sceptical and suspicious of forming cooperatives due to historical experiences; however, if they demand better prices for their fish they must start working together. Economic factors mean that now, more than ever, catchers buying and selling together is vital to the sustainability of the sector. The development of a cooperative "blue print", based on successful examples elsewhere of how a cooperative could run, moving away from traditional failures, with help to get them going, could make a lasting impact on the sector.

Traditionally shore side operations have been led by family members, fishermen's wives and members of the fishing communities. Re-engaging this element of fishing communities could be the key to assisting fishermen shorten supply chains and sell their product direct. Sharing experiences, capacity building and networking locally, nationally and internationally, such as trips to meet potential buyers and markets and thriving cooperatives, will add to this specific objective, assisting with the development of new ideas and maximise the economic opportunities and benefits to the fishing community, as well as bringing together the public, private and community sector as a partnership to lead sustainable development of the fisheries sector.

Measures and actions

- Provide support and know how to 20 groups to assist and encourage the creation of cooperatives.
- Start up funding for the establishment of six sustainable fishing cooperatives will be provided. This will ensure that as fishermen learn about cooperative working initial support is provided to help the cooperative run smoothly, including mentoring, and initial short term staff costs.
- Fifty family members, fisherman's wives and members of the wider fishing community will be supported in terms of projects which enhance the success or sustainability of the fishing industry. This could include childcare costs and support to enable the community to take part.
- Sixty people will benefit from visiting six trans-national or UK fisheries areas on study visits, to gain knowledge, learn about mentoring and inspire innovation.
- The participants will be required to feed back their learning's to their wider communities, so support for three projects to show effective dissemination of good practice arising from capacity building will be supported.

Complementarity and demarcation

This specific objective links closely to objectives 1, 2 and 3 which will provide facilities and training for fishing cooperatives and their communities.

4. Training, retention and recruitment including diversification

To improve the professionalism of the fishing sector by assisting 100 fishermen access training programmes and support 12 new entrants into the fishing sector.

Rationale

Objective 1 funding supported the set up of the Newlyn based training organisation, Seafood Cornwall Training, which is delivering training to the Cornish seafood sector. Training ranges from health and safety on fishing boats, career progression and mandatory courses. Some training, currently free, could become costly in the near future, which will impact on fishermen's ability to attend training. There is no current dedicated fisheries training centre in Cornwall and many fishermen find the logistics and cost of attending training courses challenging.

Additionally, there are grave concerns about the lack of new entrants into fishing, due to the average age of skippers in some areas. If new entrants do come forward, there are no programmes to assist them to stay in what is a tough industry with dwindling financial rewards. The key to recruiting into the sector is to bring together public, private and community sectors in partnerships to develop a realistic programme to encourage and sustain new entrants into the fishing sector.

For those working within the fishing sector who would like to leave and diversity into business of benefit to fishing communities, training to assist this will be supported.

Measures and actions

- Training programmes to assist 100 fishermen access training.
- Provision for the identification of at least one dedicated sea food sector training facility, including activities "up-stream" from fishing such as fish preparation and cooking. Without such facilities it will be challenging to develop new markets.
- Targeted programmes which underpin recruitment and retention into the fishing sector and support training and engagement of 12 young people in fishing as a career, including mentoring and promotion in schools.
- Training programmes for those leaving the fishing sector.

Complementarity and demarcation

This objective is complementary to other objectives as without improved fish prices; there are economic barriers that prevent new entrants into the sector.

5. Coastal communities, tourism and economic development

To improve access to the fishing sector through interpretation and infrastructure projects and provide dedicated business support to the development of fishing communities.

Rationale

Although tourists enjoy visiting small ports and harbours, there is restricted access to the fishing boats, fishermen, fishing heritage and even the fish. Providing locals and tourists with better insights into the sector will provide economic benefits to fishing communities. Tourism initiatives may be supported especially those projects involving fishermen, the preservation of the cultural heritage of fishing villages and the associated cultural tourism. In some areas the fishing sector will continue to contract in terms of employment, so measures are required to support those leaving the sector or living in fishing communities to start their own businesses. Therefore this objective will facilitate project development and support projects that have come forward from the fishing community.

Measures and actions

- Support for two heritage and interpretation projects which promote public understanding and engagement in the fishing industry.
- Development of fish festivals and wider tourism promotion opportunities around fishing creating three new festivals and adding value to established festivals.
- Promotion of safe and inclusive access to 8 harbours and quays through interpretation materials.
- Support for three projects for the development of a local fishing strand within the tourism and hospitality sector and its offer through consolidating the individual activities of fishermen where they have a tourism/leisure component.
- Provision of dedicated loan and business support facilities for fishing

communities supporting 25 beneficiaries.
- Activities which support access to the water for everyone, including fishermen, such as slipways.

Complementarity and demarcation

This objective is complementary to the market development objective as, by providing further opportunities to market fishing products this could lead to better prices for fishermen. Training for those leaving the fishing industry will complement the business support facilities of this objective.

6. Advocacy and engagement for fishermen

To ensure fishing communities can access EFF support and be fully represented in the context of issues that will affect their livelihoods.

Rationale

The fishing sector is fairly unique in terms of its unpredictability, labour intensiveness and pay structures. Therefore spending a day onshore to attend a consultation meeting for an environmental proposal, or finding the time to understand and write project proposals and applications, which will directly affect their livelihoods, is often unworkable. Evidently Cornwall and the Isles of Scilly have not accessed monies available to them through other EFF Axis due to the lack of facilitation offered to fishing communities. Axis 4 will use monies to ensure that fishing communities are fully supported to develop projects and be represented at meetings which will impact on their livelihoods in line with the objective to facilitate project development and support projects that have come forward from the fishing community.

Measures and actions

- Provision of an animateur to support the development of funding bids and broader cooperation amongst fishermen (two full time equivalents).
- Provision of support to enable 16 fishing communities to be effectively represented and heard in the context of governance and environmental issues.

Complementarity and demarcation
Without this objective it is unlikely that the rest of Axis 4 will succeed so this is instrumental in the delivery of Axis 4 in Cornwall and the Isles of Scilly. If fishermen had more support in these areas they could focus more on developing sustainable supply chains and market development.

7. Regional sustainable management engagement

To support fishermen to contribute and be part of the sustainable management of Cornwall and the Isles of Scilly fishing grounds

Rationale

Good governance is the key to the future of fisheries management and fishermen and their communities have a key role to play. The industry is very supportive of conservation in the sense that they want a sustainable future for their sector and the fishermen of the future. Many support the Padstow Lobster Hatchery and try out new fishing methods, adapting fishing gear to help conserve fish stocks, when possible, which should be encouraged. However discrepancies in scientific data and the conflicting reality they see on fishing grounds every day, is often frustrating and many fishermen support the idea of more scientists observing fishing activities especially on the inshore fishing grounds.

Measures and actions

- Five projects that support the promotion of the use of sustainable fishing techniques and innovation.
- Support for the dissemination of applied good practice in sustainable fishing techniques, management and innovation to 100 fishing sector members.
- Three projects which promote collaboration between scientists and fishermen.
- Develop the Duchy Fishing Quota to support the success of local fishing.

Complementarity and demarcation

This objective provides market development opportunities as sustainable well managed fisheries can open up new markets and are consumer supported. It links in with national policy developments such as inshore community quota support (such as producer organisations or community quota bodies like the Duchy Fish Quota Company).

Indicative financial allocations, weightings and project headings for the specific measures are set out below:

£380,000	**Developing sustainable supply chains and market development**	**All years total project costs**
	Improving access to retail	£60,000
	Providing 'step up' facilities	£100,000
	Branding and marketing	£60,000
	Promotion of under utilised species	£30,000
	Selling direct	£50,000
	Accreditation	£80,000
£500,000	**Infrastructure and communal facilities – inc for cooperatives**	
	Co-operative equipment	£320,000
	Adapt business units	£80,000
	IT infrastructure	£100,000
£335,000	**Capacity building, cooperative development and networking**	
	Create co-operatives (know how & support)	£75,000
	Pump prime funding for co-operatives	£80,000
	Support for wider contributors	£100,000
	Trans national projects	£70,000
	Support for dissemination projects	£10,000
£650,000	**Training, retention and recruitment including diversification**	
	Training programmes / access to training	£100,000
	Dedicated food sector facilities & training	£250,000
	Targeting recruitment & promotion amongst young people	£300,000
£1,095,000	**Coastal communities, tourism and economic development**	
	Heritage & Interpretation	£150,000
	Fish festivals and tourism	£50,000
	Access to harbours and quays	£120,000
	Support for fishing business with tourism component	£25,000
	Dedicated loan & business support	£150,000
	Access to water for everyone	£600,000
£190,000	**Advocacy and engagement for fishermen**	
	On ground animateur	£150,000
	Advocacy for fishing community	£40,000
£100,000	**Regional sustainable management engagement**	
	Promoting sustainable fishing techniques	£30,000
	Support for dissemination of good practise sustainability	£10,000
	Collaboration between science and fishing industry	£60,000
	Total Project Costs	**£3,250,000**
	***EFF @ 75% (includes Management and Administration at 10%)**	**£2,437,500**
	Match (Public, private, other)	£812,500

Consistency and Synergies with other Policies

In 2009, 74 per cent of fish landed by the UK fleet into the UK and abroad came from a sustainable source compared with 69 per cent in 2000. In terms of value, 85 per cent came from a sustainable source in 2009.
Marine Management Organisation, UK Sea Fisheries Statistics 2009 (page 58)

...action is essential to help local fishing industries meet the challenges they face and diversifying the economy of fishing communities will be very important for the future.
Ray Hedley, Marine Management Organisation, October 2010

The UK is leading the way worldwide in efforts to plan, protect and sustainably manage our marine environment and resources now and for future generations. We should plan and protect our seas as a valuable national asset as we do with our countryside...marine planning systems will allow us to strategically, and holistically manage our seas; integrating economic, social and environmental considerations, and engaging with communities to determine and shape the future.
Richard Benyon, Minister for Natural Environment and Fisheries, March 2011

Introduction

In developing the strategy it is vital to ensure that appropriate account has been taken of the consistency of the strategy with other policies, strategies and interventions.

In preparing this section, publicly available documents which contain information, data and evidence relating to fisheries management at European, national, regional and local levels have been reviewed. These documents alongside emerging issues and intelligence for the Cornwall FLAG are presented below. This is to ensure that the objectives and measures undertaken complement and add value to, rather than duplicate, existing activities. A detailed bibliography for this strategy review is attached at Appendix D and statistical profile information derived from the review of strategies is attached at Appendix E

National Context

A landmark report to consider the future of the UK's fishing industry can be traced back to **Net Benefits (Cabinet Office 2004)**. The Strategy Unit met hundreds of individuals and organisations to assess the issues facing the UK marine fishing industry and recommended actions to create a stable future for the industry and the communities that depend upon it. The package of reform measures included: reducing fleet capacity by 13% in the whitefish sector; introducing greater requirements for traceability and transparency; and introducing a system of UK regional management, mirroring that of European Regional Advisory Councils (RACs) (including devolved budgets for science and stakeholder participation).

Securing the Benefits (UK Government 2005) was a response to that report, presented jointly by the Fisheries Administrations in the UK. It set out some early actions where fishermen, recreational sea anglers, environmental groups and officials could exchange information openly. For example: establishing a picture of the size of fleets that can be profitable in the long-term beyond 2013; certification of stocks using the Marine Stewardship Council; the economic development of coastal communities.

Charting a New Course (DEFRA 2005) provided a further pathway for how Net Benefits could be achieved. Here actions focused upon fisheries management, building long-term profitability (including working with regional bodies, particularly RDAS) and recreational angling.

Fisheries 2027: a long-term vision for sustainable fisheries (DEFRA 2007) considered the future of the industry – although over a long timescale. By 2027 it was envisaged that the fisheries sector would be managed according to an ecosystem approach; that a preference for locally caught seafood would provide a direct social and economic benefit to communities; and that access to fisheries would still be available to small-scale fishing vessels. It is worth noting that each of these documents has not provided a tangible blueprint to implement the recommendations initially set out in Net Benefits.

With regards to a research base, in 2009 DEFRA assembled the ‘Sustainable Access to Inshore Fisheries’ (SAIF) project. SAIF is looking at the long-term reform of the English inshore fishing fleet. In February 2010, SAIF’s Advisory Group published a **Proposition Paper,** setting out some principles that should apply to the future management of English inshore fisheries.

This was followed, in August 2010, by a **Final Report** which made a number of recommendations around quota management, devolution of responsibilities, non-quota stocks and marketing. Moreover, DEFRA is now using SAIF to consult on a set of proposals for a profitable and sustainable English industry. Coastal communities are intended to sit at the apex of these proposals, which are expected to safeguard small-scale fleets and businesses. More recently, in April 2011, DEFRA launched a consultation seeking views on proposals for fisheries management reform in England. Key elements of the proposals include: (i) the establishment of community quota models, (ii) the allocation of entitlements using the existing Fixed Quota Allocation Mechanism, (iii) safeguards to help retain fisheries access rights, and (iv) re-alignment of fishing opportunities. The consultation is aimed at the fishing industry and coastal communities and closes on 30 June 2011.

With aspirations to be “the greenest Government ever”, the Coalition’s commitments around the future of fishing and the marine environment have been set out in DEFRA’s Business Plan 2011-2015. The Business Plan includes references to enhance the competitiveness and resilience of the whole food chain, including the fish industry; and to influence EU Commission proposals on the reform of the Common Fisheries Policy (CFP). In 2009, the Marine and Coastal Act created Marine Protection Zones (MCZs). The identification and selection of sites is being led by Natural England and the Joint Nature Conservation Committee (JNCC). DEFRA’s Business Plan includes activities to help local communities enhance and protect the marine environment by agreeing a Marine Policy Statement and publishing a first draft of Marine Conservation Zones with a deadline of April 2011. It is anticipated that this will be followed by an analysis of impact assessments provided by statutory nature conservation bodies and formal consultation on the proposed Zones (November 2011-October 2012) with a number of MCZs designated by December 2012. Crucially, a MCZ is being designed for the South West. The ‘Finding Sanctuary’ Project – a partnership between South West Food and Drink, South West Wildlife Trusts, RSPB, Natural England, JNCC and Cornwall Council – is mapping the use of waters in the South West to inform the creation of a MCZ network and intends to send its proposal to Government by September 2011. Some of the latest plans include proposals for conservation zones off the coast of West Cornwall including Mount’s Bay, Land’s End, Cape Bank, the Isles of Scilly and St Ives Bay (which has been viewed as controversial by some local fishermen).

Implementing the Marine and Coastal Access Act (2009) and reviewing domestic arrangements for fleets and fish stocks was also highlighted in ‘An Invitation to Shape the Nature of England’ (2010) and will be taken up again in the forthcoming Natural Environment White Paper (due for publication Spring 2011). In March 2011, the Government launched the UK Marine Policy Statement to provide a policy context within which national and sub-national Marine Plans will be developed and aligned with economic, social and environmental considerations. The issues for consideration highlighted in the Statement include the promotion of greater decentralisation of decision-making in fisheries management and the importance of measuring the potential social and economic impacts of other developments on fishing activity (e.g. renewable energy schemes). For example, ‘Wave Hub’ is a grid-connected offshore facility 16 kilometres off the North coast of Cornwall for the large scale testing of technologies that generate electricity from the power of the waves. This has attracted some opposition from fishermen at St Ives and Hayle.

Taken as a collective, these policy documents seek to change the way we all think about and manage fisheries in England. They attempt to bring stakeholders together – from scientists and environmentalists to representatives from the fishing industry, economic development and tourism. On the one hand, these documents focus upon fisheries businesses and *fish as farming and food* – looking at how to counter problem with the whitefish sector, overcome the ‘boom and bust’ cycles of the 1970s, 80s and 90s and create a viable fishing industry. From an industry perspective, once Net Benefits was tasked within DEFRA it is felt that the momentum was lost, with the exception of the Fisheries Science Partnership (FSP) (a Government funded scheme to build relationships between scientists and fishermen). These policy documents also set goals and actions to manage the *marine environment* and protect the health of seas (e.g. biological variation and interactions in stocks, MCZs).

On the other hand, they recognise some of the social issues underpinning these goals including *supporting the most vulnerable and fish dependent communities to maintain a local fishing industry* but all-too-often these social purposes have been seen as 'sub-objectives' and placed under 'economic diversification'. However, there are attempts within the recent activities of SAIF, and through the Marine Policy Statement, to place social objectives at the heart of the policy agenda.

European Context

Fishing in the waters around the UK (and other European Union countries) is managed under the **'Common Fisheries Policy'** (CFP). Created in 1983, the policy sets out quotas for which member states are allowed to catch what amounts of each type of fish and provides common rules for fishermen using other Member State's waters. The CFP was reformed in 2002 to include a conservation policy (restricting annual catches of certain species), fleet policy (reducing the capacity of the EU fleet), restricting access to some inshore waters and a structural policy to support the industry through a European Fisheries Fund. It is worth noting that while the UK secured a respectable share of the EU Total Allowable Catches (TACs) for the North Sea (getting 80% of the EU Haddock quota), the South West (ICES Area VII) did not fare so well (averaging only 15% of quotas, and cod quota representing just 9% of quota even though much of the cod is caught within sight of the Cornish coast). It is estimated that the 'market value' of quota held within Cornwall was £15 million.

In April 2009, the European Commission published a **Green Paper** to stimulate debate through asking a range of questions on the reform of the CFP. The Green Paper identified five structural shortcomings in the current system of EU fisheries management: fleet overcapacity; unclear policy objectives or priorities; short-term decision making; insufficient responsibility given to industry; and poor or inconsistent control and compliance by industry.

Achieving sustainable fisheries through CFP reform (DEFRA September 2009) sets out the UK Government's approach to CFP reform. Four key UK priorities were identified: prosperous and efficient fishing industry; fish stocks within safe biological limits; recognition of the contribution of fishing to local communities (particularly fishing in remote communities); and fisheries management integrated with marine conservation. The discussion document was accompanied by a series of road show events around the coast of England, including one event at Penzance.

Discussions at **Penzance** covered: how fisheries managers, industry and retailers need to work together from the start to build *horizontal networks* and for greater working relationships from local to European levels through forming *vertical networks*; providing fishers with tools to manage their own fishery; and a recognition of differences between EU and small scale fleets and/or those dependent upon fishing as a livelihood. DEFRA's suggestion for Individual Transferable Quotas (ITQs) faced strong opposition at all road shows, including Penzance where it was seen as freeing up the trade by eroding national boundaries to quota trading thus allowing other Member States to dominate the market. Draft regulatory proposals for CFP reform are due to be published in May/June 2011 with the final regulations to be approved and come into force on 1 January 2013. In the interim, DEFRA has set out in its Business Plan that it intends to continue to influence the reform of CFP.

Some key issues

- To what extent is a centralised approach to fisheries management appropriate? If a policy is established at EU level it has to be implemented across Member States but should the UK govern UK waters? The spatial scale at which fisheries management should operate can be traced back to Net Benefits which called for stocks to be managed at a regional rather than EU-wide basis. Moreover, the National Federation of Fishermen's Organisations (NFFO) wants responsibilities to transfer to the regional sea basin (i.e., North Sea, Celtic Sea, and Irish Sea). CFP has to deal with some of the most complex fisheries in the world –technically (e.g. stocks) and politically (e.g. all Member

States). With CFP under review and reforms due to be implemented by 1 January 2013, how can stakeholders be provided with more influence and say over the type of marine management that takes place in their waters? Some of the stakeholder interviews carried out for this project has highlighted unease about Europe making decisions about UK fisheries.

- To what extent and how has targeting vulnerable and dependent fishing communities taken place? Some of the issues highlighted by stakeholders during interviews include: affordable housing, narrow labour market, transport costs and accessibility. How far are social objectives embedded in fishing policy?
- The evolving relationship between fishing and marine conservation. There is often a disjuncture between people who depend on fishing for their living and scientists who are concerned that if fish populations are to be sustainable then some fisheries must be reduced or closed (citing issues such as over-fishing, stock depletion, by-catch and discards). Whilst 'no take' areas may be easier to manage than other types of protected areas (e.g. Lundy Island); with Government commitment to MCZs and the Finding Sanctuary Project in Cornwall, how are the lines of the map being drawn to designate these areas and how much consultation is taking place?
  The NFFO, for example, is calling for an urgent rethink as it believes the process is too rushed, that limited ecological data is being used to make decisions and that the scheme overall represents the epitome of a conservation land-grab. Importantly, if a South West MCZ network is designated, how will it be monitored and what is the criterion for success? How will the planning and designation of marine conservation areas be joined up with the terrestrial planning system (i.e., through the recently released Marine Policy Statement?) Some of the stakeholders interviewed for this project have highlighted the uncertainty over and a lack of information about MCZs. How can marine conservation policies therefore be designed to meet biological and socio-economic needs?

South West and Cornwall Context

An initial attempt to establish how many vessels were in use, the amount of fish caught and information about fishing communities in the region was carried out by EKOS and Nautilus Consultants. The **'Socio-Economic Baseline Study of the South West Fishing Industry'** (2003), analysed data at ward, district and regional levels to make a series of recommendations to support a sustainable fishing industry. In total, it estimated the fishing industry in the Objective 1 area to be worth an estimated £99 million, representing 2% of the total Objective 1 area GDP. In contrast, the fishing industry in the non-Objective 1 area was worth an estimated £145 million, 0.25% of total non-Objective 1 area GDP. In 2001, there were a total of 559 fishing vessels registered in the Objective 1 area: 425 under 10 metre vessels and 174 over 10 metre vessels.

The majority of the over 10 metre fleet was based in Newlyn (72 vessels) with other significant ports including Looe, Newquay, Hayle and Padstow. Similarly, the largest concentration of under 10 metre vessels was found to be in Newlyn (72 vessels), Mevagissey (68 vessels) and St Ives (42 vessels). Very little information was available to quantify the value of fishing to the region's economy around tourism, arts, sports and culture sectors but it was estimated that 792,000 visitors to the South West in 2002 went fishing whilst on holiday, leading to a £16.5 million spend in the region. Similarly, approximately 396,000 people took part in sea angling activities (also in 2002), generating £6.5 million for the region.

For Cornwall, a strategic framework and action plan to develop the county's fishing industry was developed by the Objective One Fisheries Task Force. The **Cornwall & Isles of Scilly Fishing Industry Task Force Strategy 2000-2010** established seven activities requiring development to be supported by key projects. They covered: sustainability, training, information, marketing/promotion, quality, infrastructure, tourism/public awareness. The Strategy was subsequently used as a template by DEFRA to drawdown the Financial Instrument for Fisheries Guidance (FIFG) funding for non-Objective 1 areas. Seafood Cornwall and Seafood Cornwall Training (formerly the Cornwall Fisheries Resource Centre) were key components in the delivery of the Strategy.

Seafood Cornwall 2004-2008 End of Project Report described Seafood Cornwall as a "great champion of the Cornish fishing industry and a highly visible public focal point for information and industry support". Seafood Cornwall Training delivers safety and other training courses for fishermen, processing companies and fishmongers; coordinates education visits Cornish Harbours; and 'net to plate' events.

A **Cornwall and Isles of Scilly Sector Profile: Fishing** was published in 2008. This was limited to the economic value of the sector with headline figures suggesting that in 2006 there were 672 registered fishing vessels in the county, with 800 people employed in fishing and overall GVA for the sector (fish catching sub-sector) to be worth £23.3 million.

Some key issues

- The profile of fishing in Cornwall – the baseline set out by EKOS in 2003 has not been updated and the social, cultural and environmental value of the sector remains under-developed. The figures compiled for the Sector Profile in 2008 cannot easily be translated across from the EKOS report and are contradictory in places.
- Discards – this includes over-quota, the by-catch of unwanted species, and fish under the legal minimum landing size. DEFRA has undertaken a series of projects to reduce discards. This includes funding gear modifications trials to reduce the capture of otter trawlers at Looe; 'Fishing for Markets', an initiative to encourage consumption of under-utilised and sustainable species that are often discarded; and a 'Catch Quota' Project which will use CCTV cameras to verify catches and discards. Fishermen are incentivised to participate through access to extra quota. The reform of CFP in 2012 provides a further opportunity to reduce discards.
- Inshore Fisheries and Conservation Authorities (IFCAs) – these are statutory bodies which are funded by a mixture of local authority and central government money, whose officers report to a committee comprised of local councillors, representatives from a range of other sectors and representatives from other statutory bodies who are tasked with the management of inshore sea fisheries resources in their area, out to six nautical miles. Set up under the Marine and Coastal Access Act 2009, and replacing Sea Fisheries Committees from April 2011,

  Cornwall's IFCA takes forward some of the ideas contained in 'Shaping in the Nature of England' (DEFRA 2010) in providing the strategic direction to ensure the long-term sustainability of the marine environment. Cornwall IFCA's Annual Plan 2011 to 2012 sets out the main activities that it will undertake in year 1. This includes building strong relationships with partner organisations and stakeholders to develop more efficient ways of working; and providing training, mentoring and new skills development to members of staff. Specific activities include reviewing and evaluating the legacy of byelaws to remove duplication and ensure any gaps are covered and the publication of a Strategic Research Plan.

- Community quota systems - to allow local communities to hold fishing rights and lease them to local fishermen, therefore helping prevent fishing activity from leaving the area. Following the lead of Shetland Leasing And Property (SLAP) in the Shetland Isles in 1996 and 1997, the Cornish Industry established the 'Duchy Fish Quota Company' (a not-for-profit company limited by guarantee in 2000) to set about arresting and possibly reversing the trend of fish quota being sold outside of Cornwall. However, DFQC has been unable to access public funding due to concerns about state aid rules. Between April and June 2011 DEFRA is consulting on proposals for community quota systems.
- Training – supporting people into the industry (including those with no background or support in fishing) and retaining them. Issues raised during stakeholder interviews included: the cost of buying your own boat, the low pay for crew, the value of apprenticeships but difficulty assigning trainees to sole traders, and the need to work with mainstream training providers.
- Fuel prices and other running costs (e.g. bait): fishermen are unable to

pass-on the increasing costs to their operations as they are using fish auctions who determine the price for the product.

- The MCZ process – some Cornish fishermen feel marginalised by other stakeholders who have no financial stake or will feel no financial consequences of the decisions that they take using the Finding Sanctuary project (outlined above).
- Poor prices for some species (e.g. shellfish, crabs and lobsters especially).
- An increasing trend of larger vessels landing in Cornwall but selling their fish at auctions elsewhere in the UK (e.g. Plymouth or Brixham) and France (e.g. Brittany). Approximately 50% of wet fish landed in Newlyn was sold there in 2010 compared to 90%+ in 2000.
- Big Society - the Coalition Government wants to move away from 'big government' to the 'big society', inspiring more people to work together to run their affairs locally to mend 'broken society' and address the public deficit. This presents new opportunities and challenges for fishermen and coastal communities to run public services, working with and on behalf of local authorities and other agencies; and for undertaking activities and doing things themselves without relying upon the state.

Horizontal Issues

Equal Opportunities

The FLAG has considered best practice in relation to ensuring equality of opportunity in terms of the management of EU funds. Four key objectives derived from the desk research will inform the appraisal, approval and monitoring of projects.

Objective 1: Increase the number of individuals who have multiple disadvantages accessing employment and self employment within the FLAG area.

The creation of the right opportunities and support for individuals is crucial if they are to play an active role in the labour market. A series of positive action measures to ensure priority disadvantaged groups will be established to ensure that they are able to take advantage of employment and training opportunities arising from the strategy. This will involve: developing approaches which encourage project development and applications by minority groups; engaging disadvantaged and minority groups in the consultation of, design of and governance of the approach; and ensuring effective monitoring and take up of projects and their outputs by disadvantaged individuals. The FLAG and its wider stakeholder group will ensure through its links within the community that those targeted for positive action measures have a full opportunity to influence the development and implementation of the actions.

Objective 2: Increase the numbers of women, BME people and disabled people, securing training and employment in higher paid and higher skilled sectors and self employment within Cornwall's fishing industry and its employment base more broadly.

Sustained economic advances can only be achieved if previously excluded groups secure access to higher level training and ultimately higher level jobs. The approach taken aims to ensure equal access to business support measures, access to funding and advice, home reconciliation strategies by employers, equality training for providers and a supportive physical environment that offers ease of access, safety and childcare. Specific consideration of gender, sexual orientation and wider minority issues have been made through the development of the consultation narrative, dialogue with stakeholders and in the consideration of the development of specific objectives and measures. This will be translated into project application and monitoring procedures.

Objective 3: Challenging occupational segregation by increasing the numbers of women and men training or re-training in non-traditional areas, focusing on those areas where there are skills shortages.

In the fishing industry women can face both horizontal and vertical segregation. Women have been engaged in the development of the programme and consulted significantly as a discrete part of the consultation narrative. In setting out the programme of activity, it is recognised that it is as important to facilitate women's entry into non-traditional sectors, as it is to promote men's presence in sectors traditionally occupied by women.

Objective 4: Increase the numbers of employers and training organisations to develop equality and diversity strategies, including monitoring systems and methods for feeding in improvements.

Evidence from across Europe, shows that the groups of people who are most frequently the victims of discrimination are likely to experience the greatest difficulties in accessing the labour market.

The development of good equality structures and practices will increase the ability to harness and develop the skills and talents of all those able to enhance the economic wealth of the region. The Equal Opportunities policies and monitoring procedures of the lead partner (Cornwall Development Company (CDC)) will be followed to ensure issues of fairness and equality are as effectively applied throughout the implementation of the programme as possible. This will, as a minimum, involve ensuring that the FLAG Board and any operating staff are fully inducted into the equal opportunities policy approach and that the project consideration and monitoring processes fully comply with the CDC approach. The CDC policy is attached at Appendix F.

Environmental Sustainability

The FLAG seeks to promote and apply the principle of sustainable development throughout its programme; encouraging and enabling appropriate development that enhances the economy, community, and sea as a resource for current and future generations. The Cornwall FLAG area includes a range of environmental designations including 11 Special Areas

The FLAG strategy references the importance of EU, national and local approaches to Environmental Sustainability. These are reviewed in some detail above (Consistency and Synergies section).

It has developed proposals and an approach which are consistent with DEFRA's 2011-15 Business Plan, the emerging debate about the reform of the Common Fisheries Policy and the implementation of Marine Conservation Zones (Marine and Coastal Act 2009) – and in accordance with further guidance and principles set out the UK marine Policy Statement (March 2011).

Consultation and discussion activities have involved engaging with key regional and local projects (e.g. the Finding Sanctuary Project, Wave Hub).

Approaches which will meet sustainable development principles on an operational basis have been developed. Projects can be classed in two ways – (i) those that directly meet sustainable development priorities, and (ii) those that incorporate sustainable development principles more generally.

i) Projects that directly meet sustainable development priorities: a significant number of projects that arise through the partnership's work will be concerned with delivering sustainable development activity. For example: projects which support the promotion of the use of sustainable fishing techniques and innovation and projects which support the dissemination of good practice in sustainable fishing approaches.

ii) Projects that incorporate sustainable development principles: At the appraisal stage, each project will be assessed alongside sustainable development principles to ensure that its actions have taken account of these principles (e.g. resource uses, local purchasing, community involvement). This is a key principle in the proposed approach to project management (see the key findings from the consultation section of the strategy).

Innovation

There is a long standing structural commitment within community related EU programmes to innovation.

A list of objectives and measures which put a high premium on innovation has been developed. These relate to:

- The way a project is developed or managed;
- Who is involved in the project and how they are involved;
- How the project is resourced;
- How the results or lessons are identified, used, disseminated or communicated;
- How the project becomes self sustaining; and
- How the project links to other initiatives.

Key themes covering supply chains and market development, capacity building and diversification and sustainable management have been included in the programme. These focus on the engagement of scientists and innovators on the development and dissemination of approaches to new fishing techniques and business development.

In addition to this specific focus on innovation, an application process which awards points for the innovative characteristics, referenced by the list above, of proposals will be developed. The monitoring approach used will collect information on the nature and impact of the outputs and outcomes of supported projects in terms of their level of innovation.

Networking and Trans-national connections

Axis 4 will provide Cornwall's FLAG Steering Group, FLAG animators and the fishing communities engaged in the strategy with opportunities for trans-national and interregional cooperation and networking. As such it is also envisaged that the Cornwall FLAG will have the capacity to take on an influential role and provide an enabling role for introducing projects to other EFF Axes.

This element of the strategy will not only help build the capacity and knowledge of fishing communities but also confidence, motivation and expertise. It should be noted that all connections shall be shared with the wider stakeholders across the Cornwall FLAG area.

Within the strategy the following measures provide opportunities for joint projects, peer support and mentoring, capacity building and sharing of best practice:

- The development of an English Axis 4 networking group to share experience and project ideas with at least three meetings a year;
- Trans-national networking and conferences with Axis 4 regions across Europe to share experience and project ideas which will include FLAG project officers and steering group members, political representatives and fishing community representatives (one a year)
- Trans-national & UK projects, through the FARNET network, such as study visits from one fisheries area to another (involving local stakeholders) to discuss and share experience on markets, prices, adding value, quality, underutilised species; sustainable gear techniques; and relevant policy issues;
- Identification and sharing experience of successful fishing cooperatives across Europe selling and marketing fish, run by inshore fishermen and their communities as this is such a key part of the Cornwall FLAG strategy (at least two in year 1);
- Identification and sharing experience, with possible joint projects, of successful fishing programmes which recruit and retain new entrants into the fishing sector working in partnership with careers and education establishments (one in year 1).
- Potential twinning arrangements between FLAG areas which are identified as having similar issues and opportunities as Cornwall's Fishing Communities;
- Joint working across FLAG areas to promote projects that have joint benefits and provide economies of scale;
- Thematic conference on Innovation (incorporating adding value and renewable energies) to be developed across the FARNET network.

Appendix A Ports List

CORNWALL SEA FISHERIES DISTRICT
Commercial fishing vessels and men employed from Cornish ports December 2009

BASE PORT	FISHING METHOD	NO. OF VESSELS	NO. EMPLOYED
BUDE	STATIC/HANDLINE	6	6
BOSCASTLE	STATIC	4	4
PORT GAVERNE	STATIC	3	3
PORT ISAAC	STATIC/HANDLINE	11	16
PORT QUIN	STATIC	1	2
PADSTOW	STATIC/HANDLINE	20	43
	TRAWLER	1	2
	CHARTER ANGLER	6	6
		TOTAL 27	
ROCK	STATIC	1	1
NEWQUAY	STATIC	16	27
	HANDLINE	3	3
		TOTAL 19	
ST AGNES	STATIC	4	4
PORTREATH	STATIC	2	2
HAYLE	STATIC	14	19
	HANDLINE	6	6
		TOTAL 20	
ST IVES	STATIC	8	11
	HANDLINE	34	34
	CHARTER ANGLING	1	1
		TOTAL 42	
PORTHERAS COVE	STATIC/HANDLINE	3	3
SENNEN	STATIC/HANDLINE	9	10
PORTHGWARRA	HANDLINE	1	1

PENBERTH	STATIC/HANDLINE	8		8
MOUSEHOLE	STATIC/HANDLINE	6		6
NEWLYN	BEAM TRAWL	23	(7 LAID UP)	64
	TRAWL	9	(2 INACTIVE)	14
	RING NET	4		12
	STATIC	59	(7 INACTIVE)	104
	HANDLINE	61		61
		TOTAL 156		
PENZANCE	STATIC/HANDLINE	1		1
	TRAWL	1		1
	CHARTER ANGLING	3		3
		TOTAL 5		
TRENOW	STATIC	1		1
PORTHLEVEN	STATIC	13		
	HANDLINE	5		5
	CHARTER ANGLING	2		2
		TOTAL 18		
MULLION	STATIC	2		2
	HANDLINE	1		2
		TOTAL 3		
LIZARD	STATIC	2		2
CHURCH COVE	STATIC	1		1
CADGWITH	STATIC	8		12
COVERACK	STATIC	7		8
	HANDLINE	3		3
		TOTAL 10		
PORTHOUSTOCK	STATIC	2		2
	HANDLINE	5		5
		TOTAL 7		
PORTHALLOW	HANDLINE	2		2
GILLAN	STATIC	2		2
	HANDLINE	1		1
		TOTAL 3		
HELFORD	STATIC	14		27
	HANDLINE	3		3

		TOTAL 17			
FALMOUTH EST.	STATIC	27		34	
	SCALLOP	7		16	
	HANDLINE	8		8	
	TRAWLER	2		2	
	OYSTER	28		35	
	TOTAL 72				
PORT LOE	STATIC	3		3	
GORRAN HAVEN	STATIC	5		5	
MEVAGISSEY	STATIC	32		44	
	SCALLOP	3		5	
	HANDLINE	21		21	
	TRAWL	12		21	
CHARLESTOWN	STATIC	2		3	
	SCALLOP	1		2	
		TOTAL 3			
PAR	STATIC	1		1	
FOWEY	STATIC	4		6	
	SCALLOP	1		2	
	HANDLINE	1		1	
		TOTAL 6			
POLPERRO	STATIC	4		4	
	TRAWL	2		4	
	CHARTER ANGLING		1		1
		TOTAL 6			
LOOE	STATIC	13		16	
	TRAWL	13		28	
	SCALLOP	1		2	
	HANDLINE	11		11	
	CHARTER ANGLING		4		5
		TOTAL 38			
MILBROOK	STATIC	1		2	
	SCALLOP	1		2	
	HANDLINE	3		3	
		TOTAL 5			
TRAILERED	HANDLINE	3		3	

The data compiled in this spreadsheet represent vessels operating from Cornish ports engaged in commercial fishing. That is registered and licensed powered vessels and also unregistered and unlicensed vessels, which fish commercially under oar or sail.

All commercial vessels are listed including those undergoing repairs and those laid up long term as long as they are still registered and licensed. Those that are laid up or under repair are noted as such in the right hand comments column.

Registered and licensed vessels engaged in charter angling are listed as angling vessels. This does not include charter angling vessels that are non registered commercial fishing vessels.

Crew numbers are listed as the number of people employed on the boat regardless of whether it is full or part time.

Appendix B Notes from Consultation Events

Isles of Scilly Consultation - 4 April 2011

Marketing and Adding Value
Respondents felt that adding value on the quay would be great as processing more on Scilly would mean more could be sold on the Islands and there wouldn't be any freight costs.

One key theme was around the potential to add value to shell fish leading to the question - are there people on Scilly available and willing to pick crab? Could put a processing facility in a refrigerated container on the quay?

In terms of the establishment of a processing facility on the Scilly's - Transport to the "off islands" is difficult so there would be a need for a central processing coop, but maybe with facilities on some of the smaller islands.

Cooperatives and Infrastructure
There are problems with running the ice plant as there is no one regularly taking ice now that the trawlers have gone – this could be a key driver for cooperative activity. There are discussion about the challenge of replacing the current ice plant - fishermen are uncertain whether to scrap the machine they have and buy a new one or upgrade what they have. It would be great to run it from solar power which could also cover other electricity costs to the fishermen. Maybe a study to look into the viability of solar and wind power. Refrigerated containers for bait are also needed.

Other improvements suggested include: a crane/hoist on the quay, holding tanks for crab, a drainage and wash pump. There were mixed views about the potential benefits of a cooperative – although bulk buying would seem an obvious opportunity – some members of the group persisted in the view that even grossed up the number of individuals involved in the industry in the Scilly's wasn't large enough to offer any significant "collective reach"

Training and Retention
There was no significant interest for this as a concept – all boats are single or max double handed and there are very few people who want to enter the profession

. It would be good if there were more subsidies so that smaller groups could take part in the training – there was a view that it would be hard to make it viable and cheaper to deliver training due to the small number of potential participants.

There are no trawlers on the islands now and this affects the opportunity for new entrants as there are no crewing opportunities. It also affects the costs of bait as previously this could be sourced from the trawlers.

Capacity Building
Participants felt that there was scope for a discussion about good practice especially re the off season when those with static gear can't operate – November – March.

Heritage/Tourism
A retail space in the Scillies to sell fish from would be good as would the opportunity to develop a fish festival Currently there is virtually no fish available for sale which is caught in the Scilly's – it is freighted to other places and would need to be brought back.

Scilly's have additional costs linked to their island status around freight in terms of things such as fuel and bait.

The development of the “Old Hotel” as a venue for selling locally caught fish did generate significant interest – there was also a discussion about the scope for mail order fish.

Economic Development
Participants felt it was hard to see how this is relevant from the small scale perspective of the Scilly fisherman- there was some discussion of the benefits small scale non bank based finance.

Women in Fishing
Women could have a key role in underpinning the organisation of cooperatives.

Governance/Conservation
The Scilly’s are broadly happy with their activities in these respects – IFCA has been a positive experience from their point of view (in terms of their representation on it) and whilst they have distinctive “island” challenges there did not appear to be any significant enthusiasm about pushing particular issues in the context of this theme

Theme 2: Community Infrastructure was identified as the most important theme overall.

Mevagissey Consultation– 5 April 2011

Marketing and Adding Value
Participants would support the idea of this theme. They felt it would be useful to have information on what expenditure/projects would be eligible. There was a discussion about branding of Cornish fish – smaller boats selling direct (different views within the group) – space to have small processing units is an idea which has developed some interest. Could this develop into a new cooperative?

Infrastructure & Cooperatives
Mevagissey had a coop for 25 years and then it failed – due to price competition with more effective merchants. There was some cynicism about the potential to develop a new cooperative.

Infrastructure
There was general interest in Ice, cranes, etc – currently all the prawns and crab which are landed I go to Spain (the crab price is poor – due to an over supply in Europe). St Mawes could benefit from a landing derrick and a cold store. These should be eligible – the maximum intervention is 75%– 25% has to come from other sources. Cornish FLAG group can determine the intervention rate. A bigger permanent crane on the lighthouse quay in Mevagissey would be really useful. There is also a challenge shifting the bins off the quay – a flat bed truck for this specific purpose would be extremely useful.

Training, Retention, Recruitment
There is some evidence of young people interested in taking up fishing as a career in Mevagissey. The youngsters who are interested are from fishing families. If you have no background in fishing it is currently very hard to currently get into the industry. The cost of investment if you start from nothing is highly prohibitive (around £320K but you also need experience) – The idea of Port Mentors to provide tasters for those interested in the profession was discussed as a potentially positive idea This role would suit trawlers or potters. Quotas Dover Sole and Cod are a problem but the other species are ok. Crew unaffordable – in St Mawes all the crews are single handed. Fishing ended as an easy to enter profession in the early 80s. The last time the profession was really popular was during the Mackerel boom of the 60s/70s. The number of big boats is declining significantly – this creates scope for a few more small boats which could also be engaged in fisheries training

Capacity Building
Participants discussed learning from others in terms of best practice – there were mixed views on the value of this – participants identified scope for some ring-net marketing and process issues by studying good practice elsewhere. There was also a discussion about the relative merits of fixed gear vessels vs trawlers – participants felt that fixed gear geographies could make a real difference to the viability of Mevagissey.

Tourism and Heritage
Fish festivals are already established in both St Mawes and Mevagissey – there was a discussion about the potential benefit of additional resources to enhance and develop the reach and professionalism of the current fish festivals. Heritage issues for other festival activities? Lugger festival – could develop as a bi-annual event. Keen on this as a theme. Last net loft in Mevagissey could be preserved and interpreted. The Aquarium could be updated– interface between fishing and the public (people see what they eat!). Film linked to the Aquarium is popular – it currently involves some historic footage and examples of activities (i.e. ring netting) but there is scope to do more on this front.

Economic Development
Participants discussed this issue in terms of looking at the bigger economic development of communities – the example loan/grant schemes for small businesses were raised.

Women in fishing
Participants welcomed this theme but did not have any specific projects to propose.

Governance
The involvement of fishermen in fisheries management was discussed. This was identified as a problem for fishermen in terms of the demands on their time and attendance. There was a view that a fisheries advocate would be a good resource.

Conservation
There is a view that conservation issues have become dominated by groups that have an environmental bias. An individual to support fishermen in the development of their response to conservation issues was welcomed as a potential project idea. Participants also discussed the scope to fund innovation around fishing methods. Challenges over the cost of inputs were discussed as a key problem which might be looked at in this context. Investment in fish traps as a key innovation theme was identified as an – important strap line in the strategy around conservation. Fishtraps cost £100 and are made overseas. Participants were interested in discussions about how they might be made and sourced locally.

Other things?
Currently there is no funding for repairs under this scheme – but replacement might be an option – participants raised a slipway/cradle winch idea which might be worth pursuing in this context. Increasing the local capacity for onshore maintenance of fishing vessels was also raised as a potential area of investment from the FLAG.

Newlyn Consultation- 4 April 2011

Rob Poole (RP) opened the meeting and advised those present that Cornwall and the Isles of Scilly had been awarded a share of a pot of European funding for the sustainable development of fishing communities, at least £900,000. The project in Cornwall is currently being developed and delivered by Cornwall Development Company (CDC).

Cornwall Development Company have appointed Rose Regeneration, specialists in Rural and Community engagement, to work with local fisheries communities to help shape and develop the strategy to identify themes that the fishing communities would like to see supported by the fund.

The purpose of the meeting in Newlyn was to identify those “themes” and to receive suggestions for projects that would be eligible for support from the 1st September 2011. (Approximate date)
RP explained that a project officer would be employed and a Board appointed to decide locally how the money should be spent. The Project Officer’s role would be to develop applications and work with fishing communities to write and submit applications to the panel for their consideration.

The process of funding and bank rolling was explained, RG advised that there would probably be a bankrolling fund that projects could access to aid cash flow.

Marketing and adding value
Many existing fishermen have bought insulated fish bins though previous funding opportunities but there does remain some demand to support a new project for additional ice bins.

Recently an issue had arisen over the eligibility of fishermen/s associations and their eligibility under the existing rules to access funding as a group and there was also the need for some funds to support the coordination of such a project and its administration – some concern from one attendee about repeating previous ice bin projects.

There was general support for projects to support new, innovative fishing methods and for visits to other fishing communities to learn from best practice.

Infrastructure & cooperatives
There was interest for funding to support new cooperatives, processing facilities, refrigerated vans and retail / marketing opportunities for fishermen in smaller ports. E.g. Sennen.

A clear need from fishermen’s association to support toward accreditation to various “red tractor” schemes and MSC assessment and repeat audits.
Also interest for tax advice and benefits for fishermen.

Infrastructure – ice, cranes, etc
Additional electronic cranes required in Newlyn.

Improved access required for fishermen in the smaller coves to land their fish and access boats. E.g. Helford

Training, Retention, Recruitment
Fish Industry Training School requires permanent training room, facilities and equipment. Also likely to require some support to refurbish / adapt existing buildings in the port.

There is a clear demand for an apprenticeships project to attract, mentor and retain skills in the industry and aid long term employment.

Potential lack in funding to support mandatory skills training and further training in both the onshore and offshore sectors.

Capacity Building
Tourism and Heritage – Links to fish interest and consumption.
Newlyn fish festival is already established and there are smaller festival at Hayle, Porthleven and Newquay. There is still untapped potential to showcase Cornish fish better and attract national media. Funding would be required to support additional marketing and promotional opportunities.

Conservation
Concern over adequate representation on environmental issues - need a fishermen's representative to sit on working groups and feed information back to fishers.

Other things?
There were no other ideas put forward from the floor however RP offered individuals the opportunity to contact CDC in confidence at a later date.

Other ideas for projects and area of need for development:
Gill net recycling projects
Fuel efficiency
Fishermen's Crafts and art
Start up grants for small businesses
Small scale supply chains
Heritage and tourism: Gigs, luggers, museum, training boats,
Study Tours to other fishing ports and markets
Marketing: Local festivals, seasonal awareness, Suppliers guide, Promotion of underutilised species, fishermen's markets and attendance at festivals, PGI and PDO status

Padstow Consultation – 6 April 2011

Community focus for the initiative
Participants were keen to ensure that this is developed and maintained as key element of the FLAG strategy Participants were told that R&D per se is not eligible. The Lobster Hatchery explained that they have been looking at a Padstow Lobster Festival through current Leader funding and wondered if it might be eligible for funding through this route. The importance of making sure the project stretches as far as Bude was reinforced by participants. Participants wondered is the first project in relation to the initiative could be to develop an animateur? Participants were told that the indicative intervention rate is up to 75% as indicated by the MMO. A potential role for an east and west sub-group was discussed although there were concerns that this may be challenging to justify The value of a network group to supplement the FLAG as a means of giving opportunities for wider participation was also raised.

Marketing and adding value to Cornish landed fish
Participants attached a high level of importance attached to this. Marketing angles were raised in this context including – does the fishing agenda stretch far enough into the east? Education was identified as an important adjunct to this theme – in terms of building public awareness of fish and in schools. Participants felt that making key information around the justification for conservation activities to the public and to fishermen was important. Education for marketing purposes and to raise up the standards of engagement with the fishing industry was raised. "Sense of Place" based in Poole Innovation Centre have done some work on this theme. The scope for a Centre for sustainable fishing activities as one big project - it could have a national or international context was raised. At a micro level – funded monitoring etc may be eligible. A project around the a branding exercise for Cornish fish was discussed – it was felt that this sort of activity is not normally fundable in terms of eligibility but that this was the time to raise it as an issue/opportunity.

Cooperatives and Infrastructure
Participants discussed the challenges of moving fish around – refrigeration angles and opportunities including – display refrigeration kit – refrigerated vans – fleet/loan arrangements. Farmers market project ideas translated to fish were discussed as opportunities.

Training, Retention and Recruitment
Participants were concerned that there are currently no apprenticeship schemes but there was little engagement in this aspect of the discussion by this group.

Capacity building
Technical exchange opportunities around the lobster hatchery were raised by participants

Economic development
The issues linked to this theme were not a key area of discussion by this group.

Women in fishing
Opportunities to follow the Women in Farming model were raised Opportunities to showcase the contribution of women to the industry were identified as worthy of further consideration "Crabby Jacks" – a husband and wife team, were identified as an example of a trend where women also go out on boats as part of the fishing industry now. Participants felt that there was some scope around this agenda although it is seen as less relevant in other quarters.

Governance
Opportunities to engage fishing representatives more widely in governance issues were raised as important in this context.

Conservation
MCZ agendas and issues were raised. Echoing comments above participants felt it was important to engage more effectively with fishermen on their terms. This is an important theme from the lobster hatchery perspective.

Lobster hatchery project ideas
Getting the technicians to work more closely with the industry in more detail and more inclusively was cited as a key aspiration. Other project ideas included: an Education/outreach. Marketing improvements for the Lobster Hatchery itself. Broadening the role and roll out of the centre.

Appendix C Consultation Narrative

Cornwall is one of six coastal communities in England to have been designated as a 'Fisheries Local Action Group' (FLAG) by the Marine Management Organisation (MMO) as part of the European Fisheries Fund (EFF) Axis 4 project.

The Axis 4 scheme aims to develop smaller communities in England which largely depend on fishing for employment and will provide Cornwall with nearly €1m (£985,000) to help build a more sustainable economy for its fishing areas. These funds will be able to Cornwall from Autumn 2011. Axis 4 is regarded as funding of the last resort and will not fund projects eligible under the other EFF programmes.

This is a great opportunity for Cornwall's fisheries areas. The delivery and management design and implementation, of these funds will be decentralised and devolved to a local level so that Cornwall's FLAG will be able to make decisions on which projects are supported. Currently a shadow Cornwall Fisheries Local Action Group (FLAG) has been formed to help guide the development of an area-based local development strategy with the wider community.

Over the next six months Cornwall's FLAG will be developed further as a partnership between representatives of the fishing sector and other relevant local socioeconomic sectors across the public, private and community sectors. The projects to be funded will be linked together, both in the fisheries area and by the fishing communities themselves, through a common strategy. It is this strategy that is currently being developed.

As part of the development of Cornwall's FLAG strategy, key themes need to be identified and agreed. Axis 4 promotes the development of the strategy by empowering local people, those who best understand both the problems and the aspirations of fisheries communities, and providing them with the tools and resources to develop and adapt solutions to meet their real needs.

Therefore Cornwall's shadow FLAG, in conjunction with Cornwall Development Company (the managing authority) and Rose Regeneration Ltd, is undertaking this consultation, with Cornwall's fishing communities and relevant organisations to develop a strategy for the sustainable economic development of fishing areas.

Axis 4 seeks to go beyond merely tackling the short term effects of the economic, social and environmental consequences of the depletion of fish stocks. It recognises that the complex and rapidly-changing forces affecting fisheries areas and communities cannot be dealt with by traditional policies and tools on their own. Therefore its purpose is to enable fisheries communities to create new and sustainable sources of income and to improve their quality of life. In fact it is hoped this consultation will form a strategy that may well outlast Axis 4, providing valuable insights and projects for future funding programmes.

<u>Cornwall FLAG area</u>

The Cornwall FLAG territory is all of Cornwall's coast plus one mile inland. Therefore, to assist the development of the strategy Cornwall has been divided into the following five sub mini territories:

- *North Cornwall*: This area covers Newquay, Padstow and the surrounding harbours of Bude, Boscastle, Port Gaverne, Port Isaac, Port Quin, Rock, and St Agnes with 78 fishing vessels operating across the area employing 119 fishermen (CSF 2009). The biggest port is Padstow with a total of 27 vessels (6 classified as charter angler), landing 558 tonnes of fish a year with a value of £1.44 million (MMO 2009). The total landings across the area is approximately 1060 tonnes of fish with a value of £2.5 million (MMO 2009)
- *East Cornwall*; This area includes Looe, Mevagissey, Polperro, Millbrook, Polperro, Fowey, Par, Charlestown, Portloe, Gorranhaven, and has a total of 134 fishing vessels employing 186 fishermen. Mevagissey is the second largest port in Cornwall with 68 registered fishing vessels and 91 fishermen (CSF 2009), while Looe has 38 vessels with 57 fishermen (CSFC

2009). However, with Looe's thriving fish market, its landings are the highest in this area of 866 tonnes valued at £1.8 million (MMO 2009). The whole area lands nearly 2,000 tonnes of fish with a value of £3.8m (MMO 2009). Mevagissy is said to be bucking the trend with lots of youngsters coming into and investing in the industry.

- *South Cornwall*: As well as the port of Falmouth, the area covers the Lizard and Roseland peninsulas including the ports of: Mullion, Lizard, Church Cove, Cadgwith, Coverack, Porthoustock, Porthallow, Gillan, and Helford. There are 125 fishing vessels operating from this area employing 167 fishermen (CSF 2009). The largest port is Falmouth with 72 vessels (CSF 2009) landing 920 tonnes with a value of £1.6 million, followed by Helford with 17 vessels. The total tonnage for the area is approximately 1.56 thousand, with a combined value of nearly £3 million (MMO 2009).
- *West Cornwall*: Newlyn and surrounding harbours and coves including Hayle, St Ives, Portheras Cove, Sennen, Porthgwarra, Penberth, Mousehole, Penzance, Trenow, and Porthleven. Newlyn is Cornwall's largest fishing port, with 8.7 thousand tonnes of fish landed per annum with a value of £17.27 million (MMO 2009). In terms of value, Newlyn ranks fifth amongst UK ports and second in England. Operating across the West Cornwall area are 269 fishing vessels (156 from Newlyn) employing 392 fishermen (255 Newlyn) (CSF 2009). St Ives is the next largest port in the area. The whole area lands a combined tonnage of approximately 9.3 thousand tonnes with a value of £18 million (MMO 2009).
- *The Isles of Scilly.* The Isles of Scilly main fishery is shellfish, with 85% of its £200,000 of landings is being shellfish. The main port is on St Mary's where is 68 tonnes of fish is landed a year (MMO 2009). It is them either sold to local hotels and restaurants or exported by ferry to the mainland.

Key themes

As part of the strategy development the shadow FLAG have identified 9 key themes around which to start to build the strategy. Although €1 million will not fund everything on the coastal community's wish lists, it is important to identify potential projects and alter and shape the strategic themes in response to this consultation. Across the whole strategy will be the cross cutting themes of community, equal opportunity, disability, innovation and the environment which will influence how a project is scored.

1. Marketing and adding value to Cornish landed fish

Seafood Cornwall, Rick Stein and others have successfully built up the profile of Cornish fish which has positively impacted on those employed across the fishing sector, the tourism and catering sectors and fishing communities as a whole. This may be continued through Axis 4 by supporting projects that add value, maximise fish quality, and promote local fish.

Fish-micro business developments, small scale infrastructure, as well as revenue projects may be supported to assist the projects such as: the development of local food networks; fish distribution both within and exporting out of county; improved access to farmers markets, fish markets and food promotion events; exploitation of new technologies; developing markets from fishermen direct to restaurants; maximising fish prices for fishermen including shortening supply chains; promotion of lower value, less popular and abundant fish stocks; development of diverse and added value products for all markets; and further development of Cornish quality fish produce.

2. Fishing cooperatives & communities infrastructure and access facilities

Many of Cornwall's smaller fishing ports share their physical infrastructure with the local community, much of which is in need of modernising and improving. New facilities that provide efficiency, safety, economic savings, improve fish quality and accessibility for all members of the community (including disabled access), may be supported. Communal facilities shared by fishermen, especially within a cooperative or community interest company, such as slipways, storage, and port access, and infrastructure that also benefits local communities and the tourism sector will be encouraged.

3. Training, retention and recruitment

Building on the success of the Newlyn based training organisation, Seafood Cornwall Training, training for fishermen and fishing communities may be further developed, as well as, targeted programmes that assist recruitment into and retention in the fishing sector. The further development of facilities to ease the delivery of training may be supported. Training programmes that are liked to other Cornwall FLAG initiates may also be supported.

New programmes can be developed to assist recruitment into the sector which could include partnerships with schools and colleges, mentoring, taster sessions across the fishing sector, and apprentices on fishing boats (day and overnight trips). There can be targeted programmes to assist NEET (not in employment, education or training) 16-19 year olds enter the sector as well as to support skilled enterprise and community products for retired fishermen.

4. Capacity Building
Axis 4 encourages capacity building initiatives building on best practice throughout Europe's fishing communities. This theme could involve transnational projects, as well as projects within the UK. Study visits from one fisheries area to another (involving local stakeholders); mentoring arrangements between the staff or members of an experienced group and a less experienced group; placements and traineeships, with participants coming from one FLAG area and being hosted by another; twinning arrangements between FLAGs; and Thematic workshops or conferences.

5. Tourism development & cultural heritage
Tourism initiatives may be supported especially those projects involving fishermen, the preservation of the cultural heritage of fishing villages and the associated cultural tourism. This could include diversification into day boat trips, diving, ecotourism initiatives, support for the development of festivals celebrating fishing community culture; as well as programmes to communicate fishing heritage to the wider public and protect the architectural historical assets of the fishing industry against unsustainable development.

6. Coastal community's economic development
This theme could include support for the development of co-operatives, community interest companies and social enterprises that support and contribute to the sustainable development of the fisheries sector. Community capital interventions may be supported which identify a strong sustainable economic and community benefit. Opportunities created by other funding streams or projects such as Next Generation Broadband, the wave hub, Eco Towns and Newquay airport will be exploited, to ensure fishing communities maximise any benefits.

7. Women in fishing
Some fishermen's wives are vital to the promotion and development of fishermen's businesses. Fishermen's wives, women's cooperatives, women in fishing and fishing communities may be supported, including networking, mentoring for women and business support.

8. Good Governance
Good Governance is the key to the future of fisheries management. Issues, such as restricted access to quota, are curbing investment in the inshore fleet. The promotion of good governance and sustainable fishing may be supported, including the improvement and protection of the coastal and marine environment, such as fisheries research; technical measures; selective gears and management. Support for projects that increase community and stakeholder participation in fisheries monitoring and management, looking towards future co-management, including inshore community quota support and management (such as producer organisations or community quota bodies like the Duchy Fish Quota Company) and the implementation of SAIF (Sustainable Access to Inshore Fisheries) recommendations can be encouraged.

9. Marine Conservation
The FLAG may actively support sustainable method projects, low impact and local sourcing and sales, sharing best practice on the management of local Marine Conservation Zones (MCZ). Fishermen and their communities may work with conservation organisations regarding co-management and, for example, using fishing vessels to help monitor Special Area of Conservation (SAC) and MCZ sites.

Appendix D Strategy Review Bibliography

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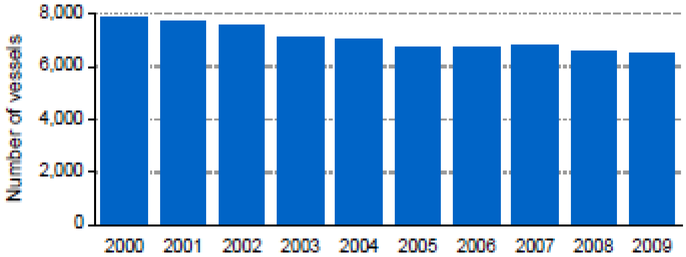
Appendix E Fishing Industry Statistics

1 Overview of the UK fishing industry

Fleet size and employment

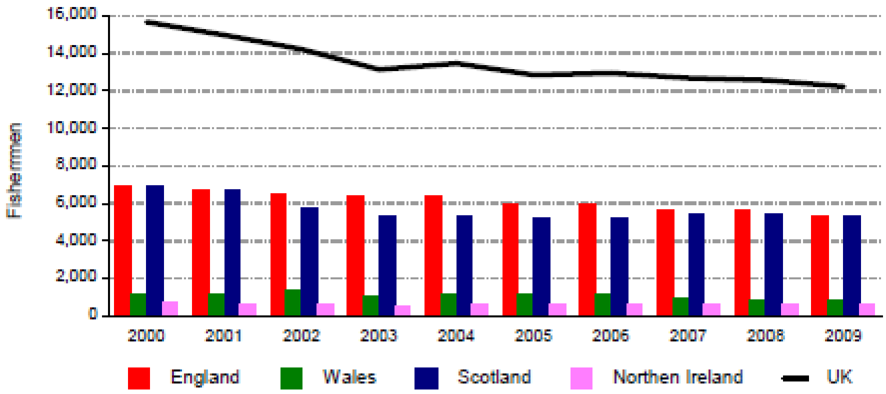
In 2009, the UK fishing industry had 6,500 fishing vessels compared with 7,818 in 2000, a reduction of 17 per cent. The fleet in 2009 comprised 5,021 10 metre and under vessels and 1,479 over 10 metre vessels.

Chart 1.1: UK fleet size: 2000 to 2009



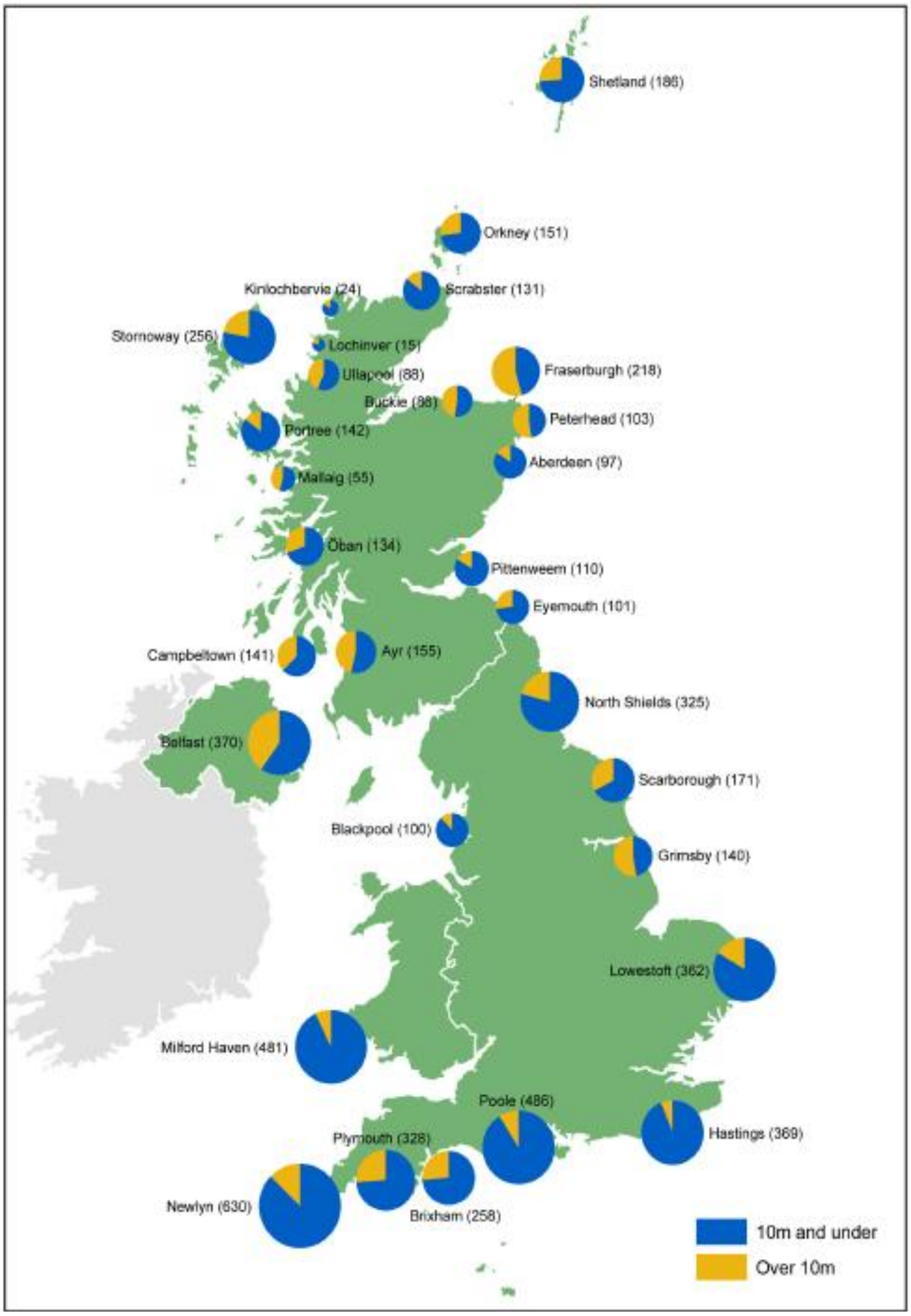
There were 12,212 fishermen in 2009, down 22 per cent since 2000. Of these, 5,358 were based in England (down 22 per cent since 2000), 851 in Wales (down 26 per cent), 5,349 in Scotland (down 23 per cent) and 654 in Northern Ireland (down 5 per cent). Part-time fishermen accounted for 17 per cent of the total, a proportion that has changed little over the last ten years. Further details can be found in Chapter 2.

Chart 1.2: Number of fishermen in the UK: 2000 to 2009



Source: Marine Management Organisation, UK Sea Fisheries Statistics 2009 (page 1)

Chart 2.5: Number of vessels by Administration Port: 2009



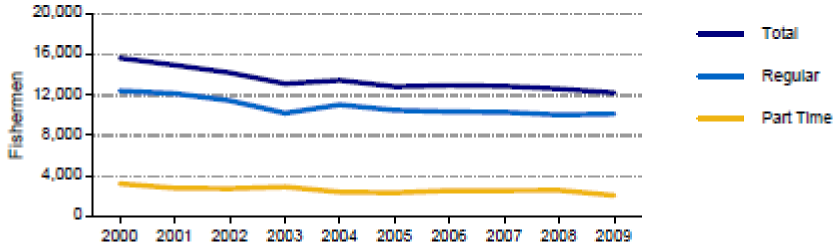
Source: Marine Management Organisation, UK Sea Fisheries Statistics 2009 (page 15)

Number of fishermen

Statistics on the number of fishermen are drawn from surveys carried out by the Marine Management Organisation in England for England and Wales, by the Sea Fisheries Inspectorate in Northern Ireland and by Marine Scotland.

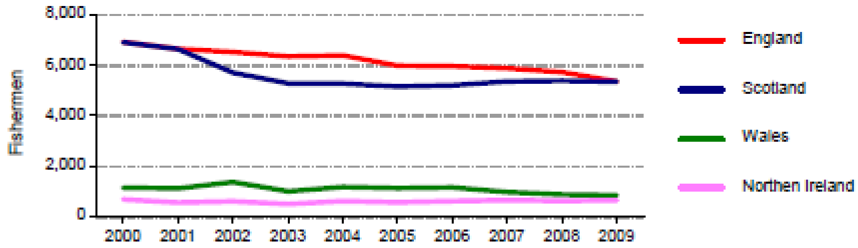
The number of fishermen in the UK has decreased by 22 per cent since 2000 from around 15,600 to 12,200. The number of regular fishermen has decreased by 18 per cent and part-time fishermen by 36 per cent over this period (see Chart 2.9).

Chart 2.9: Number of UK fishermen: 2000 to 2009



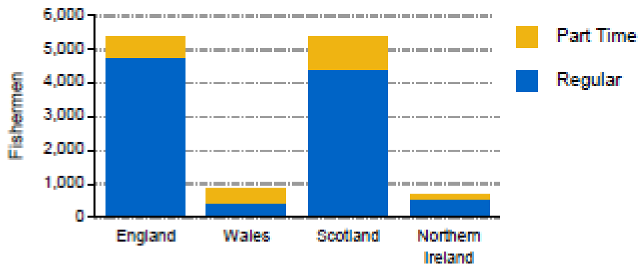
Since 2000, the numbers of fishermen have decreased in all UK countries – in England by 22 per cent, Scotland by 23 per cent, Wales by 26 per cent and Northern Ireland by 5 per cent (see Chart 2.10).

Chart 2.10: Number of UK fishermen by country: 2000 to 2009



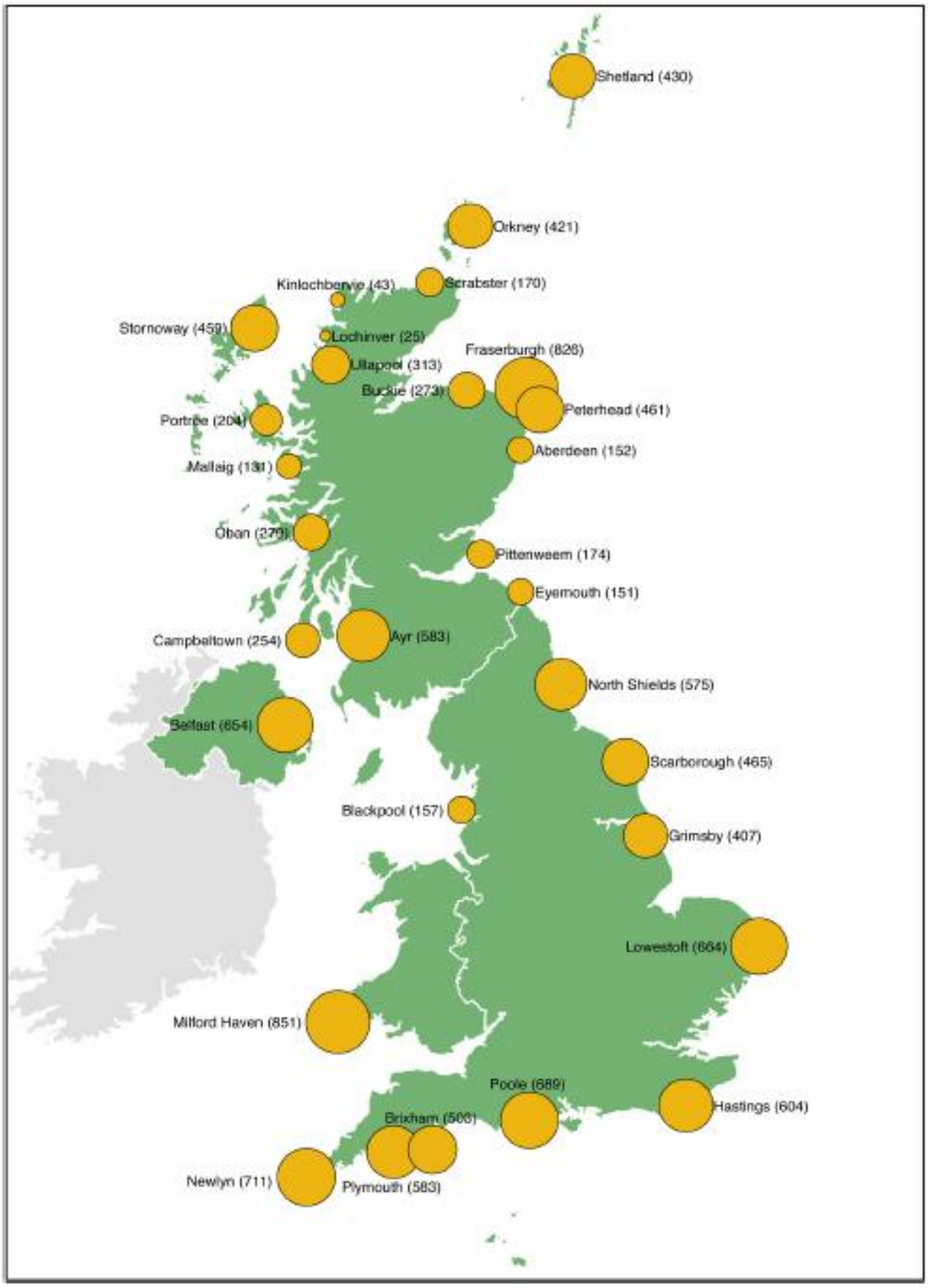
In 2009, part-time fishermen accounted for 11 per cent of all fishermen in England and for 18 per cent in Scotland (see Chart 2.11).

Chart 2.11: Number of regular and part-time fishermen by country: 2009



Source: Marine Management Organisation, UK Sea Fisheries Statistics 2009 (page 21)

Chart 2.12: Fishermen Numbers by Administration Port: 2009



Source: Marine Management Organisation, UK Sea Fisheries Statistics 2009 (page 23)

Table 6.2 Proportion of landings value to Cornish ports in 2001

FLUSHING, HELFORD RIVER, PENRYN (CORNWALL), TURO, PORTHOUSTOCK & MYLOR	2%
LOOE	8%
MEVAGISSEY	3%
NEWLYN	64%
NEWQUAY	1%
PADSTOW	7%
PENZANCE	0%
POLPERRO	1%
RIVER FAL 0 FALMOUTH	8%
SALCOMBE	4%
PENBERTH, SCILLY ISLES & SENNEN	2%
ST IVES, HAYLE & PORTREATH	1%

Source: DEFRA

Source: Socio-Economic Baseline Study of the South West Fishing Industry (page 38)

Appendix F
Cornwall Development Company Equal Opportunities Policy

EQUAL OPPORTUNITIES POLICY
Updated: March 2009
1. PURPOSE
To promote equal treatment in employment and services irrespective of race, colour, nationality, ethnic origin, gender, sexual orientation, marital status, disability, age, religion or political belief; and to manage this in such a way as to comply with Equal Opportunities legislation and Codes of Practice.

2. SCOPE
This policy involves all Company employees, job applicants, trainees and agency workers. Its implementation has particular relevance to the work of staff concerned with recruitment, training and promotion. Whilst the emphasis in this policy is on fair and equal treatment in employment, the principle of creating an environment which eliminates discrimination applies similarly to the treatment of customers, suppliers and other people who have contact with the Company or are affected by its services.

3. POLICY STATEMENT
The Company is committed to providing equality of opportunity in employment and services, and is working towards being an equal opportunities employer. All employees have a part to play in achieving this and the Company will ensure that individuals are aware of their personal responsibility to follow and support the Equal Opportunities policy.
The Company will strive to ensure that individuals are treated equally and fairly, and that only job-related criteria are used to assess matters affecting recruitment, selection, training and career development. The Company will seek to identify and prevent any unfair or unlawful discrimination which restricts individual opportunity through any of the personal aspects mentioned in paragraph 1 above.
No individual or group shall be disadvantaged by any conditions or requirements of their relationship with the Company which cannot be justified on grounds of health and safety, or genuine occupational qualifications. Examples of situations that might result in direct or indirect discrimination, victimisation or harassment are summarised in the attached guidance notes, and anyone requiring further information on these should contact the Personnel Officer. The Company will:
• encourage job applications from the full range of work-seekers available for its services
• make the best possible use of the skills, talents and abilities of all employees
• provide training as appropriate, in awareness of diversity and good practice
• ensure as far as possible that its services reflect the diverse needs of its customers
• measure achievements in equal opportunities against planned performance targets
• review and adjust the policy and related action plans regularly to fulfil the agreed aims

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The Senior Management Team fully supports the aims of this policy and will promote active steps to ensure that the policy is implemented to achieve progress towards fulfilment.
Trade unions associated with the Company fully support this policy. Employees, applicants, trainees and agency workers have the right to complain about unfair discrimination through the appropriate procedures described below.

4. PROCEDURE FOR ADHERENCE TO POLICY
The Company will monitor the diversity profile of its workforce and services, and will review the success of the policy in achieving its aims. It is the responsibility of each manager or supervisor to:

• ensure that the standards established through this policy are followed and that no unfair discrimination by action or omission takes place within their sphere of responsibility.
• contribute to the development and achievement of an Equal Opportunities Action Plan.
• review the effectiveness of the policy and all related action plans and communicate their views to senior management. All employees, trainees and agency workers must:
• not harass, abuse, intimidate or disadvantage others on account of their race, colour, nationality, ethnic origin, gender, sexual orientation, marital status, disability, age, religion or political belief.
• co-operate with any measures in place or introduced to ensure equal opportunity.
• report to their manager or supervisor any suspected discriminatory acts or practices.
• not persuade or attempt to persuade others to practise unlawful discrimination, or condone such action.
• not victimise anyone as a result of their having reported or provided evidence of discrimination.
• not try to influence job applicants in an attempt to discourage them from applying for or taking up a post.
Any breach of the Equal Opportunities Policy by staff will be dealt with through the disciplinary procedure. Serious offences such as harassment will be treated as gross misconduct and may result in dismissal.

5. PROCEDURE FOR COMPLAINTS
5.1 Discrimination against other people Staff and trainees who have reason to believe that discrimination may have taken place against others should inform their Manager or Supervisor so that the allegation may be investigated.

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5.2 Discrimination against yourself Staff who have a concern regarding the application of this policy to them personally should normally make use of the Company's Grievance Procedure.
5.3 Internal recruitment and selection
Employees wishing to raise a grievance alleging unlawful discrimination during an internal selection procedure should discuss this with the recruiting line manager and Managing Director in the first instance. An appeal, where necessary, should be made to the Chair of the Company's Board. An investigation will then be conducted by a representative of the Company who has not been previously involved in the selection procedure. The ruling of the Chair of the Board will be final, and the employee will receive written notification of the outcome.

5.4 External recruitment and selection
Any prospective employee, trainee or client wishing to raise a complaint under this policy should do so in writing to the Chair of the Company's Board within 15 working days, at the latest, of the alleged incident. An investigation will then be conducted by a representative of the Company who has not been previously involved in the selection procedure. The ruling of the Chair of the Board will be final, and the individual will receive written notification of the outcome.

Appendix G
Proposed Structure of the FLAG Partnership Board

The EFF Implementing Regulation (Article 23) states that:

> *The partnership shall comprise, including at the decision making level representatives of the fisheries sector and of other relevant local socio-economic sectors*

No precise numbers have been given as to the representation of different stakeholders on the partnership. This is because the premise behind Axis 4 is that the composition of the partnership should be adapted to local circumstances. There is no 'one size fits all' approach; it depends upon the specificities of the area. However, the membership should have access to adequate administrative and financial capacity to administer the assistance and ensure that the operations are completed successfully.

The following guiding principles are contained in the Regulation:

1. The Regulation states that more than half of the operations should be led by the private sector. This commitment should be reflected in the composition of the partnership. Local municipalities and public sector bodies remain central to the partnerships but they should not be in a position of overarching control. Private sector representatives (including representatives of the fisheries sector) and civil society organisations should be represented on an equal basis with the public sector.
2. Representatives of the fisheries sector are an obligatory and, in many cases, leading component of the partnership. However, the essence of the partnership is to forge local alliances and mobilise support around common goals - with decisions taken on the basis of practical negotiations between the partners. As a guiding principle, therefore, no single group of stakeholders should have more than 50% of the votes. Where possible, the composition of the partnership should reflect the socio-economic make up of the fisheries area.

It is recommended that membership comprise one member per organisation.

Fisheries Sector: 7 members

- Seafood Cornwall
- Seafood Cornwall Training LTD
- 2 Harbour Masters
- Cornish Fish Producers Organisation
- 2 Fishermen's Associations

Community and Public Sector: 7 members

- Penwith Community Development Trust
- Cornwall Association of Local Councils
- Cornwall Rural Community Council
- Cornwall Development Company
- Tourism Business Representative
- 2 Members from Cornwall Council

Independent

- Independent Chairman
- Independent Vice Chairman (LAG chairman)

Cornwall Development Company Secretariat.

Advisors

To be invited (as appropriate), they may include:

- MMO Field Officer
- Natural England
- Cornwall Council specialists
- Cornwall Inshore Fisheries and Conservation Authority
- Isles of Scilly Inshore Fisheries and Conservation Authority