

Fishing for a Future

An Analysis of Need, Challenges and Opportunities in UK Fishing Communities



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**A Research Report by Cornwall
Rural Community Charity & Rose
Regeneration on behalf of Seafarers UK**

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Foreword by George Eustice

Minister of State, DEFRA

Fishing plays an important part in the UK's history; across our four nations, the industry forms the backbone of many of our coastal communities.

As we leave the EU and look forward to a new era for fishermen, we have an opportunity to design a new domestic fishing policy – one which is in the best interests of all parts of the fishing fleet and allows our industry to thrive. As part of this, it is crucial that we consider how fishermen are properly protected at work, enabling them to prosper at sea, while providing assurances for their families on land.

There is no doubt that the remote working environment of skippers and their crews poses certain risks. The research in this report further underlines the toll that working conditions can take on the physical and emotional wellbeing of fishermen, as well as the impact this environment can have on their economic security.

The report proposes a number of practical interventions and solutions, which could make a real difference to improving fishermen's safety and wellbeing. Alongside these, the Government has already been taking positive steps to promote secure working conditions for fishermen.

Last year, the Maritime and Coastguard Agency (MCA) published a voluntary Safety Management System, facilitating enhanced documentation and review of incidents on board fishing vessels. The MCA has also been working towards implementing the International Labour Organization's Work in Fishing Convention

(ILO 188) this year, which will set out a clear framework for health and safety protection for all fishermen, regardless of location or employment status.

While this legislation marks vital progress in creating a more protective workplace, it is also imperative that industry supports individual fishermen in adopting these improved safety practices. The continued work of welfare charities, industry and Government will be necessary to create and maintain safe and secure working environments.

I would like to thank Seafarers UK for their efforts in helping our fishing industry to support a more productive, prosperous and sustainable workforce. I hope that this report will contribute to improving the safety and welfare of fishing communities across the UK. The maintenance and sustainability of a healthy and prosperous fishing fleet is crucial to our identity as an Island Nation.



George Eustice, Minister of State
Department for Environment, Food and Rural Affairs



Forward for a Fishing Future

At Seafarers UK we had long suspected that our fishing communities were the poor relations of our nation's maritime industry, but we needed some hard proof to guide our grant-making and thus we instigated this research project to provide that evidential base.

We hoped that other funders might join us taking the initiative forward, collaborating on strategic projects that could make a real difference to the ability of fishermen to sustain their livelihoods for longer, improve their health and wellbeing, and enhance the safety of their dangerous profession - but facts were needed.

The research has been informed by visiting and surveying ports, and talking face-to-face with working fishermen about their concerns. The interim findings were shared with fishermen and other industry stakeholders earlier this year during a forum hosted, appropriately, in Fishmongers' Hall. Thanks to the engagement and strength of debate from participants at that event, we are beginning to take these research findings forward and use them to make a real difference to the lives of fishermen themselves, their families and their communities.

Already Seafarers UK, the Fishmongers' Company and Trinity House are funding an 'animateur' programme, providing skilled and experienced individuals to work actively with fishermen to access European Maritime Fisheries Fund (EMFF) grants to support improvements to ports, vessels and individual businesses. A strategic health and dental programme is being developed by the Fishermen's Mission and the Seafarers' Hospital Society. The Fishermen's Welfare Alliance has been established to support fishermen to achieve compliance with new legislative requirements. Seafarers UK has also provided funding for two credit unions to enable them to offer access to affordable loans for fishermen needing to find a financial contribution before they are able to access EMFF funding to support their business development and safety enhancement plans. In a

relatively short time, we have made a great start with these initiatives, and their impact is already being felt.

However, there is still so much more to be done if we are to support our fishing communities, particularly those engaged in the inshore sector, into the future. This is a time of significant change for the UK fishing sector, with the as yet unknown consequences of leaving the European Union as well as the implementation of the International Labour Organization's Work in Fishing Convention (ILO 188). There currently exists a brief window of opportunity in which it is possible to leverage funding and help fishermen and their representative organisations to maximise their uptake of the EMFF, but this, and other longer-term measures, need co-ordinated action.

In the midst of such uncertainty and change we must join forces to guarantee that our fishermen, their families and the often remote communities in which they live and work are in a stronger position to face whatever the future may bring. Your help, involvement and collaboration is vital at this time. Seafarers UK calls on other funders to join us in backing some of the strategic initiatives identified in this research report, and helping to ensure that our fishermen have a safe and prosperous future.



Barry Bryant, Director General
Seafarers UK



Fishing For a Future

Purpose of the Research

Seafarers UK is a maritime charity and grant funder that has provided grant support to organisations working to help seafarers and their families for over a century.

In 2017 seafarers working in the UK Fishing Fleet, Merchant Navy, Royal Navy and Royal Marines benefited from grants totalling £3.5 million, awarded by Seafarers UK in 88 grants to over 60 organisations.

The Centenary period offered an opportunity to review strategic priorities and consider whether Seafarers UK's grant funding was being targeted in the most effective manner to address the greatest needs of the maritime sector. At the same time the Maritime Charities Group's research (Navigating Change, 2017) highlighted inequalities in funding support and level of need for seafarers in the Royal Navy, compared to the Merchant Navy and the Fishing Fleet. With potentially significant changes affecting the UK's Fishing Fleet, and Seafarers UK's Trustees directive to be more strategically focused on beneficiary need; the needs of fishermen rose high on the agenda. Seafarers UK decided to strengthen and enhance its commitment to supporting the needs of seafarers engaged in the UK's Fishing Fleet.

Seafarers UK's financial support for the Fishing Fleet has always been limited to grants to organisations providing front line services to fishermen; the most well known of which is The Fishermen's Mission. This change in direction necessitated becoming better

informed about the needs and challenges affecting the UK's Fishing Fleet, in order to understand how Seafarers UK's grant support could most effectively be targeted in the future to address identified needs and maximise its impact. This research report is the result.

Seafarers UK commissioned this research to develop an evidence base of the challenges currently facing the UK's Fishing Fleet. It is recognised that the implementation of the International Labour Organization's Work in Fishing Convention (ILO188) and the potential, but currently unknown, impact of leaving the European Union present both challenges and potential opportunities.

As such it was important to ensure that the research was informed by fishermen themselves and responded to their real needs and aspirations for their profession at this time of change. The approach taken for this research enabled those living and actively working within the UK's fishing communities to make their views known on potential solutions that could make a real difference to their working life, thereby enabling their livelihoods to be sustained and their wellbeing to be maintained.

Many of the solutions proposed in this report can be taken forward as individual funding initiatives, while others require strategic collaborative funding partnerships with others interested in supporting the UK's fishing communities. Grant funders, such as Seafarers UK, provide support for the safety and welfare of today's fishing communities and it is hoped this will contribute to making the fishing profession more appealing for new recruits and the fishermen of the future.



The UK's Fishing Fleet

The UK fishing industry has an economic value of less than 0.05% of GDP (NEF, 2017). Yet many of the 41 ports and harbours profiled in this research collectively provide the main sustaining economic driver for a large rural hinterland.

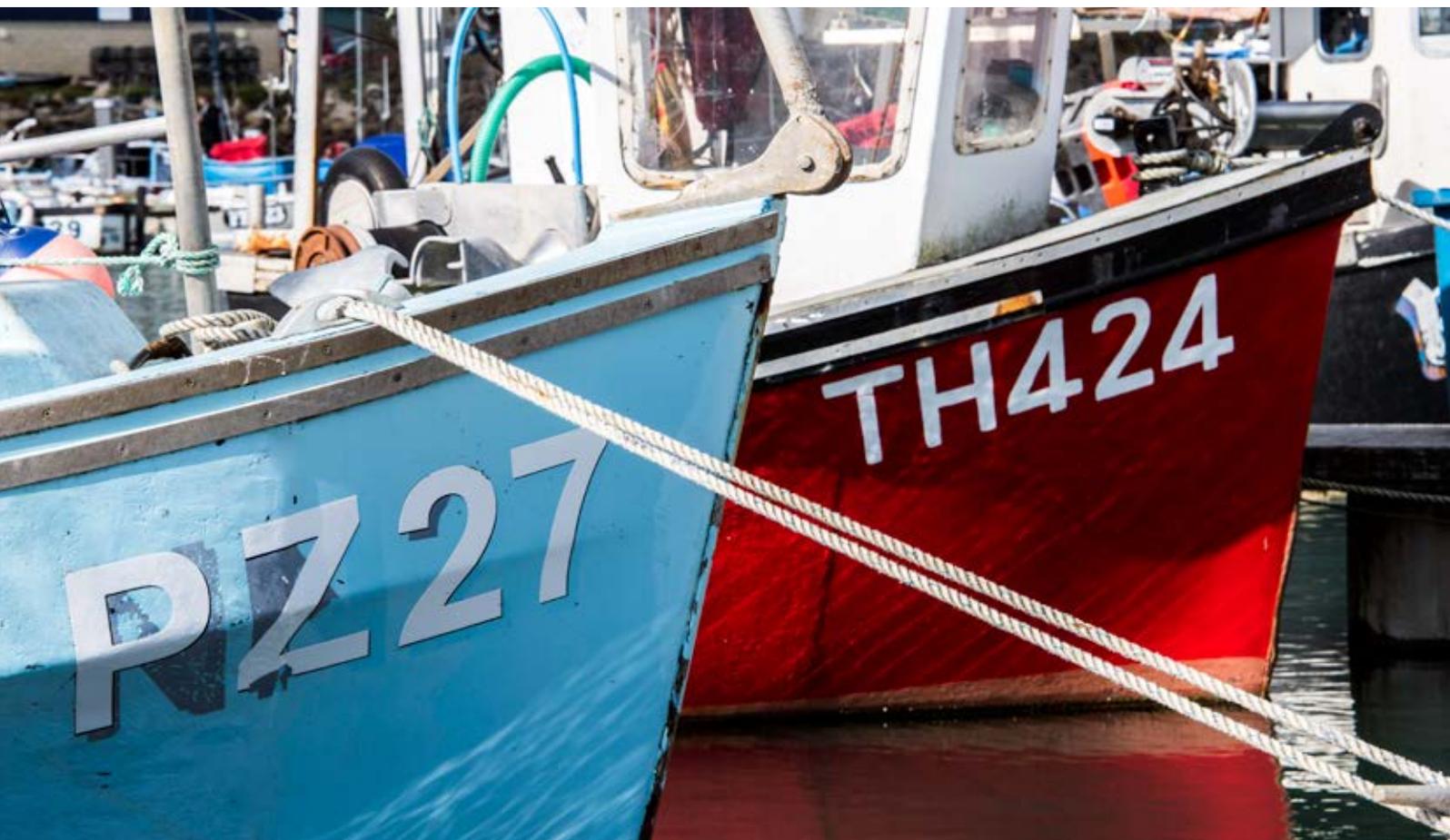
Some coastal communities use their fishing heritage to attract tourism and others remain reliant on fishing for income and employment opportunities; including and beyond fishing.

Fishing communities across the UK may have been in a process of gradual decline over the past 40 years, yet the UK is an island nation, fishermen are primary food producers and there still remains significant economic potential in the UK Fishing Fleet.

The fishing and fish processing industries employ 22,000 people within a total stock of 28.5 million

jobs across Great Britain (Business Register and Employment Survey 2015). According to data provided by the Marine Management Organisation in 2015, people directly employed in fishing accounted for around 12,000 of these jobs (Marine Management Organisation UK Sea Fisheries Statistics 2015). In 1987 the figure was approaching 25,000 (Ibid). These official figures are unlikely to reflect the true number of people engaged in a commercial fishing industry which utilises a self-employment model and has many casual and part-time crew members who aren't always captured in official figures.

Economic multipliers can be used to assess the impact of different occupations on the economy by considering the income of an individual and that individual's wider impact on the local economy through the effect their activity has on suppliers (in supporting indirect jobs) and services (in supporting induced jobs). This approach gives a fully rounded view of the economic importance of a sector. The analysis of these effects is expressed using input/output tables. Applying input/output data collated by the Scottish Government (2014) indicates that the 12,000 fishermen currently active in the UK economy support a further



4,000 jobs more widely. Other approaches using both related and different techniques suggest this figure could be significantly higher.

Total fishing income for UK vessels increased from £775 million in 2015 to £920 million in 2016. (Seafish, July 2017). This collective figure conceals a mixed picture of the UK fishing industry with some ports and areas dominating the picture, such as Peterhead in Aberdeenshire which lands 33% of the whole UK total value of landings.

According to DEFRA's April 2018 Vessels List there were 5,403 registered and licensed UK fishing vessels. There are many small-scale, localised, independent fishermen as of this number; around 4,222 are classed as Under 10 metre vessels. The New Economics Foundation identified that this 77% of smaller vessels have access to under 2% of the UK pool of fishing quota which is allocated on their behalf by the Marine Management Organisation (NEF, 2017). Such figures reveal the largely individualistic, small scale, nature of the industry.

“We want to use the opportunity of Brexit to secure a sustainable marine environment for the next generation.”

Michael Gove, MP (UK Environment Secretary) and Ruth Davidson, MSP (Scottish Conservative Leader) Joint Statement 11 March 2018.

Yet fishing is an enduring and traditional profession. It is possible to characterise fishermen as the last hunter-gatherers. However, the economic model which underpins the fishing industry does not fit a

traditional model of analysis. Whilst fishermen have relatively fixed costs to operate a fishing vessel, the return on that investment is largely unpredictable, dictated by the weather and determined by quotas and the value of each catch they land. It is characterised by significant uncertainty, which means that the usual correlation between inputs and outputs in economic terms does not apply and this may be a factor in the existence of a greater risk tolerance to secure a sufficient income.

The fishing industry is similar in many ways to the farming industry; both farmers and fishermen are primary food producers. The industry is heavily regulated, can be impacted by the weather and is managed in a way which is atypical compared to many other sectors. However, fishing has capacity (license) and output (quota) constraints which mean it is not only difficult to enter the industry, but it can also be difficult to scale up. Another significant difference is the existence of subsidies provided to farmers under the Common Agricultural Policy; compared to a lack of similar support for fishermen. Farming is a very visual part of our experience of the countryside, whereas the act of fishing is a lot less in evidence as it is typically located in relatively remote coastal communities and takes place at unsociable hours, out at sea and out of sight. This may be a reason why it has become a somewhat forgotten industry by those who do not live in coastal communities.

This research included an analysis of 41 ports, surveys and visits to talk to individual fishermen within their fishing communities. From this much has been learned from fishermen about their existing needs, forthcoming challenges and the potential changes that could be made to improve safety, wellbeing and the longevity of their fishing careers. Unfortunately, a lack of resources, capacity and time to submit funding bids mean that these needs rarely develop into realistic aspirations at a time when there are unique funds available via the EMFF funding scheme, operated by the Marine Management Organisation (MMO).

Possible Solutions: Convene collaborative funding support

- More effective support to address the safety and welfare needs of fishermen could help to retain a fishing tradition and sustain a UK Fishing Fleet into the future.
- The newly 'launched' Fishermen's Welfare Alliance, a national grant funder, such as Seafarers UK, or a Government Department can play a key role in utilising its convening power to bring together those interested in collaborating on the development and funding of strategic solutions identified by fishermen that will make the greatest impact and support the UK's Fishing Fleet.

Fishing Communities

41 ports across the UK were analysed during the course of this research

There is an important duality in the context of the fishing industry. On the one hand it is far smaller than its former self. Decline in many areas has left a legacy of community deprivation in known fishing locations such as Grimsby and North Shields. On the other hand, in these and other places, fishing still provides employment opportunities for many people and remains crucial in underpinning the viability of a number of particularly rural towns and hinterlands; this is particularly true in Scotland, for example.

To develop a comprehensive overview of the current socioeconomic characteristics of UK fishing communities, 41 ports, harbours and fishing communities across the UK were sampled and analysed during the course of this research. The ports were selected by size of fishing fleet, scale of landings and geographical distribution.

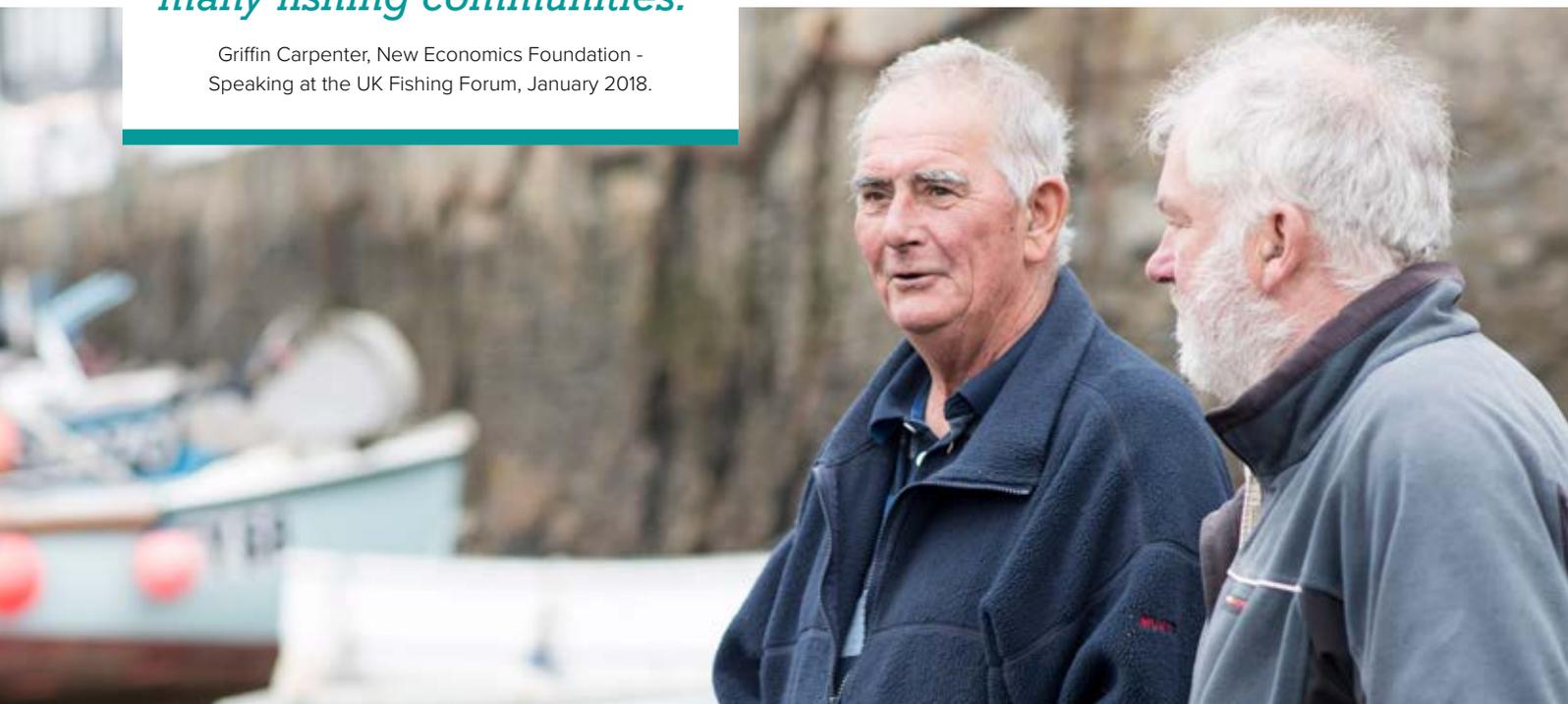
“The value of fish landings is now increasing year-on-year, and profits in the fishing industry are at the highest level recorded. And yet it is difficult to find signs of these positive trends in many fishing communities.”

Griffin Carpenter, New Economics Foundation -
Speaking at the UK Fishing Forum, January 2018.

Very small fishing fleets continue to operate in a number of settlements which were not included in the sample; this was due to lack of resources and in no way is deemed to signify their lesser significance as even the smallest pockets of fishing activity can make a significant localised contribution. For example, at the UK Fishing Forum, convened to discuss the emerging research findings, some participants provided a compelling narrative about the reduction in active fishing vessels experienced within the small fishing community in Eastbourne and near decimation in Emsworth which now has less than three remaining vessels. This is a picture which is reflected the length and breadth of the UK.

Having made a first selection of fishing communities to profile, the sample was tested with individuals active in the industry in order to firm up the overall sample. The final sample represents:

- 20% of all fishing communities in the UK with over 5 vessels
- 43% of all vessels in the UK
- 52% of all fishermen by home port (this is the day to day operational port for a vessel) and
- 76% of all fishermen by administrative port (the sub-regional port into which clusters of home ports are grouped for purposes of administrative analysis)
- 70% of the value of all landings in the UK



These are the 41 ports and harbours sampled for this research

Scotland	England	Wales
Aberdeen, Aberdeenshire	Amble, Northumberland	Holyhead, Isle of Angelsey
Anstruther, Fife	Bridlington, Yorkshire	Swansea, Glamorgan
Buckie, Moray	Brixham, Devon	
Campbeltown, Argyll & Bute	Coverack, Cornwall	
Eyemouth, Scottish Borders	Cullercoats, North Tyneside	
Fraserburgh, Aberdeenshire	Fleetwood, Lancashire	Ardglass, County Down
Kinlochbervie, Highland	Grimsby, Lincolnshire	Kilkeel, County Down
Kirkcudbright, Dumfries & Galloway	Hastings, East Sussex	Portavogie, County Down
Kirkwall, Orkney Islands	Leigh on Sea, Essex	
Lerwick, Shetland Islands	Looe, Cornwall	
Mallaig, Highland	Lowestoft, Suffolk	
Oban, Argyll & Bute	Newlyn, Cornwall	
Peterhead, Aberdeenshire	North Shields, North Tyneside	
Pittenweem, Fife	Plymouth, Devon	
Scrabster, Caithness	Poole, Dorset	
Stonehaven, Aberdeenshire	Scarborough, Yorkshire	
Troon, South Ayrshire	Shoreham, Sussex	
Ullapool, Highland	Whitehaven, Cumbria	

The geographic area of each port was identified by the postcode of the harbour master's office or a similar key feature in each port. The Office for National Statistics most relevant lower super output or data zone area for each port was used to collect data. Only where significant landings were made at the port has the value of landings using data from MMO UK Sea Fisheries Statistics 2015 been identified directly.

Whilst the number of fishermen by administrative port is publicly available, the number of fishermen by home port was considered to have the potential to reveal individual identities and so was not available for the purposes of this research. Instead the 2017 Seafish list of all vessels by home port has been used to derive an indicative number of fishermen by home port. The allocation of crew per home port vessel is based on discussions with key industry informants. For vessels under 10 metres the calculation has been based on allocating one person from 4 metres upwards. This has been increased in proportion to the length of the vessel by 0.25 full time equivalents (FTEs) per metre. An average figure of 5 people per vessel over 10 metres has been used.

Determining Deprivation

Each of the 41 ports were analysed using a combination of the following indicators:

Human Factors in terms of:

- Human – number of fishermen
- Economic – landings of significant scale
- Social – Indices of Multiple Deprivation in the UK

Contextual in terms of:

- Setting – under (rural) or over (urban) 10,000 population
- Nature – ratio under/over 10m vessels

This multi indicator analysis enabled a determination of whether the port could be described as experiencing deprivation or not.

Priority Areas

If the 41 analysed ports are sorted by the contextual settings, which score high on the indicators used, the following priority areas are identified:

Rural priority areas

These rural areas have a high number of fishermen, fish landings and deprivation:

- Ardglass, Campbeltown, Kilkeel, Oban, Portavogie

Urban priority areas

These urban areas have a high number of fishermen, fish landings and deprivation:

- Brixham, Fraserburgh, North Shields, Peterhead
- Newlyn, Scarborough

It is possible to sort the ports by individual indicators and by national geographies. Doing this, other interesting correlations can be identified:

Landings

- 8 (38%) of the 21 ports with significant landings have a high ratio of small vessels.
- 10 (48%) of the 21 ports with significant landings are rural.
- Over 66% of the value of landings comes from Scottish ports – with almost 33% of the whole UK total coming from Peterhead alone.

Deprivation

- 25 (61%) of the 41 ports are deprived (only 25% of the whole of the UK is deprived).
- 6 (32%) of the 19 rural ports are deprived.
- 19 (86%) of the 22 urban ports are deprived.
- 14 (66%) of 21 ports with significant landings are deprived.
- 11 (65%) of the 17 ports with a high ratio of larger vessels are deprived.
- 11 (46%) of the 24 ports with a high ratio of smaller vessels are deprived.
- 13 (65%) of the 20 home ports with over 100 employees are deprived.

Rural/Urban

Urban is defined as a settlement of 10,000 people or more.

- Overall the urban ports in our sample are considerably more deprived than their rural counterparts – 61% compared to 32%.
- 19 of the ports are rural and 22 are urban. This high percentage (46%) of rural ports is more than double the average UK rural population of around 20%.
- 8 of the 20 ports (with over 100 home employees) are rural, 12 are urban.

Employees

- 10 of the 20 ports with over 100 employees have a high proportion of larger vessels.
- 12 of the ports with over 100 employees have a high value of landings.

The analysis reveals that not only are more of the ports experiencing deprivation (61%) than the whole of the UK (25%), but even those ports generating significant levels of activity are impacted; with 65% of ports with a high ratio of large vessels and 66% of ports with significant landings experiencing deprivation. These statistics highlight the extent of deprivation experienced within fishing communities at all levels, regardless of the size of the port or vessels within it.

More specifically, the analysis reveals interesting national characteristics.

Scotland

Fishing operates at a far larger scale, particularly per head of population, than in the other three countries in the UK. Ports on the Aberdeenshire coast such as Peterhead and Fraserburgh operate at a different level of scale than most of the other ports in the UK. Many Scottish ports play a crucial role in underpinning the viability of very remote rural settlements. Particularly on the West Coast and in the Islands, fishing plays an important role in sustaining very isolated communities.

Northern Ireland

The fishing fleet is very significantly located in County Down and is characterised by a high proportion of larger vessels, and in many cases, a significant element of migrant labour.

England

The most substantial footprint is in the South West with Brixham and Newlyn being noteworthy, as well as North of the Tyne, which is home to the major port of North Shields. Grimsby is internationally significant in terms of fish processing which takes place in the settlement and provides substantial local employment opportunities. Based on the analysis used for the 41 ports, almost all the key ports in England suffer significant deprivation.

Wales

The fishing fleet is now very small and has a limited economic footprint, although there remain over 520 fishermen and a lucrative cockle gathering and processing industry, which continues to make a significant contribution to Welsh coastal communities.

Distribution of Key Characteristics of Profiled Ports



Further Information

An analysis of the socioeconomic characteristics of each of the 41 ports reviewed is available online at www.seafarers.uk/projects/fishing

Working in a Fishing Community

The analysis of the socioeconomic characteristics of the 41 ports identified significant levels of deprivation in some areas. In addition, respondents to the research survey identified a range of problems with their local port or harbour which impact upon their work.

A “need for dredging” was identified in many areas, while the natural characteristics of tidal ports presented common problems in respect of exposure to bad weather and being too shallow at low tide. The co-existence of tourism and / or leisure industry in a number of ports created a lack of parking, as well as mooring facilities, for the pre-existing fishermen and their vessels. Other respondents focused on the lack of facilities such as landing cranes, affordable cold storage and security.

Significant safety concerns were reported which included broken ladders, “a single exposed inadequate slipway for 10 boats” and a “rotten and dangerous wooden pier” in specific identified ports.

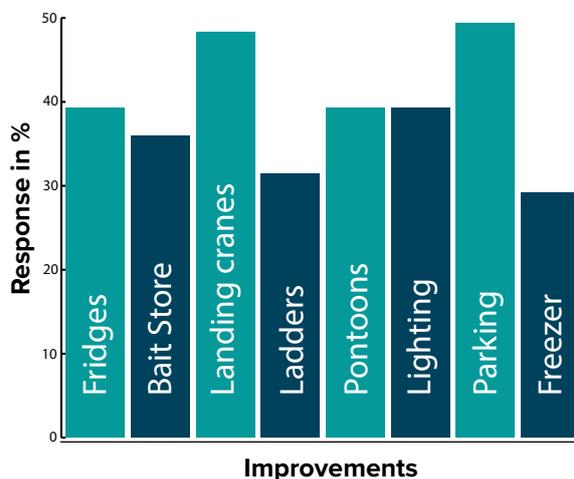
The Marine Accident Investigation Branch (MAIB) reports that poor access to vessels is a cause of serious, and sometimes fatal, incidents involving crew boarding or leaving fishing vessels (Marine Guidance Note 337). Fatalities of fishermen within harbours must surely be amongst the most avoidable. Typically, responsibility for ensuring safe access to vessels (including the provision of lighting) sits with the harbour authority. Many harbour authorities; particularly smaller port operators may need, and welcome, assistance to access development funding.

The analysis of the economic characteristics of the industry, viewed alongside the survey responses, reveals a picture of deprivation and creeping neglect in some areas as many smaller ports become increasingly challenged by the quality of their operational infrastructure. A more generalised picture of a lack of investment emerges from the research with 43.5% of all survey respondents stating that no improvements had been made to their harbour or port “in the last few years”. Those living and working in fishing communities that have experienced

apparent improvements to their port often found that the focus placed on marina development side lined and reduced the facilities, space and resources available for the pre-existing fishing industry. This can undermine an important part of the cultural heritage that attracted visitors to the location in the first place.

For many of the survey respondents, the solutions to their problems were clear. 89 survey respondents readily identified the improvements that could be made to enhance their port or harbour with parking and landing cranes mentioned most often (49% and 48% of respondents, respectively). Surprisingly, seemingly basic needs such as lighting (39%) and pontoons (39%) also figured highly in the list of improvements. For these fishermen, relatively simple changes to their place of work could make a significant impact on their working lives.

Harbour Improvements identified by Survey Respondents



The port visits revealed that a number of smaller ports would benefit from investment in buildings which provide better rest and social facilities for fishermen. The buildings could also provide scope for fishermen to obtain a better price for their catch through the provision of new processing and marketing facilities – including the opportunity to sell direct to the public at the quayside.

The provision of simple port infrastructure - including items such as cranes and icing equipment, could make a significant contribution both to the quality of the fish landed and the number of years older fishermen can continue to work in the industry, thereby enhancing and sustaining the income earned by fishermen. This is particularly true in the smaller ports within the sample.

“Grant funding is very difficult to access for a large project. I would say almost impossible. Even with professional help it’s been a long process.”

The financial support required for infrastructure improvements could be accessed from the Coastal Communities Fund or the European Maritime and Fisheries Fund (EMFF). It is currently understood that the UK will continue to participate in programmes such as the EMFF until 2020, and projects not completed by the UK’s exit date from the EU will be fully funded under a Treasury guarantee. Some Fisheries Local Action Groups (FLAGS) are well subscribed, while others have reported low take up of the EMFF funding available to deliver their local strategies. This may be

caused, in part, by a lack of access to match funding to place against the funding available from the EMFF

It is also necessary to recognise that even experienced fundraisers can find European funding applications to be complex, lengthy and somewhat difficult to complete. Recognition of this point leads to a realisation of how daunting such funding applications can be for fishermen lacking the experience, time and capacity required.

Possible Solutions

Support harbour infrastructure improvements by maximising funding take up

- It is recognised by the Marine Accidents Investigation Board (MAIB) and the Maritime and Coastguard Agency (MCA) that safe access to fishing vessels is a critical area that needs to be improved to prevent accidents and fatalities in harbours. Harbour authorities will need to be engaged and supported to take forward infrastructure improvements that will help to target the existing deprivation and neglect found in many UK fishing communities.
- At present there is an available opportunity for funders to leverage their funding to match fund EMFF funded projects and initiatives. Funding opportunities also exist through the Coastal Communities Fund. It is possible that some harbour authorities may welcome support to access such development funding for infrastructure improvements.



Living in a Fishing Community

“Seafarers are still among the least visible of UK workforces and continue to face needs unique to their occupation”

Walker and Fairclough, 2017

Discussions at the UK Fishing Forum reinforced the fact that financial insecurity arising from the uncertain nature of the profession not only underpins the preparedness of fishermen to take safety risks, but also drive a number of other negative lifestyle behaviours that impact wellbeing.

“Fishing is characterised by the uncertainties involved (if you catch, what you catch and the income this will generate).”

This consequential behaviour has previously been documented in research from the Maritime Charities Funding Group which identified five lifestyle characteristics of seafarers. The following list has been adapted from MCFG, 2007:

1. People in the seafaring community often experience feelings of separation and isolation.
2. Seafarers face constant demands for re-adjustment between being at home and at sea.
3. Seafarers and their families and dependants may face physical and emotional problems linked to separation, isolation and adjustment.
4. Seafarers' lifestyles are often characterised by using personal skills and resources to solve problems and a reluctance to seek support from others, including maritime welfare charities.
5. Poverty and debt are prevalent - particularly among fishermen, young seafarers and their families aged 40 years and under.

Almost 50% of all ports within the sample were characterised by low incomes. The seasonal and uncertain nature of the income generated by fishing, whether for “share fishermen” in bigger crews or smaller inshore operators (some of which may still be share fishermen), mean that many fishing families face significant financial challenges and are more likely to struggle to ‘make ends meet’. These challenges impact on other aspects of

life for fishermen, such as the ability to sustain a mortgage or regular rental repayments.

Housing deprivation was experienced in 32% of all the 41 ports analysed. A wide body of evidence (port visits in particular) indicated that most of the challenges in this regard were around fishermen and their families being housed primarily in the private rented sector with, sometimes, uncertain incomes with limited financial resources to support them through hardship, for example through periods of ill health; thereby causing rent arrears to arise.

“It is hard to prove income and the mortgage companies do not like the uncertainty and variations in the income.”

A significant number of the ports studied demonstrated evidence of poor health amongst their fishermen and the wider community. Over 50% of survey respondents experienced characteristics of health deprivation. The literature review and port visits further substantiated these findings; revealing amongst some fishermen evidence of a poor lifestyle in terms of diet and substance misuse.

When directly questioned in the research survey, the majority of fishermen described their health as ‘good’, but over a third managed long term, chronic conditions. This is similar to previous research which identified that a high proportion of older fishermen have at least one disability/long-term illness affecting their everyday life (Opinion Research Services, 2016). Also reported were high levels of fatigue, stress and lack of sleep; all of which have potential to cause human error and impact on accident levels; particularly in a dangerous work environment.

“I’m unwilling to retire. But my body says I should.”

Specifically, almost 79% of survey respondents, across all ages had work-related back pain. During the research process, the impact of a harsh work environment was described by a partner of a fisherman:

“My partner suffers from mild COPD [Chronic Obstructive Pulmonary Disease], diabetes, and is in constant pain with arthritic joints due to the years at sea and the hard graft”

In total, 64% of family members who responded to the survey felt that their fishermen did not take care of their health. Furthermore, the impact of a fishing career was also noted by 51% of family members who expressed the view that fishing sometimes impacted on their lives.

Not just physical health problems were noted, there was also evidence of mental health issues and depression experienced by fishermen. As well as evidence of “over the counter” opiate addiction. Health problems may be exacerbated by difficult working conditions on vessels and at ports and by lengthy periods of isolation while at sea. The following statement from a survey respondent takes a philosophical approach to the mental health challenges that arise from the financial insecurity of the fishing profession:

“I am already taking medication for depression and there is nothing they can really do when the symptoms get worse as they do in times of hardship.”

A short survey was distributed to General Practitioners (GPs) and dentists operating within fishing communities. Of those surveys returned only 1 respondent indicated that they were not aware if fishermen and their families were registered patients. All surgeries considered that they were able to provide flexible appointments and out of hours. However, only 2 surgeries were able to access outreach services and community nurses to support health checks, which may become



pertinent in the future for fishermen under the current planned ILO 188 legal changes.

The most frequently cited service that surgeries were unable to access related to mental health. This could be considered significant, given that over 95% of fishermen responding to the main survey indicated they suffered from stress. Conversely, surgeries did not indicate mental health within the most cited health concerns of fishing families. Instead the most frequent health concerns presented at GP surgeries were:

- Back Pain
- Smoking
- Excessive alcohol consumption
- Respiratory problems

Unfortunately, the majority of surgeries responding to the survey were not aware of fishermen specific services available from maritime welfare charities and therefore did not make referrals to these organisations that may be able to help fishermen further. Such services include:

- Seafarers' Hospital Society
- Seafarers' Advice & Information Line (SAIL)
- Dreadnought Medical Service
- Big White Wall (provided via Seafarers' Hospital Society)
- Free Physiotherapy Services (which tend to be geographically limited)

Findings from the survey indicate that there is scope to promote these, and other bespoke health services, for fishermen and their families more widely. However, feedback provided at the UK Fishing Forum made it clear that it would be necessary for a single portal or point of contact to exist through which fishermen and their families can be informed of, and connected with, the services they need.

Although fewer fishermen responding to the survey are registered with dentists than doctors, almost 82% were still registered and of that group, the majority had seen their dentist within the last year. Unlike GP surgeries, 43% of dentist surgeries were able to offer flexible appointments to accommodate irregular and anti-social working hours. Although 5 surgeries were able to provide access to dental outreach services, 4 of these were in the Scottish Highlands – this may be because of the dispersed nature of the area rather than in response to a specific recognition of the need to work flexibly to support fishermen. 3 surgeries responding to the survey indicated they would be interested in supporting an outreach service subject to funding – these

were in Kilkeel and Penzance and Shoreham (In Shoreham the service is already available through Sussex Community NHS Foundation Trust).

Seventeen stakeholder interviews of an hour in duration were held with organisations which offer services, advice and support to the fishing community. The outcomes of these interviews reinforced many of the above points particularly around mental health challenges, poor health and lifestyles. In addition prescription and over the counter opiate addiction were noted, along with a crisis based approach to managing personal health (i.e. only seeking help when a condition becomes critical).

Alongside references to austerity and a reduction in public services and support was a view held by some fishermen that statutory services (particularly health and personal care) were not able to respond effectively to their particular distinctive needs and circumstances.

Experience from other settings suggests health interventions work best when health screening and facilities such as mobile dentistry are made available at locations where people work. In addition to specific health interventions for fishermen there is real scope to engage the wider fishing community, including families, more broadly through campaigns which provide and promote healthy living opportunities. Ports, by their nature, are always at the edge of places, and fishermen spend long periods of time isolated at sea. Service providers need to tackle these unique challenges by taking appropriately designed services to fishing communities, instead of expecting fishermen and their families to always come to them.

“There are lots of people wanting to help. But fishermen need one place where they can go to for support and a coherent message. That’s how you enable change: by making fishermen aware of the support and services that are out there.”

Participant at the UK Fishing Forum, January 2018

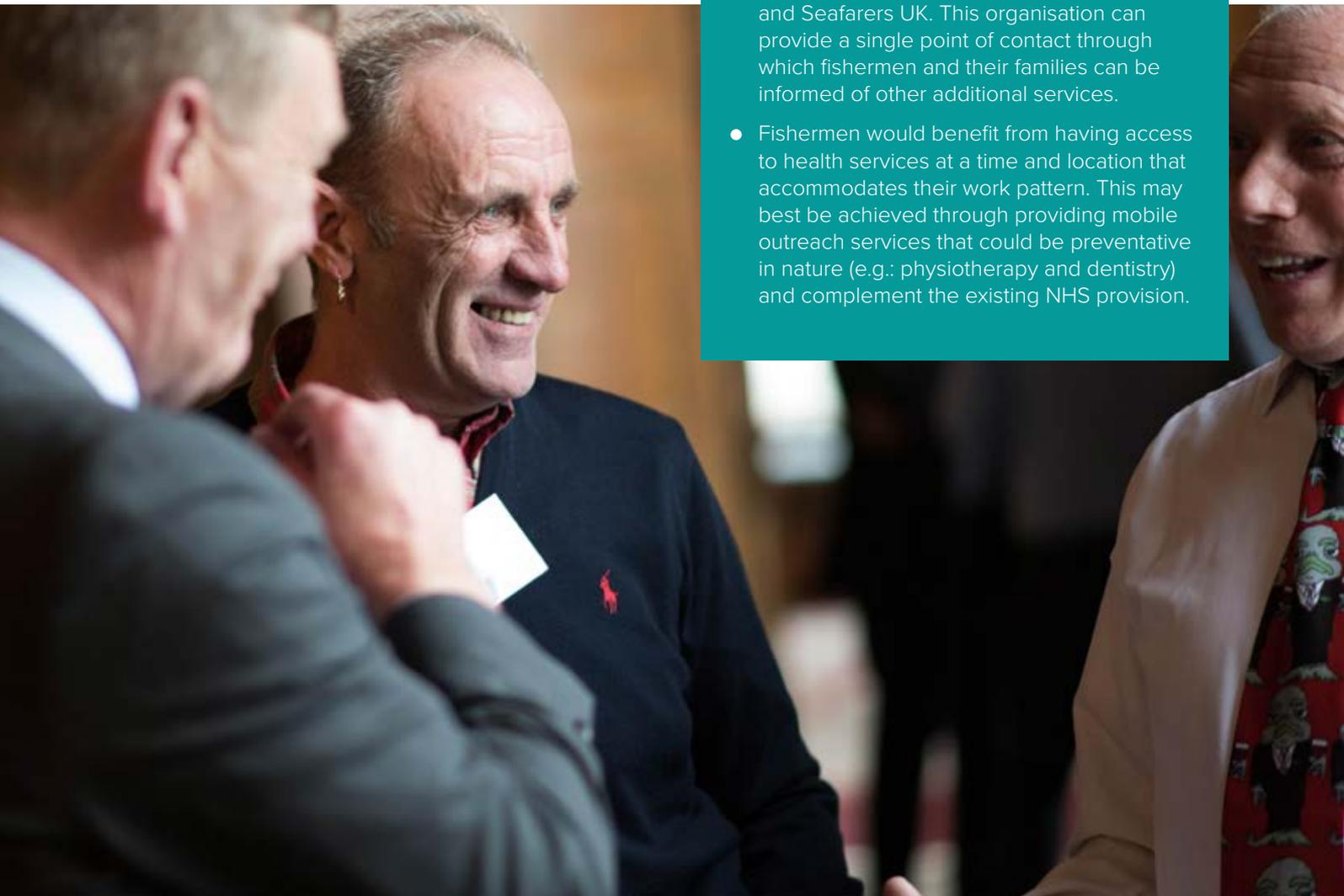
While there are different patterns of need among fishermen and their families, rather than a general picture, the common issues identified by support organisations relate to poverty, debt, ill-health and a requirement for affordable and accessible advice to address some of the challenges arising from these needs.

The literature reviewed during the course of this research suggests a high proportion of the seafaring community (up to 50% cited in some reports) will have needs that charities and support organisations are able to meet or alleviate. There is a range of different support services available to fishermen: from industry specific bodies such as producer organisations to welfare based organisations and charities such as the Fishermen's Mission. Many of these organisations have a direct and well-known presence within the fishing communities they serve. Much of the support provided to fishermen and fishing families relates to helping them to make ends meet, provide extra comforts and / or cope with crisis.

As a result of the interviews undertaken with stakeholders it is apparent that a good level of support is available to fishermen and their families, once fishermen are aware of it and help is offered. Unfortunately, there is a tendency for help to be more crisis than preventative in nature as, anecdotally, it is believed that many fishermen prefer to keep a problem to themselves until it becomes overwhelming.

Possible Solutions: Raise awareness of available support & develop health outreach services

- There is substantial scope to raise public awareness of the different maritime welfare charities and the support that they can provide to fishermen. A single access point can be achieved through active promotion of the Seafarers Advice & Information Line (SAIL) which is managed by Greenwich Citizens Advice Bureau and co-funded by Seafarers Hospital Society and Seafarers UK. This organisation can provide a single point of contact through which fishermen and their families can be informed of other additional services.
- Fishermen would benefit from having access to health services at a time and location that accommodates their work pattern. This may best be achieved through providing mobile outreach services that could be preventative in nature (e.g.: physiotherapy and dentistry) and complement the existing NHS provision.



A Fisherman's Life

“Fishing is a lifestyle as well as a job”

Maritime Charities Funding Group, Opinion Research Services, 2016.

226 responses to the online survey were received. These came from fishermen in 69 different harbours and fishing communities across the UK. 82% of respondents were full time fishermen, with 48% fishing for over 51 hours each week.

Respondents to the survey were predominantly self-employed; either as self-employed share fishermen (75%) or paid a day rate (10%). Only 7.6% of survey respondents were fully employed with a contract of employment.

The research survey supported previous research findings of a “declining and/or ageing workforce” (FARNET, 2017; Reed et al, 2011; University of Aberdeen, 2002). 73% of all respondents were aged between 41 and 70 and over 64% of all respondents had been fishermen for more than 20 years. 85% of respondents came from multi-generational fishing families (two or more generations). Over 50% were owners and skippers. 52% planned to hand their boat on to the next generation of their family at the time they retired from fishing while 48% planned to sell it as their “retirement fund”; presumably in lieu of any more formal pension planning. However, it is necessary to note that may be an over optimistic ambition given the lack of entry pathways into fishing and the financial and regulatory barriers that prevent new recruits.

92 fishermen each had over 20 years fishing experience, with a collective total in excess of 1,500 years.

In almost 50% of all ports in the sample significant levels of deprivation in terms of educational achievement were revealed with just over half of survey respondents, across all age ranges, attaining secondary school level qualifications in English, Maths and Science. This supports other research findings which identified that fishermen are skilled at what they do but often lack formal academic qualifications (Creative Research, 2009). Such a lack of basic literacy and numeracy skills affects many safety and welfare issues; from managing personal finances to reading and comprehending written safety notices, not to mention the need to keep up with changing legislative requirements.

A tradition of limited participation in formal education and training has led to a low-skill/low wage equilibrium in many port settlements. The low formal educational

achievement requirement for entry into the fishing profession means many skills are “learnt on the job”. However, increasing financial pressures on owners and skippers make it increasingly difficult to provide such learning and development opportunities for new entrants, particularly when there are cheaper, trained, foreign crew available to take up job opportunities.

A lack of formal educational qualifications does not mean that fishermen are not resourceful, resilient or capable. Indeed in many cases they demonstrate a broad range of skills equivalent to that of many small business entrepreneurs. The informal nature of these skills means that fishermen are often ill equipped to demonstrate their abilities outside of the fishing profession, where employers and investors typically rely on formal qualifications as a measure of capability.

Of the 61 fishermen who fished on their own, 27.8% identified the lack of availability of suitable crew as their reason; while 54% acknowledged that a “lack of income to support a crew” was an underpinning reason. The financial insecurity inherent within the fishing industry is a significant factor for many, as summed up by the following respondent's statement:

“I no longer wish to fish with a crew as I do not want the responsibility of having to make a wage for someone else.”

It is apparent that fishermen continue to feel under constant financial pressure from the unpredictable nature of their earnings (Creative Research, 2009). For some artisanal fishermen, their fishing activities are cross-subsidised by taking supplementary employment onshore (Brookfield et al, 2005; The Scottish Government and Economic & Social Research Council, 2008).

It is important to remember that while the nature of a fisherman's work has similar characteristics in terms of the natural work environment and the physicality of the role, not all fishermen are the same. There are differences in the nature and experience of work for inshore small scale fishermen, fishermen who are the skipper of a crew and those fishermen engaged as working crew on larger vessels.

This difference has previously been captured and categorised (Creative Research 2009) as fitting within one of three groups:

- Leaders: who are strategic and business focused and proactive in looking for solutions,
- Lieutenants: who are highly skilled fishermen and skippers likely to follow leaders and
- Followers: who are crew and those skippers who want to carry on doing what they've always done.

Many leaders / sole operators may be independent self-employed individuals who are responsible for the full range of typical business needs – from financial matters such as paying their tax and national insurance amongst other bills, to health and safety, marketing and selling, and keeping abreast of legal requirements and industry developments. A skipper of a crew, however, is responsible for all this as well as employment, personnel and payroll matters related to his crew. Many fishermen benefit from shore side support provided by family members, who manage a range of issues, including taxation, accounting and responding to requirements from authorities.

It is apparent that fishermen have a range of different roles and experiences. Some may require a broader skill set akin to any small business owner. This is a different experience to a fisherman who is a crew member paid a contracted salary, or more likely, a percentage “share” linked to the value of the landed catch.

Not only do the skills required to be an effective fisherman vary depending on the nature of an individual’s engagement, there exists a number of competing demands in respect of legislative and regulatory requirements as well as fisheries and port

management. An area of particular concern spoken about by many of the fishermen who attended the UK Fishing Forum was in respect of the restrictions of quotas and the necessity of discarding caught fish that exceed the quota. Comments highlighted the impact of this upon morale as well as income:

“We can put up with bad weather but the hardest thing is throwing good, marketable fish over the side.”

The extensive range of organisations leading these different areas which affect fishing reveals the challenge of keeping abreast of latest developments and innovations affecting the industry when the majority of time is spent at sea trying to earn an income. Those with perhaps the most complex overall demands are the fishermen who operate independently as sole fishermen in smaller, often under 10 metre vessels. It is perhaps not surprising that many spouses, partners and family members also become involved in other aspects of the fishing business such as marketing and selling or financial management of the accounts.

The nature of the industry can be very isolating and engenders independence. There are also relatively low skill levels, uncertain incomes (which can be impacted by time not spent at sea), a dislike of “officialdom”, a sense of being a little understood community. These factors when combined with



“In fishing you never have the opportunity to catch up. The enjoyment and thrill in fishing has gone... You have to capitalise on a successful day as you’re never sure when your next good day is coming.”

a limited experience of working with public and voluntary bodies outside of the fishing industry mean that fishermen tend to miss out on many “one size fits all” opportunities. This can lead to low levels of take-up for many existing schemes of support.

Indeed, some Fisheries Local Action Groups (FLAGS) had reported low take up of the European Maritime and Fisheries Fund (EMFF) available to deliver their strategies, while other FLAG areas, such as Cornwall, have been able to maximise their take up of this funding. The experience in Cornwall suggests that ‘Animation’ may be the antidote to this.

Animation is a term used in some parts of the European fishing industry. Animation involves providing active, hands-on support from a dedicated individual (an ‘animateur’) from within the local industry to identify and work up the details of projects, with and on behalf of, fishermen. The animateur is providing more than business support as they are required to work intensively with individuals and groups of fishermen to provide the expertise to achieve things which they would be unable to address on their own. In this respect the animateur’s role is much more than a facilitator or co-ordinator. Instead, it requires a relationship of trust to be established between the fishermen and the animateur to enable the animateur to gain the insight needed. The animateur operates effectively on the fishermen’s terms, because without their full trust the animateur is not able to fully engage with the issues facing fishermen; thus it is of vital importance to ensure that the animateur is the right person to provide the support. The animateur’s role may be funded in advance in order to provide an animation service at no cost to the supported fisherman.

It is recognised that the Marine Management Organisation provides a dedicated help line for applicants to get help on their EMFF grant application. However, many of the smaller scale fishermen that an animateur would be working with lack either or both the digital and / or basic skills to submit an application.

An example of the areas of activity an animation project can involve is set out in Annex 3.

Possible Solutions: Support Animation

- In recognition of the differing skills of fishermen and the low level of take up of EMFF funding opportunities that have been reported in some areas, it will be necessary to provide support for animation to engage and work intensively with fishermen.
- An animateur can be engaged to develop and take forward the fishermen’s ideas which have potential to make a real difference to their working environment, their personal safety and their ability to develop their business.
- Developing business plans and funding applications for initiatives that fishermen have identified but lack the time, experience or capacity to take forward on their own will enable EMFF funding and other funding to be accessed. This funding can support infrastructure improvements to increase economic efficiency, provide added value to the catch, and enhance the safety and working conditions of fishermen.

A Dangerous Profession

“There is considerable tolerance of risk, both by fishermen themselves and by society”

Lloyd's Register Foundation 2017.

Fishing is seven times more dangerous as a profession than the next most dangerous profession in the UK (Lloyd's Register Foundation 2017). Given the unstable work environment of a vessel at sea, moving equipment parts and incidences of unsafe harbour infrastructure ashore, it is not surprising that accidents are common, and fatalities occur. Yet fishing vessels have been excluded from the vast majority of provisions of international shipping conventions. It is acknowledged that the formulation and enforcement of regulations has an important role to play in improving safety. However, laws and rules are ineffectual within a historical culture of bravado which prizes the high rewards obtained through taking risks, and a contemporary culture driven to take risks in order to earn a sufficient income.

It appears from the research that the inherent danger and risk to personal safety is something fishermen are all too fully aware of. Experienced fishermen sometimes devise helpful ideas and initiatives to improve safety, but presumably a lack of time, capability or organising power gets in the way of taking the initiative forward. This is demonstrated by this life saving idea from a survey respondent which has been worked on previously and would be helpful to pursue to completion:

“There is a need for a man-overboard system for single-handed fishermen that ties in an engine-stop feature and a satellite DSC (Digital Selective Calling) distress alert. This would save lives.”



In such an acknowledged dangerous profession, the research identified a high tolerance of risk and low levels of safety awareness amongst many fishermen. The previously discussed lack of literacy and numeracy skills may fundamentally underpin many safety issues; particularly in respect of understanding and adopting new safety practices and attending safety training. It is also possible that the roots lay deeper and are a consequence of historic, generational cultural behaviour which link a heightened risk appetite to the uncertain and challenging nature of the profession with financial wellbeing.

“Fishermen risk their lives putting food on the table”

Scottish Courts and Tribunals Inquiry 2012 FAI 22

The need to work and generate an income can often override safety considerations; this is particularly true in respect of attending training. There exists an extensive and well-established network of training providers who provide courses for fishermen. These meet both the regulatory requirements and provide access to wider opportunities around business development and other activities. There is a one day sea survival training course which is mandatory before going to sea. Three further one day courses must then be completed within three months in first aid, basic health and safety and basic fire-fighting, thereby obtaining four basic certificates that demonstrate an ability to work at sea. All UK training centres run these courses and refreshers are recommended.

Completion of the mandatory training course by survey respondents appeared good. However, only 50% of respondents, across all age ranges, had undertaken any recent refresher training courses in terms of the certificates required to work at sea. Some respondents noted the distance of their nearest training centre as a factor. This is particularly significant in respect of the time it would take to travel, in addition to attending the training – all of which require more time away from fishing and thereby limit earning potential. However, many training providers are prepared to travel to hold training at a time, and in a location, to suit their clients.

Of the remaining 50% of respondents who had not taken a refresher training course in the last 3 years, lack of time and being too busy were commonly cited as reasons. Perhaps unsurprisingly, most

fishermen are reluctant to engage with training, often because they perceive it will cause a loss of income they would have earned if out fishing:

“All the courses are generally when we’re at sea. You miss a tide and you’re down half a month’s income.”

Others expressed a view that practical experience is the best teacher:

“Its basic stuff and being at sea teaches better than sitting in a room ticking a box.”

From the research, it appears that training is perceived as, at best, a “necessary evil”. To address this, evidence found in the literature review during this research, suggests that when other fishermen are prepared to act as trusted intermediaries, promoting the benefits of training, and in some cases, playing a role in delivering the training, a better take up rate is achieved (e.g. Scottish Government & E.S.R.C. 2008).

The research identified that very few fishermen take sensible safety precautions. For example: 56% of respondents don’t wear a Personal Flotation Device (PFD) on a regular basis. Less than 20% of the survey respondents wear a Personal Locator Beacon (PLB). Both devices can significantly increase the potential for rescue if a person falls overboard. Importantly, in the very worst scenario, they can help to aid the recovery of a body and its return to the family.

An average of 10 fishermen per year are lost at sea; a total of 100 fishermen in the past decade (Seafish, 2017). The Maritime and Coastguard Agency’s (MCA) Safety Code will provide a framework to enable the MCA to enforce the wearing of PFD’s or equivalent safety measures. This new requirement is most welcome and it is hoped that it will go some way to supporting the MCA’s Fishing Industry Safety Group to achieve its stated objective of reducing deaths to zero by 2020. But the key to this objective is an overall change in behaviour and to this end behavioural training is needed, alongside mandatory safety training.

The Fishermen’s Mission recently launched a ‘100 in 10 Campaign’ in which the statistic is used to raise awareness of the dangers of being a fisherman. The campaign specifically highlights the

devastating impact on families and communities when fishermen are lost at sea. This approach recognises that a cultural shift in respect of safety is unlikely to be achieved through legislation alone. Instead, behavioural change may more effectively be achieved through placing a focus on the impact on loved ones left behind, following a fatality.

The research also revealed that less than a third of survey respondents worked on a vessel with a life raft. For some fishermen their reasoning was based on purely practical considerations as demonstrated by this response:

“It is ridiculous to expect an under 8m vessel to carry a life raft. The MCA [Maritime and Coastguard Agency] need to get real. Soon I will need to tow another vessel behind my one to carry all the safety equipment required.”

This somewhat ironic response achieves greater context when it is recognised how few crew comforts may exist onboard some vessels. For example: 44 fishermen out of 76 (58%) respondents to the survey question indicated that they had no basic facilities on board their vessel such as hot water, heating, a shower or sleeping area. The limitations on crew comfort and safety onboard are underlined by one respondent who stated that he did not have any crew comforts at all “unless I take a flask of tea”.

At the same time survey respondents reported their lack of participation in training and unwillingness to adopt new safety practices; they also reported that accidents at sea were commonplace. Some survey respondents reported having experienced capsized and sinking vessels as well as falling overboard, while over a third reported ‘minor’ injuries received as a result of accidents. These included fractures, partial loss of fingers and fingertips and a lost thumb. While many hand injuries were caused by filleting knife accidents, others were winch or hauler accidents. Jellyfish stings and various crush injuries from equipment such as a clam dredge, pots, net bins, etc were also reported. These findings are supported by recent research from Seafish who identified 535 serious injuries to fishermen in the last 10 years.



photo: www.seafish.org





Fishermen's tolerance, and even acceptance, of the risk involved in their profession would be unlikely to be tolerated in any other industry. While culture may be an important factor, there exists limited media interest and a lack of enforcement and prosecutions following deaths of fishermen, albeit such action would be more relevant in respect of deaths of fishermen serving as crew on larger vessels than small, often sole, operators. Some stakeholders when reviewing these research findings have also suggested that there is an inconsistency towards health and safety displayed in the approach of the Health and Safety Executive (for land based incidents) and the Maritime and Coastguard Agency (for incidents at sea), with scope for the MCA to adopt a more robust approach towards enforcement. It is apparent to industry observers that a voluntary approach towards safety has not prevented deaths and serious injuries, and it may now be time to consider a more rigorous, supported and enforceable approach to improve safety practices in the industry.

It is anticipated that new legislative requirements will support an improvement in safety practices. Surprisingly, one third of survey respondents were aware of the International Labour Organization's Work in Fishing Convention (ILO 188) which will be implemented in the UK in 2018, although 70% of respondents to this question indicated they would require help to comply with it. Fortunately, there is still time to put this support in place as the national representative bodies are working on raising awareness of ILO 188 within the sector and supporting compliance by promoting the existence of a newly developed Safety Management System. Meanwhile the Fishermen's Welfare Alliance has been established with a purpose of helping to ensure new legislative requirements are implemented in a practical manner and that fishermen are able to meet and demonstrate their compliance.

The preparedness of fishermen to take health and safety risks, was borne out by discussions with third party stakeholders. They shared a perception that some fishermen can be reluctant to adopt best practice safety initiatives. This may derive from existing customs and practices which fishermen have adopted over the years and become reluctant

to change. There was agreement amongst these stakeholders that the introduction of the new Convention on living and working conditions on fishing vessels (ILO 188) would cause many fishermen some difficulty in raising sufficient finance to comply with the new ILO 188 requirements relating to health and safety. Therefore it is recommended that achieving compliance with ILO 188 should be a priority area for support. Fishing fatalities must no longer be accepted as inevitable.

Possible Solutions: Support Safety Improvements

- Funders are encouraged to support initiatives that aim to improve behavioural change in respect of safety practices in order to reduce death and accidents at sea and in harbour.
- Existing examples of supporting safety improvements include Seafarers UK's funding support for Personal Flotation Devices and Personal Locator Beacons. Guidance for applicants includes a requirement to also access EMFF funding and support behavioural change in respect of wearing, and not just providing, the safety equipment.
- Support for engagement and compliance with ILO 188 is highlighted as a priority need.



The Business of Fishing

Recent dynamics affecting the fishing industry include falling fuel costs and rising market prices for fish landings. These have been accompanied by increasing pressure on non-quota fishing stocks, the arrival of new and sometimes unwelcome species and disruption to fish stocks caused by climate change.

There also exist challenges with the recruitment pipeline of crew leading to the introduction of more migrant workers as well as the unpredictability associated with future fisheries policy following the UK's decision to leave the European Union.

Recruitment

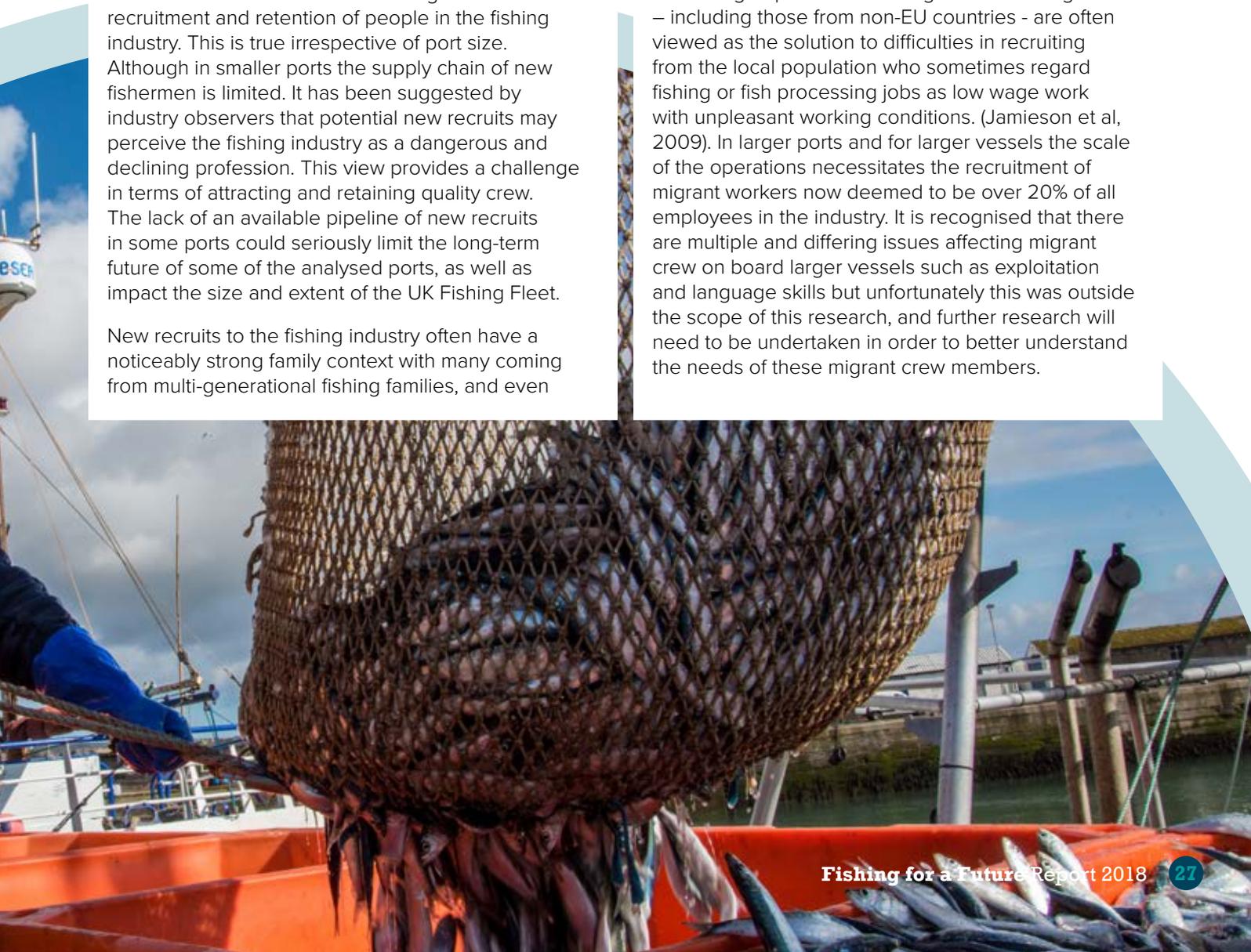
The research identified real challenges around recruitment and retention of people in the fishing industry. This is true irrespective of port size. Although in smaller ports the supply chain of new fishermen is limited. It has been suggested by industry observers that potential new recruits may perceive the fishing industry as a dangerous and declining profession. This view provides a challenge in terms of attracting and retaining quality crew. The lack of an available pipeline of new recruits in some ports could seriously limit the long-term future of some of the analysed ports, as well as impact the size and extent of the UK Fishing Fleet.

New recruits to the fishing industry often have a noticeably strong family context with many coming from multi-generational fishing families, and even

taking over responsibility for a vessel previously owned by another family member. However, it has been suggested (White, 2015) that increased educational provision and improved social and spatial mobility amongst fishing families has caused recruitment through a father-to-son pathway to become less common. While increased regulatory and financial barriers also restrict entry into the fishing industry (Plymouth Marine Laboratory and the Marine Biological Association, 2013).

There are also a lack of pathways encouraging recruitment into the fishing industry. Some do exist, such as Seafish's collaboration with the Maritime Skills Alliance to create a Sea Fishing Pathway in the Modern Apprenticeship framework (in Scotland) and a Diploma in Maritime Studies - Sea Fishing (available in the rest of the UK). However, the industry's 'share fisherman' model is, in effect, a form of self-employment that cause the apprenticeship route which requires an apprentice to be employed, to be unviable for most, unless becoming employed crew on board larger vessels.

This recruitment gap means there is becoming an increasing dependence on migrant labour. Migrants – including those from non-EU countries - are often viewed as the solution to difficulties in recruiting from the local population who sometimes regard fishing or fish processing jobs as low wage work with unpleasant working conditions. (Jamieson et al, 2009). In larger ports and for larger vessels the scale of the operations necessitates the recruitment of migrant workers now deemed to be over 20% of all employees in the industry. It is recognised that there are multiple and differing issues affecting migrant crew on board larger vessels such as exploitation and language skills but unfortunately this was outside the scope of this research, and further research will need to be undertaken in order to better understand the needs of these migrant crew members.



Support from various industry organisations such as Seafish could be enhanced to support and promote access to the profession. Such organisations, amongst others, could help to provide significant opportunities to increase awareness and engagement to attract new entrants to the fishing industry.

Fisheries Management - Quota

The European Union's Common Fisheries Policy establishes the total allowable catch for those commercial fish stocks that are subject to restricted fishing opportunities. As fisheries management is a devolved matter within the UK, the Marine Management Organisation (MMO) works with its devolved counterparts to allocate these fishing opportunities, commonly known as 'quota stocks', across the industry. Quotas are allocated differently across the fishing industry which is split into 3 sectors, the under 10 metre fleet, larger vessels not in membership of a recognised Producer Organisation (these vessels are known as the "non-sector" fleet) and vessels in membership of a recognised Producer Organisation (known as "the sector").

The Producer Organisations are allocated the vast majority of UK quotas and are responsible for managing these quotas on behalf of their members. In England for the under 10 metre and non-sector vessels (that is larger boats who are not in a PO) the MMO manages quota and sets regular catch limits with decisions on quota management based on factors such as the remaining UK quota available and these fleets' historic fishing patterns. According to DEFRA's April 2018 Vessels List there are 1,181 over 10 metre vessels and 4,222 under 10 metre vessels registered and licensed in UK waters. Of this number, an overwhelming majority of under 10m vessels are "non-sector", meaning they are not in membership of a Producer Organisation.

The New Economics Foundation (2017) has estimated that UK fishermen in under 10 metre vessels, who constitute 77% of all vessels, have access to less than 2% of the UK Pool of fishing quota. This may explain why the majority of small scale fishermen feel that the large national representative bodies do not effectively represent the interests of all sectors and believe they have been adversely impacted by this lack of distinct representation, particularly in respect of quota allocation.

The research found that in smaller ports, real challenges exist, because of the limited access to quota for some fishermen. It is evident from the research that limitations on quota restricts earning potential, which can impact on an individual's personal

and financial circumstances. The Coastal Producer Organisation has been established specifically to offer the small scale fishing fleet membership and representation by a recognised, small scale fleet specific Producer Organisation. Intended benefits include bargaining nationally for its members by representing them as a bloc in negotiations for quota allocation and fishing policy. By joining the Coastal Producer Organisation, even small scale fishermen have an opportunity to collectively benefit from quota allocation, as well as the ability for the Producer Organisation to engage in swaps and deals in respect of quota, which are amongst the benefits enjoyed by the members of the UK's other recognised Producer Organisations.

A trend noted amongst fishermen with small vessels at the UK Fishing Forum is the significant increase in the amount of non-quota regulated species they catch, often because of the lack of quota available for finfish species (NB: Finfish are fish with fins, as opposed to shellfish). It has also been noted that climate change is causing changes to fishing stocks as warmer sea temperatures cause fish and shellfish to migrate north to find colder waters. Over time this may cause some fishermen to have to travel further and longer to fish the fish they have permission to catch. Clearly this will have safety and welfare implications in respect of fatigue from a longer time spent at sea in small and potentially poorly equipped boats, as well as financial implications arising from increased fuel consumption.

A Dedicated and Distinct Representative Voice

In Europe and on the global stage, the small scale inshore fisheries sector has historically lacked a dedicated seat at the table to represent its distinct views and interest. Views which may be different due to the scale, impact and sustainability of the sector compared to the views of larger vessels which are well represented by national bodies.

Given the focus of the UK's long established Producer Organisations on quota management, it has been argued by some industry representatives that there are specific benefits in having a separate distinct lobbying body representing each of the sectors. Arguably, this is an existing gap within the industry where a funder can significantly benefit the most deprived and largest number of fishermen through the provision of a relatively small amount of core costs. It may also be a vitally important method of contributing to the support of the small scale sector as negotiations on fisheries reform continue during, and post, Brexit.

Adding Value

The small scale fishing fleet tends to be more sustainable because of the very nature of their size and scale. For example, 80% of under 10 metre fishing vessels use passive gear (such as baited hooks and lines, gill nets, traps and pots) which is inherently more selective than trawls. The research identified a high level of awareness and adherence to sustainable fishing practices, not as a legal requirement, but as a direct understanding of both the value this added to the product and the need to maintain an industry in the future.

The research identified that the provision of simple port infrastructure – including items such as landing cranes (davits) and storage and icing equipment could make a significant contribution to the quality and value of fish landed. In addition to these infrastructure improvements, it is possible to support individual fishermen to develop their business in a manner that may help to enhance their income and increase their earning power.

The research revealed that only 9% of respondents sold overseas. The majority of survey respondents sold their catch locally: 55.8% sold their catch to a local merchant, while 43% sold to a local market, only 18.4% sold directly to the general public. This means that these fishermen tend to be price takers rather than price makers, selling their catch either on contract, through merchant collection or through market auction. Support to sell locally and direct to the general public, or access to transport to alternative markets could help to improve this situation.

“We struggle with distribution and access to markets. This is common in more remote places in the UK. The ability to get our fish to Plymouth or Brixham would be key to our ability to turn a profit. We are limited to local buyers with low prices.”

Other research has identified an opportunity around food branding to add value to fish caught locally (Reed et al, 2011). It has been argued that this type of approach can help to mould consumer demand to the type of niche products which the fishing industry can supply (Brookfield et al, 2005). It follows that there is considerable potential for the small scale fleet, at many ports across the UK, to add value to their catch and generate a larger income from it, rather than selling it through current outlets. For vessels landing prime hand-line caught and static gear caught fish and shellfish, there are many opportunities to develop and exploit local and internet based market sales. However, some fishermen lack skills in respect of processing and selling fish and this is likely to be an area in need of skill development and capacity building. Another suggested option may be the development of a co-operative venture, owned by the fishermen, to carry out the processing and selling.

Capital Loans for Business Development

The uncertain and unpredictable income of many fishermen is a real impediment affecting their ability to access investment funds and the necessary capital to develop their businesses and make improvements to their vessels. This was evidenced during port visits and interviews. It is apparent that the small scale and undercapitalised nature of some fishermen in the inshore sector causes many to operate with old and often worn equipment; sometimes handed down through generations. This has potential to compromise safety on board as well as the quality of the fish product.

A representative from a maritime welfare charity who attended the UK Fishing Forum identified that there is a need for access to affordable credit and credit unions. She argued that this would be helpful as

“Fishermen often ask charities for living expenses because they’re not able to access credit or benefits to invest in their families and business.”

Credit unions are member owned co-operatives, which can provide access to affordable credit, as well as opportunities to save. Seafarers UK has provided small loan guarantee funds to two credit unions to enable them to provide access to immediate loans to fishermen living or working in their local area. This has enabled local fishermen to access additional capital to support an application to the European Maritime and Fisheries Fund for improvements to their vessels. Early initial indications have revealed a good level of take up from fishermen accessing the credit union.

Coping Strategies

There is a clear distinction borne out in the field-work and desk-based research between larger vessels and smaller vessels and their operation. In many locations there is evidence that many of the inshore fleet are struggling to remain economically viable. The extent of challenges currently faced by these fishermen is simply summed up by one survey response to the question about current challenges:

“Overfishing by larger vessels putting nothing back into the community. Brexit concerns for future export to continent, and being generally squeezed as a small scale Fisherman.”

In the absence of support for infrastructure and business development, the research identified various ‘coping strategies’ that have been used by some fishermen to support their income. This includes new forms of fishing activity and/or the expansion of processing to include added value/ niche fish products, with an increasing emphasis being placed on diversification into other non-fishing related activities such as tourism and heritage. The need for this was emphasised by an attendee at the UK Fishing Forum who stated:

“Small scale fishermen are going out of business every day. Survival is about the ability to make a living, add value, diversify and make the best of what you’ve got.”

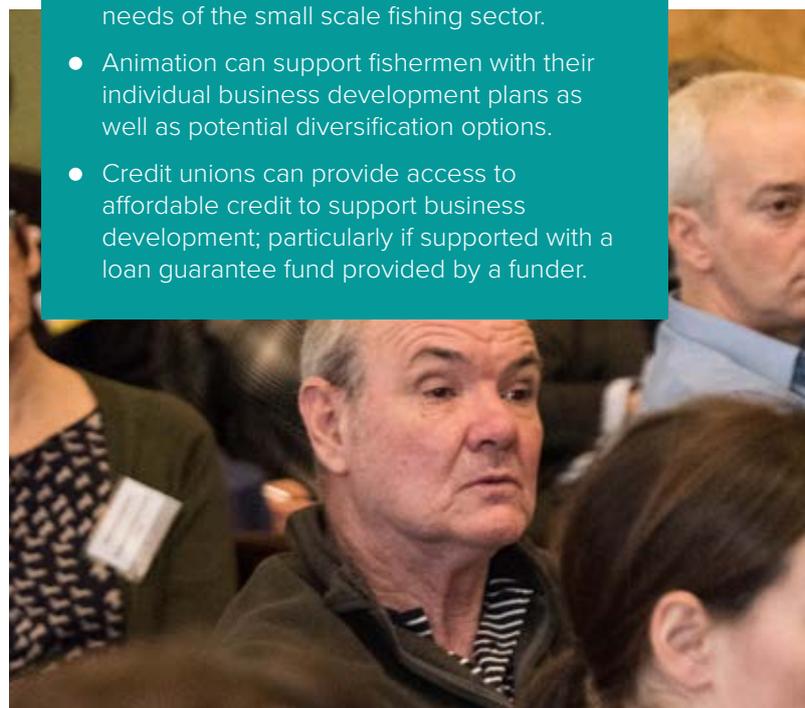
Unfortunately, not all fishermen feel able to diversify into other areas: “I am a fisherman, I fish. I can’t do anything else” is a common refrain amongst some fishermen who are aware that their levels of literacy and numeracy restrict them from taking on other employment. One industry stakeholder has identified a lack of driving skills amongst a younger generation of fishermen – partly as many of them are unable to pass the written element of the driving test. With a UK wide shortage of drivers for all classifications of commercial vehicles, this may be a useful area of support. On the whole,

port visits and survey data indicate that there is real potential to build on these diversification activities through supported interventions such as animation.

There are a number of approaches to supporting business development in order to maintain and prolong an individual fisherman’s earning capacity, and thereby support the sustained welfare of the fisherman and his family. Support for business development is considered to be an important element of the future agenda for the sustainability of these smaller ports and particularly for inshore fishermen operating smaller, often under 10 metre vessels.

Possible Solutions: Support workforce and business development

- Industry organisations such as Seafish could further enhance their support and promote access to the profession for new entrants to the fishing industry. However, support will be required from others within the sector to improve safety and to enhance the perception of the profession as more attractive and rewarding than at present.
- Small scale fishermen should be encouraged to become members of producer organisations such as the Coastal Producers Organisation in order to improve access to quota and other membership benefits.
- Small scale fishermen would benefit from strong, effective, collective representation to represent the distinct needs of the small scale fishing sector.
- Animation can support fishermen with their individual business development plans as well as potential diversification options.
- Credit unions can provide access to affordable credit to support business development; particularly if supported with a loan guarantee fund provided by a funder.



Supporting Fishermen into the Future

This research indicates that the needs of fishermen's families are unlikely to diminish – and that the needs of former fishermen, regardless of their number, will also increase.

The analysis of 41 ports, the Literature Review and bespoke survey and port visit activities have highlighted a number of themes which are a priority for intervention and support to help improve the safety and welfare of those living and working in the UK's fishing communities, and thereby sustain the UK's Fishing Fleet into the future.

Safety

Improving the existing safety culture of fishermen is paramount and it is clear that this needs significant attention in terms of behaviour and awareness training, development and implementation for fishermen.

Opportunities include funding the cost of Personal Flotation Devices (PFD) equipped with Personal Locator Beacons (PLBs), and/or EPIRBs for the vessels themselves whilst ensuring support of behavioural change to prevent overboard situations. Harvard studies recommend that approaches should be taken that encourage ownership of safety devices, for example a token charge levied towards the cost of

an item. The provision of safety equipment, including cold water survival suits, can also be supported with opportunities for cold water shock safety training. This can help fishermen to understand the importance of pro-active risk assessments and safety awareness and support a positive change in behaviour to prevent man overboard incidents. Another approach includes highlighting the potential impact on family members and the wider community of lives lost at sea.

Sponsoring safety improvements at ports and the various national federations' promotion of a Safety Management System to support compliance with ILO 188 are just a few of the current safety initiatives that exist which need to be made more widely available.

There is also scope for the Maritime and Coastguard Agency to develop a more consistent, and arguably, robust approach to health and safety enforcement to support the prevention of fatalities and accidents at sea and within harbours.

Seafarers Advice and Information Line

There needs to be a single entry point to the range of charities and support services that exist for seafarers and fishermen and there is scope to increase awareness of these services. This could be achieved by supporting the existing Seafarers Advice and Information Line (SAIL) which is managed by Greenwich Citizens Advice Bureau to provide a single entry point through which other charities and services can be accessed by fishermen and their families.



Workforce

Workforce opportunities cover two areas: the need to support succession planning for those operating in the small scale fleet through active promotion of career opportunities, as well as the development of strategies to generate better employment terms and conditions and recruitment practices for crew engaged on larger fishing vessels.

Personal Finance

There is clear evidence, based around both a high incidence of income deprivation in fishing communities and the qualitative evidence collected, that many fishermen and their families would benefit from additional support to manage their financial resources as effectively as possible. The national Government supported Money Advice Service provides a potential option if awareness of the service is increased amongst fishing communities.

Due to the particular nature of their engagement some fishermen are unusual in that they still have no private pension, despite Government efforts to enhance the provision of work based pensions. In addition to this, some fishermen experience problems in accessing a state pension because of their low level of national insurance contributions. There is scope to identify those in the greatest hardship and then work with them to address the impact of this problem as effectively as possible.

The uncertain nature of employment within the fishing industry can create a significant pattern of unsustainable borrowing by fishermen. This is manifested across the whole of the sector, irrespective of geography or port size. The existence of advice from Seafarers Advice and Information Line (SAIL) can be more widely promoted. In addition, Seafarers UK has supported existing coastal credit unions to meet the needs of local fishermen.

Education and Training

The research found evidence of poor levels of literacy and numeracy in many fishing communities. This is a fundamental need. It impacts fishermen's approach to health and safety; particularly in respect of keeping up to date with new safety notices and attendance at health and safety training courses. It is important for regulatory and enforcement bodies and training and welfare providers to understand that they may need to adapt their approaches in order to ensure that fishermen with literacy issues are supported to engage.

Port visits also provided evidence of widespread opportunities to enhance the effectiveness of the operation of fishermen through training in key discretionary aspects of their skills base. This could

help fishermen to diversify and take up other forms of employment to support their income. Areas such as computer skills, money management, fisheries management, key / functional skills and vocational maritime qualifications could be improved and made available. Action to address these challenges could make a significant contribution to the self-confidence, engagement and wider personal development of fishermen and others in communities where this is a distinctive issue.

Boat building is a niche but potentially high impact activity, which could provide employment and business development opportunities in ports with a heritage tradition. In some cases such as Cullercoats (Whitley Bay) the ports have lost any significant economic impact linked to the direct work of fishermen but fishing remains an important historical and cultural legacy. Portsoy in Scotland has already made significant endeavours, with the aid of supportive funding, to revitalise their boat building heritage and through doing so, are creating new training and employment opportunities, as well as attracting tourism to fishing communities.

Animation

Many fishermen exhibit entrepreneurial behaviours in their day-to-day activities. There is evidence from the port profiles and the port visits that a programme of work, such as animation, which is aimed at enabling fishermen to make the best use of their skills could make a significant difference to the success and scale of their work.

Health Outreach

There are opportunities to respond to the health challenges facing fishermen, which were revealed by both the desk-based research and interviews with fishermen. Experience from other settings suggests health interventions work best when health screening and facilities such as mobile dentistry are made available at locations where people work. In addition to specific health interventions for fishermen there is real scope to engage the wider fishing community, including families, more broadly through campaigns which provide and promote accessible healthy living opportunities.

Port Infrastructure and Business Development

During the port visits there was significant evidence in a number of smaller ports that investment in port buildings could both provide better rest and social facilities for fishermen and also provide scope for them to add value to their catch through the provision of new processing and marketing

facilities – including the opportunity to sell direct to the public at the quayside or online.

There is considerable scope to increase the number of years fishermen can keep working, and the quality of their catch, through the provision of small harbour infrastructure. In relation to small scale fisheries, modest investments can make a really significant difference to the quality of life of the fishermen using the port.

A Distinct Voice

The small scale inshore fishing industry needs to develop a distinct voice to effectively represent its interests and ensure that its views are heard. From this, the fishing sector needs to find common ground to represent the views of the industry to Government.

Migrant Workers

Port visits and detailed discussions with key stakeholders, supplemented by the latest analysis from Seafish's 2017 pilot study of the UK Fishing Workforce reveals that as many as 20% of all

fishermen, particularly in relation to larger vessels, are non EU nationals. There also exists anecdotal evidence that there may be significant under reporting of the number of non EU employees in the sector.

Traditional services such as seafarers' centres in ports are needed to provide comfortable shore facilities for migrant crew members who may have spent a long time at sea. However, some migrant crew members with decent living quarters tend to stay on board the vessels they operate from, even when in port. This causes an increasing emphasis on the role of ship welfare visitors in meeting fishermen on board and supporting their needs. This is particularly necessarily in respect of modern slavery and the requirements of ILO 188.

It is recommended that more research will be required to understand the issues faced by these migrant workers, the challenges of supporting them and the impact on the wider fishing communities in which they live and work.



Listening to and Learning from Fishermen

Ports are always literally at the edge of settlements, and fishermen spend long periods of time isolated at sea. Typically self-employed and based in disadvantaged and deprived communities in remote locations it is easy to see how our fishermen have become forgotten.

Desired workplace improvements have been ignored in favour of economic development plans that bring new marinas and tourists into the area and sometimes displace the traditional fishing communities.

The research paints a picture of fishermen as resourceful, resilient and capable with a broad range of skills equivalent to that of many small business entrepreneurs. However, low levels of literacy and numeracy and a reluctance to adopt new practices; particularly in relation to health and safety improvements and diversification initiatives can also be present. In addition, pride can often cause delays in seeking help from others until problems become overwhelming and crisis like in nature.

While much of the existing literature presents a view that the fishing industry requires support to help it survive and succeed, this view co-exists alongside a belief amongst many fishermen that the industry can 'ride out troubled times'. Although one survey respondent shared his view that in his 22 years of fishing experience;

“I have never known the industry to be in such trouble before.”

In contrast, this research, for the first time, allows the authentic voice of fishermen in 41 fishing communities throughout the length and breadth of the UK, to identify their challenges and identify what they need to support their industry and business during this time of change. For some, simple infrastructure improvements will make all the difference to their ability to continue their livelihood. For others, more sympathetic and equitable co-existence of marina and tourist industries would make a difference.

Working with, and continuing to listen to, fishermen will be fundamental to taking forward many of the positive interventions identified within this research. Many fishermen hold negative views about previous formal interventions and paperwork; as captured by this comment from one survey respondent:

“Too much paperwork and being stopped from catching fish.”

While another survey respondent expressed the view that:

“There are too many bodies making rules to justify their existence.”

Some of these more negative views may be formed from their experience of an industry which appears fragmented, over regulated and with too many competing voices impacting the industry, including environmentalists and fisheries management aiming to influence fisheries policy. This is in addition to the European Union, devolved government, the Marine Management Organisation, the Maritime and Coastguard Agency, the Health & Safety Executive and the Inshore Fisheries Conservation Authorities. Not to mention the various wind, energy and oil companies and tourist enterprises that are operating in some of the same spaces as fishermen.

In this complex and competitive fishing environment, with a UK Government focused on delivering Brexit, it is important that the voice of fishermen is strengthened and heard during the debate. Many small scale fishermen lack a strong, effective collective voice that larger vessels obtain from their federations and / or association who provide leadership and represent their views. It will be important to ensure that the very disparate and differentiated fishing industry; including the small scale fishing sector, finds common ground to speak to Government, and be heard, at this significant time of change.

Aside from the political changes that may occur, there exists a limited window of opportunity for Seafarers UK and other funders and organisations interested in supporting fishing communities to maximise their match funding through applications to the European

Maritime Fisheries Fund and the Coastal Communities Fund. The existence of these funding sources means the time is right to invest and maximise support for fishermen, using animation, to support and work with them on interventions, improvements and enhancements that will improve their safety, prolong their livelihood and improve the welfare of the fishermen, their families and their communities.

This is a challenging, but also, a very flexible time. A time with scope for innovation in the face of change. However, we all need to do our part to move forward. That includes listening to the views of fishermen in all the different sectors of the fishing industry. It also requires fishermen to co-operate together to develop a strong, effective and distinct voice which represents the views of the whole sector – including small scale fishing vessels.

This research provides an agenda for future action. The challenge now is for the fishing and maritime welfare charities and those with a wider interest in the sector to engage with it.

“A healthier marine environment can support more and better jobs, increased resilience to economic and environmental challenges, sustainable sources of food and energy, increased wellbeing and social cohesion and healthier and more sustainable lifestyles.”

Blue New Deal, New Economics Foundation, 2015



Fishermen's Voices

Fishermen were asked what they, and the fishing industry need.

Here is what they said.

"Better industry PR."

"Get the people in offices to go to sea and see."

"Level playing field."

"Sensible legislation."

"Take fisheries away from devolved Government and back into UK or English Government who understand it."

"Commonsense – let small fish live!"

"Industry needs one governing body"

"More help for small independent fishermen."

"Massive deregulation and tax cuts."



“We need something set in stone for a few years to enable us to invest in our businesses. Our licenses are constantly being cut!”

“Get the IFCA and MMO working with the fishermen instead of against them.”

“We need to think about how we measure success When does fishing stop being fun - with the experience of having to watch fish float away?”

“It needs the Government to fight for the fishing industry and coastal communities.”

“A better deal for under 10m boats regarding quota.”

“Fishermen need the ability to catch fish and land it and not throw it over the side; we need to be able to diversify, to access quota, to have proper infrastructure in ports and quays.”

“Leave me in peace. I am fine thank you.”





Annexes

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Annex 2: Research Methodology

A research approach was developed which recognised the need to respond to the changes affecting fishing communities and to understand potential solutions from the perspective of fishermen.

Firstly, the research framed the issues in detail through a number of activities comprising:

- A detailed literature review of published reports and information, and
- Development of socioeconomic profiles for a representative sample of ports across the UK, using published data. This information can be viewed online at www.seafarers.uk.

Secondly, the research engaged with fishermen directly through:

- An e-survey;
- A series of face to face interviews at ports, harbours and various fishing communities;
- A series of interviews with key intermediaries; and
- A short targeted survey of individuals and organisations providing health services to fishermen.

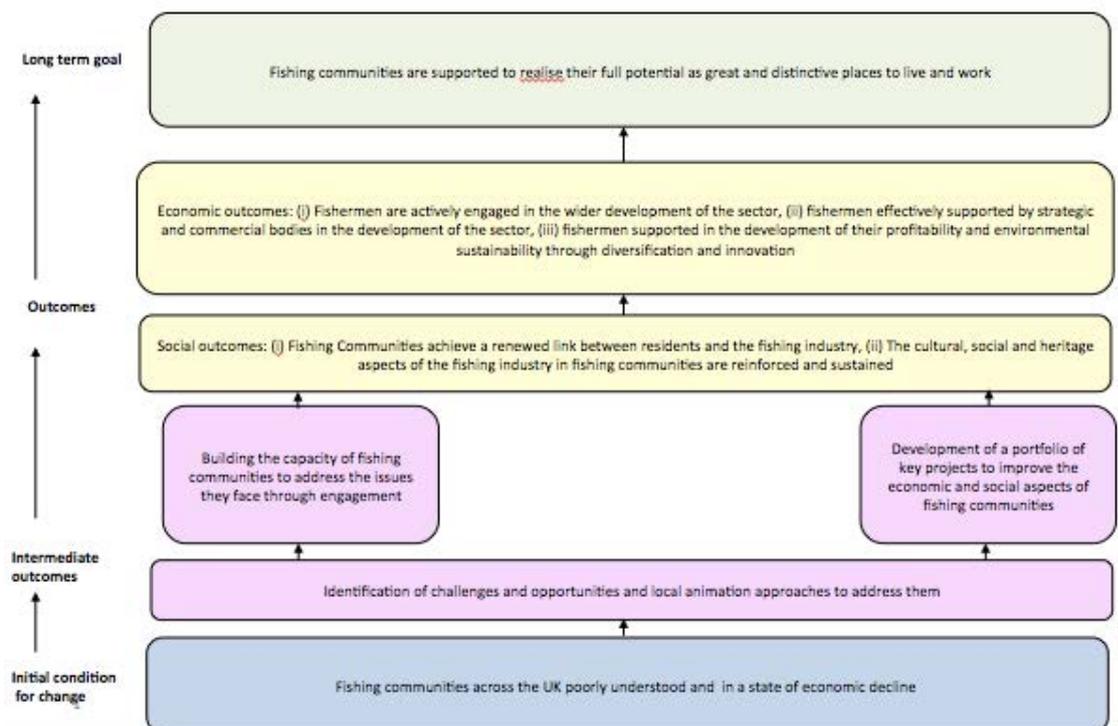
A detailed survey focusing on the issues affecting fishermen, covering the whole of their life experience in the industry, was conducted to develop a series of personal insights into the current narrative of their lives. The survey was promoted both electronically and in paper format. 226 survey responses were received. Overall,

issues affecting under 10m vessels and their crew are more extensively reflected in the survey findings with fewer responses received from skippers and crew of over 10m vessels.

As some fishermen can be reluctant to engage with research, the researchers worked with a range of key intermediaries to ensure that fishermen felt comfortable responding to the research on their own terms. Three survey based interactions were run with fishermen and intermediaries who support them. This enabled a move past the level of “commentators” and enabled the analysis get to the heart of the key issues faced. The surveys involved – a survey of health organisations supporting fishermen, an e-survey supplemented by some paper survey forms for those that preferred this level of interaction and a face to face survey of 17 key intermediaries supporting fishing communities.

Having developed the evidence base from the above activities a UK Fishing Forum was arranged to test the emerging findings. This took place on 9 January 2018, and was organised by Seafarers UK and hosted by the Worshipful Company of Fishmongers at Fishmongers’ Hall in London. It involved around 60 stakeholders from across the UK; including active fishermen, fish processors, funders and policy makers. The debate and feedback that took place during this event has helped to inform this research.

Theory of Change for UK Fishing Communities



Annex 3: Animation Project

Animation involves providing active support from a dedicated individual (an animateur) to work up the details of projects, with and on behalf of, fishermen.

In most cases it involves the establishment of a trusted relationship between the fishermen and the animateur to enable the animateur to gain the insight needed to be fully effective.

Existing experience of animation provides compelling evidence that offering an intensive, supportive interface between fishermen and communities can

yield significant benefits which can help fishermen to build the resilience and effectiveness of their businesses. Through animation there is scope to access the very significant resources available to support on board safety and crew comfort. In terms of business diversification animation provides fishermen with the support to add value to their catch and maximise underutilised species. This research presents a powerful case for an animation programme to be rolled out amongst fishing communities across the UK.

An example of the range of activities an animateur can support is included below.



Annex 4: Glossary of Terms

Term	Definition
Animation	Animation is the provision of active support from a dedicated individual (an animateur) to work up the details of projects, with and on behalf of, fishermen.
Animateur	The individual who provides animation by working actively with fishermen on their terms to develop their projects and plans.
Coastal Communities Fund	A Government funding programme delivered by the Big Lottery Fund which funds regeneration projects. Since 2012, the Coastal Communities Fund has invested £174 million into 295 projects UK-wide.
Common Fisheries Policy (CFP)	The European Union's Common Fisheries Policy establishes the total allowable catch for those commercial fish stocks that are subject to restricted fishing opportunities (known as "quota stocks").
European Maritime and Fisheries Fund (EMFF)	European co-funding which supports fishermen and coastal communities alongside national funding. Funding is available up to 2020.
Emergency Position Indicating Radio Beacon (EPIRB)	A safety device installed on vessels which can be used to alert search and rescue services of an emergency.
Federation / Association	National representative bodies for the fishing industry. Includes the National Federation of Fishermen, Scottish Fishermen's Federation, Welsh Fishermen's Association amongst others.
Fishermen's Mission	The charity has operated since 1888 and works directly with fishermen offering practical, spiritual and emotional support.
Fisheries Local Action Group (FLAG)	FLAGs are an initiative of the Marine Management Organisation and part of the European Maritime Fisheries Fund. They exist in many coastal regions. They can provide match funding for non-EMFF projects.
International Labour Organization's Work in Fishing Convention 188 (ILO 188)	These regulations came into force internationally in November 2017 but have not yet been ratified by the UK. The MCA will be responsible for enforcement. The Regulations aim to improve safety and welfare of fishermen by introducing minimum standards of living and working conditions aboard vessels and in respect of recruitment. For example all fishermen will be entitled to receive written terms of employment, decent accommodation and food, medical care, regulated working time, repatriation, social protection and health and safety.
Inshore fishing	Fishing takes place closer to the coast and in waters less than 30 metres deep. (Offshore is when waters are more than 30 metres). Inshore fishing tends to be carried out by smaller boats and uses less intense fishing methods such as passive gear.
Inshore Fisheries and Conservation Authorities (IFCAs)	Committees of local authorities that fall within an Inshore Fishing Conservation district. They are tasked with the sustainable management of inshore sea fisheries resources in their local area.
Maritime and Coastguard Agency (MCA)	An executive agency, sponsored by the Department for Transport. It produces legislation and guidance on maritime matters, and certification to seafarers aimed at preventing the loss of life on the coast and at sea.
Marine Accident Investigation Branch (MAIB)	A Government agency that works with the Department for Transport. Responsible for investigating marine accidents involving UK vessels worldwide and all vessels in UK territorial waters.
Marine Management Organisation (MMO)	An executive non-departmental public body, of the Department for Environment, Food & Rural Affairs. It licenses, regulates and plans marine activities in the seas around England so that they're carried out in a sustainable way. MMO is responsible for implementing the Common Fisheries Policy (CFP) in England and managing fishery quotas within the overall limits set each year by the European Commission.

Term	Definition
Marine Scotland	Performs an equivalent role to MMO in respect of fisheries management in Scotland.
Over 10 metre vessel	Different commercial fishing vessel license requirements are in place for over and under 10 metre vessels.
Passive and Active gears	<p>These are different methods for catching fish. Passive gears are left in place for a period before retrieval. They may either attract fish using bait, or may passively wait for a fish to swim into a net or trap. Examples of passive gear are gill nets, rod, longlines, traps and pots.</p> <p>Active or mobile gears are moved in order to catch fish by trapping or encirclement. These gears can be divided into those which are towed along the seabed and those which remain clear of the seabed.</p>
Personal Flotation Device (PFD)	A piece of wearable safety equipment designed to keep a person afloat.
Personal Locator Beacon (PLB)	A small personal portable transmitter that sends out a personalised emergency distress signal via satellites and ground stations. Often worn attached to a PFD.
Producer Organisation (PO)	An official body set up by fishery producers and recognised by the MMO. They play a role in managing quotas and marketing the fisheries products of their members. There are currently 11 established regional PO's in England (24 in total in the UK). The Coastal Producers Organisations is a national Producer Organisation that provides a voice in the market place for small scale sustainable fishermen.
Quota	<p>As fisheries management is a devolved matter within the UK, the Marine Management Organisation (MMO) works with its devolved counterparts to allocate fishing opportunities, commonly known as 'quota stocks', across the industry.</p> <p>Quotas are allocated differently across the fishing industry which is split into 3 sectors:</p> <ul style="list-style-type: none"> - the under 10 metre fleet, - larger vessels not in membership of a recognised Producer Organisation (these vessels are known as the "non-sector" fleet), and - vessels in membership of a recognised Producer Organisation (known as "the sector"). <p>The Producer Organisations are allocated the vast majority of UK quotas and are responsible for managing these quotas on behalf of their members.</p>
Seafarers' Advice & Information Line (SAIL)	A free and confidential Citizens Advice telephone service for seafarers run by Greenwich CAB. It operates by phone and email to provide specialist advice to working and former seafarers, their families and dependants.
Seafarers UK	A maritime charity and grant funder providing grant support to organisations working to help seafarers and their families.
Seafarers' Hospital Society	A maritime charity dedicated to meeting the health, welfare and advice needs of seafarers.
Seafish	A Non-Departmental Public Body set up by the Fisheries Act 1981 to improve efficiency and raise standards across the seafood industry. The organisation is funded by a levy on the first sale of seafood products in the UK, including imported seafood. Their remit includes fishermen and processors through to importers, retailers and food service providers.
Share fisherman	A model of self-employment that is common in the fishing industry. The fisherman receives all or part of their pay by sharing the profits or gross earnings of the fishing boat.
Under 10 metre vessel	Different commercial fishing vessel license requirements are in place for over and under 10 metre vessels.

Annex 5: Additional Information

If you are interested in obtaining more detail from this research project, including individual port analysis of the 41 ports reviewed, you can find additional information available online at www.seafarers.uk/projects/fishing

The information includes:

- Socioeconomic analysis of 41 ports in the UK
- Maps showing ports – by size and levels of deprivation
- Port Analysis: Summary of Key Thematic Issues
- A Rapid Evidence Literature Review
- Interim Report – Fishing For a Future, January 2018
- Summary Notes of UK Fishing Forum Event held on 9 January 2018

If you have any questions, or wish to discuss any aspect of this report, please call Seafarers UK on 020 7932 0000 or email: fishingforum@seafarers.uk



Seafarers UK aims to be a proactive and collaborative grant funder committed to making a real and sustainable difference to the UK fishing community.

Please contact Seafarers UK

- 🐟 If you would like to discuss any opportunities or initiatives that would benefit the UK fishing community.
- 🐟 If you would like to work in partnership with Seafarers UK to support the UK fishing community.
- 🐟 If you are a funder interested in partnering with Seafarers UK to co-fund or match fund specific projects within UK fishing communities.
- 🐟 If you are an eligible organisation who needs funding for a project that would improve the lives or business of working fishermen of any age.

Please get in touch

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Seafarers UK has been helping people in the maritime community since 1917, by providing vital support to seafarers in need and their families.

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