

THE UNITED KINGDOM OPERATIONAL PROGRAMME FOR THE EUROPEAN FISHERIES FUND (2007-2013)

Prepared in conformance with Article 17
of Council Regulation (EC) No 1198/2006

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1 Introduction

The European Fisheries Fund (EFF) is intended to help secure a sustainable and profitable fisheries industry.¹ It will grant financial support during the period 2007 to 2013, with a view to help the industry adapt to changing circumstances. The focus of the fund will be support for the sustainable exploitation of fisheries resources and achievement of a stable balance between those resources and the capacity of the fleet; strengthening the competitiveness of the industry; promoting environmentally friendly fishing and production methods; providing adequate support to people employed in the sector; fostering the sustainable development of fisheries areas; and supporting sustainable growth and diversification in the aquaculture and fisheries processing sectors.

Council Regulation (EC) No 1198/2006 (the "EFF Regulation") requires Member States to draw up a National Strategic Plan. The UK National Strategic Plan draws together the strategic priorities of the UK in implementing the Common Fisheries Policy. The EFF Regulation also requires an Operational Programme to be drawn up and this has to be approved by the Commission. Guiding principles for the development of the Operational Programme, and information on the content of it, are set out in the EFF Regulation. In addition, there are detailed rules on implementation set out in Commission Regulation (EC) No 498/2007 which have been followed in this document.

This UK Operational Programme for the EFF contains a detailed analysis of the fisheries industry (Chapter 2), the strategy and objectives (Chapter 3), the summary of the *ex ante* evaluation (Chapter 4), details on each priority axis (Chapter 5), the finance available (Chapter 6), and the implementing provisions (Chapter 7). Throughout this document, the statistics and data used are the latest available at the time of writing.

In the UK we aim to use the fund to support a fisheries industry that is sustainable, profitable, well managed, internationally competitive and that helps support thriving, diverse, and sustainable local communities, managed effectively as an integral part of coherent policies for the marine and freshwater environment. The EFF has four priority areas, or axes: measures for the adaptation of the fleet; aquaculture, inland fishing, processing and marketing of fishery and aquaculture products; measures of collective benefit to the industry; and sustainable development of fisheries areas. A fifth axis funds the technical assistance required to deliver the programme.

The UK has nearly €138m (£97m) for the duration of the programme, of which almost €95m (£67m) is for non-Convergence areas and just over €43m (£30m) for Convergence areas as explained below. A split between each of the UK administrations has also been agreed; Scotland nearly €55m (£39m),

¹ Consistent with Council Regulation (EC) No 1198/2006 in this Operational Programme "fisheries sector" includes all activities in the catching, production, processing and marketing of fisheries and aquaculture products.

England just over €48m (nearly £34m), Northern Ireland just over €18m (nearly £13m), and Wales just over €17m (nearly £12m).

1.1 Convergence and non-Convergence regions

The Convergence objective is aimed at supporting the least economically developed Member States and regions of the Community, according to Council Regulation (EC) No 1083/2006 laying down the general provisions on the European Regional Development Fund, the European Social Fund and the Cohesion Fund. This makes funding available for regions with average Gross Domestic Product (GDP) per capita below 75% of the EU average. In terms of the EFF, the Convergence objective results in a separate, ring-fenced budget for Convergence areas.

1.1.1 Geographical Eligibility

The Convergence regions in the UK are:

- i) Cornwall and the Isles of Scilly;
- ii) West Wales and the Valleys;
- iii) Highlands and Islands of Scotland (phasing out region).

The remainder of the UK, i.e. excluding Cornwall and the Isles of Scilly, West Wales and the Valleys, and the Highlands and Islands of Scotland, has non-Convergence status.

The table below shows the Gross Value Added per capita for Convergence and non-Convergence areas in the UK.

UK GVA per capita (€in 2006- current basic prices)^{2, 3}	
UK (inc. data not allocated to regions)	27,965
Of which:	
England	27,993
Wales	27,119

² Office for National Statistics, December 2007

³ The UK's ONS do not produce detailed breakdowns of figures in Gross Domestic Product (GDP) terms. Gross Value Added (GVA) and GDP are two related measures of the output of an economy that are related as follows - GDP for the economy as a whole = GVA of each industry plus taxes on products less subsidies on products, where GVA is the measure of the total value of output of each industry less the value of the goods and services used in producing the output from the industry. GVA is measurable at the industry level as it is a relatively discrete entity, being based on the total value of goods sold by enterprises involved in an industry, as well as the total cost of goods and services purchased by the enterprise and the difference between these two (sales minus purchase of goods and services) gives the GVA for that enterprise, which is summed to give the GVA for that industry. There is a methodology note from the ONS on this issue available at: http://www.statistics.gov.uk/articles/economic_trends/1416.pdf

Scotland	26,096
Northern Ireland	22,262
of which - Convergence Areas:	
Cornwall and Scilly Isles	16,885
West Wales and Valleys	17,014
Highlands and Islands	19,476
UK Non-Convergence Areas	27,579
UK Convergence Areas	17,322

The different areas in the UK are shown on the map below.



Convergence Objective

- Convergence Regions
- Phasing-out Regions
- Phasing-in Regions
- Competitiveness and Employment Regions

2 Analysis

2.1 General description of the sector⁴

2.1.1 Overview

The UK fisheries industry comprises three sectors: catching, aquaculture and processing, and makes a contribution to both national and regional economies.

The table below shows the contribution made by the fisheries industry to the UK economy. This shows the proportion of the Gross Value Added (GVA) for each of the three sectors in €m, and as a percentage of the total GVA.

Total Gross Value Added - UK level - €million (%) 2006 figures⁵	
Whole economy ⁶	1,158,826
Of which:	
Fishing	471 (0.04%)
Fish Farming	358 (0.03%)
Production of Fish Products	621 (0.05%)
Total	1,450 (0.13%)

The fisheries industry makes a relatively small direct contribution to GVA. However, it also contributes to other industries. For example, the catching sector supports boatbuilding and repair, marine equipment suppliers and port and harbour facilities. In some areas, the contribution made by commercial fishing and aquaculture supports other commercial and recreational activities (including tourism) and has wider beneficial social impacts especially in remoter areas in maintaining local services and communities.

The table below shows the total employment in the fisheries industry as recorded in the Annual Business Inquiry conducted each year by the UK Office for National Statistics. It should be noted that as this survey is based on enterprises registered for tax purposes, it gives employment figures which exclude self-employed persons. These form a significant component of overall employment in the fish catching sector, due to the special rules that apply for fishermen for the collection of income and other taxes. Due to these taxation differences a significant number of fishermen are classed as self-employed, more so than the normal level that might be expected in other sectors. As

⁴ Some of the information in this section is a summary of that provided in the UK National Strategic Plan. Further details are available in the Plan.

⁵ Office for National Statistics

⁶ SIC Sections A-O - agriculture, fishing, construction, production, distribution and service industries

such, for the catching sector the Marine and Fisheries Agency working with colleagues in the other fisheries administrations in the UK carries out an annual exercise to collect data on the level of employment on a vessel by vessel basis for the UK fishing fleet. These estimates for total employment in the fish catching sector thus include those that are self-employed, and show that employment in the catching sector is almost 13,000. The employment data for the fish farming and fish processing sectors are not subject to the same degree of problem due to self-employment as they do not have special status within the UK taxation system.

Total employment average during 2006 - UK level - thousands⁷	
Whole economy ⁸	23,696
Of which:	
Fishing	7 (0.03%)
Fish Farming	3 (0.01%)
Production of Fish Products	17 (0.07%)
Total	27 (0.11%)

The level of employment is relatively low but fish farming has remained stable. Although the fisheries industry is not a large employer at the UK level, it is a key source of employment in many rural communities. For example, although the fisheries industry accounts for 0.7% of the workforce in Scotland, there are some areas where this rises to over 10% of direct employment.

The table below shows UK trade in fish and fish products

UK trade in fish and fish products as part of UK trade⁹ - €m - 2006	
Trade in food, beverages and tobacco	
Imports	16,049
Exports	36,694
Trade balance	20,645
Trade in fish and fish products	
Imports	2,815 (18%)
Exports	1,385 (4%)
Trade balance	- 1,430

Imports of fish and fish products account for a large proportion (18%) of imports of food, beverages and tobacco.

⁷ Office for National Statistics

⁸ SIC Sections A-O - agriculture, fishing, construction, production, distribution and service industries

⁹ Office for National Statistics

The remainder of this section describes each of the three sectors of the fisheries industry.

2.1.2 Catching

The UK fishing fleet is diverse, reflecting the wide range of fishing opportunities. The UK fishes over 100 EU quota stocks as well as a wide range of non-quota species.

In 2007, the UK catching sector comprised 7,775 fishing vessels. Some 5,242 these were vessels of 10 metres and under in length which account for nearly half of all UK employment in the catching sector. The average age of UK vessels over 10m in length is nearly 26 years – that for 10m and under vessels is slightly less at 22 years.

In 2007, 610,000 tonnes of fish were landed by UK registered vessels into the UK or abroad.

The UK catching sector (2007 for fleet and landings, 2006 data for employment estimates)								
	Total no. of vessels (1)		No. of vessels over 10m		No. employed (2)		Landings value	
	No.	%	No.	%	No.	%	€m	%
England	3383	50%	546	36%	5957	46%	221.27	28%
Wales	443	7%	42	3%	1159	9%	22.70	3%
Scotland	2251	33%	740	48%	5205	40%	508.11	65%
Northern Ireland	329	5%	141	9%	613	5%	28.81	4%
Total	6775	100%	1533	100%	12934	100%	780.89	100%
<i>Note (1) – The total number of vessels includes UK registered vessels that operate from UK Island territories – the Isle of Man and Channel Islands.</i>								
<i>Note (2) – Employment data is from MFA survey of fishermen and this includes self-employed fishermen</i>								

2.1.3 Aquaculture

The relative importance of the aquaculture sector varies around the UK. For example, nearly all of the UK farmed salmon is produced in Scotland and the vast majority of farmed mussels are produced in Wales.

In 2006 there were 431 fish and shellfish farming businesses in the UK, directly employing some 3,000 people with a total industry turnover in 2006 of some €744m. The main finfish species farmed are salmon (132,000 tonnes

produced in 2006) and rainbow trout (13,000 tonnes). There is limited production of other species, such as carp, brown trout, turbot, halibut, cod and Arctic char. There are also emerging species such as tilapia, barramundi, bass and bream.

Farmed shellfish production was around 25,600 tonnes in 2006. Mussels are the major species produced, with oysters and clams also farmed. Scallop farming has been successful for many years and trials on scallop hatchery work have also proved to be successful.

In 2006, public bodies¹⁰ invested around €10m p.a. in aquaculture research, particularly on fish health. These bodies and the aquaculture sector jointly sponsor research to promote the sustainable development of the aquaculture sector, the maintenance of high fish health status of farmed and wild fish stocks, and the evaluation of alternative species for cultivation.

The key statistics of the UK aquaculture sector are shown in the table below.

The UK aquaculture sector in 2006						
	Total no. of aquaculture sites		Tonnes produced (fish and shellfish)		No. Employed (full and part time)	
	No.	%	tonnes	%	No.	%
England and Wales	37,054	96%	16,167	9%	1289	45%
Scotland	810	2%	145,015	84%	1530	53%
Northern Ireland	691	2%	10,724	6%	69	2%
Total	38,555	100%	171,906	100%	2887	100%

2.1.4 Processing

The UK has a substantial onshore processing sector consisting in 2006 of 388 businesses that employed some 17,000 people with a turnover of €3,296m. A high proportion of those employed are skilled and unskilled migrant workers primarily from Eastern Europe and mostly female. Processors are supplied by both the catching and aquaculture industries. The UK still has a large number of small to medium sized processors, although consolidation has taken place in recent years and is likely to continue as smaller processors face cost and supply-chain pressures.

The key statistics of the UK processing sector broken down by administration are shown in the table below – the latest year for which these are available is 2005.

¹⁰ UK Administrations and bodies such as the Biotechnology and Biological Sciences Research Council (BBSRC) and the Scottish Aquaculture Research Forum (SARF).

The UK processing sector in 2005				
	Turnover		Gross value Added	
	€m	%	€m	%
England	1,570	52%	430	49%
Wales	10	0%	3	0%
Scotland	1362	45%	432	49%
Northern Ireland	73	2%	22	2%
Total	3,248	100%	786	100%

Note – estimates at the administration level requires the splitting of data on enterprises that may have establishments in each administration, and as such they cannot be summed to give the national level.

There is a high proportion of small enterprises involved in this sector as illustrated below by the breakdown of the number of enterprises by size of turnover (Note – groupings are given in terms of £'000s – the Euro equivalent at 2007 exchange rates is given for information – a more accurate grouping in terms of the value of turnover in Euros in the years in question is not available).

Turnover groupings:		Number of enterprises:			% change 1997-2007
£'000	€'000	1997	2002	2007	
0-49	0-72	15	25	20	+33%
50-99	73-145	25	20	20	-20%
100-249	146-364	50	50	55	+10%
250-499	365-730	40	50	30	-25%
500-999	731-1460	60	45	35	-42%
1000-4999	1461-7308	110	90	100	-9%
5000+	7309+	65	60	60	-8%
Total		365	335	320	+33%

The results of a dedicated survey of the activity of the industry in 2004 indicate that the biggest source of purchases by primary processors is at auction, both landings and overland, constituting 42% of purchases, followed by direct contract with vessels (27%). Purchases from landings at auction by primary processors have decreased significantly, while direct contract and imports are increasing. This is due to declining landings in the UK forcing processors to look elsewhere for supplies. On the other hand, direct contract with boats now accounts for 44% of purchases for mixed processors in the 2004 survey, compared with an estimated 19% for the population in 2000. This shows increasing connections in the supply chain as more boats land

directly to a particular processor. Secondary processors source mainly through direct imports (70% of supplies), much of which is part-processed and frozen.

Processors commented in the 2004 survey that there had been a decline in the supply of fish over the last five years, particularly on the markets, that fish are smaller, and that they were finding it harder to find reliable sources of supply. These difficulties were also reported in 2000 and are continuing trends. This means that on a continuing basis, processors are having to work hard to find supplies or adapt their product offering in order to be able to use new supply sources.

However, crucially for the processing industry, the mix of species has changed. Over the period 1997 to 2006, the quantity of demersal species landed into the UK by UK and foreign vessels decreased by 49%, with significant decreases in the key species consumed in the UK such as Cod (-59%) and Haddock (-47%). This decrease has been offset by increased imports of demersal species – for example imports of frozen fillets of cod have increased by 63% and frozen fillets of haddock by 59%. These increases have helped offset but have not totally reversed the decline in the volume of whitefish available for processing. On the other hand, over the period 1997 to 2006 landings of pelagic species have increased by 37% since 1998 and imports of pelagic fish for processing have increased so that pelagic species now form a greater part of the fish available to UK processors than was the case in 2000. The manpower required to process whitefish is much higher per tonne than for pelagic fish, so this change in the mix of species is likely to be a factor in the decline in employment in the processing industry seen in recent years.

Just over half of employment in the fish processing industry is in units handling more than one type of fish (compared to 40% in 2000) and one quarter is in units dealing only with demersal species, a slightly smaller proportion than in 2000. Shellfish-only units account for 19% of all FTE jobs. There are relatively few pelagic-only processors. There has been an increase in the proportion of employment in mixed fish-type processing since 2000, and a reduction in the proportion in demersal-only processing, although the overall picture in relation to fish types has changed little. The slight move away from dependence on a single fish type perhaps reflects the difficulties processors report in securing reliable supplies of fish – moving to ensure that total sales are less reliant on a single product type is a natural response to raw material supply problems.

2.1.5 Convergence and non-Convergence areas

As mentioned in Chapter 1, the areas in the UK which qualify for Convergence funding are Cornwall and the Isles of Scilly, West Wales and the Valleys, and the Highlands and Islands of Scotland (phasing out region).

In Cornwall, increasing the area's wealth is based on providing assistance in regenerating the economy so that prosperity is increased, communities are

made more sustainable and the environment is protected and enhanced. In West Wales and the Valleys the focus of the economic development strategy is to increase the number of jobs and raise skill levels. In the Highlands and Islands, progress has been made to the extent that it is not a full Convergence area and is a 'phasing out region'. However, the problems of remoteness and low population density still have to be addressed. The key aims are therefore to increase incomes in the region relative to the EU average, reduce economic and social disparities, create and safeguard employment, ensure communities and individuals can make a full contribution to the development of the region, reduce problems caused by peripherality and insularity, and enhance the environmental quality of the region in terms of sustainability and biodiversity.

It is important to note that the distinction between Convergence and non-Convergence areas is in terms of the relative economic development of these areas; there is no systemic difference between the fisheries industries in these areas.

2.2 Main lessons learned from the previous programming period

At the start of the previous EU grant programme, the Financial Instrument for Fisheries Guidance (FIFG), in the non-Objective 1 areas, uptake of grants in the area of processing and marketing was reasonable, but it was poor in other sectors. In contrast, uptake in objective 1 areas was higher, thought to reflect higher grant rates in those areas and the greater need for economic support.

The mid-term evaluation of the UK non-Objective 1 Programme suggested that a major factor contributing to low uptake was a degree of economic difficulty and uncertainty in the industry. This was due to factors such as the impact of decommissioning schemes, rising operational costs and the reduced availability of quotas. It was felt that under the circumstances, individual businesses would have difficulty in making the private investment necessary (e.g. 80% of a vessel modernisation) for projects.

The mid-term evaluation also expressed concern over the monitoring of performance. There was more focus on the approval and expenditure process at the expense of evaluation of project impacts and outturns. Much of this was due to under-resourcing by Administrations. That said, the Monitoring Committee adequately discharged its functions laid out in the relevant EC Regulation.

During the course of the non-Objective 1 programme the decommitments which occurred and the mid-term evaluation prompted the introduction in England of a facilitation team to better publicise the scheme at grass roots level and assist people in the process of applying. This has resulted in a lessening of the amounts decommitted. In addition improved administrative arrangements to follow up on outstanding claims has also helped to reduce decommitment in some cases by up to three quarters of the amount.

The level of decommitment incurred during the 2000-2006 FIG Outside Objective 1 programme in Scotland was primarily as a result of the challenging economic environment experienced by the various fishery sectors during the programming period. Factors such as the under-cost of Norwegian salmon on the EU market, reduction of days at sea, the reduced supply of primary materials and the lack of sectoral liquidity and finance all lead to reduced confidence and the ability to invest in capital improvements and infrastructure (particularly so in the processing sector). Proactive actions taken by the Scottish Managing Authority during Article 4 inspections coupled with early and direct contact with grant beneficiaries with respect to N+2 targets greatly assisted in containing, if not reducing, subsequent decommitments.

With respect to the new EFF programme, the Scottish FIG Managing Authority has considered the need to more closely monitor the progress of individual projects, ensuring that project delivery timetables are adhered to and that slippages are picked up early so that action may be taken to minimise any future decommitment. EFF management systems have been designed to red flag any delivery issues at an early stage, in order to avoid slippage in programme expenditure.

The mid-term evaluation of Objective 1 Cornwall, concluded that major changes at programme level for FIG would not be practical, necessary or helpful. It was thought probably best to shift resources from decommissioning to funding major infrastructure, processing and regeneration projects.

There were 7 separate FIG programmes in the UK during 2000-2006. In Northern Ireland FIG was delivered under the Building Sustainable Prosperity Programme. The reviews of these did not produce recommendations specifically about lessons learned in all cases. The main lessons learned come from the non-Objective 1 programme but points arising from the others are included below.

Demand for FIG support in the Scottish Highlands & Islands area remained strong across all measures throughout the first half of the programming period. Following the mid-term review it was agreed to reduce individual FIG grant awards and increase the Member State contribution above the minimum allowable in order to allow FIG resources to accommodate anticipated demand towards programme closure.

In Northern Ireland, some difficulties were experienced in relation to meeting the “n+2” spend rule, introduced at the time of the FIG Programme, where despite assurances some project beneficiaries failed to meet spending predictions. While the Department of Agriculture and Rural Development (DARD) ensured that sufficient projects were brought forward to avoid decommitment of funds, it believes that improvements can be made to its programme management procedures. Under EFF the Department will implement more stringent project monitoring arrangements which will involve more frequent contact with project beneficiaries during the life of the

project. Other arrangements will include setting pre-conditions that must be fulfilled before a letter of offer is issued. These could relate to obtaining planning and other statutory approvals which are needed before a project can be implemented. Approval of applications for EFF funding will only be granted where it can be demonstrated that all relevant consents, approvals and assessments have been completed and appropriate mitigation measures identified.

The more “hands-on” approach to communication and monitoring will ensure that there is more meaningful, regular and timely project management information (such as progress against costs, timescales and revisions to approved projects), but this is also aimed to help project beneficiaries with project delivery from an early stage and ensure the smooth completion of the projects as approved by the Selection Panel.

European Commission Task Force for Northern Ireland’s Report published in April 2008 contains a detailed analysis of Northern Ireland’s relationship with the EU in a number of policy areas as well as suggesting areas where progress could be made and initiatives in which NI could increase its participation. The one specific action point for the Department of Agriculture and Rural Development in relation to the EFF is to investigate the options for the development of a more facilitative approach to help potential applicants develop their proposals and thus help lever higher levels of private sector investment.. Under new arrangements, potential applicants will be assigned a DARD project officer who will be available to discuss potential applications prior to the formal submission. The Department will, on a part-time basis, retain an office convenient to the fishing ports to host meetings with EFF applicants and to convene “EFF advice clinics” as necessary.

In response to the mid-term evaluation, Administrations made changes to their delivery programmes. In England, a revised streamlined funding scheme was introduced. The grant rate for vessel modernisations was increased from 20% to 40%. The upper ceiling for eligible costs was raised to €2.84m for improving port facilities and to €1.42m for processing facilities, with grant rates increased from 20% to 30% for the development of new markets, improvements to food safety and traceability and waste treatment, and to 40% for new processing of locally caught produce. New grants of up to 40% were introduced for aquaculture and mariculture projects up to a ceiling for eligible costs of €710,453. The impact of these changes was an increase in grant applications.

In England, facilitators were appointed to promote the FIG scheme and to assist with grant applications, namely:

- to ensure that applications submitted were compliant with the principles governing the grant of funding under FIG regulations;
- to liaise with the appropriate experts in central, regional and local government, industry and environment related professional bodies to secure comment on how a project might fit with national, regional and

local plans and priorities, collating relevant comments with an application;

- to ensure that an applicant was entitled to receive a grant and that projects were appropriate prior to submission to the appraisal panel;
- to help reduce the risk of de-commitment, i.e. returning unspent funds to the EU.

Their contribution was deemed a success and their role will continue under EFF. In addition, application forms were improved and a three month tranche system for applications was introduced.

In Wales, the role of the existing Objective 1 co-ordinator was extended to cover non-Objective 1 areas. Application forms were improved and a three month tranche system for applications was introduced, as in England.

In Scotland, stakeholders were closely involved in delivery of the programme through the use of Fisheries Management Groups (FMGs) and with regard to the Processing and Marketing Grant scheme, Project Assessment Committees (PACs). In the case of FMGs there was one group for the Highlands and Islands and one for 'Lowland Scotland' with representatives from the fisheries sector, local authorities and the enterprise network. The FMGs and PACs have been invaluable in bringing stakeholder insights to the management of the FIG programme. In response to the mid-term evaluation, grant rates in the Scottish lowland programme were also raised to 40%, in certain circumstances, to provide increased targeted support and encourage greater uptake. However, this should be seen in the context of the improving economic health of the fisheries industry. In addition, a rolling tranche system was also approved by the FMGs to allow faster award decisions for vessel modernisation projects seeking less than €14.2m in grant support.

The key outcomes of the FIG programme are as follows. It should be noted that these are not final figures for the programme as projects are still ongoing:

- a significant contribution to stock conservation has been made by decommissioning schemes (380 vessels decommissioned removing 127,067Kw and 40,452 gross tonnage from the UK fishing fleet between 1997 and 2007);
- the processing sector has been made more competitive with 154 processing and marketing companies assisted with €16.9m public spend;
- the fund has contributed to the preservation of fishing communities and safety with forty harbour projects relating to upgrading harbours and market facilities and storage, gear supplies, access to services (icing, fuel etc) at a cost of €2.8m;
- there have been twenty-five projects under Innovative Measures concerned with gear selectivity, product development and environmental standards with €1.3m of grant aid, and seventy-one

projects of collective benefit to the industry for example on traceability, certification schemes, lobster stock conservation - these contribute to creating the basis for a more forward looking sector which takes full account of environmental effects;

- the fleet has been modernised with €1.2m spent on quality enhancements in eighty-four projects and eleven additional projects on promoting alternative fisheries.

In summary, the main lessons learned from the previous programming period are:

- i) it is important to recognise, and make appropriate adjustments for the economic performance of the various fisheries sectors. The different measures under the FIG schemes met with varying levels of success. For example the level of uptake of vessel modernisation was low while the grant rate was 20% but did improve after the rate was increased to 40% which meant a lower level of private investment was required and therefore more likely to be forthcoming. Had the sector been more buoyant, that adjustment might not have been necessary;
- ii) the level of grant has to be such that the private investment, where required, is forthcoming; we have learnt that raising the grant rates can improve uptake. Also in the Objective 1 areas, such as Cornwall and the Scottish Highlands and Islands, where a higher rate of grant was already available, and demand for grant support remained consistently high;
- iii) grant rates need to be set at appropriate levels to reflect need;
- iv) performance monitoring needs to be adequately resourced; and
- v) grant facilitators and direct stakeholder input provide a valuable role in achieving the strategic aims of the programme as well as enhancing the delivery of it by promoting grants and assisting with applications.

These lessons have been considered and incorporated into the preparation of this Operational Programme, reflecting our commitment to make improvements to management and monitoring processes under the EFF. The intention is that increased grants rates will continue to help ensure sufficient uptake of grants. The facilitation arrangements will continue in England. In addition, further measures will be taken to help ensure sufficient uptake of grants including better information and publicity schemes, exchanges of good practice and improved communication between the four administrations, and simplification of the application procedures, including a review of application forms.

A specific team to manage the EFF has been created in the UK Managing Authority with increased emphasis on performance monitoring. The four

administrations will work closely to ensure that no decommitment of EFF funds occurs. This will be strengthened by improved communication with successful applicants. The lessons learned from publicity under the FIG scheme will be used to better target the private sector, for example through monitoring how potential recipients heard about the scheme. In addition, potential project sponsors will be better supported through technical assistance during the project development phase so as to reduce project rejection rates.

From the audit reports done on monitoring FIG, we have learnt that the Article 10 checks required by the audit authority should have started earlier so that a backlog did not build up. There was an issue about having the necessary resources for the various controls needed. We accept this: the point of Article 10 checks is to pick up any systemic problems on the way and put them right, not wait to the end to find problems. Audits have highlighted that we need to be properly resourced for Article 4 checks and Paying Authority checks. Recruitment of additional resources has already been undertaken to address this point.

2.3 Context indicators and statistics

Section 2.1 above sets out an overview of the UK fisheries industry at the time of writing. This section aims to set the industry into context by examining trends over the last 10 years (subject to data availability). Data tables can be found in Annex A.

2.3.1 Overview

The UK fisheries industry makes a relatively small contribution to GVA and this contribution is decreasing. However, the contribution to GVA from fish farming has shown a significant increase (108%) over the period 2000 to 2006 (see Table 3).

Table 2 shows how total turnover of UK businesses in general has risen by 18% since 2000. Of this, the turnover of fish farming has seen a significant increase (83%), whilst the turnover of the fish catching sector has decreased by around 18% over the same period.

Table 2 shows how employment in the fisheries industry has seen a fall of around 27% since 2000. Employment in the aquaculture sector has remained reasonably stable, but fishing and processing have seen significant decrease. Table 7 shows how the proportion of female employees has dropped slightly in all enterprises. There are only limited data regarding the number of employees by size of enterprise and therefore conclusions cannot be drawn about any trends.

Table 6 shows that imports of fish and fish products have increased by 84% over the past ten years. This is against the trend of imports of food which have remained static in the same period. Exports of fish and fish products have grown at a similar rate to food in general.

2.3.2 Catching

Table 8 to 14 provide details on the catching sector. Over the 10 year period 1997 to 2007, the number of UK fishing vessels has fallen by 19%, with greater reductions seen in the English and Scottish fleets as a result of regional decommissioning schemes. However, the tonnage of UK fishing vessels has decreased by 20%, and the engine power of UK fishing vessels has decreased by 16% in the same period.

There has been a corresponding 30% reduction in the number of fishermen employed over that period (Table 12), at similar levels across the four UK administrations. The average age of UK vessels (Table 11) (over 10m) has increased by 18%. In summary, the historic trend is an ageing fleet of fewer but larger vessels.

Over the period from 1997 to 2007 there has been a fall of 26% in the quantity of fish landed by UK vessels but an increase of 15% in value terms when the value of landings is converted to €. The reduction in the amount of fish landed is a result of the fall in the catch of demersal fish such as cod, haddock and whiting. The lost income from landings of demersal species has been offset by increased landings of shellfish. Over the period landings of shellfish in the UK only rose by 11% in quantity terms but increased in (sterling) value terms by 165%, primarily driven by the increased value of landings of nephrops. These high valued shellfish landings have been a key driver for the increased value of UK exports of fish and fish products over the period. Tables 15 and 16 provide more detail on the breakdown of the quantity and value of landings.

2.3.3 Aquaculture (Tables 17-19)

Over the 10 year period 1997 to 2007, the total number of aquaculture enterprises has risen by 7%. The total turnover of these businesses has increased by 83% over the same period.

Total employment has increased by 50%, and correspondingly total employment costs have risen by 75%.

2.3.4 Processing (Tables 20-24)

Over the period 1997 to 2006, the total number of processing enterprises has decreased by 1.8%, but total turnover of these businesses has increased by 34% over the same period. Turnover has increased in all UK administrations, with the exception of Wales where a decrease in turnover of 71% was seen over the period 1998 to 2005.

Total employment has remained relatively stable but has seen a slight decline in 2006. However, total employment costs have risen by 24%.

2.3.5 Convergence and non-Convergence areas (Tables 25 and 26)

The contribution to GVA of UK non-Convergence areas increased by 66% over the period 1997 to 2006. GVA in UK Convergence areas saw an increase of 50% over the same period. Of this, the greatest increase in contribution to GVA was seen in Cornwall and the Isles of Scilly (76%), with increases also seen in West Wales and the Valleys (41%) and the Scottish Highlands and Islands (62%).

GVA per head rose by 54% in UK non-Convergence areas and by 46% in UK Convergence areas. The greatest increases in GVA per capita can be seen in Cornwall and the Isles of Scilly (63%) and in the Scottish Highlands and Islands (61%).

2.4 Driving forces and developmental tendencies

This section assesses the future development of the fisheries industry, including the sectoral and regional dimension of the socio-economic development of the industry.

Overall, the UK, which mainly competes with developed countries such as Iceland, Denmark, Ireland, Spain and France for supply of wild fish and Norway, Denmark and Turkey for farmed, is seeing increasing demand for fish and fish products¹¹. Total UK consumer purchases of fish were estimated to be €3.18 billion in retail in 2003 and €3.78 billion in foodservice¹². Consumers' expenditure on fish and fish products per head of population has risen by 46% between 1997 and 2006 (see Annex A).

2.4.1 Catching sector

The operation of the days at sea regime under the cod recovery programme continues to exert a considerable influence on the activities of fishermen subject to the controls. There is a significant and increasing market for traded days, as cuts become more severe, with the transactions adding demonstrably to enterprise costs. Additionally, the value of licences for a significant proportion of the over 10 metre sector is directly linked to their ability to fish in the cod recovery zone, with those without this entitlement witnessing a substantial drop.

Reductions in the 2008 Total Allowable Catches (TACs) for a small number of key stocks, notably North Sea sole and whiting and English Channel cod, have had a disproportionate impact on the under 10 metre fleet who rely on them for a significant share of their income. Initial discussions with the under 10 metre industry indicate that capacity, quota and fuel issues are also affecting this segment of the fleet.

¹¹ Domestic consumption increased by 1.1% in volume and 2.5% in value between 2003 and 2004; UK exports of fish and fish products have increased by 48% since 1996

¹² Provision of food out of home.

For some stocks however e.g. mackerel and North Sea haddock, TAC cuts triggered by the respective management plans have had less of an impact than might otherwise have been the case, because they have been accompanied by firming market prices. Incomes have thus been generally maintained. More significant negative impacts on profitability have been generated by other factors such as increasing fuel costs.

The UK's sea fisheries catching sector is important to the socio-economic well-being of coastal communities right around the country. It spans a wide range of different types of operation from small, often part-time inshore vessels, to multi-million pound pelagic vessels ranging widely over offshore waters. The communities in which sea fishing is important are similarly diverse, facing a wide range of challenges and opportunities depending on their differing socio-economic positions. There are challenges with regard to skills/labour shortages, a lack of training, an ageing fleet and an ageing workforce, especially in the catching and processing sectors. Transport infrastructure and other services are further limiting the ability of the industry to maximise its potential and therefore its contribution to sustainable fishing communities.

Of increasing importance is the need to safeguard the quality of the marine environment. The way that fisheries are managed can make a positive contribution to this objective as ultimately the stocks depend on healthy marine ecosystems. However, a new element is that the market is increasingly demanding a product with a high environmental reputation and credentials.

Fishing businesses across all sectors have become increasingly focused on maximising the value of the catch rather than focusing on volume alone. This trend is partly driven by reduced quotas and restrictive management measures but also by the challenges facing all businesses – operating costs, quality initiatives and market demands. Recent major increases in fuel prices pose a threat to the profitability of the industry and, in particular, of the most fuel-intensive fleet segments, such as beam trawlers and demersal trawl vessels. There are opportunities to reduce the sector's environmental footprint at the same time as reducing operating costs through the use of modern fuel efficient engines, gear and fishing methods, equipment to protect catches and gear from wild predators and to protect sensitive biota and habitats. Value and profitability can be maximised for all involved by improving the efficiency and cohesion of the supply chain through greater collaboration between catchers and processors. The sector has an excellent opportunity to capitalise on rising consumer demand for fish and to further develop high value, niche and differentiated products and markets.

In addition to these aspirations, there is growing enthusiasm for Marine Stewardship Council (MSC) certification in the industry. The MSC is an independent not for profit organisation that promotes responsible fishing practices. In England, under the previous programme there were several projects that received funding for MSC certification.

The introduction of the Registration of Buyers and Sellers of first sale fish has facilitated the tracing of almost all landings of fish with a consequent reduction in undeclared landings. This is expected to lead to improvements in the scientific understanding of the stocks, allowing prices to more accurately reflect supply and demand and paving the way for a more targeted, risk-based approach to fisheries enforcement. A key challenge is to reinforce this move to improved compliance by pressing on with moves to simplified and better regulation.

The catching sector as a whole is critical of the regulatory burdens placed on it and for this reason the UK is seeking to streamline them as far as is practicable. Other current initiatives in fisheries management include reform of the quota management arrangements; securing greater catching sector involvement in fisheries science; establishing a better compliance culture; and reducing discarding and by-catch. We expect this to lead to stability of catching opportunities and supply to the market in the long-term.

There are a number of communities in the UK for which fisheries activity provides important income. Many of these communities are rural, with few existing employment alternatives; contraction of fishing opportunity will therefore continue to have greater socio-economic implications for these communities. Similar effects may be felt in more urban areas.

In summary:

- the UK's sea fisheries catching sector is important to the socio-economic well-being of coastal communities right around the country, but contraction of fishing opportunity will continue to have socio-economic implications for the rural fishing communities;
- there are challenges with regard to skills/labour shortages, lack of training, and an ageing fleet and workforce;
- value and profitability can be maximised by improving the efficiency and cohesion of the supply chain through greater collaboration between catchers and processors, though the recent increase in fuel prices represents a severe challenge to the industry; and
- the sector has an excellent opportunity to capitalise on rising consumer demand for fish and to grow high value markets, and the growing enthusiasm for MSC certification in the industry.

2.4.2 Aquaculture

The aquaculture sector is for the most part economically stable, and technological advances are leading to improving productivity and improved welfare and environmental protection. There are strong brand identities in established products such as Scottish salmon and the sector is beginning to diversify into other species (for example cod and halibut) where there are significant new market led opportunities.

Since commercial aquaculture began in Scotland in the early 1970s, the industry which now includes a significant and growing organic sector has developed into an important employer. There are further opportunities to develop additional sectors through quality and traceability schemes, as well as other initiatives. Techniques to farm alternative finfish species such as halibut and cod have now reached commercial fruition and there is an interest in diversifying. Production, especially of cod, is rapidly expanding, e.g. production of cod via aquaculture was 542 tonnes in 2006.

Expansion of the shellfish farming sector continues. Diversification of species (both molluscan and crustacean) can have a minimal impact on the surrounding environment. However, this must not lead to escapes into the marine or freshwater environment (as required by Regulation (EC) 708/2008). The shellfish sector has indicated that it is looking to increase production as market demand remains robust across the sectors. However, future expansion is dependent on the availability of suitable farming sites and obtaining the necessary consents.

It is important that aquaculture works in harmony with the environment. Best practice site management is therefore being pursued and developed with the industry and wild fish interests at the local level through such initiatives as the Scottish Tripartite Working Group¹³. The plenary group and its associated management group, Regional Development Officers and Area Management Groups, work to identify solutions for ensuring the maintenance of a healthy stock of wild fish whilst at the same time promoting a healthy aquaculture industry in Scotland.

In summary:

- there is scope for continued market-led growth; and
- there may be potential for further growth of new species aquaculture.

2.4.3 Processing

UK processors face cost and supply-chain pressures. There are significant opportunities for processors associated with the increase in demand for fish products. This is partly driven by growing consumer awareness of the health benefits of fish and an increasing range of species on offer. Growth, particularly in the chilled and pre-packed markets, is expected to continue. There are also opportunities for the development of niche markets and promotion of higher quality fish both nationally and worldwide, particularly sustainably sourced products.

The processing industry has undergone considerable change over the past decade, particularly with the introduction of EC and UK legislation on hygiene, health and safety along with the increased reliance on quality standards.

¹³ The Tripartite Working Group (TWG) works to address problems common to salmon farming and salmon fisheries and to seek solutions for ensuring the maintenance of a health stock of wild fish whilst at the same time promoting a sustainable aquaculture industry. The TWG, chaired by the Scottish administration consists of regulators, industry and wild fisheries interests.

Another significant driver of change is the growing influence of multiple retailers which has resulted in many processing companies requiring modernisation of their operations and investment to improve the standard of processing facilities and equipment.

In addition to the changes noted there will also be new opportunities over the period 2007-2013. The possibility exists to increase the provision of produce to the food service sector, both private and public. It is estimated that for every pound spent on food, 30% of this is on food service¹⁰. Public sector guidelines on procurement and nutritional standards now provide greater opportunities to access the public sector market which is worth some €124m annually.

The importance of improving the efficiency of the supply chain has already been highlighted. Generally, this tends to be fragmented, with catchers, agents, sellers, processors and retailers failing to co-operate, and instead, duplicating investment in e.g. cold storage and transport. A focus on greater collaboration will support the further development of sustainable trading relationships. Along with any increased investment in the processing sector there is also the need to improve competitiveness to deal with the prospect of growing pressures in core markets from low-cost producing countries, technological advancement, and the continuing development and innovation by market leaders in value-added seafood products.

In summary:

- there are significant opportunities for processors associated with consumer demand for fish;
- there are opportunities for the development of niche markets and the promotion of higher quality and sustainably sourced fish;
- processing companies require modernisation of their operations and investment to improve the standard of processing facilities and equipment to facilitate delivery to multiple retailers;
- there is potential to further increase supply to the customer;
- there is a need to improve the efficiency of the supply chain with a focus on greater collaboration to support development of sustainable trading relationships; and
- there is a need to improve the competitiveness of the industry through new quality and value enhancement for fisheries and aquaculture products and access to improved market information.

¹⁰ Source: Sea Fish Industry Authority

2.5 SWOT Analysis

An overall assessment of the strengths, weaknesses, opportunities and threats (SWOT analysis) of the sector was prepared for the UK National Strategic Plan. This section refines the SWOT analysis to highlight those issues that can be addressed through the EFF programme.

SWOT Analysis of the UK Fisheries Industry

Strengths

- Good diversity of available species with some stocks healthy and fished at sustainable levels
- Proximity to good quality fishing grounds in many regions leads to lower costs and fresher products
- Strong local fishing tradition and heritage resulting in a good name for seafood
- Fish is seen as a healthy food and benefits are well documented (e.g. omega-3 fish oils); increasing marketability and demand for fish products
- Fish are the fastest growing component of the protein food market with potential for further growth
- Some aquaculture markets are well established (salmon, trout, mussels, oysters)
- Good quality products recognised by the public and some brand loyalty including premium brands (e.g. Scottish salmon, Whitstable oysters, Conwy mussels)
- Organic aquaculture production standards are already established for some species (e.g. salmon, trout) and being developed for others (e.g. cod, oysters)
- High aquatic animal health status allows controls that help reduce the likelihood of introduction and spread of diseases
- Business support for the processing sector e.g. SFIA, regional bodies, leading to good customer service and a strong customer base
- Some processors are technically advanced with some high levels of investment in equipment

Weaknesses

- Environmental challenges, e.g. discards and by-catch, water quality and animal welfare issues
- Over capacity in some parts of the fleet leading to increased damage to the marine environment and reduction in long-term fishing opportunity
- Ageing fleet; many engines are relatively fuel inefficient, meaning more fuel is being used than is optimal, and such engines are more polluting
- Some areas lack skilled labour and the workforce is ageing; poor levels of profitability are leading to problems with recruitment and retention
- In some parts of the fishing fleet, fragmented representation, lack of cohesion and limited co-operation with authorities
- Some examples of poor working conditions and safety standards
- Poor business management skills in some areas
- Lack of trust and co-operation between processors
- Lack of supply chain coherence and too many middlemen – supply chain too long; not enough customer feedback
- Insufficient focus on good practice amongst catching sector in relation to quality and product handling
- Poor levels of traceability
- Processing capacity not matched to supply in some areas, e.g. a lack of processing capacity for pelagic species and overcapacity of whitefish processing
- Reliance of sector on wild-caught species for fish feed
- Dependence on wild-caught spat for culture of some species of shellfish (environmental impact; leaves the sector vulnerable to variation in spatfall)
- Disease control can be difficult in open systems; lack of licensed medicines
- Some media reports have portrayed a negative image of farmed fish
- Product quality standards could be better developed for the shellfish sector
- Lack of local processing
- Limited number of funders of research and development in comparison to other animal production industries

Opportunities

- Satisfying a increasing consumer demand for sustainably sourced seafood products
- Scope for innovation and diversification into new species, both caught and farmed
- Development of practices to increase catch value, e.g. best practice in catching and handling
- New geographic and product markets; regional brands and product development
- Market premium for quality initiatives
- Niche markets in the catering sector
- Local branding; local promotion of seafood (awareness of food miles)
- Improved incentives to encourage sustainable fishing practices and supply chain cohesion through strategic alliances and marine stewardship
- Availability of cleaner, more fuel efficient vessel engines
- Assurance schemes of quality and of sustainable sourcing, improving standards of labelling, traceability and freezing
- Availability of high quality training
- Ability of stakeholders to influence policy and work more closely with scientists
- Scope for utilisation of by-products
- Improvements in packing and shelf-life technology
- New technology has the ability to significantly mitigate environmental impacts
- Potential for aquaculture in new areas (e.g. opportunities further offshore)
- Water quality may be improved through culture techniques (e.g. bivalve mollusc cultivation)
- Examining ways to move towards the maximum sustainable yield could provide ways to make the industry more operationally efficient.

Threats

- Non-native introductions and associated impacts including competition and disease transmission
- Disease and parasites/availability of disease control – relevant to all farmed species
- Fleet size may fall below the critical mass that can sustain local infrastructure
- People leaving the catching sector to alternative employment
- Resource competition and conflict (e.g. with tourism)
- Inability to compete with imports to the UK
- Fluctuations in local raw material supply and quality
- Lack of market processing capacity for pelagic species; UK's leading share of home market is declining
- More efficient and cost-effective processing abroad
- Potential negative image of fish products, partly related to environmental damage, partly to inadequate labelling to identify source, capture method, etc
- Availability, sustainability and quality of fish meal, oil and other feed ingredients (considerable fishing pressure on the industrial fisheries)
- Fuel price increases and capacity related issues.

2.6 The Environmental Situation and Results of the Strategic Environmental Assessment (SEA)

This section provides an overview of the environmental situation in the UK and summarises the results of the environmental assessment conducted in compliance with the Strategic Environmental Assessment (SEA) Directive¹⁴. The initial SEA Environmental Report can be found at Annex B. There will be ongoing consideration of the potential environmental impacts of projects, as the Programme is rolled out across the UK, in accordance with the SEA recommendations.

2.6.1 Description of the environmental situation

The seas of the United Kingdom extend to some 867,400 km². Of this, about 161,200 km² lies within territorial waters (including Rockall, but excluding the Crown Dependencies of the Isle of Man and the Channel Islands), while the remainder extends over the continental shelf and some areas of the adjacent continental slope.

In coastal districts, and in the southern North Sea, the seas are shallow, usually less than 50 m in depth, while in the northern North Sea, the Channel, south-west approaches, Irish Sea and inshore waters off the western coast of Scotland, the seas are rather deeper, shelving to some 200 m depth at the upper edge of the continental shelf. West of St Kilda, and offshore from Shetland, the seabed descends rapidly to the foot of the continental shelf at about 1,000 m. Beyond this, the sea floor is interrupted by a number of banks and seamounts. Further offshore still, a succession of deep-water banks and troughs descend to an extreme depth of over 3,000m, 200 miles west of Rockall (CHM, 2002).

The UK coastline encompasses almost all types of temperate intertidal habitat, from hyper-saline and brackish lagoons, estuaries, coastal marsh and mudflats, shingle and sand dunes, sea cliffs to sandy and rocky shores with every degree of exposure and widely varying profile. Some sections of the coastline are unspoilt and contain internationally important examples of habitats and species. Other areas are the focus for intense human activity which can affect the natural environment. At present six percent of UK territorial waters are covered as a Special Area of Conservation under the Natura 2000 system.

The UK targets a wide range of demersal and pelagic fisheries. Many of these stocks are shared with other European nations and are managed accordingly. The stocks below the Safe Biological Limits (SBL) that are of particular concern for the International Council for Exploration of the Seas

¹⁴ 2001/42/EC of the European Parliament and of the Council of 27 June 2001 on the assessment of the effects of certain plans and programmes on the environment. OJ. L 197, 21/07/2001.

(ICES) are shown in the table below, which indicates the spawning stock biomass and recruitment of age 1 fish over the period 2002 – 2006.

Key UK fish stock status indicators (2003-2007) for species of concern to ICES

		2003	2004	2005	2006	2007	
A) North Sea							
Cod							
	Spawning stock						
	biomass	('000 tonnes)	40	36	31	28	37
	Recruitment (age 1)	(million fish)	92	134	111	333	n/a
Haddock							
	Spawning stock						
	biomass	('000 tonnes)	420	354	302	238	289
	Recruitment (age 0)	('000 million fish)	4.0	3.6	37.6	6.3	6.5
Whiting							
	Spawning stock						
	biomass	(index) ¹	156	135	105	97	68
	Recruitment (age 1)	(index) ¹	0.4	0.4	0.4	0.4	n/a
Plaice							
	Spawning stock						
	biomass	('000 tonnes)	233	184	203	197	193
	Recruitment (age 1)	(million fish)	474	878	500	637	n/a
Sole							
	Spawning stock						
	biomass	('000 tonnes)	27	40	36	28	24
	Recruitment (age 1)	(million fish)	90	44	44	147	n/a
Herring							
	Spawning stock						
	biomass	('000 tonnes)	1703	1759	1593	1208	n/a
	Recruitment (age 0)	('000 million fish)	19	23	18	28	12
B) Irish Sea							
Cod							
	Spawning stock						
	biomass	('000 tonnes)	4.4	4.0	2.5	2.6	2.1
	Recruitment (age 0)	(million fish)	1.9	1.3	1.6	1.1	n/a
Sole							
	Spawning stock						
	biomass	('000 tonnes)	2.9	2.4	2.1	1.8	1.8
	Recruitment (age 2)	(million fish)	3.5	3.3	3.3	1.9	3.4
C) West of Scotland							
Cod							
	Spawning stock						
	biomass	('000 tonnes)	6.2	5.3	4.0	3.5	4.9
	Recruitment (age 1)	(million fish)	2.0	3.8	3.0	8.6	3.1

Source:- WG reports and reports of the ICES Advisory Committee on Fishery Management 2007

¹SSB and recruitment given by ACFM as indices only - no units given.

State of the stocks as determined by ICES in 2007 (ICES ACFM advice, October 2007), the percentage of the EU TAC allocated to the UK and the TAC (tonnes) in 2008.

The state of the stock in relation to precautionary and maximum sustainable yield levels gives an indication of the health of the stock, and the last two statistics give an indication of its economic importance to the UK.

NORTH SEA

Stocks	State of the stock				
	Spawning biomass in relation to precautionary limits	Fishing mortality in relation to precautionary limit	Fishing mortality in relation to high long-term yield	% of EU TAC to UK	TAC for 2008
Cod in the North Sea, Eastern Channel and Skagerrak	Reduced reproductive capacity	Harvested sustainably	Overexploited	47%	22152 t
Cod in Kattegat	Reduced reproductive capacity	Unknown	Unknown	0%	673 t
Haddock in the North Sea and Division IIIa	Full reproductive capacity	Harvested sustainably	Overexploited	79%	49300 t
Whiting in the North Sea And Eastern Channel	Unknown	Unknown	Overexploited	62%	17850 t
Saithe in the North Sea, Division IIIa and Subarea VI	Full reproductive capacity	Harvested sustainably	Overexploited	18%	150000 t
Anglerfish in Division IIIa, Subareas IV and VI	Unknown	Unknown	Unknown	66%	16500 t
Plaice in the North Sea	At risk of reduced reproductive capacity	Harvested sustainably	Overexploited	38%	49000 t
Plaice in the Eastern Channel	Unknown	Unknown	Unknown	29% (As Western Channel)	5050 t (As Western Channel)
Plaice in Division IIIa	Unknown	Unknown	Unknown	5%	11688 t
Sole in Division IIIa	Full reproductive capacity	Harvested sustainably	Overexploited	0%	940 t
Sole in the North Sea **	Reduced reproductive capacity	Harvested sustainably	Overexploited	4%	12800 t
Sole Eastern Channel	Full reproductive capacity	Harvested sustainably	Overexploited	19%	6593 t
Sandeel North Sea	Reduced reproductive capacity	Undefined	Undefined	Not established	Not established

Norway pout North Sea	Full reproductive capacity	Undefined	Undefined	0%	36500 t
Autumn spawning herring in the North Sea, VIId and IIIa	At risk of reduced reproductive capacity	At risk of being harvested unsustainably	Overexploited	26%	201227 t
Spring spawning herring in IIIa and Subdivisions 22-24	Undefined	Undefined	Undefined	0%	51673 t
Mackerel in the North Sea	Unknown	Unknown	Unknown	3%	18149 t
Horse mackerel in the North Sea	Unknown	Unknown	Unknown	10%	39309 t
Skates and rays	Unknown	Unknown	Unknown	65%	1643 t
Spurdog	Unknown	Unknown	Unknown	Not established	Not established
Nephrops stocks	Unknown	Unknown	Unknown	87%	26144 t

WESTERN WATERS

Stocks	State of the stock				
	Spawning biomass in relation to precautionary limits	Fishing mortality in relation to precautionary limit	Fishing mortality in relation to high long-term yield	% of EU TAC to UK	TAC for 2008
Anglerfish in Divisions VIIb-k and VIIIa,b (L. piscatorius and L. budegassa)	Unknown	Unknown	Unknown	14%	36000 t
Anglerfish in Division IIIa, Subarea IV, and Subarea VI	Unknown	Unknown	Unknown	58%	16500 t
Cod West of Scotland	Reduced reproductive capacity	Unknown	Unknown	60% (As Rockall)	402 t (As Rockall)
Cod in Division VIb (Rockall)	No assessment	No assessment	No assessment	60% (As West of Scotland)	402 t (As West of Scotland)
Cod in Division VIIa	Reduced reproductive capacity	Harvested unsustainably	Overexploited	29%	1199 t
Cod in Divisions VIIe-k	Reduced reproductive capacity	Harvested sustainably	Overexploited	8%	4316 t

Haddock West of Scotland	Full reproductive capacity	At risk of being harvested unsustainably	Overexploited	78%	6120 t
Haddock in Division VIIb (Rockall)	Full reproductive capacity	Harvested sustainably	Underexploited	81%	6916 t
Haddock VIIa	Undefined	Unknown	Undefined	10% (As VIIb-k)	11579 t (As VIIb-k)
Haddock in Divisions VIIb-k	Undefined	Undefined	Unknown	10% (As Irish Sea)	11579 t (As Irish Sea)
Herring in VIa south and VIIb,c (Advice June 2007)	Uncertain	Uncertain	Unknown	0%	11642 t
Herring in Division VIa North (advice June 2007)	Undefined	Undefined	Overexploited	60%	27200 t
Celtic sea and Division VIIj herring (Advice June 2007)	Uncertain, but likely at risk of reduced reproductive capacity	Unknown	Unknown	<1%	7890 t
Irish Sea herring (Division VIIa N)	Unknown	Unknown	Unknown	74%	4800 t
Megrim in Divisions VIIb,c,e-k and VIIa,b,d (L. whiffiagonis and L. boscii)	Unknown	Unknown	Unknown	13%	20425 t
Megrim in Subarea VI (West of Scotland and Rockall)	Unknown	Unknown	Unknown	31%	2592 t
Nephrops in Divisions VIIb,c,j,k, FU16-19) biannual advice, same as 2006)	Unknown	Unknown	Unknown	33% (As FU20-22 and FU14/15)	25153 t (As FU20-22 and FU14/15)
Nephrops in Divisions VIIf,g,h, FU20-22 (biannual advice, same as 2006)	Unknown	Unknown	Unknown	33% (As FU14/15 and FU16-19)	25153 t (As FU14/15 and FU16-19)
Nephrops in Division VIa (FUs11,12,13) (biannual advice, same as 2006)	Unknown	Unknown	Unknown	98%	19885 t
Nephrops FU 15 and FU 14 (biannual advice, same as 2006)	Unknown	Unknown	Unknown	33% (As FU16-19 and FU20-22)	25153 t (As FU16-19 and FU20-22)
Norway pout West of Scotland	Unknown	Unknown	Unknown	Not established	Not established
Plaice VIIa	Full reproductive capacity	Harvested sustainably	Underexploited	30%	1849 t

Plaice West of Ireland (Division VIIb,c)	Unknown	Unknown	Unknown	0%	110 t
Plaice in Division VIIe (Western Channel)	At risk of reduced reproductive capacity	At risk of being harvested unsustainably	Overexploited	29% (As Eastern Channel)	5050 t (As Eastern Channel)
Plaice in the Celtic Sea (Divisions VIIf and g)	Reduced reproductive capacity	Undefined	Overexploited	15%	491 t
Plaice Southwest of Ireland (Division VIIh-k)	Unknown	Unknown	Unknown	13%	303 t
Sandeel in Division VIa	Unknown	Unknown	Unknown	Not established	Not established
Sole VIIa	Reduced Reproductive Capacity	Harvested unsustainably	Overexploited	22%	669 t
Sole West of Ireland (Division VIIb,c)	Unknown	Unknown	Unknown	0%	59 t
Sole in Division VIIe (Western Channel)	Increased risk	Harvested unsustainably	Overexploited	59%	765 t
Sole in the Celtic Sea (Divisions VIIf and g)	Full reproductive capacity	Harvested sustainably	Overexploited	28%	964 t
Sole Southwest of Ireland (Division VIIh-k)	Unknown	Unknown	Unknown	17%	650 t
Sprat in divisions VII d,e (Advice June 2007)	Unknown	Unknown	Unknown	52%	6145 t
Whiting in Division VIIa	Unknown	Unknown	Unknown	38%	278 t
Whiting in Divisions VIIe-k	Unknown	Unknown	Unknown	11%	19940 t
Whiting West of Scotland	Unknown	Unknown	Unknown	57% (As Rockall)	765 t (As Rockall)
Whiting in Division VIb (Rockall)	No assessment	No assessment	No assessment	57% (As west of Scotland)	765 t (As west of Scotland)

During the 1990s, the percentage of fish stocks (i.E. the number of those stocks, not the tonnage or value of catches) considered to be 'harvested sustainably' was no more than 20 per cent. By 2000 this was 10 per cent, but has increased to 35 per cent in 2005. Despite such increases, these trends show that around 70 to 75 per cent of fish stocks in seas around the UK have suffered reduced reproductive capacity and have been harvested

unsustainably each year since 2001. Further information can be found in Section 3 of the Environmental Report.

A recent analysis of marine environmental trends around the UK's seas is documented in *Charting Progress: An Integrated Assessment of the State of the UK Seas* (Defra 2005). A summary of this analysis can be found in annex C of the Environmental Report.

The UK has significant obligations to meet in terms of nature and the environment in accordance with a range of EU Directives.

EC Shellfish Directive - There are currently 98 designated shellfish waters in England, 108 in Scotland, 26 in Wales and 9 in Northern Ireland, a total of 241 shellfish waters in the UK. Shellfish waters are formally designated under the EC Shellfish Waters Directive. Generally shellfish water quality has been improving and over the last five years an average of 93 per cent of shellfish waters reached the standards of the Shellfish Directive.

The UK is committed to maintaining a broad match between designated shellfish waters and shellfish harvesting areas. More designations may be made in the future, if necessary, to maintain the broad match between designated shellfish waters and shellfish harvesting areas.

The Directive will be repealed in 2013 by the EC Water Framework Directive. When this occurs, the Water Framework Directive must provide at least the same level of protection to shellfish waters.

Water Framework Directive - In the UK, much of the implementation work will be undertaken by competent authorities. To help deliver a consistent approach to implementation of the Directive, the Agencies responsible for the implementation of the Directive have established a UK Technical Advisory Group (UKTAG) comprised of experts from the UK environment and conservation agencies.

We are working hard to ensure that development of the UK Marine Bill and implementation of the Water Framework Directive (WFD) are consistent in approach. Plans outlined in the Marine Bill for the possible reform of the current licensing regime for example, could help deliver a number of WFD objectives within the Transitional and Coastal areas, and this will be discussed as details of changes to marine licensing regimes are developed over the coming months. It is possible that the proposed Marine Management Organisation (MMO) will also have an important regulatory role to play in delivering WFD TRAC objectives in England in the future, this prospective role will be determined as the Marine Bill itself is developed. Similar issues apply in relation to separate Scottish proposals for marine legislation and a Scottish MMO.

Natura 2000 – There are a total 614 designated SACs, SCIs or cSACs in the United Kingdom (excluding Gibraltar), covering a total area of over 2,630,000 ha. There are currently 76 SACs with marine components in the UK.

The majority of existing SACs with marine components are coastal; a further phase of site selection is underway to select marine sites beyond coastal waters. There are seven possible SACs and one draft offshore site under consideration.

UK Biodiversity Action Plan (BAP) – The UK list of Priority Species and Habitats was comprehensively revised in June 2007, and contains 1149 species and 69 habitats that have been listed as priorities for conservation action under the UK BAP. The process to refine priority actions will be achieved through consultation. Further detail can be found in Section 3 of the Environmental Report.

2.6.2 Results of the Strategic Environmental Assessment (SEA)

The Strategic Environmental Assessment (SEA) of the UK Operational Programme is being undertaken by Poseidon Aquatic Resource Management Ltd and Mott MacDonald under the direction of the UK fisheries administrations.

The Environmental Report details the potential environmental effects of the plans and measures to be undertaken as part of the UK Operational Programme for the EFF. It responds to the European Commission's SEA Directive (2001/42/EC) and the corresponding UK regulations, representing an important step in the overall SEA process. The assessment has been prepared on the basis of existing data and knowledge and at a level appropriate to the programme. There will be ongoing consideration of the potential environmental impacts of projects, as the Programme is rolled out across the UK, in accordance with the SEA recommendations.

Non-technical summary

The core objective of the UK Operational Programme is to contribute to the overarching aim of fisheries and aquaculture management in the UK – a fisheries industry that is sustainable, profitable and supports strong local communities, managed effectively as an integral part of coherent policies for the marine environment.

A number of other plans, programmes and legislation influence the UK Operational Programme (see Annex B of the Environmental Report) by establishing the overarching environmental objectives against which the specific actions of the UK Operational Programme are assessed. The UK Operational Programme must ensure that EFF funding does not compromise the environmental objectives associated with these other plans and programmes.

The environmental assessment indicates that the baseline conditions of UK fish stocks are currently poor, with only 35 percent of fisheries being harvested sustainably. Whilst this situation is improving (in the 1990s this figure was around 10%), it is essential that any activities funded under the Operational Programme support recovery measures and do not lead to an unsustainable increase in fishing effort in the UK. Other baseline issues of

concern include the high discard levels from certain gear types and fisheries which particularly reflect the overfishing of demersal resources. The bycatch of sea mammals, especially porpoises, has also been of concern in the past but recent measures have seen an improvement in the situation. Seabird bycatch is of lesser concern in UK fisheries, although this may rise with the increasing uptake of longlining by UK fishermen. There is also concern about the stocks of a number of skate and ray species mostly taken as bycatch in fisheries directed towards other species.

Other important baseline indicators include the growing level of coastal and marine areas under nature protection, especially from the EC Habitats and Birds Directives (Natura 2000). This is likely to expand with the development of a 'marine protected area' network into offshore areas. Amongst the most common effects of fishing activity are concerns about habitat degradation, particularly through physical disturbance of the seabed by some types of fishing gear, leading to an adverse effect on seabed habitats and communities.

A number of key marine, freshwater and migratory species have been listed as threatened or endangered and some have also been provided Biodiversity Action Plans by the UK. Some of these species – salmon, European eel and river lamprey – are of particular importance to the UK and thus their current status is of relevance to the Operational Programme.

Other environmental baseline conditions are generally of lesser relevance, although some need to be considered in respect of EFF activities. These include river and coastal water quality, since coastal aquaculture can be an important localised source of nutrient discharges. Fish processing can also utilise high volumes of water and generate significant quantities of organic waste, although there are more options for water management and effluent minimisation. Fuel consumption by the fishing industry is also a growing economic issue to the industry. The effect of fisheries and aquaculture activities and infrastructure on landscapes and national heritage also needs to be considered, although there is equal concern over the potential loss of traditional fisheries related heritage in fast changing water-front areas and coastal communities.

The UK Operational Programme will assist in helping to achieve the environmental protection objectives, established at international, community and Member State level, which have influenced the development of key environmental objectives in relation to implementation of the UK Operational Programme itself. For example, within the coverage of strategies established under the OSPAR convention is the protection and conservation of marine biodiversity and ecosystems, a key environmental objective in relation to the UK Operational Programme.

The environment assessment has looked at the effects of the UK programme on a number of environmental issues, including biodiversity, population, human health, fauna, flora, soil, water, air, climatic factors, material assets, cultural heritage and landscape. Overall the assessment does not identify any significant negative environmental issues.

Axis 1: Measures for fishing fleet adaptation

The measures to assist young fishermen purchase second-hand vessels and to modernise the fleet may unwittingly increase fishing capacity and effort as a result of increased catch rates and efficiency. Whilst this increase is likely to be controlled, since the EFF Regulation restricts such projects to ensure that effort and capacity are not increased, the effects of this measure need to be monitored and periodically evaluated particularly in relation to technological creep. The *modernisation of the fleet* also raised a precautionary note that this may have the potential to affect the cultural place of fishing fleets in traditional settings and landscapes, although it is noted that the risk is very low and heavily outweighed by the potential benefits. The *socio-economic compensation* measures were all considered to be environmentally beneficial with no significant negative effects. In summary, both the Operational Programme and the National Strategic Plan emphasise the need to match fleet capacity to available resources but there is a need to detect unforeseen increases as the Programme unfolds.

Axis 2: Aquaculture, inland fishing, processing and marketing

This axis has a number of wide-ranging measures with varying environmental implications. Aquaculture development in particular has the potential to cause environmental harm through the introduction of exotic species as well as highly domesticated native strains. The risk is amplified by both the nature of the measures, which are aimed at diversifying aquaculture into new species, as well as the general rate of expansion of the industry. Allied to this is the promotion of new or improved production facilities that may impinge upon sensitive conservation areas or result in additional avenues for stock escapement. These new technologies may also create additional visual conflicts with seascape and landscapes and heighten the need for appropriate consultation and sympathetic design. The inland fishing measures are very much designed with stock conservation in mind but may again result in unintentional collateral effects, especially as new fisheries development opportunities appear as riverine water quality improves under the Water Framework Directive.¹⁵ Finally, the development of processing and marketing enterprises was generally considered to be environmentally benign, although there was some concern raised over additional water consumption by fish processing and the general impact of new building site development upon soils, both in brown field sites (i.e. the disturbance of contaminated soils) and green field sites.

Priority Axis 3: Measures of common interest

The development of fishing ports, landing sites and shelters may result in increased fishing pressure as a result of increased efficiency, or may displace effort to new areas that might be sensitive to fishing activities, although these impacts are considered unlikely. Similarly these measures might divert pressure to alternative species – whilst this may be environmentally desirable in most cases, there may be occasions when this might result in additional

¹⁵ The SEA was conducted on an early version of the Programme. Inland fishing measures for Axis 2 are no longer envisaged as part of the UK Programme.

pressure on threatened or endangered species or habitats. The development of new markets might also have similar effects, although this was generally seen as environmentally positive, especially if it reduces pressure on less sustainable stocks. The funding of pilot studies was also seen as environmentally benign, although some concern was raised over the potential effect on traditional fisheries should such activities result in a change in their nature. Again, this was seen as low risk and such projects may also be beneficial if they result in securing the position of traditional fisheries and processes.

Priority Axis 4: Sustainable development of fisheries areas

Many areas of the strengthened competitiveness measure under this axis reflect the concerns raised in the first three axes. However, the potential for realisation of these effects is considered low and very much dependent on the nature of the management regime under which funded activities are conducted. Realisation of these effects is likely to be locally significant at the spatial scale and be permanent in nature. The development of small fishing community activities also reflected a concern over raising fishing pressure on inshore resources and habitats, as well as possibly increasing bycatch and discard levels. The likelihood is considered low and the effects spatially restricted, but may be locally significant. The diversification of small fishing community activities away from fishing based activities would obviously reduce pressure on fisheries resources, but may have socio-economic, cultural or heritage implications that would need to be understood and where possible avoided.

The identification of the broad environmental effects that might result from implementation of the UK Operational Programme has allowed various mitigation approaches to be developed. However a major constraint is that the Operational Programme must remain consistent with the original aims and legal requirements of the EFF. Where significant negative and positive effects might arise from implementation of the Operational Programme, broad guidance can be provided on how negative effects might be prevented, reduced or offset and how positive effects could be enhanced and replicated. This advice can be practically applied at two levels:

Changes to the Operational Programme: the environmental analysis did not result in the identification of any major environmental issues, and thus it is the conclusion of the analysis that the Operational Programme is broadly environmentally sound and that no major changes to any of the axes and measures are required. Full details regarding the environmental assessment can be found in the Environmental Report. However broad guidance has been provided on clarification and development of the Operational Programme where significant potential environmental effects were determined.

Mitigation at the project design and development stage: it is recognised that the initial SEA was conducted at a broad level on an Operational Programme that was in draft form. Therefore a second level of mitigation is recommended, whereby a simple environmental risk assessment is applied

during the funding application stage. This allows applicants to describe the potential environmental implications of their proposed activities and develop project-specific mitigation measures.

The assessment process has involved the consideration of each of the principal measures proposed under the UK Operational Programme against environmental objectives. This included the assessment of short, medium and long-term effects, permanent and temporary effects, positive and negative effects, and secondary, cumulative and synergistic effects. The assessment was undertaken by a group of fisheries and environmental experts using a matrix approach. Where potentially significant negative effects are considered possible, a second more detailed assessment was undertaken to determine the nature of the predicted effects.

It was assumed that all additional legal and regulatory obligations associated with measures would be undertaken, e.g. improvements to infrastructure will be carried out in compliance with planning and environmental legislation. The analysis undertaken dealt with a data poor environment when compared to the ability to identify significant terrestrial environmental effects. Determination of effects in the aquatic environment can be difficult to identify and monitor and an aspect of professional caution was therefore included in the analysis, so that more significance was given to uncertain negative effects. Identification of effects is also limited by the absence of detail on the specific actions and spatial regions into which activities under the UK Operational Programme will be focussed, which cannot be determined until applications are received.

Monitoring of the environmental effects can be undertaken at two levels. The broad scale monitoring of key fisheries-related environmental conditions such as stock status, by-catch levels will continue to be undertaken through ongoing CFP, regional and national initiatives. Other key environmental indicators such as water quality, are also subject to recurrent monitoring programmes. These should be assessed at the mid-term appraisal stage.

Project-level environmental monitoring would be linked into the mitigation approaches designed for individual projects, where the effect of significant risks would be measured through the use of appropriate scale indicators that would be identified and agreed at the grant award stage. The results from these would be used to inform the environmental appraisal of future grant applications and where necessary, used to refine the Operational Programme at the mid-term appraisal stage (see the description of monitoring measures below).

2.6.3 Information on consultations with public and environmental authorities

Scoping consultation

In accordance with Article 5(4) of the SEA Directive, a Scoping Report establishing the environmental issues, topics and objectives, and our approach to the SEA process, was issued for consultation on 5th October

2007. A five week period of consultation, led by Defra on behalf of all UK fisheries administrations, was undertaken specifically seeking views on:

- environmental issues in relation to the UK Operational Programme;
- environmental objectives and assessment criteria;
- SEA assessment methodology;
- data sources and baseline data gaps and
- the potential for positive and negative effects of the UK Operational Programme.

The scoping consultation was sent out to the eleven designated UK environmental consultation bodies, which in turn provided opportunities for other stakeholders within their area of competency to express views. Transboundary consultation was also undertaken with other Member States. A full list of those consulted during the SEA process can be found at Annex C.

The scoping consultation resulted in 10 replies; Federation of Scottish Aquaculture Producers; Environment and Heritage Service, Northern Ireland; Scottish Natural Heritage; Aberdeenshire Council; Countryside Council for Wales; Scottish Enterprise Grampian; Historic Scotland; Scottish Environment Protection Agency; the Environment Agency; and the Scottish Fishermen's Federation. No formal submissions of views on the Scoping Report were received from other Member States.

Consultation on the Environmental Report

In accordance with Article 6 of the SEA Directive, an eight week consultation on the draft UK Operational Programme and SEA Environmental Report was issued on 13th February 2008. The consultation was led by Defra on behalf of all UK fisheries administrations.

The consultees included the UK environmental consultation bodies, key stakeholders and transboundary consultation with other Member States (see Annex C).

The Environmental Report consultation resulted in 10 replies; Countryside Council for Wales; Department of Agriculture, Fisheries and Food, Ireland; Aberdeenshire Council; Environment and Heritage Service, Northern Ireland; the Environment Agency; the Joint Nature Conservation Committee and Natural England; Scottish Natural Heritage; Scottish Environment Protection Agency; the Federation of Scottish Aquaculture Producers; and the Ministry of Agriculture, Rural Development and Fisheries, Portugal.

2.6.4 Statement foreseen by Article 9 of the SEA Directive – summary of environmental considerations and the opinions expressed during consultations

The environmental assessment did not result in the identification of any significant negative environmental issues. Therefore it was concluded that the UK Operational Programme is broadly environmentally sound and that no major changes to any axes or measures would be required.

However, where potential for significant negative/positive effects might arise from implementation of the Operational Programme, further conditions will be attached to the application to ensure that negative effects can be prevented or reduced and positive effects can be enhanced and replicated.

In addition to ensuring that minimum legal and regulatory obligations associated with measures are undertaken (e.g. planning consents), we will seek further information in the application process regarding potential environmental effects and what practical steps the applicant might take to minimise/enhance these. We will also develop an environmental screening capability at the application review stage to ensure that assessment of environmental effects has been rigorously conducted, to seek clarification from the applicant where ambiguities remain, and to ensure the decision to fund projects includes an appraisal of the overall environmental costs and benefits against the wider benefits of the project.

Opinions expressed during consultations

The scoping consultation responses resulted in a broadening of the scope of the assessment to include all SEA defined environmental topics, and further work to clarify and refine the proposed environmental objectives against which the UK Operational Programme would be assessed. A wider scope of plans, programmes and strategies which affect or influence the Operational Programme were also considered. Further data was collected to establish baseline environmental conditions and to broaden the focus of key environmental issues to be assessed.

The key common themes arising from the Environmental Report consultation, and our response to these are detailed in the table below.

Issue	Response
The need for 'appropriate assessment' under the Habitats Directive.	We do not feel that 'appropriate assessment' can be conducted at Operational Programme level since this will be determined by the specific detail of projects for which we receive applications. As with the decision making process for FIGG, we will seek expert advice regarding the need for 'appropriate assessment' when assessing applications for grant funding. We will also ensure the grant facilitators and members of the in-house grants teams in the devolved administrations are suitably trained to alert applicants to the potential linkages to the Habitats Directive and other

	<p>environmental objectives such as those established under the Water Framework Directive. Applications for grant funding will only be approved where it is demonstrated that all appropriate consents, approvals and assessments have been completed prior to award of the grant, or in appropriate cases, will be completed within a reasonably short period after the offer of grant. In such cases, awards will be subject to appropriate conditions.</p>
<p>Environmental assessment should be conducted at Operational Programme level and not deferred to project level.</p>	<p>Initial environmental assessment of all projects which may be funded under the UK Operational Programme has been conducted. This has resulted in the identification of some projects as having the potential for significant negative environmental effects. The actual environmental effects can only be determined by the specific detail of projects. Hence it is felt that only a high level assessment is possible at this stage.</p> <p>The findings of the Environmental Report will be used in assessing applications for grant funding. A further assessment will be introduced at project level, and applicants will be required to answer a number of questions on environmental performance when completing application forms. The grant facilitators and members of in-house grants teams will be suitably qualified to assist applicants with this process. In addition, where relevant information already exists as part of other consents, approvals or assessments, this will be sufficient thereby avoiding duplication of effort when completing application forms.</p>
<p>More specific monitoring plans should be detailed in the Operational Programme, including reassurance that existing monitoring regimes are robust and that the cumulative impacts of projects will also be assessed.</p>	<p>We will adopt a risk based approach to monitoring. The obligation to undertake monitoring will rest with the UK Monitoring Committee and detail will be agreed with the Committee in due course. We propose to work with applicants to collect necessary data, and appropriate monitoring agreements will be established prior to the commencement of each project.</p> <p>The cumulative impacts of projects will be assessed as part of the mid term evaluation of the programme.</p> <p>The UK administrations will work closely to ensure a compatible approach to data collection so that data can be compared at a UK scale.</p>
<p>Whether the National Strategic Plan was</p>	<p>We do not consider that the NSP itself falls within the remit of the SEA Directive. The EFF is one of a</p>

<p>subject to SEA.</p>	<p>number of policy tools and mechanisms which can help us deliver the priorities and objectives of the NSP. It is the specific actions that we take to deliver the NSP that may impact on the environment and that should be subject to SEA.</p>
<p>The Environmental Report should include more detail about the positive negative effects of projects and how these can be enhanced.</p>	<p>As the programme is rolled out, we will keep under consideration what, if any, further work is required to address this aspect of the environmental assessment further, keeping the Monitoring Committee advised. The Environmental Report does however include some suggestions as to how positive environmental effects of projects can be enhanced and these recommendations will be used in developing the criteria for selecting projects for funding.</p>
<p>The SEA should consider alternative approaches to utilising EFF funds, e.g. considering different splits of funding between the four UK administrations, between the priority axes and the types of measures that can be funded under each axes.</p>	<p>We consider that the ability to adopt alternative approaches to utilising EFF funds is largely constrained by the EFF Regulations which prescribe those measures which are eligible for funding. We agree that the priority prescribed to specific axes should take account of the results of the environmental assessment. However the initial environmental assessment did not result in identification of any projects where there is a strong likelihood of significant negative environmental effects. Those projects where there may be potential for environmental effects will be addressed through mitigation and monitoring. The division of the UK budget between the four administrations has been agreed by Ministers as the fairest approach given the current needs of the industry. Performance will be kept under review by the four administrations and will be the subject of regular reporting to the Monitoring Committee and the Commission, in accordance with Commission Regulation EC 1198/2006.</p>

Description of monitoring measures

In accordance with Article 10 of the SEA Directive, monitoring of the environmental effects of the implementation of the Operational Programme will be undertaken in order to identify unforeseen adverse effects, and to take appropriate remedial action.

We will utilise the results of monitoring of key fisheries-related environmental conditions such as stock status and by-catch levels, undertaken through on-going Common Fisheries Policy, regional and national initiatives. Other key

environmental indicators such as water quality are also subject to recurrent monitoring programmes in the UK. These will all be assessed as part of the interim evaluation of the Programme.

A risk based approach will be applied to monitoring. Where a decision is taken to grant funding, the relative environmental risk will be determined by reference back to the predicted risk in the Environmental Report and the results of the project specific risk assessment.

The obligation for carrying out monitoring requirements will rest with the UK fisheries administrations and the Monitoring Committee (in accordance with Article 66 of the EFF Regulation). The Monitoring Committee will periodically review progress made towards achieving the specific targets of the programme and examine the results of implementation. Responsibility for monitoring will also fall to the applicant, with funding being tied to a monitoring agreement, for which we will work closely with applicants to ensure accurate monitoring data is collected. The four UK administrations will work closely to ensure a compatible approach to data collection so that monitoring data can be compared at a UK scale.

Publication of the SEA Environmental Report

The final SEA report was submitted to Defra on 5th March, and approved by the four fisheries administrations on 11th March. As part of the consultations on the Programme, the SEA report, and OP including Article 9 statement and Article 10 monitoring measures, were published on the Defra website and announced by a public Information Bulletin, with appropriate links to the websites of the devolved administrations.

In accordance with Article 9 of the SEA Directive, the UK will ensure that once the OP has been adopted, the public and any Member States consulted on the SEA and OP will be notified, and a further announcement made by Information Bulletin or Press Release, and the relevant web pages will be updated by the four administrations.

2.7 Equality

Table 7 of Annex A shows in general there are relatively few women employed in the fisheries sector. In the results from the ONS Annual Business Inquiry for 2006 (covering Great Britain only), women constituted around 28% of all those employed in the fisheries sector, 12% of those employed in the catching sector as a whole, 11% of those employed in aquaculture, and 35% in fish processing.¹⁶ However the level for the catching sector is likely to be an overstatement, as the ABI results as stated previously do not include self-employed people. In the fish catching industry those that are self-employed are primarily male, so the overall representation of women

¹⁶ Office for National Statistics, Annual Business Enquiry

in the fish catching sector is likely to be below 5%. The main reason for this comparative under-representation in the fish catching sector is the nature of much of the work undertaken rather than constraints on specific groups.

The UK has a well-established legal structure that prohibits discrimination on the grounds of race, sex, sexuality, religion or disability. The UK is also a signatory to the European Convention on Human Rights and is committed to implementing the reforms under the Lisbon Agenda, which includes increasing the number of women in work.

The delivery bodies for the EFF programme in the UK are all government and public bodies. The Equality Act 2006 places a statutory duty (the Gender Equality Duty) on all Government departments and public authorities, when carrying out their functions, to have due regard to the need to promote equality of opportunity for women and men. The delivery of the Programme will operate within the established UK legal framework covering equalities.

Delivery bodies will be responsible for ensuring the proactive promotion of equality at all stages of programme implementation (design, implementation, monitoring and evaluation). This will include, for example, the preparation of literature and publicity material, guidance for delivery staff, and the criteria for targeting of support under the programme.

All applications for support under the Programme will be equally judged on their merits by the respective delivery bodies. Part of the role of the tranche panel Chair in England will be to ensure that all applications have been treated equally and fairly, and in accordance with the Regulations. We will ensure the Chair is suitably qualified to undertake this aspect of the role. Unsuccessful applicants will be informed via letter as to why their application failed, to ensure transparency in the assessment process. There will be comparable arrangements in Wales, Scotland and Northern Ireland to promote gender balance in the fisheries sector.

The Monitoring Committee, as formed under Article 63 of the European Fisheries Fund Regulation (Council Regulation (EC) No. 1198/2006), in conjunction with the Managing Authority, as formed under Article 58 of the same regulation, is responsible for the promotion of equality between men and women at implementation, monitoring and evaluation stage as required under Article 59 of the same Regulation. In accordance with Article 65, the Monitoring Committee will be consulted on the criteria used for approval of financed Schemes under the Programme, and this will allow oversight of the selection criteria to ensure that equal opportunities are promoted.

2.7.1 Avoidance of discrimination in programme implementation

In addition to obligations outlined above, the EFF delivery bodies will put processes in place that will seek to prevent discrimination on grounds of gender, race or ethnic origin, religion or beliefs, disability, age or sexual orientation.

The Monitoring Committee and the Managing Authority are responsible for ensuring discrimination is prevented at the implementation stage, and also by ensuring that elimination of discrimination is factored into the monitoring and evaluation phases of the Programme.

The programme will not impose any restriction or involve any requirement which a person of a particular gender would find difficult to comply with. Conditions apply equally to all individuals and businesses who apply for funding under the programme.

Consultation on the UK Operational Programme has been open to all interested parties via the Administrations' websites. In the UK, both men and women are represented in the same unions and trade organisations, and there are also some specialist women's fisheries organisations with whom we engaged during the consultation process on the UK Operational Programme.

2.8 Main Outcomes of the Analysis

The UK's catching and aquaculture sectors are widely-distributed around the country. Each of them is diverse both in the nature of its operations and in the pressures and challenges which it faces.

One of the most important challenges for the catching sector is the need to develop higher profitability and greater economic confidence, while at the same time respecting the need to maintain or improve the sustainable management of fish stocks as well as wider environmental considerations.

Central to delivering sustainable stock management are the problems associated with mixed fisheries in terms of discards and by-catches. Improvements in fishing gear would contribute to more sustainable stock management in these fisheries and to reducing wider environmental impacts. In the latter context, further development is needed to ensure that the handling and treatment of waste – notably from the shellfish sector – meets the highest environmental standards.

Industry profitability can be enhanced by reducing operating costs (e.g. by switching to more energy-efficient vessel engines, which also deliver environmental benefits, notably reduction in CO₂ emissions) and exploiting new technology, as well as diversifying into other (including non-quota) species (where these can be sustainably exploited). There is also scope for identifying new/niche markets and improving product quality at all stages of the production chain, from catching and storage through processing and transport. In addition, support for time limited projects for new technical measures is an important area, and some short term projects are likely to be developed with issues concerning climate change in mind: for example, identification of new fish species in new fishing areas.

In a number of areas, the industry – especially the catching sector – is finding it difficult to retain skilled labour. To a significant degree this reflects the

concerns mentioned above regarding profitability and the long-term future of the industry. In addition to specific measures aimed at addressing those concerns, improvements in working conditions should also contribute to labour retention, while additional support for training would help to address the shortfall in skills, and improve the number of people entering the catching sector. Retraining opportunities will also be available for fishermen to diversify and to be retrained in occupations outside sea fishing.

Safety training funding under the previous scheme appeared to contribute to a significant increase in the take up of fishermen attending safety courses. Non mandatory safety training funding will continue in a bid to help reduce the number of fatalities and accidents in UK commercial fishing. In 2006, the death rate was 1.3 per 1000 fishermen (a decrease of 15% over the previous ten year period) and an accident rate of 50.5 per 1000 vessels (a decrease of 10% over the same period).

In terms of marketing, there is clearly scope to achieve greater efficiency by improving the coherence of the supply chain and through vertical integration. Marketing initiatives could also be directed at local branding and promotion of local and niche markets, along with assurance schemes to meet consumer demand for a high-quality product.

While the aquaculture sector is generally economically stable, and is using technology to improve its productivity and reduce its environmental impact, there is scope for this sector to enhance employment opportunities and to improve working and safety conditions in all areas. There is also scope for increasing both the volume and value of sales, and for the enhanced protection of farms from wild predators. More can also be done to ensure that best environmental and welfare practices are followed across the industry, in terms of mitigating environmental and welfare concerns. As with the catching sector, there is scope to improve the handling and treatment of waste to achieve high environmental standards.

The demand for fish products, and the growth in niche/quality markets, creates significant opportunities for processors. Here too the need to maintain/improve profitability will necessitate some restructuring in the light of changes in supplies of raw materials and in consumer demands. Some processing facilities will require upgrading to maximise returns, improve product quality and ensure that high standards are met in terms of hygiene, public health and environmental impacts, including the handling and disposal of waste and measures to prevent the spread of disease through untreated effluent.

Contraction of fisheries-related activity in some (especially rural) locations will have significant implications in areas where there is currently limited scope for alternative employment. Support will be needed to mitigate the socio-economic consequences of industry restructuring.

In delivering support under EFF to address these challenges, account will be taken of experience under FIGG in terms of allowing for differences in the economic performance of the various fish sectors; setting grant rates at

appropriate levels; ensuring adequate performance monitoring; and involving stakeholders and facilitators in programme delivery.

3 Operational Programme Strategy

3.1 Overall objective of the Operational Programme

The overarching aim of fisheries management in the UK is a fisheries industry that is sustainable, profitable, well managed, internationally competitive and helps support thriving, diverse, and sustainable local communities, managed effectively as an integral part of coherent policies for the marine and freshwater environment. Using the analysis set out in the preceding sections, we intend to use the EFF programme to help deliver this aim. This chapter describes the strategic approach to delivering this aim in the context of the Operational Programme.¹⁷

The overall objective of the Operational Programme is to contribute to the overarching aim of UK fisheries management. To test whether this overall objective is being met, we propose to use the following impact indicators:

Impact indicator	Baseline 2006	Mid-term objective 2010	End target 2015
Gross Value Added	£988m €1,449m ¹⁸	£1,030m €1,510m	£1,070m €1,550m
Gross exports from UK	£944m €1,385m ¹⁹	£1,022m €1,500m	£1,128m €1,660m
Note – Targets are provided in Sterling and Euros – work will focus on achieving the Sterling target due to the fact that exchange rate movements could negate a positive national result.			

¹⁷ In response to the Prime Minister's Strategy Unit report *Net Benefits A sustainable and profitable future for UK fishing* (http://www.cabinetoffice.gov.uk/strategy/work_areas/~media/assets/www.cabinetoffice.gov.uk/strategy/netbenefits%20pdf.ashx) the UK administrations published *Securing the Benefits* (<http://www.defra.gov.uk/marine/pdf/fisheries/securingbenefits.pdf>). The response was structured around the following themes: Managing Fisheries within the Marine Environment; Towards a more effective Common Fisheries Policy; Modernising UK Fisheries Management; and Building Long Term Profitability. These four themes cover the set of recommendations made in *Net Benefits*. (except for recommendations 6 and 15, relating to the inshore/shellfish industry and management). This Operational Programme captures these themes and the subsequent work undertaken since the response was published.

¹⁸ Office for National Statistics

¹⁹ Office for National Statistics and HM Revenue and Customs

3.2 Specific objectives of the Operational Programme

The specific objectives of the Operational Programme are intended to allow progress to be made towards the achievement of the overall objective set out above. They also flow from the analysis set out in the preceding chapter and are consistent with the National Strategic Plan (as described in Chapter 5). The objectives are related to four of the elements of the overarching aim: sustainability, profitability, competitiveness and strong communities. They are described below together with related impact indicators.

Sustainability objective - to improve the balance between fishing effort and opportunity

A sustainable, profitable catching sector relies on healthy fish stocks and a healthy marine environment more broadly. One of the greatest threats to these is over-fishing caused by over-capacity. This is defined by the balance of fishing effort and fishing opportunity. Restoring this balance where appropriate will largely be achieved by a reduction in the capacity of the fishing fleet, but also by employing measures that reduce fishing effort. Such action will be concentrated on those segments of the fleet which currently target the fish stocks which are most under pressure, and are the least profitable. However, as explained later, current uncertainties arising from the very steep recent increases in fuel prices and from continuing consideration of appropriate response measures at EU and member state level make it impossible to set a useful and meaningful target.

Indicator	Source of data	Baseline (2007)	Control level (2010)	Target (2015)
Total UK fleet capacity (tonnage of vessels (tonnes))	Marine and Fisheries Agency	212,844		Current expectation (not a target) of 10-15% reduction

The UK is committed to supporting the EU recovery plans for stocks under pressure, as a priority for the use of Axis 1 funds. Capacity reduction is one important tool for this, but there are other relevant measures too which can attract EFF support. For example, to make these plans more effective, better understanding is needed of existing fishing patterns and the incidence of discards. The UK therefore proposes to increase its use of EFF to support observer monitoring and self-sampling of fishing activity. There is also scope for EFF support for the UK's piloting, and if this proves successful the eventual roll-out, of more selective fishing gear which will allow unwanted fish (under-sized, or of the wrong species) to escape. Finally, EFF support for promotion and marketing initiatives can help to switch consumer demand from the stocks under most pressure and promote high-value products.

Profitability objective – maximise returns

A key driver of profitability is increasing returns from the same inputs. Our objective is to facilitate the increase in profitability, for example by improving the quality and first sale value of products, increasing marketing, developing premium brands and developing new and niche markets. The chosen indicator is GVA per capita employed as there is insufficient data on profitability to use this as an indicator.

Indicator	Source of data	Baseline (2006)	Control level (2010)	Target (2015)
GVA per capita employed.	Office for National Statistics	£36,593	£43,017	£52,655
		€53,681	€58,744	€65,749

Note – Targets are provided in Sterling and Euros – work will focus on achieving the Sterling target due to the fact that exchange rate movements could negate a positive national result.

Competitiveness objective – to increase profitability compared to other EU Member States

Fish are a global commodity and UK businesses compete with their counterparts across the world. The comparative performance of UK businesses in this context depends on a range of factors including the efficiency of operations and the wider operating environment. In addition, the fisheries sector needs to be comparable in its performance with other sectors of the economy. The suggested indicator is thus to compare the GVA per capita for the fisheries sector with that for other sectors of the economy in individual member states and also in other Member States as follows:

- Comparison of the relative performance of the fisheries sector against other sectors of the economy of the individual Member States:
 - Indicator will be a percentage figure
 - Target will be to improve performance so that the GVA per capita for the fisheries sector is seen to be at or exceeding a level that is 105% of the performance of the economy as a whole. If already exceeding the 105% performance target then the current level should be maintained across the EFF period. Note – this may be revised to focus the comparison to be between the fisheries sector and other manufacturing industries or the agriculture/food industry in the UK.
- Comparison of the trend in the relative performance of the fisheries sector between Member States:
 - Indicator will be an index time series with 2006 set as 100 to identify the trend in performance of each Member State

- Target will be for the UK to match or exceed the trend in the performance in other Member States – NB this will need to be borne in mind with the earlier objective for improvement in performance of the profitability of the sector which is to maintain a 2% annual increase in the level of GVA per capita for the fisheries sector. This indicator will give some idea of whether or not this 2% indicator is sufficient for the industry in the UK to retain its level of competitiveness with that in other Member States.

Note – with regards to the second of these indicators, the extent to which the comparison will be possible (in terms of the other Member States to which the UK can be compared) will depend on the availability of comparable information from other Member States. This information will be collated either from sources at Eurostat or by establishing direct contacts with other Member States to provide the information required.

Indicator	Source of data	Baseline (2006)	Control level (2010)	Target (2015)
GVA per capita employed as a percentage of the overall GVA per capita for manufacturing industries as a whole	Office for National Statistics	110%	110%	110%
Trends in GVA per capita employed for the fisheries sector compared to the GDP per capita figures for other Member States	Office for National Statistics / Eurostat / Other Member States Statistical Offices	To be determined	To be determined	To be determined

3.3 Calendar and intermediary objectives

The duration of the Operational Programme is from 1 January 2007 to 31 December 2013. EFF funding can be spent on eligible expenditure incurred from 1 January 2007 to 31 December 2015. This timescale is a feature of the funding scheme and reflects the time needed for projects to complete and claim.

As required by Article 67 of EU Regulation 1198/2006, the Managing Authority shall send the Commission an annual report on the programme by 30 June each year. A final report on the implementation of the Operational Programme is to be submitted to the Commission by 31 March 2017.

The mid-term evaluation, as required by Article 49 of EC Regulation 1198/2006, will be performed in 2011, in sufficient time to meet the 30 June deadline for submission of the annual report to the Commission. The UK Programme Monitoring Committee will be consulted on the mid-term evaluation results.

In general, the objectives will be measured by result indicators which will be reviewed in conjunction with the mid-term evaluation in 2011. In some cases annual objectives/indicators will be used.

To launch the measures, the selection criteria will have to be approved beforehand by the Monitoring Committee. For this reason, the UK has set up a shadow Monitoring Committee which will have as many selection criteria as possible discussed and agreed in principle before the adoption of the Operational Programme. This will ensure that time is not lost after the Commission formally approves the UK's Operational Programme. It is anticipated that the implementation of the Operational Programme will be launched within two months of receiving Commission approval. For Axis 4, in 2008, work will be undertaken which will inform bids from groups which are expected in early 2009. Progress will be reviewed at the interim evaluation planned during 2010/12.

For Axis 4 of the EFF, capacity building support will be granted to local groups to ensure that plans reflect the importance of the fishing industry and communities; to influence projects funded through the other Axes; and to enhance the marine environment. In 2008, work will be undertaken which will inform bids from groups which are expected in early 2009. Progress will be reviewed at the interim evaluation planned during 2010/2011.

4 Summary of the *ex ante* evaluation

4.1 Introduction

In February 2008, EKOS Ltd were commissioned to undertake *ex ante* evaluation of the UK Operational Programme in accordance with Article 48 of Regulation (EC) No 1198/2006.

The purpose of the *ex ante* evaluation is to facilitate the improvement of the UK Operational Programme, in order that it presents the best possible solution to the socio-economic needs of the fisheries industry, whilst at the same time supporting the Common Fisheries Policy. It assesses amongst other things the objectives of the programme, and cohesion with EU policies and the UK National Strategic Plan.

The *ex ante* evaluation is being conducted as an interactive and iterative process between the evaluators and those responsible for development of the UK Operational Programme. The evaluators have assessed and commented on several drafts of the Operational Programme, and their assessments incorporated into the Operational Programme as it develops.

4.2 Conclusions of the *ex ante* evaluators

The information presented in this section represents the conclusions of a conditional draft *ex ante* report. Work is continuing on the *ex ante* evaluation, including assessment of how the results of stage two of public consultation are considered, and appraisal of the anticipated results and impacts of the Programme. The information in this section will be updated in due course.

4.2.1 Analysis of the UK Fisheries Industry (Chapter 2 of the Operational Programme)

Chapter 2 is an extensive section of the Operational Programme presenting the socio-economic analysis of the fisheries industry, including lessons learned from FIGG, a descriptive as well as a tabular section of the SWOT, the environmental situation and SEA summary, and a section on equality aspects of the Programme.

It is the evaluators opinion that the Chapter provides a good overview of the geographic and economic structure of the industry, including its key development issues, driving forces, and opportunities. It also provides a good analysis of the range of issues and opportunities in the sector that are also highlighted in the SWOT analysis. Internally, the SWOT is logical and coherent.

Since the first appraisal in February of the Operational Programme version 4, the majority of the *ex ante* comments have been addressed such as; improving the clarity of the SWOT analysis, increasing the coverage of

environmental improvements and sustainability, and extending the section on equality.

It is the evaluator's opinion that although many of the *ex ante* appraisal comments have been addressed, Chapter 2 still requires a substantial amount of additional data. The Chapter could present more robust and comprehensive evidence by including detail about market failures or baseline information that provides up-to-date statistical and comparative evidence to justify the objectives of the Programme.

In addition, summary tables for the sections referring to the four UK administrations would help to visualise the different industry structures and their geographic characteristics.

4.2.2 Rationale and Consistency of the Strategy (Chapter 3)

The "Operational Programme Strategy" contains an overall objective in line with the policy aim for the fisheries industry in the UK, and four closely aligned "specific objectives" to address the sustainable development of the fishing industry; the aim to increase the profitability; the requirement to remain competitive internationally; and to help support local communities dependent on fisheries employment.

It is the evaluators opinion that the four objectives are highly complementary, and closely interlinked with each other, thereby allowing for excellent synergy and trigger effects between various EFF activities of the Programme. They are also consistent with the NSP on sustainable development.

Although the four specific objectives are in close alignment with the individual aspects of the "overarching aim of the fisheries management in the UK", there is a risk that there could be overlap between the two of the objectives around profitability and competitiveness. These two objectives require more clear distinction.

The introductory sections of Chapter 5 provide a good overview of the specific focus of Programme activity. Each of the four Priority Axes contains further and more specific information on the Priority objectives, result indicators, complementarity and beneficiaries, and presents the range of measures available.

However, the evaluators comment that there are also a large number of measures which report extremely little and this makes the Chapter feel uneven and inconsistent in approach and extent of measure contents. Indicators are also in places underdeveloped and under populated. The evaluators recommend improving the overall structure of information presented under each measure, so that a clearer picture of the scope and intended activity emerges.

4.2.3 Strategic Coherence

It is the evaluator's opinion that the Operational Programme provides a clear recognition of the connection between efficiency, energy pollution and climate

change. Following updates to the Operational Programme, there is now a stronger explanation on plans to reduce discards via investment in new fishing gear and by modernising equipment across the fisheries industry.

The Operational Programme better meets the issues in the Lisbon Agenda through the commitment to improving recruitment, retention and training, fostering synergies for environmental protection and improved marketing of fish products.

The evaluators comment that with regards to the Gothenburg Strategy, the Operational Programme could offer greater discussion of pricing and quota issues, and proposals to reduce discards through incentives to fishermen. There also could be more discussion on plans to improve transport links to create smoother supply chains.

Relating to the Lisbon Agenda and the NSP, the Operational Programme would still benefit from explaining in more detail how fisheries policy would foster collaboration and knowledge transfer, enterprise and eco-innovations, and how to encourage more women into the industry.

The Operational Programme would also benefit from explaining how it will ensure or encourage co-operation in meeting the administrative requirements of the industry, without adding significantly to the regulatory burden.

4.2.4 Appraisal of Implementing Provisions (Chapter 7)

The evaluators recognise that a number of the *ex ante* comments on presentation of the approach to implementation, particularly in terms of partnership and membership of panels, have been addressed. This contributes to explaining the complexity of the EFF structures in the UK devolved administrations.

It is the opinion of the evaluators that Chapter 7 requires further editorial refining to remove a number of wordy passages and the rephrasing of text which closely mirrors the legal text provided in the EFF regulations. Clearer explanation would be useful regarding the application process, specifically relating to the key principles of applying for funding. More detail regarding the purpose and the involvement of the partnerships beyond the consultation period of the Operational Programme, identifying the payment bodies in each of the four UK administrations, and improvements to the flowchart of payments structure would also add clarity.

The evaluators comment that in order to avoid bottle necks, it is of great importance to agree the membership of the EFF Monitoring Committee and the various appraisal panels, as well as all vital application procedures and approval mechanisms as a matter of urgency.

4.2.5 Strategic Environmental Assessment (SEA) Fit (Chapter 2)

The evaluators comment that overall the summary section of the SEA (Section 2.6 of the Operational Programme) represents a fair reflection of the key recommendations made by the SEA Environmental Report. Looking at

the wider Operational Programme document, there is coverage of the majority of SEA objectives but more explicit links could be made between the Operational Programme commitments and the SEA.

All the objectives in Section 4 of the SEA Environmental Report are covered to some extent by the Operational Programme. Particular reference is made to the sustainable harvest of target species, the minimisation of non-target species catch, the protection and promotion of human health, the cleanest and economical use of water, promotion of cleaner air and climate, making best use out of material assets, protecting the landscape, cultural heritage and minimising adverse effects on soil.

It is the opinion of the evaluators that there could be greater coverage in the Operational Programme on how environmental damage and undesirable effects of disease could be offset or minimised, and the provision of alternative employment in areas where fisheries are no longer viable. Generally, there could be more explicit links in the Operational Programme with the all the specific SEA objectives.

4.2.6 Consultations with Stakeholders

The evaluators have conducted consultations with key stakeholders as part of the *ex ante* evaluation. The following issues were highlighted by stakeholders:

- The catching sector is currently experiencing a complex range of problems such as insufficient quotas, discards and by-catch and a lack of statistics about the availability of stocks. Increasing fuel costs are also affecting the competitiveness of the industry.
- The success of the EFF will depend on when and how the funding is allocated and administered, especially taking into account the complexities of devolution.
- Stakeholders are on the whole optimistic about the outcomes and impacts they expect the EFF to achieve; from upgrading the fleet and equipment, to the provision of better training and viable diversification opportunities.
- Issues the UK EFF scheme could encounter include a lack of match funding, inherent instability in the sector and a lack of knowledge about stocks. Additionally, the issue of co-operation with other marine users was cited.
- There were requests that the application process be simplified, especially where it involves devolved bodies, and more advice and sharing of best practice should be available to applicants.

The key objective for carrying out these consultations was to inform the subsequent stages of the Operational Programme. The issues and needs cited by stakeholders across the industry, such as quotas, sustainability,

competitiveness and viability, reflect the priorities of the Operational Programme very closely.

The feedback indicates there is some tension between competitiveness, profitability and sustainability. Whilst this balance comes across in the Operational Programme, it indicates the constraints the EFF will face in the delivery of these objectives.

However, feedback on the FIG scheme was positive and there was an upbeat assessment on the EFF's expected effects on fostering innovative projects and collaborations. Feedback suggests how important it will be to clearly define the parameters, nature and scope of activity in the Operational Programme.

The evaluators highlight the problems that stakeholders perceive that the UK EFF scheme could encounter; such as a lack of match funding and a lack of knowledge about stocks. Of particular importance will be the clarity and complexity with which the application process is administered, especially within the devolved administrations, where there may be several layers of accountability.

5 The Programme's Priority Axes

This section sets out the choice of priority axes for the UK Operational Programme. For each chosen axis, the objectives and targets are set out together with a description of the main measures proposed (these measures are adopted from those set out in Chapter 1 of Title IV of EC Regulation No 1198/2006). A justification for the average rate of co-financing is given and the proposed rates of co-financing for each measure are set out in section 6. Finally, this section provides information on the demarcation with similar activities funded by the European Agricultural Fund for Rural Development and the Structural Funds. This is in line with Article 6 of EC Regulation No 1198/2006, which requires that assistance from the EFF is consistent with the policies, priorities and activities of the Community and complementary to other financial instruments. The complementarity with other Community support will ensure there is no duplication of funding. To achieve this, the following measures will be employed:

- the four Administrations, in partnership with other Managing Authorities for the other European funds and programmes, will regularly re-assess issues regarding complementarity and will produce annual reports on the different funds;
- the strategic and operational fit between the programmes will be formally evaluated as part of the EFF mid-term evaluation;
- there will be liaison between the various Managing Authorities within the Administrations to discuss complementarity; and
- there is some degree of cross-membership of the Programme Monitoring Committees and members will be expected to note issues of complementarity.

5.1 Coherence and justification of the priority axes

The priorities for the Operational Programme flow from the UK National Strategic Plan and the SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis. They follow the guiding principles for the Operational Programme set out in Article 19 of EC Regulation No 1198/2006, and take account of the *ex ante* evaluation required by article 48 of that Regulation.

5.1.1 Coherence with the National Strategic Plan

Objectives for the UK's fisheries and aquaculture sector are defined in the National Strategic Plan. All these objectives have been transposed into objectives for the Operational Programme. The coherence of the objectives with the priority axes is shown in Annex D.

5.1.2 Coherence with guiding principles of the Operational Programme

Coherence with the guiding principles of the Operational Programme, as laid down in accordance with Article 19 of the EFF Regulation (Council Regulation (EC) No. 1198/2006), will be achieved by the programme's establishing linkages with EU priorities in the following areas:

- The priority axes and objectives chosen have been selected for consistency with the objectives of the common fisheries policy, with particular reference to promoting sustainable fisheries and competitive and innovative catching, aquaculture and processing sectors.
- The programme places emphasis on the balance between fishing opportunity and effort, including where necessary assisting fishermen to diversify into fishing for other species, or into non-fishing activities and targeted decommissioning where this appears appropriate and provides value for money.
- Support will be provided to assist the sustainable development of small fisheries communities, both to continue their involvement with sea fishing and aquaculture and, where necessary, to diversify into other activities.
- The priorities of the Lisbon agenda are reflected in the programme's support for knowledge-based innovation and technological development in areas such as vessel modernisation, gear improvements and opportunities for farming new species.
- With regard to the principles of the Gothenburg strategy, the programme includes objectives to reduce the environmental impact of fishing through such measures as improving the selectivity of fishing gear and encouraging reductions in by-catches and discards, and diversification into non-pressure stock species. Specific aid will be targeted at promoting products with low environmental impact, including certification schemes. Measures will also be adopted to contribute to the improved processing and treatment of waste.
- Included in the programme are objectives intended to promote retraining and upgrading of professional skills for those working in the fisheries sector, as well as enhanced working and safety conditions and non mandatory safety training.
- In order to improve added value, support will be provided for increasing the efficiency of fisheries operations, optimising returns from fisheries activity and maximising product quality, for example through improved facilities for the landing, processing and storage of fish and the high value added processing of caught and farmed finfish and shellfish.
- Aid will also be made available for improved marketing arrangements for the fisheries sector, including the marketing of new products and developing new markets. We will also support measures to contribute to the transparency of markets in fisheries and aquaculture products.

- Because each administration in the UK has its own policy priorities, there is no direct correspondence between these priorities and the allocation of funds between the priority axes at the UK level as set out in Chapter 6.

5.1.3 Coherence with the outcome of the *ex-ante* evaluation

As detailed in Chapter 4, the UK Operational Programme is the subject of *ex ante* evaluation. The evaluation is an interactive and iterative process meaning that many of the recommendations of the evaluators have now been incorporated into the Programme.

The table below shows how the evaluators' recommendations in the draft *ex ante* report have been or will be followed up.

Recommendations of the <i>ex ante</i> evaluators	Response
Additional data is required to present a robust and comprehensive evidence base in order to provide up to date statistical and comparative evidence to justify the objectives of the Programme. This includes data to help visualise the different industry structures and geographic characteristics in the four UK administrations. Also data to establish whether there are disparities with other Member States, in order to link to the objective of improving international competitiveness.	Further data has been included in the Operational Programme. We consider there are now sufficient data to support a robust and comprehensive evidence base to justify the objectives of the OP.
More explicit connection between the SWOT and other sections of the Programme will improve clarity.	We consider there are sufficient linkages between the SWOT and other sections of the Programme to justify the objectives of the OP.
Further detailed explanation of the principal economic rationale and intent of the Programme will strengthen Chapter 3.	We believe that Chapter 3 is sufficiently developed.
Clearer distinction should be made between the objectives for profitability and competitiveness to avoid overlaps.	We consider the distinction between these objectives to be sufficient. The profitability objective focuses on improving quality and developing new markets, whereas the competitiveness objective has a wider scope

	in improving efficiency of operations in comparison to other Member States.
Rationales for objectives on sustainability and community can be improved.	We consider that sufficient data has been provided in the OP to justify these objectives.
Impact indicators for the specific objectives of the Programme should be defined and populated.	We have included impact indicators in the Programme.
Improvements can be made to the structure of Chapter 5 in order to clarify the scope and intended activity to be funded under EFF.	This has been completed.
Result indicators for the measures to be funded under EFF should be defined and populated.	Result indicators have now been defined and populated.
Further detail is required to clarify the approach to Axis 4.	Further detail regarding the approach to Axis 4 has been provided for all administrations.
In the context of the Gothenburg strategy, greater discussion could be offered regarding pricing linked to market forces and quota issues, and cutting discards by offering incentives fishermen.	We feel that sufficient linkages have been made to the Gothenburg Strategy, reflected also in our objectives for a sustainable UK fisheries industry.
Reference should be made to the remaining specific points of the Lisbon Agenda, including explanation if they are not relevant. The Operational Programme could benefit from more detail about fostering collaboration and knowledge transfer, enterprise and eco-innovations, and encouraging more women into the industry.	We feel the OP adequately addresses linkages with the Lisbon Agenda, reflected also in our objectives for a profitable, well managed and internationally competitive UK fisheries industry. Commitments are made to support for innovation and technological developments, through the support of measures such as vessel modernisation and gear improvements, and the farming of new species. The OP will operate in the context of the UK legal framework covering equalities. We have

	proactively promoted equality in the development of the OP, by consulting relevant organisations. This will continue during monitoring and evaluation of the OP.
Further detail could be provided about encouraging co-operation in meeting administrative requirements without significantly increasing the regulatory burden.	Detail has been added to the Operational Programme about simplifying administrative requirements. This includes streamlining assessment procedures, simplifying application forms and guidance which will be subject to user testing to ensure they are fit for purpose. Also the continuing use of grants facilitators to assist applicants and ongoing assistance from in-house grants teams as part of their routine scrutiny of applications.
Discussion should be included about the general approach to potential areas of overlap with other EU funds, including complementarity with LEADER activities.	The demarcation sections of the OP address the issue of potential overlap with other EU funds, and how this will be addressed. We have been working closely with colleagues responsible for other EU funds to ensure consistency of approach. We will also put mechanisms in place, through scheme literature, to ensure that no double funding occurs.
Greater reference to coherence with the NSP should be made, including explanation about fostering collaboration between the science base and industry, encouraging more women into the industry, and fostering good governance with stakeholders.	We consider that coherence with the NSP is sufficient, NSP objectives have been transposed into the Programme. The table Annex D further demonstrates our analysis of consistency with the NSP.
Editorial refining of Chapter 7 is needed, and a clearer explanation about the key principles	Key principles of applying for funding, including

<p>of applying for funding and partnerships beyond the consultation on the Operational Programme. The various payment bodies should be identified in each administration.</p>	<p>composition of appraisal panels is not relevant to the OP itself. These will be defined in the description of control and management systems as required by article 71 of the EFF and discussions with the Monitoring Committee. The various payment bodies have been identified in section 7 for each administration.</p>
<p>The membership of the EFF Monitoring Committee and appraisal panels, as well as application procedures and mechanisms should be agreed as a matter of urgency.</p>	<p>A number of organisations have been invited to serve on the Monitoring Committee, and membership has now been finalised. The shadow Monitoring Committee will start work as soon as possible and before formal adoption of the OP. Work is underway to design application forms and guidance, and also to define application procedures and mechanisms. These will be subject to user testing and discussion with the Monitoring Committee.</p>
<p>More explicit links could be made between the Operational Programme and the recommendations of the Strategic Environmental Assessment, and greater explanation as to how negative environmental effects will be offset or minimised.</p>	<p>We have included further information in the Operational Programme about how environmental effects of projects will be monitored and mitigated. Application forms will include a number of questions regarding environmental impact. We will ensure suitably qualified facilitators are available to assist applicants with this process. The application panel will also take account of environmental issues when assessing applications and again we will ensure suitably qualified panel members for</p>

	this process.
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5.1.4 Rationale for co-financing rate

Co-financing is a mechanism which indicates what percentage of public money is coming from the EU. It is calculated by dividing the EU contribution by the total public contribution. The co-financing rates, shown in section 6 of this document, have to be consistent with the provisions of Article 53 of the EFF regulation (Council Regulation (EC) No 1198/2006). These require a maximum EU contribution of 50% for the non-Convergence area and 75% for the convergence area. For the non-Convergence areas, the co-financing rate across the axes is 50%, which is the minimum required to draw down EU funding. For the Convergence areas, there is variation at UK level between the axes and the total co-financing rate is 70%. This variation is because the four administrations within the UK have chosen different levels of national contribution and in some cases more than the minimum necessary to draw down the EU funding. That reflects priorities within the different parts of the UK. These national contributions will come from a variety of public sector sources and though mostly expected to be central Government funds, these could be local authority, regional body or economic development body funds. The co-financing rates respect the requirements of the legislation and reflect the amounts of funding estimated as being available as the national match contribution.

5.2 Axis 1: Measures for adjustment of the fishing fleet

5.2.1 Main Objectives of the axis

This axis will contribute to the sustainable development of fisheries resources, while at the same time improving the performance and profitability of the fisheries sector.

The objectives of this axis are:

- to adapt fishing effort to match the opportunities for sustainable and profitable fishing, taking account of the particular current challenge of high fuel prices;
- to ensure UK fishing vessels are able to operate competitively and efficiently by upgrading the fleet to become more efficient, environmentally friendly, provide better working conditions, improve product quality, and improve labour resources in the catching sector; and
- to maintain the activity of small scale coastal fishing thereby contributing to the socio-economic health of many of our small coastal fishing communities.

5.2.2 Result indicators

The table below sets out indicators of achievement of the priority axis objectives, together with the present situation (baseline) and target.

Indicator	Source of data	Baseline (2007)	Control level (2010)	Target (2015)
Total UK fleet capacity (tonnage of vessels (tonnes))	Marine and Fisheries Agency	212,844	-	Current expectation (not a target) of 10-15% decrease
Value of fish landed per vessel (tonnes)	Marine and Fisheries Agency	£95,000 €140,000	£100,000 €146,000	£111,000 €164,000
Training uptake (numbers attending training courses)	Seafish Industry Authority	6,130	6,300	6,550

Note: Targets are provided in Sterling and Euros - work will focus on achieving the sterling target due to the fact that exchange rate movements could negate a positive national result.

5.2.3 Complementarity and demarcation

The table below sets out the demarcation of funding between the available EU funds for axis 1.

EFF	EAFRD	ERDF	ESF
Includes aid for permanent cessation, engine replacement, on board selectivity, technological innovations skills specific to the fishing and aquaculture sectors and safety training. Also small-scale coastal fishing and socio-economic measures such as diversification and retraining. No other EU Fund can cover the operations of EFF priority axis 1. The only exception is ESF where retraining and training can be provided to people regardless of their sector of origin.	Covers farming food and forestry sectors with provision of specific training and knowledge transfer activity	N/A	Basic generic skills training and re-training not covered by sector-specific measures

5.2.4 Beneficiaries

This priority axis is aimed at vessel owners, fishermen and young fishermen.

5.2.5 Description and justification of the main measures proposed under Priority Axis 1

Public aid for permanent cessation of fishing activities (Article 23)

The UK has reduced its fishing capacity considerably over the FIGF programming period, through various decommissioning schemes, as set out in the table below.

UK Decommissioned Vessels

	Number of vessels	Tonnage decommissioned	kW decommissioned
1997-2007	380	40,452 tonnes	127,067kW

However, adjustment of fishing effort in the UK is achieved not just through such schemes but also by the catching sector responding to market demands and prevailing economic conditions. This voluntary movement out of the industry has been important in recent years and is likely to be reinforced by recent trends in fuel prices. It could be facilitated through grants from ERF for the retraining of fishers for occupations outside sea fishing.

As mentioned earlier (page 15) the UK has already made extensive use of decommissioning schemes, which in recent years have been increasingly focussed on fleet segments which target the fish stocks which are under most pressure. Such schemes are not without their difficulties, for example high unit costs, 'deadweight' losses (compensation being paid to owners who would have shed capacity even in the absence of a scheme), and in some cases payments being reinvested in new capacity. Such problems can be mitigated through careful scheme design, but not eliminated. Impacts on local communities affected can also be considerable.

Notwithstanding these difficulties, territorial or local permanent cessation schemes may none the less still be necessary in some circumstances where market forces on their own are judged unlikely to bring about sufficient, or sufficiently rapid, adjustment so as to achieve a long term balance between fishing capacity and fishing opportunity. There is currently for example a problem with the balance between these two factors in the English under 10 metre fleet, and a scheme to address this is being developed at present. Urgent consideration is also being given to the impact of recent fuel price increases on the industry's profitability. This is likely to be particularly severe in the case of the most fuel-intensive segments of the fleet, such as beam trawlers and submersal trawl vessels.

Joint Government-industry task forces are studying the problem in each part of the UK, analysing key segments of the fleet, and assessing what measures, or combinations of measures, might be required in addition to those already planned to help the fleet to adapt to rapidly changing circumstances, and local communities to adjust to the impact of any capacity reductions. These measures could take a wide variety of forms, including for example investment in re-engining to improve fuel efficiency and investments in new gear and fishing practices to improve selectivity and reductions in discards, as well as where appropriate permanent cessation of fishing activities. This work will take full account of the proposed EU package of emergency measures, once the details of this have been established and approved.

The financing of measures for the permanent cessation of fishing activities, through the scrapping of the fishing vessels, may only be undertaken when part of a fishing effort adjustment plan, where a reduction in fishing effort has been identified as necessary for the success of a plan. This includes support for plans to ensure recovery of stocks within safe biological limits, and management plans to maintain stocks within safe biological limits (as defined in Regulation EC 2371/2002),

A fishing effort adjustment plan will be set up, approved and adopted by the relevant UK administration, in consultation with stakeholders. This will take

account of a range of factors including the state of relevant fish stocks; especially those subject to recovery plans. Results achieved in implementing such plans will be communicated to the Commission in the annual and final reports for the Programme. Assuming that the proposed emergency package is adopted, the UK will also consider the development of Fleet Adjustment Schemes for those segments of the UK fleet most severely affected by the fuel price increases. This will be done in close consultation with the industry, consistently with the Article 8 partnership principle underpinning the EFF.

For permanent cessation schemes, premiums will be calculated using the market value of the vessel and its licence as a guide. The principles for calculating the market value of the vessel will be based on vessel insurance values compared with prices/purchases of similar vessels which are continually monitored, and any other relevant pertinent factors will also be taken into consideration. To ensure good value for money, ranking systems that take into account the age and capacity of the vessel (tonnage), engine power in kW, the amount of fish caught in a reference period, turnover of the vessel, and the amount bid by the owner for the permanent cessation of the vessel and licence, may also be used.

There are major uncertainties over the future fuel price situation and its likely impact on the industry's finances. The work of the joint task forces is still at an early stage. The details of the proposed EU package of emergency measures have yet to be determined at the time of writing, with some very important issues outstanding. It is not therefore yet possible to decide capacity reduction targets for individual fleet segments, or, consequently, for the UK fleet as a whole. The UK's current assessment however is that, taking the possible effects of the industry's response to market pressures and of specific adaptation measures together, a total tonnage reduction of the order of 10-15% could reasonably be expected by 2015. This estimate will be kept under regular review over the coming months.

Once the industry task forces have completed their work and progress has been made in developing UK measures to implement the EU emergency package, the UK will consider what targets for tonnage and engine power reduction targets for relevant individual fleet segments are appropriate and notify those to the Commission.

Public aid for temporary cessation of fishing activities (Article 24)

In addition to permanent cessation measures, aid may be made available for the temporary cessation of fishing activities in the circumstances provided for under Article 21 (i), (ii), (iv) and (vi).

If in cases where temporary cessation schemes are introduced for stock conservation reasons premiums will be calculated on the basis of the expected loss of revenue of the vessel during the period of cessation less the anticipated running costs. The expected loss of revenue will be calculated using a reference period, taking into account historical landings of the vessel and the fishing opportunities available to it during the period of temporary cessation. Running costs are calculated with regard to the same reference

period but revised to take account of the costs prevailing during the period of temporary cessation. The value of landings foregone will be based on the average price/kg for the fish in the month immediately preceding the period of temporary cessation.

Where temporary cessation payments are being made available to facilitate Fleet Adaptation Plans involving permanent cessation or investments on board vessels in relation to energy efficiency premiums will be based on the fixed cost incurred by the vessel owners during the period of temporary cessation such as port charges, insurance cost, financial costs related to loans; and part of the basic salary of the fishers.

Investments on board fishing vessels and selectivity (Article 25)

The UK has an ageing fishing fleet, with nearly 70% of vessels being 20 years of age or older. Because of this age profile, assistance will be made available to the industry for vessel modernisation, including safety improvements, working conditions, hygiene, product quality, energy efficiency and selectivity. Support to investments on board fishing vessels will only be granted if the investment does not increase fishing effort. No aid shall be granted for the construction of fishing vessels or for the increase of fishholds.

We will also help fishermen invest in technical modifications that can help reduce impacts on the environment, and contribute to an increase in the number of stocks assessed as being exploited sustainably. Such action will help to address consumer concerns in this area. This investment may include equipment that reduces the impact of fishing on non-commercial species, ecosystems and the sea bottom; protects catches and gear from wild predators; and to support projects covering the preparation or trial of new technical measures for which a limited period of financing will be set by the Council or Commission.

The financing of measures to achieve selectivity of fishing gear, including up to two replacements of fishing gear over the period of the programme, can only be financed where the fishing vessel is affected by a fishing effort adjustment plan which forms part of recovery plans (as defined by Regulation EC 2371/2002), or the new gear is more selective and meets recognised environmental criteria/practices which go beyond regulatory obligations under Community law.

Where contributions are made towards engine replacement (which have the potential to reduce fuel costs and CO₂ emissions) it is a condition that the vessel's engine power must be reduced by at least 20%. This excludes vessels of less than 12 metres that do not use towed gear (as listed in Annex I, EC No 26/2004), where engine power must not exceed that of the previous engine. Vessels of more than 24 metres must be subject to a rescue and restructuring plan and change to a less fuel intensive fishing method.

A grant may only be given for one engine replacement per vessel during the period 2007-2013. The 20% reduction in engine power may be achieved by a

group of vessels when in compliance with the conditions for the group's composition, stated in Article 25 of EC Regulation 1198/2006.

The EFF regulation limits the power of the new engine to 20% less than the replacement except where the vessel is less than 12m in length and not towing gear.

Group re-engining will be considered where:

- the number of vessels in the group do not exceed 50;
- vessels withdrawn from the fleet using public aid cannot be included in the group;
- all the vessels in the group operate in the same management areas;
- the vessels are individually identified; and
- all the vessels in a group will belong to the same fleet and therefore use the same main fishing gear.

To achieve control, the following measures will be used:

- a marine surveyor will confirm reduction, or like for like power, of new engine(s);
- the group will be notified to the Managing Authority;
- for each vessel belonging to a group, the membership of the group will be registered in a note in the fishing vessel register;
- vessels removed from the group and used to justify a grant will be permanently deleted from the fishing register in the same way as decommissioning. Any such vessel will be scrapped or a legal declaration made prohibiting its future use as a fishing vessel; and
- decrease in engine power used to justify grant will be deducted from the reference level and the level for entry/exit of capacity. This will be notified in the annual report for the fishing fleet.

The total costs per vessel for investment on board and selectivity during the period 2007-2013 shall be determined by the following criteria:

- the market value of the fishing vessel or its insurance value
- the turnover of the fishing vessel
- the age of the fishing vessel and its tonnage expressed in GT or engine power expressed in kW.

Small-scale coastal fishing (Article 26)

This type of fishing is defined as those vessels of an overall length of less than 12 metres and not using towed gear. This activity in particular makes a key contribution to the socio-economic health of many of our small coastal fishing communities in the UK.

Assistance will therefore be made available in the form of premiums for improved management and control of access to fishing areas; to promote the organisation of production, processing and marketing chain of fisheries products; encourage voluntary steps to reduce fishing effort for conservation of resources; encourage technological innovations (provided they do not increase fishing effort and go beyond existing regulatory obligations); and improve professional skills and non mandatory safety training.

Premiums will be calculated on the basis of a plan submitted by those involved in the project, which will include the main goals, activities, investments and the budget for the project. The premium will be calculated as a percentage of the total eligible costs of the project. Where assistance is given for measures under Article 25 in favour of small-scale coastal fishing the minimum private contribution will be 40%.

Socio-economic compensation for the management of the Community fishing fleet (Article 27)

The pattern of fishing activity around the UK coast is constantly varying under the influence of a range of factors, not all of which are linked to fishing activity. In order to help the fleet adapt to these changes, assistance will be made available to fishermen for diversification into other activities; upgrading professional skills; and retraining for alternative occupations. Support will be calculated on the basis of the cost of participation in the training; this will vary from region to region but will be based on cost of income foregone while travelling to the course and attending it, as well as the cost of the training itself. The principle of support is that it will be sufficient to attract people to undergo the training.

Premiums will also be available to young fishers (under 40 years, with at least 5 years experience as a fisher or have equivalent professional training) to acquire, for the first time, part or full ownership of a fishing vessel of less than 24 metres in length which is equipped to go fishing and between 5 – 30 years old. Each applicant will be offered a maximum of 15% of the cost of acquisition of ownership not exceeding €50 000.

5.3 Axis 2: Aquaculture, processing and marketing

5.3.1 Main Objectives of the axis

The objectives of this axis are:

- to support the growth and diversification of aquaculture, processing and marketing of fishery and aquaculture products, thereby improving profitability and competitiveness;
- to promote improvements in production standards, environmental and welfare performance;
- to respond to consumer demand for sustainably caught fish; and

- to contribute to lifelong learning in the aquaculture, processing and marketing sectors.

5.3.2 Result Indicators

The table below sets out indicators of achievement of the priority axis objectives, together with the present situation (baseline) and target.

Indicator	Source of data	Baseline (2006)	Control level (2010)	Target (2015)
Turnover of UK aquaculture sector	Office for National Statistics	£507m €720.4m	£550m €781.5m	£600m €852.5m ²⁰
Turnover of UK processing sector	Office for National Statistics	£2,247m €3,192.8m	£2,410m €3,42.4m	£2,640m €3,751.2m
Note – Targets are provided in Sterling and Euros – work will focus on achieving the Sterling target due to the fact that exchange rate movements could negate a positive national result.				

²⁰ Increases in the production of farmed fish and shell fish are being fuelled in part by the increased interest in niche markets giving rise to higher prices and a need for increased production. The Scottish Salmon Producer's Organisation has set a target of an increase in production of 4% annually, with 2008 alone predicted to achieve a 6-7% increase. The Association for Scottish Shellfish Growers believe that this sector has a huge potential for growth, between 2003 and 2007 the production of mussels achieved a 13.2% increase. There has also been significant increases in the production in alternative species, especially cod, although this forms a relatively small percentage of overall production but it is expected that there will be a continued increase

Complementarity and demarcation

The table below sets out the demarcation of funding between the available EU funds for axis 2.

EFF	EAFRD	ERDF	ESF
<p>Includes aid for investment, in aquaculture production, diversification into new species, methods which enhance the environmental impact, including support for related aquaculture specific lifelong learning.</p> <p>Promotion of organic aquaculture, and other quality and traceability initiatives.</p> <p>Also for processing facilities, improvements in hygiene, quality, dealing with waste and developing innovative production methods targeted at micro, small and medium sized enterprises (SME), including support for related fish and shellfish processing specific lifelong learning.</p> <p>The EFF also supports education and lifelong training of fishermen, fish-farmers and workers in the processing and marketing sector, in their respective fields.</p>	<p>Support for investments in processing and marketing by the development of new products, processes and technologies in relation to primary agricultural and forestry products.</p> <p>Targeted at micro enterprises for forestry and micro, SME enterprises for aquaculture.</p> <p>No funding for environmental improvements of wetlands as an aqua-environmental measures.</p> <p>Productive investments in aquaculture are only available under the EFF.</p>	<p>Support for improving economic performance in the agricultural, forestry and food sectors (not fisheries).</p>	<p>Support for training for workers in the fisheries sector who seek an additional qualification (e.g. accounting or languages), a certified qualification of general type or who plan to leave the sector and want to develop their skills for other activities.</p>

5.3.3 Beneficiaries

All individuals, businesses or co-operatives involved in the aquaculture, processing and marketing sectors.

5.3.4 Description and justification of the main measures proposed under Priority Axis 2

Measures for productive investments in aquaculture (Article 29)

There is scope in the UK for significant expansion in aquaculture production and the sector is an important employer in rural communities, particularly in Scotland. Small businesses in particular need support as their ability to access capital is likely to be more limited than for larger business. To facilitate this expansion, investments will be made in the construction, extension, equipping and modernisation of production facilities. Such investments must contribute to one or more of the following objectives:

- diversification into new species and production of species with good market prospects;
- implementation of aquaculture methods which substantially reduce negative impact or enhance positive effects on the environment, when compared with normal practice in the aquaculture sector;
- support for traditional aquaculture activities important for preserving and developing both the economic and social fabric and the environment;
- support for the purchase of equipment aimed at protecting the farms from wild predators;
- improvement of the working and safety conditions of aquaculture workers.

Aid will be limited to micro, small and medium-sized enterprises, and those enterprises with fewer than 750 staff or a turnover of less than €200m: this includes linked and partnership enterprises²¹. The mechanism for ensuring priority is given to micro and small enterprises will be through the assessments systems. A higher mark would be awarded to those in preference to larger enterprises.

Aqua-environmental measures (Article 30)

There is a growing market in the UK for organic and high welfare aquaculture; support will be provided to enterprises that serve that market. This will include compensation for the use of aquaculture methods helping to protect and improve the environment, and to conserve nature, namely the promotion of organic aquaculture and aqua-environment schemes targeted in Article 30 of the EFF Regulation.

Compensation will only be granted where a commitment is made for a minimum of five years to aqua-environmental requirements which go beyond normal good aquaculture practice. Environmental benefits will be subject to prior assessment by a competent authority.

²¹ As defined in the European Commission publication 'The New SME Definition – User Guide and Model Declaration.

Compensation will be calculated on the basis of loss of revenue and additional costs resulting from the application of aqua-environmental methods. Compensation will be allocated for:

- A maximum amount per hectare of the area to which aqua-environmental measures are applied;
- A maximum of 2 years compensation during conversion to organic production;
- A maximum of 2 years compensation from the date of the decision establishing NATURA 2000 areas, only where aquaculture units existed prior to that decision.

Animal health measures (Article 32)

Disease is a major factor affecting aquaculture production. Aid will be available through contributions to the financing of the control and eradication of diseases in aquaculture, under the terms of Council Decision 90/424/EEC of 26 June 1990 on expenditure in the veterinary field.

Processing and marketing (Articles 34 and 35)

There is scope for the processing sector to undertake the following:

- deliver on opportunities associated with increasing consumer demand for sustainably caught fish;
- deliver on opportunities for the development of niche markets and the promotion of higher quality and sustainably sourced fish;
- modernise their operations and investment to improve the standard of processing facilities and equipment to facilitate delivery to multiple retailers;
- increase supply to the customer;
- improve the efficiency of the supply chain with a focus on greater collaboration to support development of sustainable trading relationships; and
- improve the competitiveness of the industry through new quality and value enhancement for fisheries and aquaculture products and access to improved market information.

With this in mind, we will support investments in the construction, extension, equipping and modernisation of enterprises while concentrating, in particular, on achieving one or more of the following objectives:

- improving working conditions;
- improving and monitoring public health and hygiene conditions or product quality;
- producing high quality products for niche markets;
- reducing negative impacts on the environment;

- improving the use of little known species, by-products and waste;
- producing or marketing new products, applying new technologies, or developing innovative production methods; and
- marketing products mainly originating from local landings and aquaculture.

Investments will not be eligible for aid where they concern fisheries and aquaculture products intended to be used and processed for purposes other than human consumption, with the exception of investments exclusively for the treatment, processing and marketing of fisheries and aquaculture product waste.

Aid will be limited to micro, small and medium sized enterprises and those enterprises with fewer than 750 staff or a turnover of less than €200m: this includes linked and partnership enterprises. The mechanism for ensuring priority is given to micro and small enterprises will be the assessments systems operated by the panels. A higher mark would be awarded to those in preference to larger enterprises.

We will also support projects which aim to facilitate lifelong learning.

5.4 Axis 3: Measures of common interest

5.4.1 Main Objectives of the axis

The overall objective of this axis is to promote the competitiveness and profitability of the UK fisheries sector, within the context of sustainable development.

The main objectives of this priority axis are:

- to ensure a well qualified and innovative industry through the development and delivery of professional, safety and specialist skills training;
- to support common actions that will contribute to improved management, sustainable exploitation of resources, improved hygiene standards and minimisation of environmental impacts;
- to support investments in fisheries ports, infrastructure and services;
- to provide conditions in which the fisheries industry is profitable in the long term, competitive in both global and local markets to the benefit of producers and consumers; and
- to develop new markets and promotional campaigns including on quality and value enhancement for fisheries and aquaculture products.

Support under Axis 3, covers measures of common interest with a broader scope than measures normally undertaken by private enterprises and which help to meet the objectives of the Common Fisheries Policy.

5.4.2 Result indicators

The table below sets out indicators of achievement of the priority axis objectives, together with the present situation (baseline) and target.

Indicator	Source of data	Baseline (2006)	Control level (2010)	Target (2015)
Training uptake (numbers attending training courses)	Seafish Industry Authority	6,130	6,300	6,550
Gross Value Added	Office for National Statistics	£988m €1,449m	£1,030m €1,510m	£1,070m €1,550m

5.4.3 Complementarity and demarcation

The table below sets out the demarcation of funding between the available EU funds for axis 3.

EFF	EAFRD	ERDF	ESF
<p>Includes better management of resources including electronic means which assist control, promotion of selective methods and gear and by-catch reduction. Improvements in working conditions, safety, hygiene, quality and treating waste. Partnerships between scientists and fishermen.</p> <p>Also port improvements dealing with landing processing and storage as well as provision of supplies e.g. fuel, and reducing discards.</p> <p>Developing new markets particularly with low environmental impact, quality certification and environmentally responsible production methods.</p>	N/A	<p>Provision of wider harbour infrastructure facilities but fisheries specific investments shall be financed from the EFF.</p> <p>Research, technological development and innovation pilot projects can be funded provided there are no negative effects on fisheries resources. (The appraisal process for projects will ensure no double funding occurs).</p>	N/A

5.4.4 Beneficiaries

Private enterprises, trade organisations and federations, fishermen, fish farmers, processors and those acting on their behalf.

5.4.5 Description and justification of the main measures proposed under Priority Axis 3

Collective actions (Article 37)

There are already instances of UK industry sectors working together on initiatives to improve local fisheries management, product quality, marketing and traceability. However, there are opportunities to reduce the environmental impacts of the industry, and improve profitability by promotion of higher quality and sustainably sourced fish and priority will be given to such projects.

Support will be granted to projects of common interest that are brought forward including by private enterprises, trade organisations and federations, fishermen, fish farmers, processors and those acting on their behalf where such measures:

- contribute sustainably to better management or conservation of resources;
- promote selective fishing methods or gear and reduction of by-catch;
- improve working conditions and safety;
- contribute to the transparency of markets in fisheries and aquaculture products including traceability;
- improve quality and food safety;
- contribute to the improved production, processing or marketing equipment and infrastructure including for the treatment of fisheries and aquaculture products waste;
- upgrade professional skills or develop new training methods and tools;
- promote partnership between scientists and operators in the fisheries sector;
- contribute to UK objectives for small-scale coastal fishing;
- carry out feasibility studies relating to promotion of partnership with third countries in the fisheries sector; and/or
- create or restructure producer organisations, and implementation of their plans to improve product quality.

Aid for the creation or restructuring of producer organisations, and implementation of their plans to improve product quality, shall be limited to a maximum of three years following the date of recognition of new producer organisations or decision to restructure. In these circumstances, aid shall be digressive over these three years.

There is a wide range of potential projects eligible for funding under this Axis. In line with the objectives of the Operational Programme those which are most likely to attract funding would be those which help to improve the balance between the fishing effort and opportunity (e.g. gear selectivity) as well as those which would increase profitability (such as improving quality) and competitiveness or increase employment. By serving wider public interest this

measure aims to contribute to a stable increase in income of fishers, contribution to the restructuring of the sector, and the promotion of joint activities of the sector.

Collective actions will not be used as a route to overcome the eligibility conditions and aid intensities of Priority Axes 1 and 2.

Measures intended to protect and develop aquatic fauna and flora (Article 38)

The stocks of migratory fish (including Salmon, Trout and Eels) have declined dramatically in recent years and stocks in the UK have mirrored this decline. For this reason, support will be available for measures relating to the rehabilitation of inland waters, including spawning grounds and migration routes for migratory species. Action must be implemented by public or semi-public bodies, recognised trade organisations or specifically appointed bodies.

Aid for direct restocking will not be eligible for funding under this axis, unless explicitly foreseen as a conservation measure by a Community legal act. Council Regulation (EC) No 1100/2007 puts in place a framework for the protection and sustainable use of European eel.

Fishing ports, landing sites and shelters (Article 39)

The improvement of conditions under which fisheries and aquaculture products are landed is essential to the sector to help protect and promote improvements in the quality of caught and farmed fisheries products.

Investments will be available for existing fishing ports which:

- improve the conditions under which fisheries and aquaculture products are landed, processed stored in the ports and auctioned;
- relate to the provision of fuel, ice, water and electricity;
- repair equipment and the maintenance of fishing vessels;
- construction, modernisation and extension of quays improving safety during landing or loading;
- computerised management of fisheries activities;
- improve working and safety conditions;
- improve the storage and treatment of waste; and/or
- reduce discards.

Development of new markets and promotional campaigns (Article 40)

The development of new markets and promotional campaigns for fisheries and aquaculture products will help raise consumer awareness about new species and the merits of purchasing sustainably sourced fish.

Aid will be made available to projects that are intended to develop new markets and in promotional campaigns for fisheries and aquaculture products and shall, in particular relate to:

- conducting regional, national or transnational promotion campaigns for fisheries and aquaculture products
- the promotion of products obtained using methods with low impact on the environment;
- implementation of a quality programme for fisheries and aquaculture products;
- promotion of products recognised under the terms of Regulation (EC) No 510/2006;
- quality certification (e.g. support for certification schemes such as the Marine Stewardship Council and the Responsible Fishing Scheme which focus on sustainable and well managed fisheries), including label creation and the certification of products caught or farmed using environmentally responsible production methods;
- campaigns to improve the image of fisheries and aquaculture products and image of the fisheries sector; and
- implementation of market surveys.

Pilot Projects (Article 41)

Good science makes an important contribution to fisheries management. With this in mind, support will be made available for pilot projects to test the viability of new technologies, management plans and fishing effort allocation plans.

This may include experimental use of more selective fishing techniques aimed at acquiring and disseminating new knowledge. It may also include support for the development and testing of methods to improve gear selectivity, reduce by-catches, discards or the impact on the environment, or testing alternative types of fishing management techniques. There must be in place arrangements for adequate scientific follow up of pilot projects, in order to ensure and demonstrate significant results, along with arrangements for the publication of results.

Projects will only be eligible where they are of non-commercial nature and are carried out by approved bodies such as economic operators and recognised trade associations or any other UK designated competent body, in partnership with a scientific or technical body.

5.5 Axis 4: Sustainable development of fisheries areas

5.5.1 Introduction and Extent

The sustainable development of fisheries communities is an important element of the UK's overarching objectives to be achieved within the context of the EFF and the delivery of the national fisheries policy; support under this axis will target these communities as a priority.

The limited amount of funds available under EFF make it paramount that an integrated approach be taken to both drawing up a strategy and delivering the Programme, and that targeted fishery areas be carefully identified.

Axis 4 will support coastal communities to continue with the business of aquaculture and sea fishing, increase the economic value of these activities and the social cohesion arising from them, and support diversification away from these activities where appropriate.

Axis 4 of the EFF will provide an integrated and territorial approach to the sustainable development of fisheries areas, which will be firmly rooted within the economic and social development contexts of the locality. An important element in Axis 4 is the existence of an overall strategy which seeks to support the implementation of the objectives of the common fisheries policy.

5.5.2 Description and justification of the main measures proposed under Priority Axis 4 for the Devolved Administrations making up the UK

Axis 4 will make investments in projects which will:

- Strengthen the competitiveness of these areas;
- Restructure and redirect economic activities, e.g. by promoting ecotourism;
- Diversify activities including creating additional jobs outside the fisheries sector;
- Add value to fisheries products; and
- Support the running costs of local area groups.

Axis 4 will promote through its actions:

- strengthening the competitiveness and employment base of the fisheries areas;
- a collaborative approach spanning the value chain with respect to market information, customer wants and needs, distribution and innovation potential for the sector to be better able to deliver to existing, as well as anticipate likely future, customer demand;
- redirecting and diversifying economic activities, for instance by promoting ecotourism;

- improving and protecting the coastal and marine environment;
- protecting and enhancing the natural ,architectural and cultural heritage in fisheries areas;
- building the capacity of local fisheries areas actors to encourage greater active participation in local area groups and developing their skills in preparing local development strategies.

Axis 4 Implementation strategies will be led by local groups representing public and private partners from the relevant socio-economic sectors. The geographical scope of these strategies will comply with the requirements of Article 43 of the Regulation on the EFF²², and hence will target areas that either have:

- Low population density; or
- Fisheries in decline; or
- A small fishing community

The size of the area may, in accordance with Article 43(3), exceed NUTS 3 level if geographical or socio-economic conditions justify larger areas; specifically where such an area:

- Complies with the objectives in the local strategy, improves the impact of the measures in the local strategy; or
- Improves the interaction between fisheries, aquaculture, processing of seafood or fishing related activities.

Concentration and Subsidiarity

The implementation of Axis 4 will ensure that the principle of concentration is respected by ensuring that fishery areas are only targeted where it can be shown that they represent coherent units of economic and social activity and where the wider fisheries and/or aquaculture sector is significant in terms of contribution to local employment, the local economy or the sustainability of the local community.

Within each of the four Administrations (Scotland, England, Wales and Northern Ireland), the selection of individual fisheries action areas will be driven by a “bottom up” approach following the LEADER principle, whereby locally perceived need, local declared interest and initiative will strongly influence and help define the resulting commonly agreed strategic planning for the implementation of the EFF in local areas.

5.5.3 Designation of fisheries areas

The term “fisheries area” is used to refer to a coherent geographical, economic and social area, which means that the identification of fisheries areas is based on areas whose historical development has been concentrated on fishing, a fishing village, a fishing port or landing site, or areas which have significant employment in the fisheries and aquaculture sector.

^{22 22} Under the terms of Council Regulation (EC) No 1198/2006 assistance under this axis should prioritise area with low population density, fishing in decline or small fisheries communities.

A separate map for each Administrative region (Annex E) shows the fisheries areas of the UK coastline that are eligible for Axis 4 actions. Local EFF Groups will be selected to take forward the implementation of this Axis of the EFF and the selection process will be conducted on a competitive basis through open bidding rounds within each of these areas

Procedures and criteria for selecting the fisheries area:

The basis for selecting areas of coastline as eligible for support under Axis 4 of the EFF is as follows:

- In order to ensure a close alignment between Axis 4 of the EFF and existing representational structures, such as Local Strategic Partnerships, the geographical extent of Local EFF Groups will be expected to follow the local government boundaries although cross-boundary partnerships will be encouraged;
- This process of alignment of boundaries with units of local government will help ensure that the “bottom up” approach of the EFF, informed by the LEADER experience, is reinforced by effective and streamlined engagement with the relevant public authorities. Derogation from this structure will be permissible where evidence would support alternative boundaries (e.g. where the species is the common factor); Further, the areas must be demarcated in relation to the programme’s objectives and measures for the development of fisheries areas. The primary geographical areas for implementation of the activities should also be prioritised in the local development strategy.

This procedure means that the ultimate definition of the fisheries areas will be based on a “bottom up” approach: it is local stakeholders who, through an expression of interest, will specify the areas that the local development strategy is to cover. In connection with the Local EFF Groups’ deliberations, it will be possible to further limit and prioritise action in the areas within the local authority boundaries.

Where appropriate, the Local EFF Groups will be set up on the basis of existing LEADER networks, for example:

Scotland: across most of the territory

England: in less populated regions such as Cumbria and Northumberland.

In south-eastern England, where much of the coastline is ineligible for LEADER support due to a high population density, the fisheries are facing specific challenges, e.g. higher business costs; lower than regional average incomes and pressure on landing sites from property developers.

In other areas, local Axis 4 groups may emerge with the support of Local Strategic Partnerships or other public authority support.

Wales and Northern Ireland: where there are some existing LEADER networks.

The procedures, criteria and timetable for selecting the Local EFF Groups, including indicative number of groups and planned percentages of fisheries areas to be covered by the Local Development Strategies, are the responsibility of each devolved national administration; details for each are set out below.

5.5.4 Description of the management and financial systems that will apply in each of the four Devolved Administrations of the UK

Figure 1 contains a description of the financial flow. Each Local EFF Group is allocated a budget for the whole programme period, broken down into years and action areas (1). The group recommends projects for grants (2), which the relevant public authority either rejects or accepts (3,) either for an applicant outside the group or for the group's work (3). The public authority's role is exclusively to perform a legality check and to assume overall responsibility as an administrative body. The group will be responsible for selecting the projects.

Figure 1: Financial flows for local groups (Axis 4)

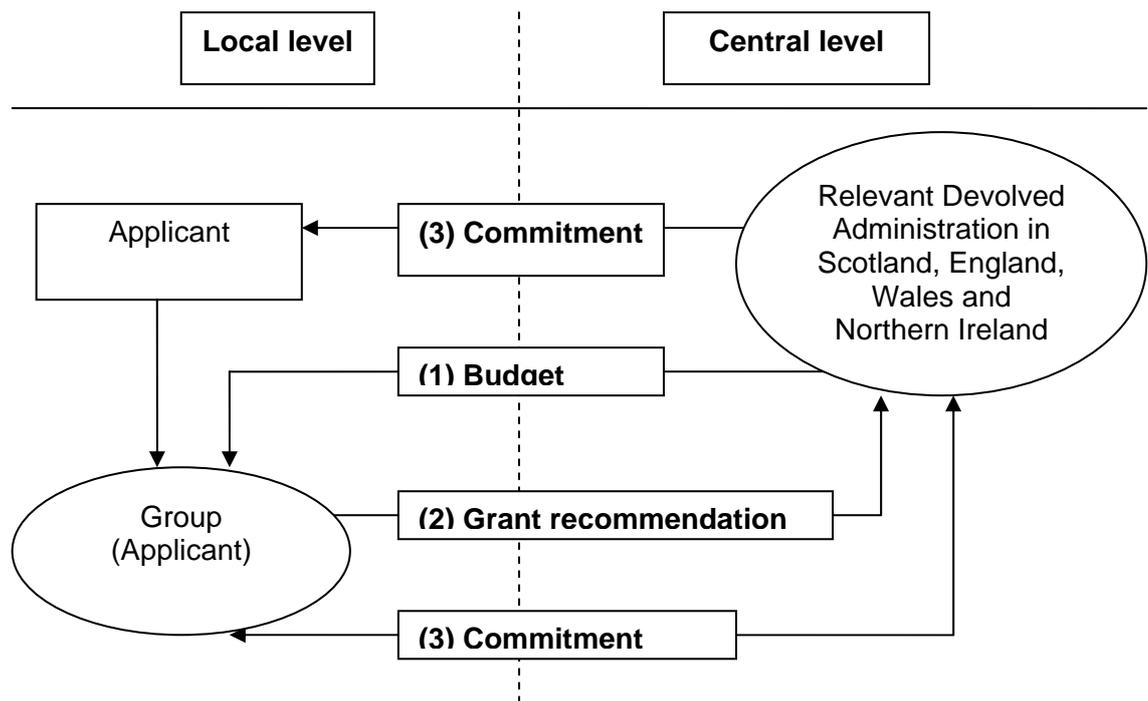
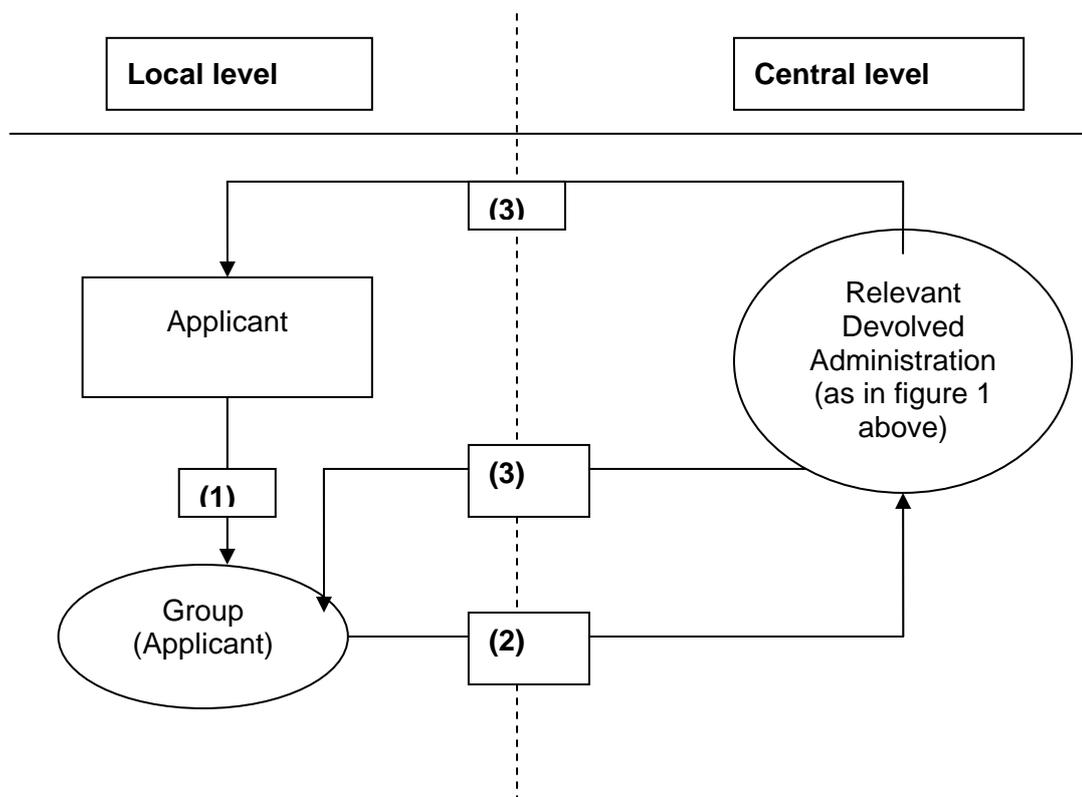


Figure 2: Administrative flow for local groups (Axis 4)



Applications in accordance with Axis 4 of the Regulation (sustainable development of fisheries areas):

The application is sent to the Local EFF Group (1); the Group can itself be the project owner and submit applications to the Devolved Administration (2). The Administration performs a legality control (2). The Group evaluates the application with reference to the local development strategy and submits a recommendation to the relevant Devolved Administration (2). Acceptance or rejection is announced by the Devolved Administration (3).

Justification for the running costs that exceed the ceiling fixed under Article 44(5) of Regulation (EC) 1198/2006.

Running costs for groups may not exceed, as a general rule 10% of the total budget allocated to a fisheries area, the UK will however consider, on a case-by-case basis, exceeding the ceiling according to Article 44(5) of the EFF regulation: in areas where the majority of fisheries operators are micro or very small enterprises, among which management skills and experience of involvement in partnerships, strategic development and planning would benefit from further development, extra resources may be required by the Group to ensure the active participation of local fisheries actors in the activities of the Local EFF Group.

5.5.5 Beneficiaries (in the 4 UK Devolved Administrations)

The beneficiaries of Axis 4 will include micro, small and medium-size enterprises, third sector organisations, institutions, associations and public bodies and organisations.

5.5.6 Indicators of Achievement (in the 4 UK Devolved Administrations)

Indicator 1: While all efforts will be made to involve representatives of the catching, aquaculture and processing sectors, experience indicates that in fisheries areas where most operators are micro and small enterprises, it can prove difficult to secure their time and active participation (see above); as a consequence, and to ensure the broadest representation of local fisheries' interests, both enterprises and umbrella organisations will be eligible for membership of the Local EFF Groups. There will, however, be at least one fishery/aquaculture enterprise on every group.

Indicator 2: While the work of the Local EFF Groups will vary from area to area, every group will be required to produce a local strategy and to get involved with local projects. Experience has shown that the fishing community generally lacks experience in applying the skills (e.g. developing strategies, interpreting plans, working in groups to secure consensus) required to fully engage in these types of exercise and we will therefore support activities that aim at enhancing such skills. Others that need training but cannot access it through other forms of support will not be excluded but the focus will remain meeting the needs of those employed in fishing and aquaculture.

Indicator	Source of data	Baseline (2007)	Control level (2010)	Target (2015)
The percentage of Local EFF Groups that include fisheries (enterprises and umbrella organisations - in catching, aquaculture or processing) appropriate to their areas	Responsible public authorities	n/a	50% (action plans will be developed for improving representation if required)	100%
More than 30% of the Local EFF Groups can demonstrate improved management skills among fisheries operators	Responsible public authorities	n/a	40% (action plans will be developed for improving skills if required)	100%
That, as a result of activity by Local EFF Groups the number of jobs safeguarded in sectors other than fishing/catching', i.e. related to on shore activities such as aquaculture, processing, distribution, etc. will not be less than 50 full time equivalents	Responsible public authorities	n/a	20 (action plans will be developed to strengthen Local EFF Group activities in support of work to safeguard jobs)	50 Full Time Equivalent

5.5.7 Complementarity and Demarcation

European Social Fund (ESF)

The regulatory requirements applying to ESF apply similarly to EFF but demarcation issues are more limited in the case of ESF because of the limited strategic and geographical overlap with ESF programmes. The main area of complementarity is training e.g. under EFF, vocational training is limited to individuals in the fisheries and aquaculture sectors while in ESF only limited training is available for individuals in these sectors.

European Regional Development Fund (ERDF)

ERDF supports enterprise development generally but not activities that specifically target the fisheries sector. EFF may support projects which strengthen the competitiveness of fisheries or allow for restructuring or redirecting economic activities in fisheries areas (as already outlined above) but the only enterprises to be supported by EFF will be those in the fisheries and aquaculture sector, including processing.

To avoid overlap whilst ensuring complementarity, the Scottish, English, Wales and Irish public authorities responsible for the implementation of EFF will be under an obligation to:

- explicitly make it a requirement that the EFF support be targeted at actions which are not the subject of similarly targeted support under current ERDF Programmes in the locality;
- communicate clearly which funding Programme is targeted at which sector and how different EU Programmes fit together coherently within the wider context of enterprise support in the UK;
- require all funded groups / organisations to demonstrate that in no case is any element of EU support match funded against any other element of EU funding; and
- Limit EFF support to projects focused on environmental, nature, tourism and heritage projects that benefit the fisheries communities in selected eligible Axis 4 areas; those projects can however include elements of refurbishment of potential tourist spots, as well as support for marketing and promotion activities.

LEADER

Complementarity between LEADER and EFF will be achieved by delivering EFF across the UK in full accord with the “bottom up” approach championed by LEADER, whilst maintaining clear demarcation between these funds in their implementation as follows:

If a Local EFF Group is based on an existing LEADER Local EFF Group, the same administrative support structure may be used to implement both EU funds. The operating costs will be shared proportionately and a clear separation of instruments will be required between the two groups:

- Distinct partnerships – the composition of the partnerships of the Local EFF Group and the LEADER Local EFF Group will be different (even if

some local actors, e.g. fisheries industry representative are members of both partnerships)

- Distinct project selection committees - the composition of the decision making bodies of the partnerships will also be different, even if some local actors (e.g. fisheries sector representatives) are members of both.
- Separate accounting, monitoring and management structures and
- Clear delineation between the EFF and LEADER strategies.

European Agricultural Fund for Rural Development

The EAFRD Programme will only fund enterprise support projects if they are related to agriculture and agricultural products / services, or related to rural communities. As for EFF, a bottom-up, LEADER-informed approach will maximise the opportunities for complementarity benefits with other funds, including the EFF.

5.5.8 Inter-regional and trans-national cooperation

Co-operation and sharing of Axis 4 good practice, especially relating to Capacity building, knowledge management and improvement of management skills, will be facilitated at regional and national levels within the UK and at inter-regional and trans-national levels across the EU, by means of distance (electronic) networks as well as through network meetings and fact finding missions and financed through a combination of regional public funds and private funds wherever possible, supplemented, if necessary, with Axis 5 Technical Assistance monies.

Within the UK, the Devolved Administrations will be included in the quarterly meetings of the Marine and Fisheries Agency with the Regional Development Agencies where examples of good practice in the fisheries industry are discussed and exchanged. The location of the moves around the different regions and reports on Local EFF Group activities will form part of the meetings.

Other channels for exchanging good practice will include:

- Women in Fisheries EU networks;
- Special interest groups both for individual fish species e.g. whiting and with respect to other technical issues such as the electronic log book initiative;
- The Marine and Fisheries Agency and Devolved Administration websites, e.g. www.mfa.gov.uk; and
- FARNET, the EU-network of Axis 4 actors, to include Local Action Groups and people working in the fisheries / aquaculture sector.

5.5.9 Devolved National Administrations within the UK

While the structures and processes for developing and implementing national, regional and local policies and strategies and for establishing and linking local groups have common main features, they differ in some of their details across the devolved Administrations in the UK (Scotland, England, Wales and Northern Ireland).

For this reason, and to ensure that decisions are taken as closely as possible to the beneficiaries and gain legitimacy at regional or local level, some of the mechanisms for delivering support under this axis will reflect those differences and are indicated below for each Administration. It must be noted however that it is only where the situation in the Administrations differs from the generic UK OP that it is indicated below.

Scotland

Procedures and criteria for selecting the fisheries areas

Within each Scottish fisheries region (there are 11 in total, covering the entire Scottish coastline, see Annex E 1 – map of Scottish area, p. 131 below), it is planned to establish at least one fishery area using the national, UK criteria set out above (5.5.3 page 2), augmented with the following specific criteria to suit the circumstances in Scotland:

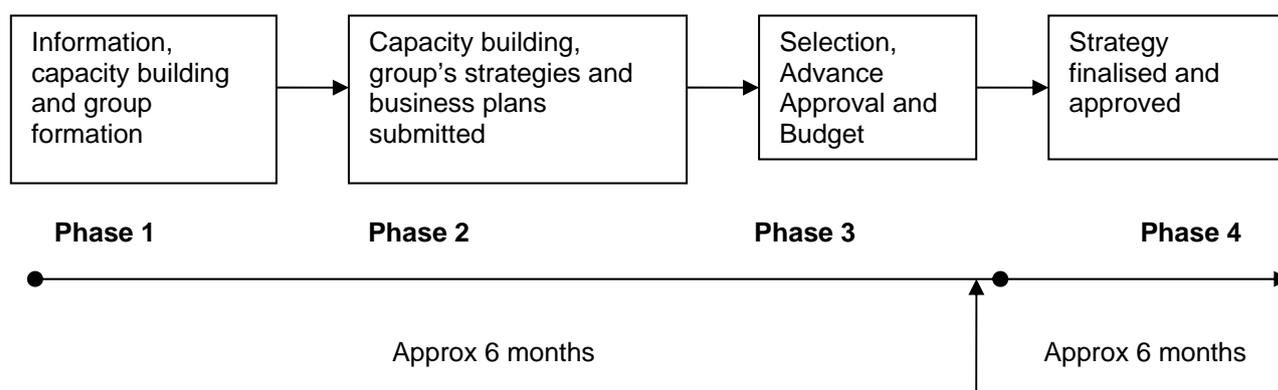
1. The area has a low population density compared to the average for Scotland (NUTS 1); or
2. a decline in the local fishing industry can be documented; or
3. the area is sufficiently coherent from a geographical, economic and social point of view (there are 23 NUTS level 3 regions in Scotland); or
4. has common socio-economic characteristics.

Procedures, criteria and time table for selecting the Local EFF Groups

The groups will be set up on the basis of utilising the existing Scottish LEADER network where that is appropriate. For those areas where there is no LEADER group, proposals will be encouraged from other bodies such as statutory community planning partnerships to facilitate the formation of a group following the procedures as outlined above. It is expected that between eleven and fifteen Axis 4 Local EFF Groups will be supported, covering 100% of the coastline.

The procedure for establishing the groups will have four phases:

Figure 1: Procedure and time table for establishing local groups



The first 3 phases are expected to last approximately six months altogether. In phase 2, the strategy and business plan are submitted by the group; in phase

3, the strategy is given advanced approval allowing for progress to phase 4. In phase 4, the strategy is finalised and given approval by the Scottish Administration. There will be two initial application phases; if the group is unable to meet the deadline for round 1 they can continue and apply for approval in round 2. The implementation phase of the local strategies is therefore expected to start approximately one year after the formation of the group.

In order to secure a broad composition of the Local EFF Groups involving different stakeholders, the establishment of the decision-making body of the group must comprise a balanced and representative group of partners from local communities and socio-economic sectors as well as other representatives of civil society, including parties from the fisheries and aquaculture sector, which together must make up at least 50% of the local partnership. The composition of the board must aim at the following socio-economic parties being represented on the board:

- Local individuals;
- Local organisations and enterprises of the fisheries sector;
- Local associations and
- Local and regional public authorities.

The representation of public authorities must not exceed 30% of the membership of the board. The composition of the board shall aim at equity taking into account gender and age.

A panel will be set up by the Scottish Administration to assess applications by groups to take part in Axis 4 funding. The members of the panel will have a wide involvement in fisheries/rural affairs/other funding streams.

Phase 1: Information, capacity building and group formation

The Scottish administration informs the individual regions about the programme and the procedure for establishing local groups by public notice. On the basis of this, Scottish Government will invite declarations of interest with a view to outlining the proposed groups.

The groups must be representative and democratically legitimate. The following procedures must therefore be observed when establishing a local group:

- At the decision-making level the labour market and economic partners, as well as other representatives of civil society, including parties from the fisheries and aquaculture sector must make up at least 50% of the local partnership;
- The relevant local authorities may each appoint one member of the board in accordance with the defined criteria for the composition of the group; and
- The general meeting shall elect the chair of the board. The Articles of association for the Local Action Group shall be adopted at a general meeting. The Scottish Government shall draw up standard articles of association, which can form a basis for the groups' own articles of association.

Phase 2: Capacity building, strategies and business plan

When the local group has been formed with Articles of Association and a board, the board shall draw up an outline partnership plan and a development strategy. The partnership plan should inform the Scottish Administration of the proposed geographical boundaries and deliver a note of who is represented in the group, their skills, experience and role in fisheries/rural development. The Scottish Administration will consider this information to ensure there is no duplication of area cover and that the partnerships satisfy the regulation criteria and represent as wide a view between public agencies and private groups as possible. Any groups submitting proposals which involve duplication of boundaries or partnerships which do not provide wide engagement will be contacted and given an opportunity to amend the detail of their proposals before proceeding much further in preparing their local strategy.

The following baseline details are required to enable appraisal and approval of groups to move to the second stage:

- Basic information – name, geographic area, Local Authority/Authorities for the area;
- Eligibility criteria – explanation of why an area has been chosen; and
- Population – total population of area to be covered by group.

The partnership plan is then submitted. Potential groups who have provided the plan and who satisfy the baseline eligibility criteria will be asked to provide more detailed information along with the local development strategy and business plan for their chosen area. The strategy should describe how the following will be achieved:

- Themes to be addressed;
- Specific needs, target groups;
- Outcomes;
- Innovation;
- Co-operation;
- Fit with other programmes and
- Sustainability

At the same time as submitting the local development strategy, potential groups will draw up a business plan indicating how they intend to implement their respective strategies and submit bids for Axis 4 funding. The plan should include the following:

- Delivery mechanism;
- Administrative arrangements;
- Communications strategy;
- Equal opportunities policy;
- Programme of planned activities;
- Project selection criteria;
- Plans for monitoring and evaluation; and

- Financial plan.

Phase 3: Selection, advance approval and budget

Groups will be given advance approval for Axis 4 funding once the Scottish Administration is content that the Local Development Strategy and Business Plan satisfy the selection criteria, comply with the regulation and demonstrate they will deliver.

This will involve checks on the legality of the board's composition and the Articles of association and the outline development strategy, including the conditions for the strategic areas. Advance approval serves to guarantee that the conditions for the effective implementation of the subsequent strategy are present. The group will be notified of the budget being allocated to the respective group.

The local development strategy will be assessed against the following themes:

- Revitalising communities;
- Coastal community capacity;
- New markets and products; and
- Progressive coastal economy.

Phase 4: Strategy finalised and approved

The local groups, which obtain advance approval from the Scottish Administration, then finalise the actual development strategy for the area. Successful potential beneficiaries for group status will be required to submit terms of reference for their partnership to the Scottish Administration, providing details of the organisations involved in the partnership as well as information as to how the partnership satisfies the disability, discrimination and equality guidance. All group chairs will be required to sign a service level agreement setting out the responsibilities of the group in delivering the Axis 4 element of the EFF and in particular in managing the staff, Axis 4 funding, monitoring and evaluation, reviewing the implementation of the strategy, audit checks on the projects etc. The local authorities/enterprise networks must confirm that the local strategies comply with the regional strategies that have been drawn up in the area. The strategy must then be approved by the Scottish Administration.

The work of the group:

It is the task for the group to work for the activities and achieve the objectives set out in the local development strategy approved by the Scottish Government. The group selects and submits project applications under the EFF programme for a decision by the Scottish Administration within a financial framework defined by the Scottish Government. Only projects that fall within the framework of the approved local development strategy are eligible for support.

It is recommended that each group appoint an administrator/fisheries co-ordinator or similar. It is the co-ordinator's task to manage the daily running of the group, to act as a secretariat for the board and to serve as an advisor and a link between the group and the local players, including other development

initiatives in the local area. The co-ordinator must also be responsible for contact with project applicants and act as the day-to-day point of contact for stakeholders with the group.

Areas that are both fisheries areas and rural areas:

In cases where there is an overlap between the areas designated as a fisheries area in accordance with Axis 4 of the Regulation under the European Fisheries Fund and as a rural area in accordance with the regulation on the development of rural areas, axis 4 on local action groups, the groups may be integrated in order to guarantee the greatest possible economies of scale.

If the groups consider it appropriate, they can share the secretariat and co-ordinator function with a local action group designated in accordance with the Rural Development Programme e.g. LEADER.

England

The implementation of Axis 4 will be informed by the priorities of regional government through Regional Development Agencies (RDAs) and Government Offices (GOs) which operate at NUTS 1 level. The nine English RDAs are responsible for the economic and spatial development of the English Regions but only seven of these have fisheries areas. The nine GOs have the same boundaries as the RDAs but represent central government policy in the regions and lead on relationship management with County, Metropolitan and Unitary Authorities.

In England there are seventeen County or Shire Councils with coastline of which 6 are classified as NUTS 3 population density level (the remainder are NUTS 2). There are 5 coastal metropolitan authorities in England, all classified at NUTS 3 population density level, and a further 18 coastal unitary authorities of which only three have population densities of NUTS 2 level (the remainder are all NUTS 3).

In south-eastern England, where much of the coastline is ineligible for LEADER support due to its high population density, the fisheries are facing specific challenges from higher business costs, lower than regional average incomes and pressure on landing sites from property developers. In other areas, local Axis 4 groups may emerge with the support of Local Strategic Partnerships or other public authority support.

Procedures and criteria for selecting the fisheries area:

Of these English coastal authorities, we have identified 24 areas (either County, Metropolitan or Unitary) that would meet the national criteria of NUTS 3 population density or smaller, a fishery in decline or a rural area. This represents approximately 60% of all the coastal authorities in England. The procedures and criteria for selecting Axis fisheries areas in England will be as follows:

Firstly, location within the specific coastal authorities complying with the above set of requirements.

Secondly, aligned with the national UK criteria set out above but augmented with the following specific criteria:

1. The area has a low population density compared to the average for the English region within which it resides (NUTS1); or
2. A decline in the local fishing industry can be documented; or
3. The area is sufficiently coherent from a geographical, economic and social point of view (there are 26 NUTS level 3 regions in England); or
4. The area has common socio-economic characteristics.

An additional eligibility requirement for England is that any fisheries area must include at least one recognised landing fishing port.

Finally it is planned that there will be at least one fishery area in at least 85% of England's fisheries regions (see Annex E 2- England map), to ensure effective coverage across different parts of the English coastline; given that some English fishery regions are of far greater geographical extent than others. There is no expectation, unlike in Scotland, that every single fishery region will designate at least one fishery area eligible for Axis 4 support. It is estimated that a total of 15% of the English coastline will be within one of the chosen Axis 4 fishery areas.

Procedures, criteria and time table for selecting the Local Action Groups

On the map at Annex E 2-, the areas of coast line marked with a black line indicate the fisheries areas that comply with the criteria set in this Operational Programme and are therefore eligible under Axis 4. Altogether they represent approximately 60% of the total English coastline when the convergence region is included; this falls to 51% when the Convergence region is excluded. Between 6 and 10 Local EFF Groups will be created in (non-Convergence) England with up to a further 2 groups in Cornwall (the Convergence area).

The English Local EFF Groups will be selected by a panel set up by the Marine and Fisheries Agency, utilising existing local groups and administrative support structures that will follow the UK model (see 5.5.3, p. 75 above). Groups that are prepared to adjust their structure to include fisheries representatives would be eligible to apply; this can include LEADER LAG amongst others. An EFF Facilitator (see Axis 5) will be appointed to each Local EFF Group to act in an advisory / capacity building role, which will strengthen the complementarity of the different Axes and enhance the ability of the Group to secure funding.

For those areas where there is no LEADER LAG proposals will be encouraged from other bodies such as Local Strategic Partnerships to facilitate the formation of a group.

The procedure for establishing the groups will have four phases:

Phase 1: Mapping of existing groups for their potential to become Local EFF Groups will be carried out by the Marine and Fisheries Agency in cooperation with the relevant Government Offices and Regional Development Agencies. Expressions of interest already received as part of the consultation process will be considered as part of Phase 1. The mapping exercise will inform the

operation of Axis 4 Group grant application rounds the first of which is planned for the early 2009.

Phase 2: Applications to form Local EFF Groups will be called for as part of a competitive process and a target will be set for the first group to be operational by the close of June 2009. It is expected that further Local EFF Groups will be established during the calendar years 2009 and 2010 and potentially later on during the Operational Programme period. To create maximum opportunity and draw on the impact of the capacity building activities, applications to form Local EFF Groups will be considered, on average, three times a year (proposals that fail to meet a deadline or that do not receive approval will have further opportunities to be considered). Proposals will have to include details of how the group intends to build the capacity of the local fisheries community that will encourage its engagement in the production of the local fisheries development strategy. **Phase 3:** The Local EFF Groups will produce their Local Development Strategy, to be submitted to the relevant Regional Development Agency for confirmation of complementarity with regional plans, no later than six months following phase 2. The local development strategy must show evidence that fisheries issues have been addressed and members of the fisheries industry are actively engaged with the Local EFF Groups.

Phase 4: Each Local EFF Group will be required to submit at least one application for an Axis 4 project and have commented upon external proposals for projects under Axes 2 and 3; the comments will not form part of the selection process but are intended to encourage the Local EFF Groups to make themselves aware of a wider range of activities within the EFF (proposals for projects under Axes 2 and 3 will be considered by the national tranche panel within six months of the end of Phase 3). If a project over the minimum threshold limit for immediate approval is being considered by a tranche panel then the views of the Local Group, where one exists, would be taken into consideration by the tranche panel. This does not mean that if a Local Group were not to support a proposal it would necessarily be ruled out but it would impact on the scoring of the project by the tranche panel.

Phase 5: A follow-up review of the Local Development Strategy will be undertaken at the mid-point between the start of the Local EFF Group and the end of the Operational Programme period in order to assess the long-term sustainability of the Local EFF Group and secure alternative funding streams or develop exit strategy for the period beyond 2013.

Phase 6: Axis 4 of the EFF Programme will be subject to two formal evaluations: one mid-term and one-post programme. The mid-term evaluation will inform the development of a system for exchanging good practice and experiences between Local EFF Groups nationally and transnationally; in addition, it will be used to develop action plans to improve representation (if required) and any areas of operation.

Main measures supported

The main measures adopted (see 5.5.2, p. 73 above) apply to England as to the other 3 Devolved Administrations of the UK.

Projects supported

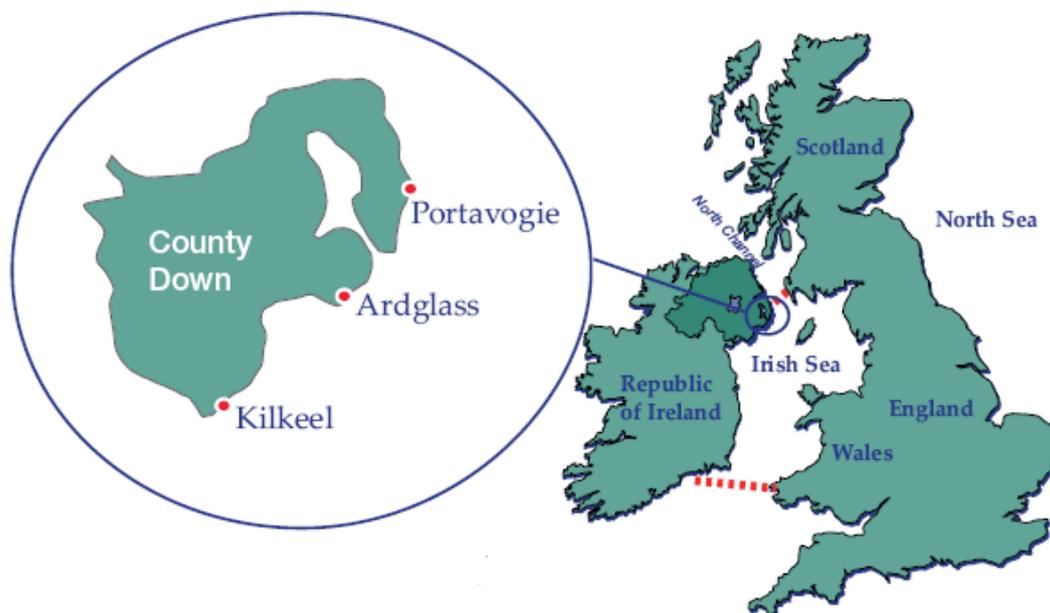
The added value of proposals will therefore be critically evaluated in terms of the degree to which they bring together relevant and complementary expertise both from within the fishing industry itself and from outside this sector (for example as a route to enhanced market or financing access, or as a tool to broaden the economic potential).

Description of the management and financial systems

The management structures for England are the same as for the other 3 Devolved UK Administrations (see 5.5.4, p. 75 above).

Northern Ireland

Northern Ireland's primary "fishing dependent region" comprises the 3 Local EFF Groups of Ardglass, Kikeel and Portavogie situated along a relatively short length of the County Down coastline. The total population of the three Groups is around 15,000 people. In 2006 they accounted for 93% of the region's over 10m fleet, 95% of employment in the catching sector, 84% of fish landings by value and 92% of fish landings by weight. Northern Ireland has 30 registered fish processing businesses and 24 of these are based in the 3 fishing ports.



In 1994, Northern Ireland established the South Down Fishing Taskforce to develop and implement a strategy for the socio-economic regeneration of Northern Ireland's fishing dependent communities. Since then DARD has invested over €16.65 grant support in "socio-economic" projects within County Down's fishing dependent village EFF Groups. This investment took place in association with the International Fund (Fishing Villages Initiative), the European Commission (1994-99 PESCA Programme) and the South Down

Fishing Taskforce (Integrated Development Fund). These programmes focused on schemes promoted by the voluntary sector and public domain initiatives undertaken by local government.

The current programme of the South Down Village Taskforce comprises 6 themes

- Fishing Industry – Diversification and Sustainability
- Fishing Industry – Consolidating Infrastructure
- Fishing Industry - Improved Training and Education
- Enhanced Tourism
- Fishing Industry – Effective Communications and Public Relations
- Environmental Improvement

The Taskforce programme expenditure will come to an end on 31 March 2009. By then some €9.2m Integrated Development Funding will have been invested into the region's fishing communities through the delivery of a programme comprising 70+ projects. At that time the Department for Agriculture and Rural Development, in consultation with the Taskforce, will undertake a Post Project Evaluation of this investment to inform decisions about the need and scale of projects that should be supported in a future programme part financed under Axis 4 of the EFF.

The current South Down Taskforce comprises a wide range of social partners including central government, local government, fishing industry and the voluntary sector. Northern Ireland proposes to build on the experience of this established organisation to develop local strategic proposals. All Northern Ireland government organisations have a statutory duty under Section 75 of the Northern Ireland Act 1998 to have due regard to the need to promote equality of opportunity. DARD routinely carries out screening exercises on all its policies, legislation and funding programmes to determine whether equality impact assessments are needed. Equality will be a key consideration when determining the future membership of the Taskforce, assessing the impacts of previous investment and formulating plans for future investments supported through Axis 4 which will aim to focus on projects undertaken for the collective benefit of the wider communities rather than individual beneficiaries. The area of benefit is defined as 10km from the centre of each local Group.

It is likely that any future Taskforce programme will focus on investment in employment diversification, enhanced tourism, regional communication, and environmental improvements.

Wales

Axis 4 of the EFF will build on evidence provided by the FIG programme in Wales of the innovative partnerships the Welsh Assembly Government initiated with the local fishermen's associations to provide funding for local community fisheries.

Wales will utilise the current mechanisms available to the Food and Market Development Division (FMDD), namely the FMDD regional network, to deliver the EFF to local regions as well as RDP Axis 1 scheme. This initiative would

be implemented by using the successful LEADER + approach which will deliver a holistic process and will provide synergy with other European Programmes.

This approach will encourage the direct involvement of the fishing communities using the LEADER approach to deliver their objectives in Wales, using initiatives that are participative, holistic, synergistic and non-risk averse.

Procedures and criteria for selecting the fisheries areas

In addition, RDP Axes 3 and 4 LAGs will be utilised to set up Local EFF Groups in coastal areas of Wales. The areas that have been identified will meet the following criteria, in line with the other nations of the UK:

1. The area has a low population density compared to the average for the Wales (NUTS 1); or
2. A decline in the local fishing industry can be documented; or
3. The area is sufficiently coherent from a geographical, economic and social point of view (there are 12 NUTS level 3 regions in Wales); or
4. The area has common socio-economic characteristics.

Using these criteria, the following Local Authority areas have been identified to be eligible in Wales for assistance under Axis 4 of the EFF:

- Anglesey;
- Ceredigion; and
- Llyn Peninsula within Gwynedd.
- The Welsh Assembly Government will liaise with RDP managers and utilise existing RDP Axis 3 and 4 LAG administrative arrangements and set up new Local EFF groups with members from the existing RDP LAGs with additional members from the fishing sector. The Local EFF Groups will involve a wide range of stakeholders and represent a balanced group of partners from local communities and socio economic sectors as well as other representatives of civil society, including parties from the fisheries and aquaculture sector. There will be at least one Local EFF Group in each of these three designated Axis 4 fisheries areas. Approximately 38% of the total Welsh coastline will be covered by a LAG.

Procedures, criteria and time table for selecting the Local EFF Groups

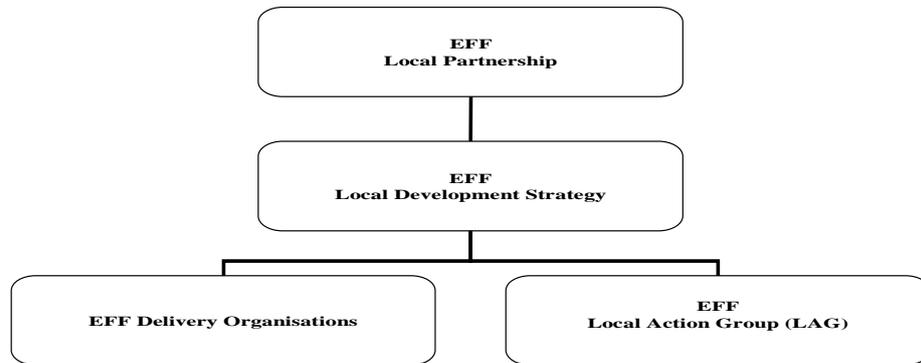
Local EFF Groups Deployment Process

The Phases will consist of:

- 1 – Setting up a Local Partnership (of very broad local interests)
- 2 – Setting up a Local EFF Group (made up of members of the local partnership but with a greater focus on fisheries and associated sectors)
- 3 – Preparation of the Local Development Strategy (LDS) 2007-13
- 4 – Preparation of a Business Plan for the effective implementation of the LDS; the business plan will have to be approved by the Welsh Assembly Government
- 5 - Implementation

The criteria for the selection of groups will be to use members of the existing RDP groups and incorporate local fisheries interests to form Local EFF Groups. The set up and administration costs of these groups will be funded from EFF and there will be clear demarcation between the respective groups to avoid any issues of double funding.

Local EFF Group Application Process



The period 2007-13 will be divided into 2 Business Plan Periods, each running for around 3 years. For each period, Partnerships must prepare a Business Plan, together with Project Applications.

We are working with colleagues in the RDP unit to set up Local EFF Groups in September and these will be for the periods, 2008-2010 and 2011-2013. The Local EFF Group will receive applications from other beneficiaries and business plans will form part of these applications.

The Local Development Strategy (LDS), Partnership and Local Action Group status will be approved by the Welsh Assembly Government for the lifetime of EFF, subject to periodic review.

The LDS and Business Plan will be submitted to a panel specially set up within the Welsh Assembly Government and assessed on a competitive basis. The LDS must show evidence that fisheries issues have been addressed and members of the fisheries industry are actively engaged with the Local EFF Group.

The Local EFF Group will provide a selection panel for applications and will monitor delivery in respect of outputs and spend

This strategy is being adopted to ensure complementarity between the EFF and RDP programmes but however distinct partnerships will be set up to guarantee demarcation.

Key features of EFF Axis 4 Implementation in Wales:

In line with the parameters of the UK operation of Axis 4, the following features will be particularly prominent in Wales:

- a) Area-based local development strategies intended for well-identified sub-regional rural territories;
- b) Local public-private partnerships (to be known as Local EFF Groups ;
- c) Bottom-up approach with a decision-making power for groups concerning the elaboration and implementation of their element of the combined local development strategies between the programmes;
- d) Multi-sectoral design and implementation of the strategy based on the interaction between actors and projects from different sectors of the local economy;
- e) Implementation of innovative approaches;
- f) Implementation of cooperation projects; and
- g) Networking of local partnerships.

5.6 Axis 5: Technical Assistance

5.6.1 Main Objective of the Axis

The overall objective of this axis is to support the preparation, management, monitoring, evaluation, publicity, control and audit of the programme.

The main objectives of the axis are:

- to ensure the proper execution of the Programme through improved and effective monitoring and evaluation, and the exchange of information and best practice in the field of evaluations;
- to increase awareness of the Programme, generate applications and to support applicants;
- encourage the sharing of best practice in the field of dissemination of information; and
- to ensure sufficient administrative capacities for delivery of the Programme;

5.6.2 Beneficiaries

Partners (e.g. regional, local and public authorities, and economic and social partners), potential beneficiaries of assistance from the EFF and the general public.

5.6.3 Description of justification of the main measures proposed under Priority Axis 5

Technical Assistance (Article 46)

In prioritising spending under this axis, we will draw on the lessons learned from the previous programming period (set out in detail in section 2.2 above). These are that performance monitoring and control should be adequately

resourced, and that the facilitators provide a valuable role in achieving the strategic aims of the programme as well as enhancing the delivery by promoting grants and assisting applications.

With this in mind, we propose to fund measures to disseminate information, improve networking, raise awareness, and promote co-operation. We will also fund studies concerning the effectiveness of the EFF programme generally and the operation of the Programme itself.

In England, it is proposed that the facilitation process established under FIGG will continue under EFF, through the appointment of facilitators. The team of facilitators will be led by a National Fisheries Funding Liaison Officer who will be the lead facilitator. Based on the experience of take up under FIGG, the remaining three UK administrations are unlikely to need to adopt facilitation although that view will be kept under review during the programming period.

We will also fund the installation, operation and interconnection of computerised systems for management, monitoring, inspection and evaluation.

In addition to Axis 5 funds, we will utilise other resources to ensure adequate staffing in order to fulfil our obligations for delivery of the fund.

6 Financial Provisions

This section sets out, in the format which follows the requirements of the detailed rules regulations, both the annual allocation of EU funds and the allocation of funds by the axes. This is done in two tables for both the UK Convergence area and the UK non-Convergence area.

Table 1 shows the allocations of EFF funding by each of the seven calendar years of the programme, 2007-2013. These allocations are set by the EU, i.e. the initial profile of spending is set by the EU.

Table 1: Financing plan of the Operational Programme, giving the annual commitment of the EFF, for convergence and non-convergence regions

Operational Programme reference (CCI number): 2007UK14FPO001

Convergence regions:

Year	EFF (€)
2007	
2008	7,132,154
2009	7,157,960
2010	7,182,351
2011	7,205,260
2012	7,226,620
2013	7,246,356
Total EFF	43,150,701

Non-convergence regions:

Year	EFF (€)
2007	
2008	15,112,454
2009	15,372,251
2010	15,637,246
2011	15,907,541
2012	16,183,241
2013	16,464,455
Total EFF	94,677,188

Table 2 shows the allocation of funding for each priority axis. The distribution of funds between the axes is chosen to reflect the relative priority placed on each axis in accordance with the Operational Programme.

Table 2: Financing plan of the Operational Programme, giving the amount of the total financial allocation of the EFF, the national public contribution and the rate of reimbursement by priority axis, for convergence and non-convergence regions

Operational Programme reference (CCI number): 2007UK14FPO001

Convergence regions

Priority Axis	Total public contribution a=(b+c)	EFF contribution (b)	National contribution (c)	EFF co-financing rate (d)=(b)/(a)*100 (%)
Axis 1	10,617,930	7,963,447	2,654,482	75
Axis 2	19,225,061	14,418,796	4,806,265	75
Axis 3	22,718,630	17,038,973	5,679,657	75
Axis 4	4,141,622	3,106,217	1,035,405	75
Axis 5	831,024	623,268	207,756	75
Total	57,534,267	43,150,701	14,383,565	75

Non-Convergence regions

Priority Axis	Total public contribution $a=(b+c)$	EFF contribution (b)	National contribution (c)	EFF co-financing rate $(d)=(b)/(a)*100$ (%)
Axis 1	63,342,716	31,671,358	31,671,358	50
Axis 2	38,341,830	19,170,915	19,170,915	50
Axis 3	65,163,846	32,581,923	32,581,923	50
Axis 4	16,984,466	8,492,233	8,492,233	50
Axis 5	5,521,520	2,760,759	2,760,759	50
Total	189,354,378	94,677,188	94,677,188	50

The columns headed: "EFF contribution" show the total EFF budget (as shown in table 1). The columns headed "National Contribution" show the amounts of public funding that will also be put towards projects. Most of the national contribution will come from central Government or devolved administration funds; but only public sector sources of national match funding will be used.

The national contribution must fall within the limits set out in the EFF Regulation. The figures shown represent the minimum amounts of national money required to attract EU funds. The addition of both of those columns gives the initial column on total public funding; it is expected that private finance will also contribute to projects though the exact amounts will depend on the location and type of project in question. The final column is the EU co-financing rate referred to above as the EU rules necessary to drawdown the funds. All figures are in Euros.

An implementation plan will be developed in order to meet n+2 spending targets, and this will be agreed with the Programme Monitoring Committee.

6.1 Scope and Range of the Grants

The scope and range of the grant rates are set out in Annex II of the EFF Regulation (EC No 1198/2006). The project types are grouped into four and also into two areas of interest to the UK i.e. convergence and non-Convergence. Within this framework the maxima or minima of public and private contribution are set out. How much grant aid is given will depend on the circumstances of the applicant, the location and the activity carried out.

Within the framework, decisions on grant rates for individual applications will be a matter for the arrangements in each administration e.g. using assessment panels.

7 Implementing provisions

7.1 Designation of bodies

Overall UK policy responsibility for the implementation of the programme at the member state level rests with the Department of Environment, Food and Rural Affairs (Defra). The Marine and Fisheries Agency (MFA) is an Executive Agency of Defra and undertakes and manages delivery functions for Defra, including responsibility of the European Fisheries Fund for the UK. In England, the MFA has overall responsibility for the enforcement of the Common Fisheries Policy (CFP) and its associated regulations. The Fisheries Unit of the Welsh Assembly Government works closely with the MFA and has responsibility for the enforcement of the CFP, associated regulations and UK and Welsh Statutory Instruments. In Scotland, responsibility for enforcement of national law, the CFP and its associated regulations sits jointly with the Scottish administration's Marine Directorate (policy) and the Scottish Fisheries Protection Agency (operational enforcement). Within Northern Ireland, these responsibilities lie with the Department of Agriculture and Rural Development.

The governance arrangements in the UK delegate responsibility for the delivery and programme administration to the Marine and Fisheries Agency for England and to each of the three devolved administrations. This has been achieved through the wide ranging Constitutional Reform resulting in The Scotland Act, 1989, The Government of Wales Act, 2006 and The Northern Ireland Act, 2006.

In accordance with Article 58 of EC Regulation No 1198/2006:

- the UK Managing Authority will be the Business Relations Team of the Marine and Fisheries Agency, as they have responsibility for grants and undertake the delivery functions for grants. The Managing Authority performs the tasks described in Article 59 of EC Regulation No 1198/2006.
- the UK Certifying Authority will be The Natural Environment Group Finance and Business Management Team in the Department for Environment, Food and Rural Affairs, to perform the tasks as described in Article 60 of EC Regulation 1198/2006. This includes approval of applications for expenditure and payment requests before they are submitted to the Commission. The approval confirms that the requested payments conform to relevant EU and national rules. (Further detail in Annex F).
- the UK Audit Authority will be the Internal Audit Division in the Finance Group of the Department for Environment, Food and Rural Affairs.

Internal audit is an independent and objective appraisal service within an organisation, and as such is the appropriate body to carry out the role of the

Auditing Authority. Internal audit primarily provides an independent and objective opinion to the Accounting Officer (AO) on risk management, control and governance, by measuring and evaluating their effectiveness in achieving the organisation's agreed objectives. Internal Audit Division performs tasks for Defra and monitors security and efficiency with regard to commercial transactions. The Audit Authority performs the task described in Article 61 of EC Regulation 1198/2006, and will undertake an assessment of the management and controls systems as required by Article 71 of 1198/2006 and Article 50 of 498/2007.

The devolved administrations are designated as intermediate bodies to carry out some of the functions of the managing authority and the certifying authority, under the responsibility of the UK Managing Authority and UK Certifying Authority.

7.2 Responsibilities for payments

The UK Certifying Authority will be the body responsible for receiving payments from the Commission on the basis of the certified statements of spend. EU co-financing is transferred directly into Defra's bank account and is posted as income for Defra's Natural Environment Group Finance and Business Support Division. EC Receipts will then be disbursed among the administrations within agreed timetables, as set out in service level agreements and in accordance with expenditure in their area and relative to their respective share of the UK allocation at the Member State level.

Payment to the final beneficiaries will be made by different bodies in the four administrations in the UK; in each case appropriate mechanisms to ensure financial propriety and separation of functions are in place. Final payments are made to the beneficiaries on the basis of expenses incurred and paid that are documented by the beneficiaries. Payment can be made in instalments, but final payment is conditional upon completion of the project.

In England, the separation of functions between administering the programme and the authorisation of grant payment clearly defined, and complies with the requirements of Articles 39 and 43 of Regulation 498/2007. The Shared Service Organisation of Defra is responsible for making payments on the basis of instructions from the grants claims team in the Marine and Fisheries Agency.

In Scotland, there will be complementary mechanisms based upon the separation of functions established to administer the predecessor FIG programme. These will be fully compliant with the standards and requirements specified by the EFF UK Managing Authority, the UK Certifying Authority, the competent auditing authority and Articles 39 and 43 of the implementing Regulation. Service Level Agreements will record and further reinforce these administrative arrangements. In Scotland, the Scottish administration Internal Audit Division is the body assigned to deliver the audit requirements of the EFF Programme on behalf of the UK Audit Authority.

In Wales, payments will be delivered by the Welsh Assembly Government Food and Market Development Division, Fisheries Strategic Development and Implementation Unit. Match funding arrangements will be administered by the Food and Market Development Division Fisheries Policy Unit and the programme will be audited by the Welsh Assembly Government Internal Audit Department.

In Northern Ireland, payments will be made using the similar mechanisms employed for the purposes of the FIFG programme. Payments will be delivered by the Fisheries Grant Section of the Department of Agriculture and Rural Development responsible for checking and processing payments. The Department's Internal Audit Division will undertake the audit requirements of the EFF Programme on behalf of the UK Audit Authority.

7.2.1 Separation of Functions by each Administration

This table is for illustrative purposes and administrative arrangements are subject to agreement within the respective administrations.

England	Scotland	Wales	Northern Ireland
<p>MFA Business Relations Team</p> <p>Applications process and awarding grant</p>	<p>Scottish Marine Directorate Grants Teams</p> <p>Applications process and awarding grant</p>	<p>WAG Fisheries Unit</p> <p>Applications process and awarding grant</p>	<p>Fisheries Grants Unit</p> <p>Applications process and awarding grant</p>
<p>MFA Payments Team</p> <p>Approve payment following checks by MFA Coastal Officers that the projects have been satisfactorily completed</p>	<p>Scottish Marine Directorate Grants Teams</p> <p>Scrutiny of claim documentation, arrangement of site/project inspection, approval of payments</p>	<p>WAG Fisheries Unit and WAG Fisheries Officers</p> <p>Check documentation, site visits/inspections by officers, approval for payment</p>	<p>Fisheries Management</p> <p>Upon satisfactory completion of all checks by project officers, consider claims for payment from final beneficiaries.</p>
<p>Defra (payments and receivable service)</p> <p>Receive approval from MFA payments team and make payment to Beneficiary</p>	<p>Scottish Administration's Central Accounts Branch</p> <p>Make payments to beneficiary on the instructions of the Grants Team through the SEAS system.</p>	<p>RPD Payments</p> <p>Receive approval forms for payments and make payment to Beneficiary</p>	<p>DARD Finance Branch</p> <p>Receive payment approval from DARD Fisheries Management and make payment to Beneficiary</p>

Defra Internal Audit Audits of Operation (Art 39, Reg. 498/2007)	Internal Audit* Audits of Operation (Article 39, Reg 498/2007)	WAG Internal Audit* Audits of Operation (Art 39, Reg. 498/2007)	DARD Internal Audit* Audits of Operation (Art 39, Reg. 498/2007)
Defra Internal Audit Sample checks on projects (Art 43, Reg 498/2007))	Scotland Internal Audit Sample checks on projects (Art 43, Reg 498/2007)	WAG Internal Audit Sample checks on projects (Art 43, Reg 498/2007))	DARD Internal Audit Sample checks on projects (Art 43, Reg 498/2007))
Business Relations Team – UK Managing Authority	Marine Directorate Fisheries Teams	Fisheries Policy Branch	Fisheries and Rural Policy Division
Submit requests to devolved administrations for their forecasts of expenditure. Undertake calculations for England. Submit the UK forecast through the SFC 2007 system.	Respond to requests from Managing Authority for forecast of expenditure, as detailed in the SLA.	Respond to requests from Managing Authority for forecast of expenditure, as detailed in the SLA.	Respond to requests from Managing Authority for forecast of expenditure, as detailed in the SLA.
Certifying Authority Agree Statement of Spend and submit to the EU	Certifying Authority Agree Statement of Spend and submit to the EU	Certifying Authority Agree Statement of Spend and submit to the EU	Certifying Authority Agree Statement of Spend and submit to the EU

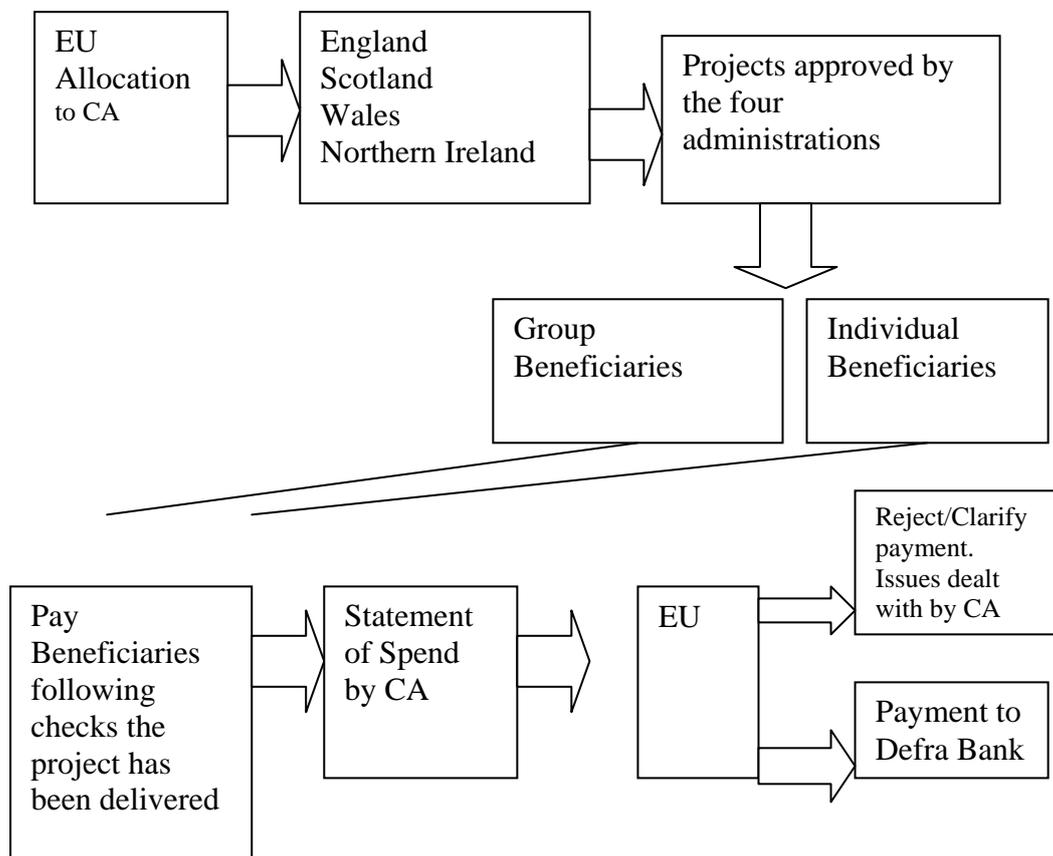
* Regional audit bodies will work under close supervision of Defra Internal Audit, who hold the position of UK Audit Authority, and will coordinate the work of the regional audit bodies. Further detail will be provided in the Description of Management and Control Systems required by Article 71 of Regulation (EC) 1198/2006 and Article 47 of Regulation (EC) 498/2007.

7.3 Financial procedures

Procedures for mobilising finance to ensure the required transparency will be set out in service level agreements between the Managing, Certifying and Audit Authority, and the intermediate bodies in the devolved administrations. The Auditing Authority will ensure the quality of audit reports from Internal Audit Functions of the Devolved Administrations, by agreeing procedures to ensure compliance with relevant elements of ISA 600 and ISA 610 or equivalent audit standards.

An EFF specific concordat and associated service level agreements will be put in place for each of the four administrations to guide the intra-UK administration of the programme.

FLOWCHART OF UK PAYMENT STRUCTURE



The Managing Authority and the intermediate bodies will undertake a number of checks during the lifetime of a project. There will be sample on-the-spot verification checks to ensure that the expenditure declared is real, and the product or services have been delivered in accordance with the approval decision. There will also be administrative checks which will cover documentation checks prior to payment.

In accordance with Article 61 of EU Regulation 1198/2006, the UK Audit Authority performs the control to check whether the management and control systems are working effectively, and will produce an audit strategy which sets the scope, objectives and methodology for all the audit work to be carried out. The Audit Strategy will be reviewed annually and will lead to:

- the submission of an annual control report as required by Article 61(1)(e)(i) to the Commission on 31 December each year.
- The report will set out the findings of the audits carried out during the previous 12 months and give an opinion based on the controls and audits that have been carried out under its responsibility as to whether the management and control systems have been effective.
- Service Level Agreements will be set up between the UK Audit Authority and each administration to ensure that auditing roles within each administration are carried out in agreement with the UK Audit Authority and in accordance with Regulations 39 and 43 of EC Regulation 498/2007.
- A Service Level Agreement will also be set up between the Managing Authority and the Certifying Authority.
- Service Level Agreements will be set up between the UK Managing Authority and each administration to ensure Managing Authority functions are carried out as required.

Service Level Agreements will be in place by the 15th August 2008 for the Audit Authority, and all other agreements in place by 1st October 2008.

Audits (referred to in Regulation 1198/2006, Article 61 (1)(b)) will be carried out on operations on the basis of an appropriate sample to verify expenditure declared of operations selected by a method established or approved by the Audit Authority, and in accordance with Article 43 of Regulation 498/2007.

In accordance with Article 71(1) of EU Regulation 1198/2006, a report will be submitted to the Commission providing a description of systems which covers the organisation and procedures of:

- The Managing and Certifying Authorities
- Certifying Authority and the responsibilities of each administration to provide payment details for the Statement of Spend
- The Audit Authority and the procedures for the close supervision of work by each administration, who will be carrying out audits under the responsibility of the Audit Authority.

The description of systems report will, as required by Article 71 (2) Regulation 1198/2006, be accompanied by a paper setting out the results of an assessment of the setting up of systems and giving an opinion on their

management and control compliance with Articles 57 to 61. The report will be submitted to the Commission before the submission of the first application for interim payment, or at the latest 12 months after the approval of the Operational Programme. Overall responsibility for the completion of the Compliance Assessment required by Article 71 (2) will be held by Defra Internal Audit Division in its role as the UK Audit Authority. Work in each administration will be completed by the relevant designated audit bodies (as detailed in 7.2.1).

As described in Article 58 (2) of Regulation 1198/2006, the devolved administrations will act as 'intermediate bodies', to carry out regional duties on behalf of the Managing Authority, and under the responsibility of that authority. The UK does not qualify for proportional control arrangements as described in Articles 51, 52 and 53 of Regulation 498/2007.

7.4 Monitoring and evaluation system and the Monitoring Committee

There will be one Monitoring Committee for the UK programme. The composition of the UK Monitoring Committee will cover key sectoral and regional interests as appropriate to reflect the diverse nature of the industry. Membership of the Monitoring Committee will include UK representation from the catching, processing, aquaculture sectors and environmental groups. The membership of the Monitoring Committee will be kept under review to ensure that representation is correct to meet the programme priorities and the delegation of tasks which are required of the Committee.

The UK EFF shadow Monitoring Committee has been formed by the UK Managing Authority, in close consultation with each of the UK administrations and discussion with the outgoing FIG Monitoring Committee (which includes economic and social partners). The shadow Monitoring Committee will start working on the procedures to facilitate the official launch of the programme after its adoption.

In accordance with Article 63 of EC Regulation, the composition of the EFF UK Monitoring Committee has been agreed between the UK Managing Authority, Defra and the devolved administrations. The UK EFF Monitoring Committee will immediately take over responsibility from the shadow Monitoring Committee as soon as the Operational Programme is approved by the Commission.

The following organisations have been invited to serve on the UK EFF Programme Monitoring Committee:

- EU Commission DG Mare (advisory capacity)
- Department for Environment, Food and Rural Affairs
- Marine and Fisheries Agency
- Scottish Administration

- Welsh Assembly Government
- Department of Agriculture and Rural Development Northern Ireland
- Sea Fish Industry Authority
- World Wildlife Fund
- Joint Nature Conservation Council
- National Federation of Fishermen's Organisations
- Shellfish Association of Great Britain
- Food and Drink Federation
- British Trout Association
- British Ports Association
- Scottish Fishermen's Federation
- Federation of Scottish Aquaculture Producers
- East of England Regional Development Agency
- Cornish Fisheries Task Force
- Highlands & Islands Enterprise
- Scottish Salmon Producers Organisation
- Welsh Aquaculture Producers Association
- Welsh Federation of Fishermen's Associations
- Northern Ireland EFF Advisory Group

The UK EFF Monitoring Committee shall be satisfied as to the effectiveness and quality of the implementation of the Programme, particularly in accordance with the following conditions set out in Article 65 of Council Regulation (EC) No 1198/2006:

- approving the selection criteria for operations, and any revisions to those criteria in accordance with programming needs;
- reviewing the progress of the programme with particular regard to the specific targets;
- examining the results of implementation, focussing in particular on the achievements of the targets set for each priority axis and interim evaluations of the Programme;
- approving the documentation (annual and final reports) before they are submitted to the Commission;
- being informed of the annual control report and any relevant comments made by the Commission after examining that report; and

- proposing any revisions to the Operational Programme, including improvements to management and financial management.

The Managing Authority and the Monitoring Committee shall out carry out monitoring by reference to the targets set for each priority axis, as set out in Article 20(1)(c) of Regulation 1198/2006.

As required by Regulation 1198/2006, the Operational Programme will be subject to an *ex ante* evaluation, an interim evaluation and an *ex post* evaluation, in accordance with the provisions of Articles 48-50. Evaluations will be carried out by independent assessors, and will be financed from the budget for Technical Assistance. The *ex ante* evaluation has been summarised at Section 4 of the Operational Programme, and submitted with the Operational Programme. The interim evaluation will be organised on the initiative of the Managing Authority and in consultation with the Commission. The interim evaluation will be forwarded to the Monitoring Committee for their comment. The *ex post* evaluation shall be performed at the initiative and under the responsibility of the Commission, and the Managing Authority shall collect the information necessary for its implementation. The *ex post* evaluation will be completed no later than 31 December 2015.

As required by Article 67 of Regulation 1198/2006, the Managing Authority shall by 30 June each year, send the Commission an annual report on the implementation of the programme which will include all the information requirements as set out under Article 67. Under Article 40 of Regulation 498/2007, at the written request of the Commission the Managing Authority shall provide the Commission with information set out at Annex III to the Regulation within 15 days of receipt of the request or other agreed period.

In the fisheries sector, the meeting of targets such as increases in turnover, profitability, jobs, catch, production, etc. depend on a variety of factors such as the weather, fish stocks, quotas, etc., and it would be unfair to penalise applicants if such factors prevented targets being met. Applicants will be asked to complete a progress report whenever a claim is submitted. For projects lasting more than a year before the final claim is submitted, applicants will submit progress reports after each year, and this will be the opportunity to review the indicators and targets and if necessary amend them.

The Marine and Fisheries Agency will be responsible for collating data on each scheme for the annual and final implementation reports, and for communicating with the Monitoring Committee to seek the Committee's approval to submit the reports to the Commission. The Marine and Fisheries Agency will provide appropriate information to external evaluators for the mid-term and final evaluations. The programme will be monitored to ensure compliance and that the Operational Programme is correctly implemented as required by Article 62 of Regulation 1198/2006.

7.5 Computerised exchange of data system

The newly developed SFC data system will enable the exchange of data in computerised form, as required by Article 64 of Regulation 498/2007. The grants team in the Marine and Fisheries Agency (Managing Authority) will coordinate returns of information on the required management and control systems.

As required by Article 66 of Regulation 498/2007, the Managing Authority shall record into the computer system for data exchange the documents for which they are responsible, and update information using the required model as set out in the Regulations. The Managing Authority will ensure that the system is kept up to date and that the data exchange to the Commission is accessible.

The system will allow the managing authority to record grant application data and financial information regarding the cost of projects, funding offers and payments made. This database will be located on a Defra integrated system and built on a Microsoft Access platform. User acceptance testing will be completed by mid July, with the database scheduled to go online by end August 2008. The systems will be functioning in due time before the first payment claim on behalf of the UK is submitted to the Commission, and no later than 3 months following the decision on the Operational Programme.

Each of the devolved administrations has made arrangements for their internal computer systems to be set up to provide the information required by the UK Managing, Certifying and Audit Authorities, and the Commission.

The dates for the forwarding of documents to the Commission shall be the date on which the Managing Authority records the documents into the computer system for data exchange. This system will be used by the Managing Authority, the Certifying Authority and the Audit Authority. The Managing Authority will be coordinating the data from all four administrations. This includes the Operational Programme, the National Strategic Plan, the Financing Plan and the Commission's decisions on the programme. Other information includes the audit strategy, description of management and control systems, reports and opinions of audits, statements of expenditure, annual statements on withdrawn and recovered amounts, and annual forecasts. The system will also contain financial data and data on all irregularities.

In relation to the UK EFF Monitoring Committee, the following final versions will be submitted within the SFC 2007:

- Rules of procedure for the Monitoring Committee;
- Adopted minutes of each Monitoring Committee;
- Selection criteria and their revisions;

- Documents reviewing the progress in implementation of the OP;
- Interim evaluations.

7.6 Partnership arrangements

As required by Article 8 of Regulation 1198/2006, the objectives of the EFF shall be pursued within the framework of close co-operation with the Commission. The competent public authorities are Defra and the devolved administrations in the UK.

In line with the requirements of Article 17(3) and Article 8 of Regulation 1198/2006), regional, local, economic and social partners have been involved in the preparation of the Operational Programme. They will continue to have involvement in the implementation, monitoring and evaluation of the Operational Programme through regular network meetings during the lifetime of the programme. Each administration has their own partners and these are described in the table below.

	Partnership (Regional, Local, Economic and Social Public Partners)
England	Coastal Regional Development Agencies, Local Authorities and Sea Fish Industry Authority
Scotland	Stakeholders including the Scottish Sea Fisheries Council, the Ministerial Working Group on Aquaculture, Enterprise Networks (Scottish Enterprise and Highlands & Islands Enterprise), Scottish Local Authorities, Seafood Scotland and Sea Fish Industry Authority
Northern Ireland	Stakeholder organisations, including direct fishing interests, local government organisations, Northern Ireland Seafood Ltd and Sea Fish Industry Authority
Wales	The Wales Fishing Strategy whose membership includes Sea Fisheries Committee, Environment Agency, Countryside Council Wales, Local Authorities, WWF Cymru and Sea Fish Industry Authority

Defra has responsibility for ensuring broad and effective partnership involvement in all administrations, along with the promotion of equality, sustainable development and social inclusion. Defra, and the Marine and Fisheries Agency as the Managing Authority, are the lead Department/Agency

for the delivery of the consultation on the Operational Programme and this process has been undertaken in partnership with the devolved administrations: Scotland, Wales and Northern Ireland. The devolved administrations have been, and will continue to be, fully engaged in the development of the arrangements for delivering the UK EFF programme.

To take account of the differing partnerships, it was appropriate for each administration to consult with their partners and to produce an analysis of their responses. Defra have consolidated the outcomes from each administration to feed into a UK consultation report.

The formal consultation of the UK Operational Programme has been undertaken in the following stages:

- First stage consultation with 122 organisations during a four week period from 7 March to 4 April 2008.
- Responses taken into account and a second stage 8 week consultation undertaken from 2 May until 27 June 2008.
- Key environmental organisations across the UK have been widely consulted across the four administrations as part of the SEA process. Two environmental organisations are members of the FIFG PMC and have therefore been involved in EFF discussions, and are also members of the shadow UK EFF PMC. These organisations will serve on the EFF PMC.
- An ex-ante Steering Group was set up to discuss the Operational Programme in advance of the formal consultation. Membership consisted of representation from each administration, industry, the fishing and environmental sectors.
- A series of visits and meetings have taken place across the UK during the second stage of the EFF consultation, to give an opportunity for local, economic and social partners, the fishing industry and potential beneficiaries to put forward their comments on the proposed EFF programme.

A list of those consulted during the preparation of the UK Programme can be found at Annex G, reflecting a broad scope of consultation across different interest groups,

7.6.1 Consultation

The first phase of consultation ended on 4 April 2008. There were 36 responses to this consultation. A number of responses commented on areas that have since been addressed in later versions of the Operational Programme, for example the need for more detail on axis, indicator and objectives. Other comments included concern that the emphasis of the Operational Programme is on economics rather than to address environmental issues; the need for a social/economic balance; and concern

about the lack of scientific knowledge in the Operational Programme to be used to protect fish stocks. All comments were considered in finalising the draft Operational Programme and changes were made where appropriate.

The second phase of consultation ended on 27 June 2008. There were 72 responses to this consultation. A number of respondents commented on changes to the Programme that would require re-working of the EFF Regulation, and that were therefore not within the power of the UK administrations to change. For example, it was suggested that aquaculture and processing grants should be open to all enterprises, and not just limited to micro and small enterprises or those with less than 750 staff or €200m turnover. The impact of high fuel prices on the fishing industry was another theme, with Axis 1 measures such as engine replacement and changes to more efficient and selective gears being highlighted as a priority. In this context, some respondents argued for a re-alignment of funds in favour of Axis 1. Others however were anxious to ensure that funds were distributed between the priority axes in a balanced way that would avoid putting any one sector of the industry at a disadvantage. Other common themes included support for quality and certification schemes, measures that support training and recruitment (including encouraging young fishers), and improvements in safety and working conditions.

In response, taking account also of comments from the Commission, the UK Administrations have increased significantly the proportion of programme resources allocated to Priority Axis 1, but not to an extent that would seriously compromise the level of assistance for other sectors.

All administrations have undertaken stakeholder consultation with their regional, local, economic and social partners on the EFF Programme, NSP and the Operational Programme in advance of the formal consultation. This includes:

England

- Consultation on the UK National Strategic Plan with stakeholders (industry and environmental interests), Regional Development Agencies (RDA's), other relevant Government departments, the Environment Agency and English Nature.
- Workshops with the "Marine Fisheries Stakeholder Forum" on EFF prioritisation. The Marine Fisheries Stakeholder Forum includes membership from the RDA's, the Regional Advisory Councils (RAC's), industry representatives and environmental bodies.
- Financial Instrument for Fisheries Guidance (FIFG) "Lessons Learned" workshop in which a number of recommendations were made to improve implementation and monitoring for the EFF scheme. In attendance were Defra, the Marine and Fisheries Agency, Fishery Coastal Officers and Grants Facilitators.

Wales

- Ongoing informal and formal stakeholder consultations through the development of the Wales Fisheries Strategy, which in turn has informed the EFF funding priorities for Wales. The Wales Fisheries Strategy looks at the long term future of fisheries in Wales including the promotion of a sustainable industry and reducing the environmental impacts of fishing. The Strategy has been developed over the past 18 months in close consultation and partnership with all stakeholders in Wales, through stakeholder groups and a Steering Committee. This comprised representatives from the fishing sectors, responsible authorities e.g. SFCs, EA, CCW, and other interested parties e.g. Local Authorities, WWF Cymru. The Strategy is now out for consultation and work continues with stakeholders on its implementation. This successful partnership approach has been continued in seeking the views of the industry in Wales on the Programme and funding priorities under EFF.

Scotland

There has been ongoing formal and informal consultation with and briefings for stakeholders. This has included the following:

- The quarterly meetings of the Scottish Fisheries Management Groups and Project Assessment Committees for FIFG have been used as a platform to discuss EFF Implementation. This was followed-up by an EFF discussion forum, facilitated by the then Scottish Executive and attended by Fisheries Administration Officials and representatives of Producer Organisations and representative bodies, the Scottish Environment Protection Agency, Scottish Natural Heritage, NGOs (including Environmental and Natural Heritage interests), Local Authorities, the Scottish Enterprise Networks and Industry Representatives (March 2006).
- An informal consultation on a draft of a Scottish Operational Programme for EFF and the requirements of the UK Operational Programme was conducted in November, 2006. Consultees included NGOs, Local Authorities and industry representatives.
- A workshop for Scottish stakeholders and policy officials was held in April 2008. The catching, aquaculture and processing sectors, along with representative from the Scottish enterprise networks, Scottish local authorities, training providers and others, participated to review the lessons learned from FIFG and the priorities and arrangements for delivering EFF in Scotland. The Grants Team participated in the Ministerial Fresh Start Summit for Salmon in June 2008, as well as meeting of the Fuel Task Force working group of the Scottish Sea Fisheries Council.

Northern Ireland

A number of formal and informal consultations and briefings were held with stakeholders. These consultations included:

- Meetings of the Northern Ireland Inshore Fisheries Management Review Group.
- Ad hoc meetings with industry organisations, the County Down Tri-council Fisheries Working Group and the County Down Fishing Villages Steering Group
- Ministerial briefings for presentation and scrutiny at the NI Assembly's cross-party Agriculture and Rural Development Committee.

7.7 Information and Publicity

In accordance with Article 51 of EC Regulation 1198/2006 and Article 28 of EC Regulation No 498/2007, the Managing Authority will have responsibility for the content of the information and publicity of the EFF programme. The Managing Authority in accordance with Article 51 of EC Regulation 1198/2006 shall notify the Commission each year of the information and publicity initiatives undertaken through annual and final implementation reports.

The UK Administrations would expect, between them, to spend approximately €200,000 on facilitation and publicity annually, of which €50,000 will be aimed at the wider public. Publicity costs will be incurred in advertising and the development of EFF promotional material. Each Administration will be responsible for deciding the best way forward to promote EFF in the light of their local priorities. The administrative departments responsible for publicity in each administration are, in England, the Business Relations Team of the MFA; in Scotland, the Processing and Marketing Grants Team; in Wales, the Fisheries Policy Branch; and in Northern Ireland, the Fisheries and Rural Policy Division.

Publicity measures will be evaluated continuously throughout the programme, with a view to adjusting the effort, if necessary, to improve visibility and awareness of the Programme and the role played by the Community.

7.7.1 Information and publicity arrangements

Facilitation

The use of facilitators will be a principal means of promoting the programme in England. Publicity material in the form of a handout has been produced for facilitators to give to potential beneficiaries/interested parties. Facilitators are the advisory middle men between the beneficiaries and the Marine and Fisheries Agency. The facilitators advise and support the beneficiary prior to

and during the application stage, and ensure applications are compliant with principles governing the grant of funding under EFF regulations.

In the devolved administrations, the in-house grants teams will assist potential applicants and beneficiaries with information on the EFF, the applications, assessment and claims processes, as well as signposting other potential sources of advice and assistance.

Website

Each Administration will promote the programme through their websites. Details of awarded grants will be placed on the website. Details will cover who the beneficiary is, how much the grant was awarded and a short description of the project. Each Administration will be responsible for the upkeep and monitoring of information to ensure it is up to date.

Press

Each Administration will place articles in both the national fishing press (Fishing News) and local media to both promote the EFF programme and detail grant awards. At publicity events, each administration will be responsible for the development of its own publicity arrangements and clearance of Press Releases.

Exhibitions/Events

Each Administration will use attendance at fisheries exhibitions, strategy meetings and festivals as another avenue to promote the programme, and to showcase the benefits of projects funded. Stakeholder events will also provide an opportunity to showcase the programme.

Partnerships

Where possible, each administration will make use of internal and external partners to publicise the EFF Programme. For example, in England, the MFA headquarters will link with Coastal Offices to arrange a mail shot to publicise the formal launch of the scheme.

7.7.2 EFF Launch – Arrangements of each Administration

England

A series of Coastal visits have been undertaken to inform industry and alert them to the opening of the EFF scheme. A Press Release will be issued when the Operational Programme is approved.

Scotland

In addition to a news release when the Operational Programme is approved, the launch will be publicised through News Releases to the national and trade media, at trade shows and at conferences through participation on trade stands and distribution of publicity leaflets. Publicity material will be sent to every recognised trade body and to selected previous grant recipients under

the earlier FIFG programme. This will then be followed-up by EFF presentations at various key fisheries events or areas throughout Scotland.

Wales

The Welsh Assembly Government will encourage Ministerial involvement in the launch of the EFF programme, and a Ministerial Press Release has already been issued. The launch provides synergy with the Wales Fisheries Strategy which has been rolled out by the Minister following full consultation with the Welsh fishing industry. A further Press Release will be issued when the Operational Programme is approved following the final consultation with stakeholders and partners in Wales.

Northern Ireland

Northern Ireland will seek Ministerial involvement in the formal launch of the EFF programme and will publicise the launch through press releases to the national and trade media, web-site development, attendance at relevant industry-based events and publicity leaflets located at key points within fishing dependent regions. Fisheries Division, in association with the Departmental Press and Private Offices, will be responsible for information and publicity.

7.7.3 Information and Publicity Campaigns

In addition to the publicity arrangements in each administration, a large publicity campaign to promote awareness and details of the EFF programme took place at the Fishing 2008 Show in Scotland in April 2008. This is an annual conference and is the largest fishing show in the UK, with attendance from across the UK and beyond. The show is attended by all areas of the industry and provided the opportunity to inform and update potential beneficiaries as well as the wider public on the UK's EFF programme. Promotional material was developed for the conference.

This was further developed for use by the Scottish administration grants team, at the Aquaculture UK 2008 Exhibition and Conference in Aviemore Scotland in May 2008.

During the consultation of the Operational Programme, a series of coastal roadshows/visits were organised to inform and publicise the programme. In England, 12 coastal areas were visited and an open invitation was issued to interested parties. Scotland, Wales and Northern Ireland undertook similar publicity arrangements using trade and industry events, conferences and fish fairs to promote the programme.

In 2007, a series of coastal roadshows linked to the 2027 Fishing Vision took place across England. The road shows provided an opportunity for potential beneficiaries to discuss the EFF programme and how they may benefit from support.

7.7.4 Evaluation of Publicity Measures

As required under Article 28(d) of Regulation 498/2007, the information and publicity measures will be evaluated by:

- Recognition through beneficiary feedback that the EFF programme provides vital support for the fishing industry;
- Increasing number of grant applications;
- Applications from new applicants who may not have been aware of the FIGG programme, but through increased EFF publicity have been made aware of the EFF programme;
- The EFF annual allocation is accounted for each year;
- Risk of decommitment significantly reduced;
- The Scottish administration will evaluate the effectiveness of publicity and awareness through its project inspections and as part of ongoing evaluation and annual reporting for Scotland.

ANNEX A – DATA TABLES

Summary details of UK vessels landings into the UK and abroad:

Table 1

	Quantity of landings - Tonnes Live weight of fish	2000	2001	2002	2003	2004	2005	2006	2007
(1)	All species, All Areas	747322	738756	688430	641062	655140	715799	617943	609747
	Of which:								
(2)	Stocks fished unsustainably	195044	200394	202022	183935	175660	156652	104265	134722
(3)	Stocks at risk of being fished unsustainably	94460	101450	78226	97184	133951	219188	162279	111706
(4)	Stocks fished sustainably	106100	88164	96673	73098	78891	81001	72228	66473
(5)	Stocks where Fpa has not been set	56654	42104	37583	27948	29610	26113	31224	31935
(6)	Stocks where no assessment has been made	49390	43088	34497	27472	26001	31791	33991	38167
(7)	Other Species/areas inc. non-quota species	245675	263556	239430	231425	211026	201053	213957	226743
(A)	(4)+(5)+(6)+(7)= all species <u>NOT</u> being fished unsustainably	457818	436912	408183	359944	345528	339958	351399	363319
	As %'s of all species, all areas:								
	Stocks fished unsustainably	26%	27%	29%	29%	27%	22%	17%	22%
	Stocks at risk of being fished unsustainably	13%	14%	11%	15%	20%	31%	26%	18%
	Stocks fished sustainably	14%	12%	14%	11%	12%	11%	12%	11%
	Stocks where Fpa has not been set	8%	6%	5%	4%	5%	4%	5%	5%
	Stocks where no assessment has been made	7%	6%	5%	4%	4%	4%	6%	6%
	Other Species/areas inc. non-quota species	33%	36%	35%	36%	32%	28%	35%	37%
(B)	(4)+(5)+(6)+(7)= all species <u>NOT</u> being fished unsustainably	61%	59%	59%	56%	53%	47%	57%	60%
(C)	Worst case - (4)+(7)	47%	48%	49%	48%	44%	39%	46%	48%
	Value of landings - €million	2000	2001	2002	2003	2004	2005	2006	2007
(1)	All species, All Areas	904.83	924.44	873.75	764.02	754.56	842.63	901.03	941.10
	Of which:								
(2)	Stocks fished unsustainably	107.81	140.16	155.86	125.61	130.48	161.81	128.24	138.87
(3)	Stocks at risk of being fished unsustainably	26.00	36.01	27.90	41.59	27.63	48.18	55.83	37.40
(4)	Stocks fished sustainably	211.38	163.02	155.43	117.66	128.90	136.06	143.54	138.25
(5)	Stocks where Fpa has not been set	16.64	20.03	13.79	10.61	9.21	10.53	15.62	15.13
(6)	Stocks where no assessment has been made	98.28	86.26	72.23	51.70	52.97	71.59	75.29	81.18
(7)	Other Species/areas inc. non-quota species	444.71	478.97	448.53	416.85	405.36	414.46	482.51	530.26
(D)	(4)+(5)+(6)+(7)= all species <u>NOT</u> being fished unsustainably	771.01	748.27	689.98	596.83	596.44	632.64	716.96	764.83
	As %'s of all species, all areas:								
	Stocks fished unsustainably	12%	15%	18%	16%	17%	19%	14%	15%
	Stocks at risk of being fished unsustainably	3%	4%	3%	5%	4%	6%	6%	4%
	Stocks fished sustainably	23%	18%	18%	15%	17%	16%	16%	15%
	Stocks where Fpa has not been set	2%	2%	2%	1%	1%	1%	2%	2%
	Stocks where no assessment has been made	11%	9%	8%	7%	7%	8%	8%	9%
	Other Species/areas inc. non-quota species	49%	52%	51%	55%	54%	49%	54%	56%
(E)	(4)+(5)+(6)+(7)= all species <u>NOT</u> being fished unsustainably	85%	81%	79%	78%	79%	75%	80%	81%
(F)	Worst case - (4)+(7)	73%	69%	69%	70%	71%	65%	69%	71%

Definition of stocks - derived from ACFM reports on the state of fish stocks - Reference ICES 2007a in UK SEA annex to OP

ICES (2007a). Report of the ICES Advisory Committee on Fishery Management, Advisory Committee on the Marine Environment and Advisory Committee on Ecosystems, 2007. ICES Advice. Books 1 - 10. 6, 310 pp

Fisheries compared to overall business activity in the UK - This is a comparison of key indicators from the UK Annual Business Inquiry conducted by the Office for National Statistics at the overall level and those for the fishing industry and its related activities.

Source: ONS – http://www.statistics.gov.uk/abi/downloads/sections_a-o.xls

Table 2

Total turnover of businesses - UK level - €million											% change 00-06
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	
SIC Sections A-O - Agriculture, Fishing, Construction, {Production, Distribution and service industries	2511904	2643708	2823070	3241125	3286492	3294635	3147250	3383100	3596230	3817348	+ 18%
Of which:											
Fishing	--	--	--	1135	1087	1052	934	1051	919	936	- 18%
Fish Farming	--	--	--	406	470	535	455	457	683	744	+ 83%
Production of Fish Products	2458	2623	2615	3094	2992	3155	2864	2991	3248	3296	+ 7%

Table 3

Total Gross Value Added - UK level - €million											% change 00-06
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	
UK national Gross Domestic Product at market prices: Current price	1182456	1288782	1385427	1574756	1614004	1679661	1616535	1745534	1805183	1912843	+ 21%
SIC Sections A-O - Agriculture, Fishing, Construction, {Production, Distribution and service industries	747934	801440	873652	994175	1015540	1015890	954943	1047499	1105176	1158826	+ 17%
Of which:											
Fishing	--	--	--	481	500	404	393	422	503	471	- 2%
Fish Farming	--	--	--	172	129	143	98	143	233	358	+ 108%
Production of Fish Products	501	528	574	719	716	708	698	750	786	621	- 14%

Table 4

Total Employment Average during year - UK level - Thousands											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	00-06
SIC Sections A-O - Agriculture, Fishing, Construction, {Production, Distribution and service industries	--	21985	22549	23125	23509	23497	23448	23743	24045	23696	+ 2%
Of which:											
Fishing	--	--	--	9	10	8	9	8	9	7	- 22%
Fish Farming	--	--	--	3	4	4	4	3	3	3	+ 0%
Production of Fish Products	--	20	21	25	21	20	20	18	18	17	- 32%
<i>NB - Employment in the ABI excludes those that are self-employed and so excludes a significant element of employment in the fish capture industry</i>											

Table 5

Implies GVA per capita employed											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	00-06
SIC Sections A-O - Agriculture, Fishing, Construction, {Production, Distribution and service industries	--	36454	38745	42991	43198	43235	40726	44118	45963	48904	+ 14%
Fisheries Sector:	--	--	--	37105	38425	39226	36052	45335	50714	53681	+ 45%
Of which:											
Fishing	--	--	--	53463	50031	50511	43689	52692	55915	67272	+ 26%
Fish Farming	--	--	--	57477	32174	35795	24575	47656	77534	119316	+ 108%
Production of Fish Products	--	26424	27346	28771	34089	35398	34911	41679	43643	36502	+ 27%

Details of UK trade in fish and fish products as part of overall UK trade in goods

Source: ONS – Balance of Payments data and HMRC data for trade in fish and fish products

Table 6

€million	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	% change 97-06
Total trade in all goods											
Imports	249168	244230	252439	308628	304194	296741	272235	281334	309561	357407	+ 43%
Exports	267055	276703	296574	362782	370492	372635	342502	371084	410193	471180	+ 76%
Trade balance	-17887	-32473	-44134	-54153	-66298	-75894	-70266	-89750	-100631	-113773	+ 536%
Trade in Food, Beverages, tobacco											
Imports	16092	15209	15111	16271	15492	15898	15727	15591	15575	16049	- 0%
Exports	24509	25680	27022	29001	29737	30824	30628	32642	34663	36694	+ 50%
Trade balance	8418	10472	11911	12730	14245	14926	14901	17052	19088	20645	+ 145%
Trade in Fish & Fish Products											
Imports	1529	1587	1978	2176	2308	2289	2080	2173	2481	2815	+ 84%
Exports	877	528	1133	1143	1198	1212	1288	1306	1374	1385	+ 58%
Trade balance	-652	-1058	-845	-1033	-1110	-1077	-792	-867	-1107	-1430	+ 119%

Details of gender breakdown for employment in the Fishing sector – Data for Great Britain (i.e. excludes Northern Ireland)

Source: ONS – Breakdown of employment data from the Annual Business Inquiry

Number of employees at GB enterprises	1998	1999	2000	2001	2002	2003	2004	2005	2006	% change 98-06
Fishing										
Male	7162	7025	4268	5094	3391	3788	2905	3875	3922	- 45%
Female	1654	1313	1180	967	593	757	520	629	539	- 67%
Total employment in GB	8816	8338	5448	6061	3984	4545	3425	4504	4461	- 49%
% male	81%	84%	78%	84%	85%	83%	85%	86%	88%	+ 7%
% female	19%	16%	22%	16%	15%	17%	15%	14%	12%	- 7%
Fish Farming										
Male	2891	2018	2533	3592	2188	1981	1652	1802	1809	- 37%
Female	789	432	551	593	409	424	243	356	232	- 71%
Total employment in GB	3680	2450	3084	4185	2597	2405	1895	2158	2041	- 45%
% male	79%	82%	82%	86%	84%	82%	87%	84%	89%	+ 10%
% female	21%	18%	18%	14%	16%	18%	13%	16%	11%	- 10%
Production of Fish Products										
Male	10773	12261	14637	10874	10756	11210	10899	10780	10317	- 4%
Female	9256	8207	10704	8315	7815	7452	6909	6820	5516	- 40%
Total employment in GB	20029	20468	25341	19189	18571	18662	17808	17600	15833	- 21%
% male	54%	60%	58%	57%	58%	60%	61%	61%	65%	+ 11%
% female	46%	40%	42%	43%	42%	40%	39%	39%	35%	- 11%
Total for Fisheries Sector										
Male	20826	21304	21438	19560	16335	16979	15456	16457	16048	- 23%
Female	11699	9952	12435	9875	8817	8633	7672	7805	6287	- 46%
Total employment in GB	32525	31256	33873	29435	25152	25612	23128	24262	22335	- 31%
% male	64%	68%	63%	66%	65%	66%	67%	68%	72%	+ 8%
% female	36%	32%	37%	34%	35%	34%	33%	32%	28%	- 8%

NB - Employment in the ABI excludes those that are self-employed and so excludes a significant element of employment in the fish capture industry

Key Statistics for the UK Catching Sector

Source: MFA Stats Unit, 2008

Table 8

Numbers of vessels	as at 31st December:											% change 97-07
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	
England	4199	4089	3960	3826	3742	3734	3618	3511	4199	3368	3383	- 19%
Wales	469	469	458	437	445	460	451	438	469	426	443	- 6%
Scotland	2820	2768	2704	2656	2642	2521	2383	2389	2820	2261	2251	- 20%
Northern Ireland	354	345	345	341	339	321	313	317	354	330	329	- 7%
UK (including Islands and unassigned vessels)	8265	8080	7865	7651	7559	7422	7137	7039	8265	6759	6775	- 18%
Of Which - Over 10m vessels												
England	896	792	737	713	697	660	625	585	564	555	546	- 39%
Wales	74	67	57	50	51	52	51	46	43	41	42	- 43%
Scotland	1193	1126	1075	1032	1021	882	797	781	764	746	740	- 38%
Northern Ireland	183	176	175	176	173	151	149	141	143	139	141	- 23%
UK (including Islands and unassigned vessels)	2453	2259	2136	2061	2032	1833	1699	1636	1590	1553	1533	- 38%
Source - UK Fisheries Administrations												

Table 9

Tonnage of vessels (tonnes)	as at 31st December:											% change 97-07
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	
England	80426	76905	76320	73930	73354	71343	69113	65703	80426	65776	64588	- 20%
Wales	10655	10444	9657	8853	8989	8762	9103	8386	10655	7941	8031	- 25%
Scotland	154310	159738	161035	161909	161427	141553	132219	130485	154310	122600	122170	- 21%
Northern Ireland	16553	16027	16431	16449	16538	16005	16096	15084	16553	15503	15387	- 7%
UK (including Islands and unassigned vessels)	266610	267537	267572	265118	264287	240998	229292	223309	266610	215026	212844	- 20%
Source - UK Fisheries Administrations												

Table 10

Engine Power of vessels (KW)	as at 31st December:											% change 97-07
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	
England	403871	387798	372039	365125	362815	355473	343489	328622	403871	320459	316981	- 22%
Wales	47386	45334	41567	37700	38740	39449	39028	37331	47386	36005	36979	- 22%
Scotland	472179	477016	468897	476521	498899	454577	440640	442356	472179	416368	413879	- 12%
Northern Ireland	59340	56602	58397	62451	62679	59305	59002	57806	59340	58986	59506	+ 0%
UK (including Islands and unassigned vessels)	1018669	1002268	974882	975653	997292	942376	912692	901161	1018669	865451	859372	- 16%
Source - UK Fisheries Administrations												

Table 11

Average age of over 10m fishing fleet (Years)	as at 31st December:											% change 97-07
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	
England	22.6	23.1	23.6	24.0	24.4	24.8	25.2	25.4	25.9	26.3	26.7	+ 18%
Wales	22.9	25.2	26.0	26.2	26.6	27.1	26.6	27.1	27.7	27.9	27.9	+ 22%
Scotland	21.5	21.6	22.0	22.3	22.6	22.7	23.1	23.6	24.3	24.8	25.5	+ 19%
Northern Ireland	26.7	27.4	27.6	28.4	28.7	28.3	29.6	29.3	28.6	29.2	29.7	+ 11%
UK (including Islands and unassigned vessels)	22.3	22.7	23.2	23.5	23.9	24.2	24.6	24.8	25.2	25.8	26.4	+ 18%
Source - UK Fisheries Administrations												

Table 12

Employment in fishing industry (full and part time)	as at 31st December:											% change 97-06
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	
England	7733	7457	7,166	6,913	6,645	6,518	6,347	6,383	5,976	5,957		- 23%
Wales	1696	1654	1,465	1,148	1,117	1,369	1,001	1,176	1,131	1,159		- 32%
Scotland	8194	7771	7330	6,902	6,637	5,707	5276	5,275	5,155	5,205		- 36%
Northern Ireland	981	1007	935	686	559	611	498	619	569	613		- 38%
UK	18604	17889	8,631	15,649	14,958	14,205	7,348	13,453	12,831	12,934		- 30%
Source - UK Fisheries Administrations												

Table 13

Estimate of GVA for the fishing industry (€mn)												% change 00-05
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	
England	--	--	--	163	190	119	155	106	176	--	--	+ 8%
Wales	--	--	--	--	16	--	13	10	16	--	--	n/a
Scotland	--	--	--	475	272	290	218	224	312	--	--	- 34%
Northern Ireland	--	--	--	--	53	--	17	19	15	--	--	n/a
UK	--	--	--	659	531	445	402	360	519	--	--	- 21%
Source - ABI - Combines Capture and aquaculture together - Also methodology for the regional estimates results in differences from the National totals given in table EFF1												

Table 14

Estimate of value of landings of fish into the UK by UK vessels (€mn)												% change 97-07
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007 (p)	
England	223.923	237.074	225.621	214.037	213.319	195.503	192.856	177.457	176.724	199.059	221.270	- 1%
Wales	19.609	19.279	17.427	20.860	25.781	26.178	16.641	15.388	23.327	21.256	22.701	+ 16%
Scotland	403.882	434.787	428.484	429.494	412.971	413.072	341.722	383.952	451.713	474.825	508.1082	+ 26%
Northern Ireland	31.386	29.759	32.660	28.305	30.457	28.094	22.590	21.152	21.533	29.887	28.808	- 8%
UK	678.801	720.899	704.191	692.696	682.527	662.847	573.809	597.949	673.297	725.028	780.886	+ 15%
Source - UK Fisheries Administrations												

Landings by UK Registered vessels into the UK and abroad by nationality of vessel

(Source: MFA Stats Unit, 2008)

Table 15

		Tonnes (000s)				
		England	Wales	Scotland	Northern Ireland	UK
Demersal Species	2003	57.9	6.4	129.8	8.2	202.7
	2004	58.5	6.0	159.7	6.3	231.1
	2005	60.2	3.5	204.3	8.5	276.8
	2006	65.7	1.7	166.2	2.7	236.6
	2007	66.7	1.9	132.8	2.8	204.5
	% Change 03-07	15%	-70%	2%	-66%	1%
Pelagic Species	2003	60.8	--	212.2	19.9	292.9
	2004	58.2	--	212.8	2.0	290.9
	2005	56.0	--	223.5	18.6	298.1
	2006	64.6	--	153.7	21.4	239.7
	2007	67.1	0.2	169.9	22.9	260.1
	% Change 03-07	10%	--	-20%	15%	-11%
Shellfish Species	2003	70.5	11.5	52.9	6.9	144.0
	2004	58.5	8.4	54.8	7.9	131.7
	2005	57.6	10.4	55.3	8.1	132.8
	2006	54.5	11.5	59.3	11.3	137.9
	2007	55.6	7.6	66.9	13.7	145.8
	% Change 03-07	-21%	-34%	26%	99%	1%
Total All Species	2003	189.2	17.9	394.9	35.0	639.6
	2004	175.2	14.4	427.3	34.1	653.7
	2005	173.8	13.9	483.1	35.2	707.8
	2006	184.9	13.3	379.2	35.3	614.2
	2007	189.3	9.8	369.5	39.4	610.4
	% Change 03-07	0%	-45%	-6%	13%	-5%
UK totals includes landings by vessels registered in the Island administrations of the UK (Jersey, Guernsey, Isle of Man)						

Table 16

		Value (€million)				
		England	Wales	Scotland	Northern Ireland	UK
Demersal Species	2003	134.0	10.6	158.9	12.3	317.9
	2004	135.2	13.1	169.5	9.4	329.4
	2005	141.0	7.0	188.7	7.2	345.4
	2006	132.8	5.6	209.3	6.3	354.9
	2007	138.1	5.3	196.0	5.6	345.9
	% Change 03-07	3%	-50%	23%	-55%	9%
Pelagic Species	2003	46.4	--	109.1	9.8	165.5
	2004	24.3	--	120.4	0.7	155.9
	2005	25.6	--	158.4	15.4	199.4
	2006	42.4	0.1	125.1	14.8	182.5
	2007	48.7	0.6	126.2	11.5	187.0
	% Change 03-07	5%	--	16%	17%	13%
Shellfish Species	2003	97.6	26.3	139.8	13.7	280.3
	2004	84.5	14.7	152.8	15.9	270.8
	2005	85.9	21.9	163.6	17.4	291.0
	2006	107.2	14.4	206.1	27.4	357.9
	2007	117.5	18.7	237.9	32.9	409.8
	% Change 03-07	20%	-29%	70%	140%	46%
Total All Species	2003	278.0	37.0	407.8	35.9	763.7
	2004	243.9	27.9	442.6	36.4	756.1
	2005	252.6	29.0	510.8	39.9	835.8
	2006	282.4	20.1	540.6	48.7	895.3
	2007	304.4	24.6	560.1	50.1	942.6
	% Change 03-07	9%	-34%	37%	40%	23%

UK totals includes landings by vessels registered in the Island administrations of the UK (Jersey, Guernsey, Isle of Man)

Information on the UK Aquaculture Industry

This is a comparison of key indicators from the UK Annual Business Inquiry conducted by the Office for National Statistics for Aquaculture

Source: Office for National Statistics – http://www.statistics.gov.uk/abi/downloads/section_b.xls

Table 17

	Units	2000	2001	2002	2003	2004	2005	2006	% change 00-06
Number of enterprises	Number	404	429	436	438	425	442	431	+ 7%
Total turnover	€million	406	470	535	455	457	683	744	+ 83%
Approximate gross value added at basic prices	€ million	172	129	143	98	143	233	358	+ 108%
Total purchases of goods, materials and services	€ million	256	404	436	351	314	480	471	+ 84%
Total employment - point in time	Thousand	2	4	4	4	3	3	3	+ 50%
Total employment - average during the year	Thousand	3	4	4	4	3	3	3	+ 0%
Total employment costs	€ million	44	64	75	81	69	83	78	+ 75%
Total net capital expenditure	€ million	53	19	21	35	19	23	45	- 13%
Total net capital expenditure- acquisitions	€ million	54	32	22	36	19	28	47	- 13%
Total net capital expenditure - disposals	€ million	--	13	2	1	--	3	1	n/a
Total stocks and work in progress - value at end of year	€ million	192	253	272	218	214	279	330	+ 72%
Total stocks and work in progress - value at beginning of year	€ million	187	195	231	226	212	255	245	+ 31%
Total stocks and work in progress - increase during year	€ million	5	58	40	-7	3	25	84	+ 1597%

Table 18

Number of sites involved in aquaculture in 2006:	Number of Units for fish:				Number of sites for Crustacean	Number of sites for Molluscs	Total Number of sites
	Ponds & Tanks	Enclosures	Other sites	Total			
England and Wales	6264	145	1225	7634	35	29385	37054
Scotland	126	0	354	480	7	323	810
Northern Ireland	350	0	267	617	0	74	691
UK	6740	145	1846	8731	42	29782	38555

Table 19

Production of fish from Aquaculture in 2006	Fish:							total Fish
	Rainbow trout	Brown Trout	Halibut	Cod	Salmon	Other Fish		
tonnes of fish								
England and Wales	4890	207	0	0	0	120	5217	
Scotland	7492	267	233	542	131847	10	140390	
Northern Ireland	599	0	0	0	126	0	725	
UK	12981	474	233	542	131973	130	146332	
Production of fish from Aquaculture in 2006	Molluscs:						Total all fish	
	Clams	Oysters	Scallops	Mussels	Other or not specified	Total Molluscs		
tonnes of fish								
England and Wales	4	455	0	10492	0	10951	16167	
Scotland	0	335	70	4219	0	4624	145015	
Northern Ireland	0	0	0	0	9999	9999	10724	
UK	4	790		14711	9999	25574	171906	

Information on the UK Fish Processing Industry

Source: Office for National Statistics – Regional Analysis of UK Annual Business Inquiry Results

Table 20

Overall results for the UK:	Units	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Number of enterprises	Number	395	393	391	388	367	393	399	392	386	388
Total turnover	€million	2458	2623	2615	3094	2992	3155	2864	2991	3248	3296
Approximate gross value added at basic prices	€ million	501	528	574	719	716	708	698	750	786	621
Total purchases of goods, materials and services	€ million	1967	2101	2055	2365	2297	2507	2179	2268	2491	2636
Total employment - point in time	Thousand	--	20	22	25	21	20	20	18	19	17
Total employment - average during the year	Thousand	--	20	21	25	21	20	20	18	18	17
Total employment costs	€ million	346	380	406	448	409	445	432	432	415	430
Total net capital expenditure	€ million	59	67	71	87	82	105	84	71	67	104
Total net capital expenditure- acquisitions	€ million	75	73	76	97	88	116	90	100	*	116
Total net capital expenditure - disposals	€ million	17	6	5	10	6	13	6	29	*	12
Total stocks and work in progress - value at end of year	€ million	220	263	266	243	254	340	308	280	331	324
Total stocks and work in progress - value at beginning of year	€ million	209	275	261	256	230	280	295	249	303	361
Total stocks and work in progress - increase during year	€ million	12	-12	3	-13	24	60	12	31	29	-35
In some cases data has had to be suppressed to preserve confidentiality (indicated with *)											

Table 21

Overall results for England:	Units	1997	1998	1999	2000	2001	2002	2003	2004	2005	% change 98-05
Total turnover	€million	--	1264	1389	1785	1594	*	1430	1539	1570	+ 24%
Approximate gross value added at basic prices	€ million	--	286	325	458	394	371	340	389	430	+ 50%
Total purchases of goods, materials and services	€ million	--	977	1065	1312	1203	1209	1096	1167	1144	+ 17%
Total employment costs	€ million	--	180	204	263	219	234	210	220	205	+ 14%
Total net capital expenditure	€ million	--	31	35	38	37	40	36	40	37	+ 17%

Note - The methodology used to produce the results at a regional level requires the splitting of information on establishments that may have sites in each region - as such the sum of the results from the regions cannot be summed to the overall position for the UK. In addition in some cases data at the regional level has had to be suppressed to preserve confidentiality (indicated with *)

Table 22

Overall results for Wales:	Units	1997	1998	1999	2000	2001	2002	2003	2004	2005	% change 98-05
Total turnover	€million	--	36	44	48	*	*	*	*	10	- 71%
Approximate gross value added at basic prices	€ million	--	10	*	10	*	*	*	*	3	- 72%
Total purchases of goods, materials and services	€ million	--	25	26	*	*	*	*	*	9	- 65%
Total employment costs	€ million	--	7	8	11	*	*	*	*	1	- 80%
Total net capital expenditure	€ million	--	*	*	2	*	*	*	*	-	n/a

Note - The methodology used to produce the results at a regional level requires the splitting of information on establishments that may have sites in each region - as such the sum of the results from the regions cannot be summed to the overall position for the UK. In addition in some cases data at the regional level has had to be suppressed to preserve confidentiality (indicated with *)

Table 23

Overall results for Scotland:	Units	1997	1998	1999	2000	2001	2002	2003	2004	2005	% change 98-05
Total turnover	€million	--	1178	1133	1163	*	*	1100	1284	1362	+ 16%
Approximate gross value added at basic prices	€ million	--	322	*	305	*	*	330	396	432	+ 34%
Total purchases of goods, materials and services	€ million	--	860	811	*	*	*	802	908	939	+ 9%
Total employment costs	€ million	--	205	196	202	*	*	210	214	215	+ 5%
Total net capital expenditure	€ million	--	*	*	51	*	*	43	24	34	n/a

Note - The methodology used to produce the results at a regional level requires the splitting of information on establishments that may have sites in each region - as such the sum of the results from the regions cannot be summed to the overall position for the UK. In addition in some cases data at the regional level has had to be suppressed to preserve confidentiality (indicated with *)

Table 24

Overall results for Northern Ireland:	Units	1997	1998	1999	2000	2001	2002	2003	2004	2005	% change 98-05
Total turnover	€million	--	71	77	89	*	*	*	*	73	+ 2%
Approximate gross value added at basic prices	€ million	--	31	21	23	*	*	*	*	22	- 30%
Total purchases of goods, materials and services	€ million	--	46	58	61	*	*	*	*	50	+ 8%
Total employment costs	€ million	--	12	14	16	*	*	*	*	12	- 2%
Total net capital expenditure	€ million	--	7	5	5	*	*	*	*	3	- 61%

Note - The methodology used to produce the results at a regional level requires the splitting of information on establishments that may have sites in each region - as such the sum of the results from the regions cannot be summed to the overall position for the UK. In addition in some cases data at the regional level has had to be suppressed to preserve confidentiality (indicated with *)

Details of Gross Value Added and Gross Value Added per head for UK Convergence and non-Convergence Areas

Source: Office for National Statistics – <http://www.statistics.gov.uk/pdfdir/gva1207.pdf>

Table 25

GVA (€million - current basic prices)											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
UK (inc. data not allocated to regions)	1,051,193	1,144,206	1,224,458	1,390,423	1,430,236	1,491,187	1,436,214	1,550,446	1,604,259	1,694,325	+ 61%
Of which:											
England	876,586	961,001	1,029,256	1,160,183	1,198,005	1,252,242	1,208,114	1,305,214	1,348,563	1,420,993	+ 62%
Wales	41,554	44,344	46,694	52,383	53,932	56,082	53,866	57,983	59,556	106,646	+ 157%
Scotland	87,857	94,053	98,914	110,333	112,599	117,232	112,852	121,653	126,279	133,532	+ 52%
Northern Ireland	23,786	26,091	27,918	31,547	32,415	33,670	32,477	35,275	36,597	38,771	+ 63%
of which - Convergence Areas:											
Cornwall and Scilly Isles	4,996	5,379	5,767	6,600	6,896	7,412	7,255	7,996	8,480	8,806	+ 76%
West Wales & Valleys	22,608	23,876	24,857	27,277	27,523	28,415	27,105	29,095	30,756	31,970	+ 41%
Highlands and Islands	4,516	4,774	5,068	5,707	5,827	6,045	5,842	6,472	6,931	7,295	+ 62%
UK Convergence Areas	32,119	34,029	35,692	39,584	40,246	41,872	40,202	43,563	46,168	48,072	+ 50%
UK Non-Convergence Areas	997,663	1,091,460	1,167,090	1,314,862	1,356,705	1,417,353	1,367,107	1,476,562	1,524,827	1,651,871	+ 66%

Table 26

GVA per capita (€- current basic prices)											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
UK (inc. data not allocated to regions)	18,026	19,567	20,865	23,612	24,195	25,136	24,115	25,907	26,632	27,965	+ 55%
Of which:											
England	18,013	19,684	20,991	23,566	24,227	25,221	24,227	26,047	26,723	27,993	+ 55%
Wales	14,354	15,293	16,097	18,020	18,532	19,209	18,376	19,680	20,165	21,119	+ 47%
Scotland	17,283	18,525	19,502	21,792	22,234	23,192	22,314	23,955	24,786	26,096	+ 51%
Northern Ireland	14,232	15,551	16,628	18,746	19,189	19,845	19,075	20,624	21,224	22,262	+ 56%
of which - Convergence Areas:											
Cornwall and Scilly Isles	10,387	11,088	11,818	13,400	13,864	14,762	14,285	15,594	16,402	16,885	+ 63%
West Wales & Valleys	12,180	12,870	13,411	14,726	14,853	15,320	14,573	15,660	16,393	17,014	+ 40%
Highlands and Islands	12,105	12,824	13,632	15,363	15,748	16,364	15,899	17,547	18,631	19,476	+ 61%
UK Convergence Areas	11,851	12,545	13,155	14,572	14,794	15,359	14,698	15,902	16,696	17,322	+ 46%
UK Non-Convergence Areas	17,943	19,573	20,851	23,409	24,058	25,043	24,059	25,857	26,532	27,579	+ 54%

Details of Fatalities and accidents involving UK fishing vessels

Source: UK Marine Accident Investigation Branch of the Marine and Coastguard Agency.

Table 27

Number of fatalities involving UK fishing vessels											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
0-10m vessels	4	9	2	3	2	2	4	5	3	1	- 75%
10-12m vessels	4	3	2	1	0	4	2	4	0	2	- 50%
12-15m vessels	1	0	0	0	0	0	0	0	0	1	+ 0%
15-24m vessels	7	0	2	2	3	4	2	1	4	10	+ 43%
24m and over vessels	4	14	3	19	5	1	1	0	2	3	- 25%
Total fatalities involving UK fleet	20	26	9	25	10	11	9	10	9	17	- 15%

Table 28

Details of fishing vessel losses - number of vessels											% change
	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
0-15m vessels	12	12	17	15	16	7	16	16	20	11	- 8%
15-24m vessels	10	5	10	18	17	6	8	9	11	7	- 30%
24m and over vessels	1	4	6	7	1	5	4	0	3	1	+ 0%
Total losses from UK fleet	23	21	33	40	34	18	28	25	34	19	- 17%
UK registered fleet	8265	8080	7865	7651	7559	7422	7137	7039	8265	6759	- 18%
Losses as % fleet	0.3%	0.3%	0.4%	0.5%	0.4%	0.2%	0.4%	0.4%	0.4%	0.3%	

Table 29

Number of incidents of all types involving UK fishing vessels - all lengths											% change
Nature of incident	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
Capsize/Listing	8	11	15	4	3	5	4	2	6	5	- 38%
Collision/Contact	25	20	22	27	23	16	24	15	26	15	- 40%
Fire/Explosion	17	11	15	16	10	13	13	19	16	15	- 12%
Flooding/Foundering	51	62	54	59	46	40	50	40	54	34	- 33%
Grounding	44	40	31	40	29	26	38	29	19	24	- 45%
Heavy Weather Damage	1	2	4	4	0	2	1	2	3	1	+ 0%
Machinery Failure	316	247	232	174	212	181	221	202	232	240	- 24%
Missing Vessel	0	1	0	1	0	0	1	1	0	1	--
Person Overboard	15	9	8	11	11	3	2	7	10	11	- 27%
Other	1	1	0	1	0	0	1	1	1	0	- 100%
Total number of incidents	478	404	381	337	334	286	355	318	367	346	- 28%

Table 30

Number of incidents of all types involving UK fishing vessels - all lengths - Incidents per 1000 vessels											% change
Nature of incident	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	97-06
Capsize/Listing	1.0	1.4	1.9	0.5	0.4	0.7	0.6	0.3	0.7	0.7	- 24%
Collision/Contact	3.0	2.5	2.8	3.5	3.0	2.2	3.4	2.1	3.1	2.2	- 27%
Fire/Explosion	2.1	1.4	1.9	2.1	1.3	1.8	1.8	2.7	1.9	2.2	+ 8%
Flooding/Foundering	6.2	7.7	6.9	7.7	6.1	5.4	7.0	5.7	6.5	5.0	- 18%
Grounding	5.3	5.0	3.9	5.2	3.8	3.5	5.3	4.1	2.3	3.6	- 33%
Heavy Weather Damage	0.1	0.2	0.5	0.5	0.0	0.3	0.1	0.3	0.4	0.1	+ 22%
Machinery Failure	38.2	30.6	29.5	22.7	28.0	24.4	31.0	28.7	28.1	35.5	- 7%
Missing Vessel	0.0	0.1	0.0	0.1	0.0	0.0	0.1	0.1	0.0	0.1	--
Person Overboard	1.8	1.1	1.0	1.4	1.5	0.4	0.3	1.0	1.2	1.6	- 10%
Other	0.1	0.1	0.0	0.1	0.0	0.0	0.1	0.1	0.1	0.0	- 100%
Total number of incidents	57.8	50.0	48.4	44.0	44.2	38.5	49.7	45.2	44.4	51.2	- 11%

Information on UK consumption and expenditure on fish and fish products:

Source: National Food Survey, Family expenditure Survey, General Household Survey

Table 31

Average consumption per head in the UK of fish consumed at home

Description	Units	1997	1998	1999	2000	2001-02	2002-03	2003-04	2004-05	2005-06	2006	% change 97-06
Fish	g	149	148	146	144	157	155	156	158	167	170	+ 14%
White fish, fresh, chilled or frozen	g	37	36	33	32	36	33	27	26	26	28	- 25%
Herrings and other blue fish, fresh, chilled or frozen	g	5	5	6	5	6	6	8	6	8	7	+ 57%
Salmon, fresh, chilled or frozen	g	8	9	8	8	9	9	10	10	12	12	+ 56%
Blue fish, dried or salted or smoked	g	4	4	4	5	5	5	5	6	6	6	+ 51%
White fish, dried, salted or smoked	g	6	5	6	5	4	4	4	4	4	4	- 27%
Shellfish	g	7	5	5	6	10	11	11	11	12	13	+ 104%
Takeaway fish	g	11	11	11	7	12	11	11	11	10	10	- 4%
Salmon, tinned	g	8	7	5	7	6	6	6	6	6	5	- 34%
Other tinned or bottled fish	g	23	24	27	27	29	29	28	30	33	31	+ 31%
Ready meals and other fish products - frozen or not frozen	g	28	28	26	28	36	38	43	45	49	50	+ 82%
Takeaway fish meals and fish products	g	14	15	14	14	3	3	2	2	3	3	- 80%

Table 32

Average consumption per head in the UK of fish consumed outside the home

Description	Units	1997	1998	1999	2000	2001-02	2002-03	2003-04	2004-05	2005-06	2006	% change 01/02-06
Fish and fish products	g	--	--	--	--	15	14	14	14	14	14	- 2%
White fish	g	--	--	--	--	9	9	8	8	9	9	- 5%
Fatty fish	g	--	--	--	--	1	1	1	1	1	1	- 16%
Shellfish - without sauce or dressing e.g. prawns, shrimps, oysters, crab	g	--	--	--	--	1	1	1	1	1	1	- 1%
Kippers and other smoked fish e.g. smoked salmon	g	--	--	--	--	0	0	0	0	0	0	- 3%
Other fish products and unspecified 'fish' e.g. squid, sushi, crabsticks	g	--	--	--	--	1	0	1	1	0	1	+ 19%
Processed fish	g	--	--	--	--	3	3	3	3	4	3	+ 6%

Table 33

Average Expenditure per head in the UK on Fish for consumption in or outside the home

Description	Units	1997	1998	1999	2000	2001-02	2002-03	2003-04	2004-05	2005-06	2006	% change 97-06
Fish	c	112	118	125	133	149	148	136	146	153	163	+ 46%
White fish, fresh, chilled or frozen	c	27	28	29	32	33	32	24	24	23	25	- 8%
Herrings and other blue fish, fresh, chilled or frozen	c	4	4	4	4	6	5	6	5	6	6	+ 74%
Salmon, fresh, chilled or frozen	c	6	7	8	11	11	11	11	12	14	16	+ 146%
Blue fish, dried or salted or smoked	c	4	4	5	6	7	7	6	7	8	9	+ 100%
White fish, dried, salted or smoked	c	4	4	5	5	4	4	4	5	5	5	+ 10%
Shellfish	c	8	7	8	10	14	14	14	14	15	18	+ 122%
Takeaway fish	c	12	13	15	11	21	20	18	20	18	19	+ 68%
Salmon, tinned	c	5	5	5	6	5	5	5	5	4	5	- 11%
Other tinned or bottled fish	c	10	11	12	12	15	15	13	14	15	15	+ 52%
Ready meals and other fish products - frozen or not frozen	c	16	17	17	20	25	28	30	33	37	39	+ 145%
Takeaway fish meals and fish products	c	16	17	17	16	8	8	6	6	8	7	- 55%

Figures in pence converted to € cents

ANNEX B – STRATEGIC ENVIRONMENTAL ASSESSMENT REPORT

See separate attachment

ANNEX C – STRATEGIC ENVIRONMENTAL ASSESSMENT – LIST OF CONSULTTEES

1. UK Environmental Consultation Bodies

England

- Natural England
- English Heritage
- Environment Agency

Wales

- The Countryside Council for Wales
- The Environment Agency Wales
- Cadw

Scotland

- Scottish Environment Protection Agency
- Scottish Natural Heritage
- The Crown Estate

Northern Ireland

- Environment and Heritage Service

2. Transboundary

- France
- Spain
- Portugal
- Netherlands
- Belgium
- Ireland
- Iceland
- Norway
- Germany
- Denmark

3. UK Stakeholders

- Aberdeen City Council
- Aberdeenshire Council
- Agri Food Bio Institute (AFBI) – Aquatic Science
- Anglo-North Irish Fish Producers Organisation
- Anglo-Scottish Fishermen's Association
- Aquaculture Wales
- Association of Scottish Shellfish Growers
- British Marine Fin Fish Association
- British Trout Association
- Clyde Fishermen's Association
- Comhairle Nan Eilean Siar (formerly Western Isles Council)
- Commerce & Employment Department, Guernsey
- Convention of Scottish Local Authorities (COSLA)
- Council for Nature Conservation and the Countryside
- Department of Agriculture, Fisheries and Forestry, Isle of Man
- Department of Environment (Environmental Policy), Northern Ireland

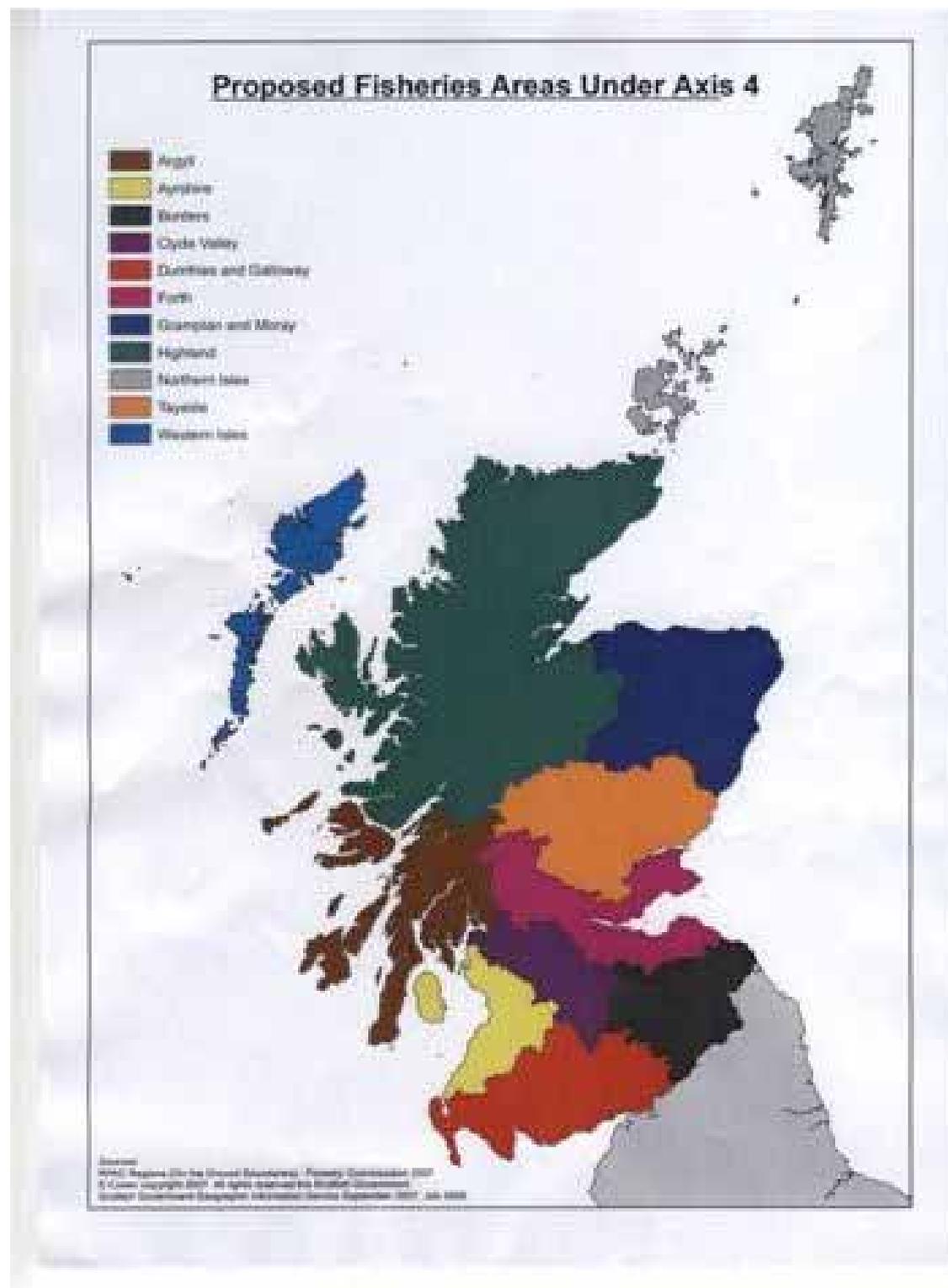
- Federation of Highlands and Islands Fishermen
- Fife Council
- Fife Fishermen's Association
- Fisheries Research Freshwater Lab
- Fisheries Research Service Marine Laboratory
- Fishermen's Association Ltd
- Food Industry Leadership Group
- Food Industry Representative
- Foyle Carlingford & Irish Lights Commission / Loughs Agency
- Herring Buyers Association Ltd
- Highlands and Islands Enterprise
- Highlands and Islands Fishermen's Association
- Inland Stakeholders (RFERAC Wales)
- Institute for European Environment Policy (IEEP)
- Joint Nature Conservation Committee (JNCC)
- JW Holdings Ltd
- Mallaig & North West Fishermen's Association
- Marine Laboratory
- Marine Stewardship Council
- Marks and Spencer plc
- National Federation of Fishermen's Organisations (NFFO)
- Northern Ireland Fish Producers Organisation
- Northern Ireland Seafood
- Orkney Fisheries Association
- Royal Society for the Protection of Birds (RSPB)
- Scottish Borders Council
- Scottish Enterprise Dumfries and Galloway, Business, Skills and Communities
- Scottish Enterprise Grampian
- Scottish Environment LINK
- Scottish Fish Merchants Federation
- Scottish Fisheries Protection Agency
- Scottish Fishermen's Federation
- Scottish Fishermen's Organisation
- Scottish Inshore Fisheries Advisory Group
- Scottish Food and Drink Federation
- Scottish Pelagic Fishermen's Association
- Scottish Quality Salmon
- Scottish Seafood Processors Federation
- Scottish White Fish Producer's Association
- Sea Fish Industry Authority
- Seafood Scotland
- Seafood Shetland
- Shetland Fishermen's Association
- Shetland Islands Council
- States of Jersey Environment Department
- University of Wales
- Welsh Aquaculture Producers Association
- Welsh Federation of Fishermen's Associations
- WWF
- WWF Scotland

ANNEX D: COHERENCE WITH THE OBJECTIVES IN THE NSP

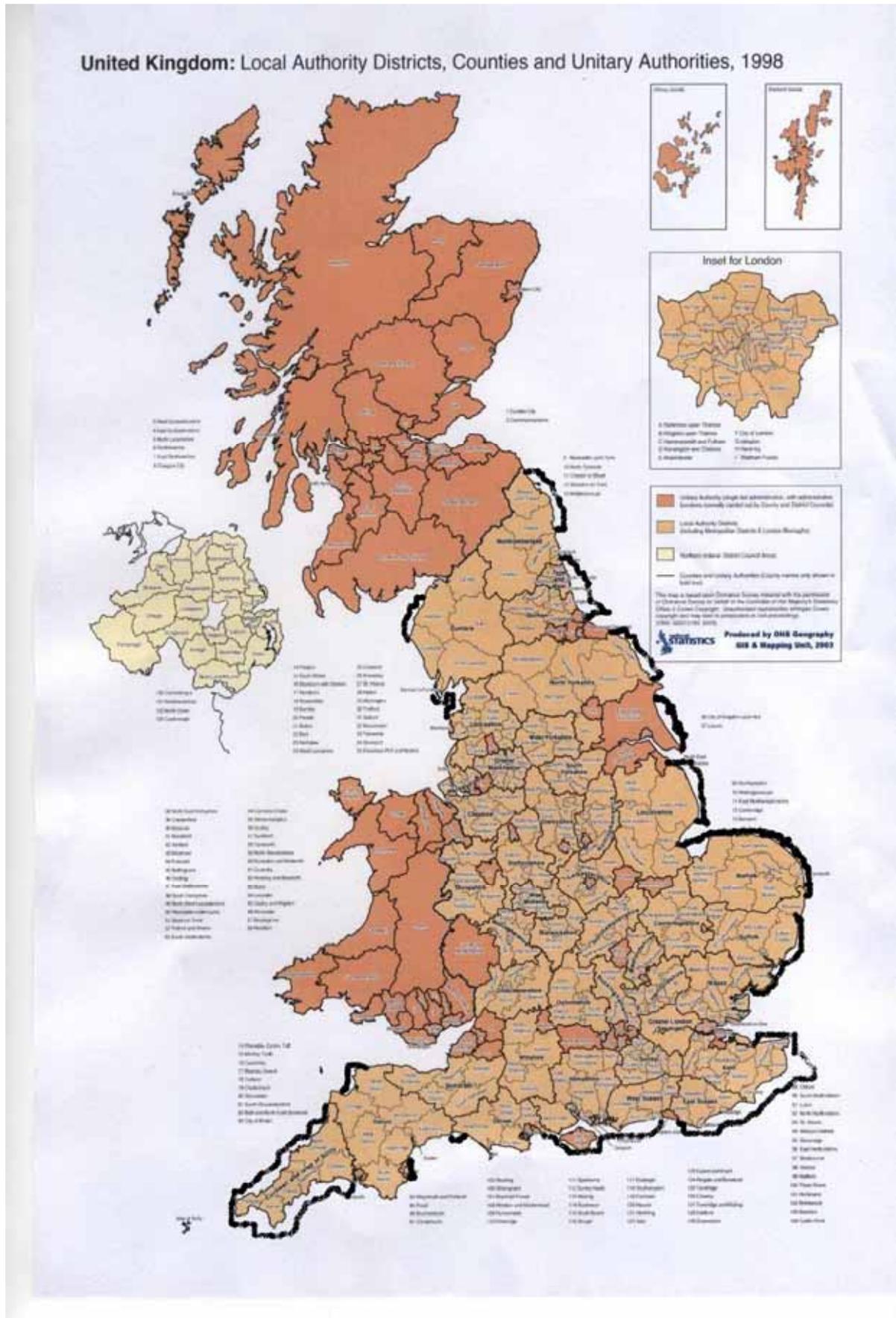
Objective	Axis 1	Axis 2	Axis 3	Axis 4
To promote sustainable fisheries consistent with a diverse and resilient marine environment	✓		✓	
To ensure that the fisheries management within the UK is seen as an example of best practice	✓	✓	✓	
To promote high levels of confidence in the catching sector that lead to long term investment in innovation and technology	✓		✓	
To promote sustainable fisheries consistent with a diverse and resilient marine and freshwater environment	✓	✓	✓	
To promote high levels of confidence in the catching and aquaculture sector that lead to long term investment in innovation and technology	✓	✓	✓	
To provide conditions in which the fisheries industry can be profitable in the long term and competitive, in both global and local markets to the benefit of producers and consumers	✓	✓	✓	✓
To promote an aquaculture sector that works in harmony with nature; protecting the health and welfare of farmed and wild stocks, safeguarding the environment and benefiting local and national economies		✓	✓	
To ensure the conservation and health of fish and shellfish, including through improving bio-security and disease control measures and sustainably sourced feed	✓	✓		
To provide adequate professional training and re-skilling	✓	✓	✓	✓
To tackle social exclusion and promote long term prosperity in communities traditionally dependent on fishing			✓	✓

ANNEX E: AXIS 4 FISHERIES AREAS

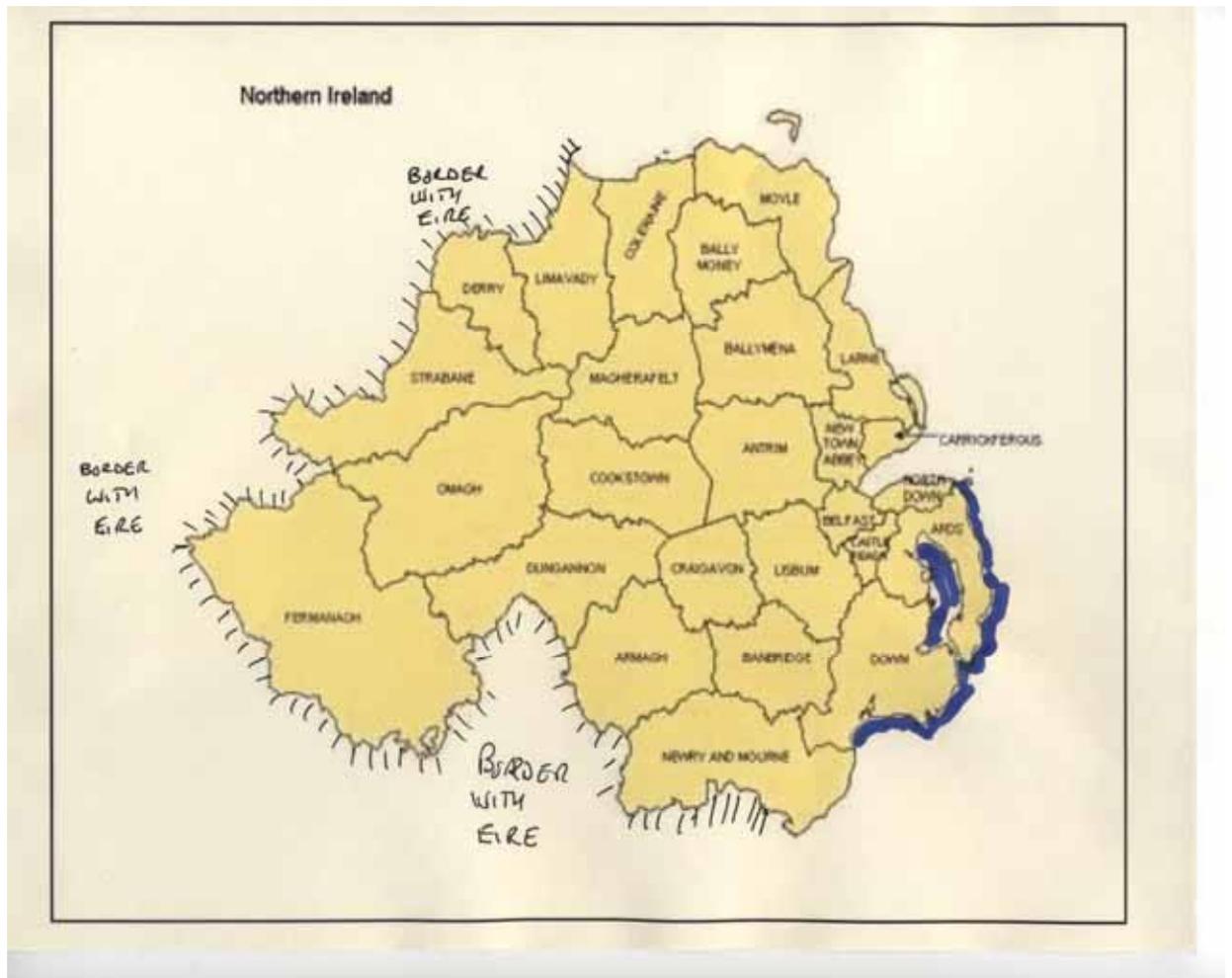
1- Scotland



2- England



3- Northern Ireland



4- Wales



**ANNEX F: UK Paying Authority for Financial Instrument Fisheries
Guidance 2000-2006 and the European Fisheries Fund 2007 – 2013**

	HEO		SEO		G7	
	2008/09 (days)	2009/10 (days)	2008/09 (days)	2009/10 (days)	2008/09 (days)	2009/10 (days)
Finalising guidance for closure and drafting final claim	12	15	12	15	5	5
Reviewing new EFF Legislation	5	0	10	0	12	0
Guidance/ Desk Instructions	10	20	10	20	2	10
Irregularities (Including Debtor's Ledger)	8	10	8	10	1	4
Drawdowns	20	25	16	25	2	5
Annual Coordination Meeting	0	0	2	2	5	5
Service Level Agreement	5	10	20	20	4	6
Quarterly Management Meetings	12	12	12	12	4	4
Article 4 checks	6	8	9	12	6	10
EU Meetings	2	2	4	4	4	4
Reviewing MA systems for compliance	0	16	0	16	0	8
Managing EU/IAD Audits	0	5	0	10	0	10
Forward Planning	5	5	5	5	20	20
Meetings	15	15	15	15	4	4
Conducting Article 9 Checks for each Devolved	9	9	9	9	1	1
Analysing Article 10 & 13 Reports	6	6	6	6	3	3
Work on EFF Database	0	10	0	10	0	5

Grade 7 Role

The Primary role of the Grade 7 will be to Programme Project Manage the remainder of the FIGG Programme and the EFF Programme when it commences later this year and to provide day to day management of the SEO and the HEO.

David Cryer as Head of Division will have oversight of the work of the grade 7 and will ultimately be responsible for the effective administration of the two programmes. David is a CIMA accredited accountant.

SEO Role and HEO Roles

The roles of the SEO and the HEO are to provide day to day administrative support to the Grade 7 ensuring the PA discharges it's duties. The SEO post has now been filled by Nigel Davies and the HEO role has been filled by Trevor Nash.

Nigel Davies has 24 years experience of working in the civil service during which he has worked for the Department of Environment, the Department of Transport and the Driver and Vehicle Licensing Agency. During this time he has worked on several multi million pound grant schemes as well as issues such as the acquisition and disposal of land required for the Channel Tunnel and as a prosecutor for the DVLA.

Trevor Nash has worked for MAFF/Defra for approximately 14 years. Most of his experience is working in the Central Finance working on the development, training and decommissioning of the FPRS Finance Reporting system. He worked in ITD for 2 years as a systems analyst on the IACS/AAPS programme ensuring the system was robust enough for processing payments of claims from farmers.

ANNEX G: UK OPERATIONAL PROGRAMME – LIST OF CONSULTEES

- Aberdeenshire Council
- ABP Marine Environment Research Ltd
- Acquis Business Systems Ltd
- Adler Group
- Advice NI
- Advisory Committee on Historic Wreck Sites
- Advisory Committee on Protection of the Sea
- AEA Technology Environment - Future Energy Solutions
- Aegis Rubber Engineering
- Age Concern (NI)
- Age Sector Reference Group
- Agri-Food & Biosciences Institute
- AL Nisa Women's Group
- Albro Planning & Environmental
- Aldeburgh Town Council
- Allen & Overy
- All-Energy Opportunities
- Alliance Fish Whitby Ltd
- Alliance Party of Northern Ireland
- Amble Seine Net and Keel Boat Association
- AMEC Wind Energy
- Amerada Hess Limited
- Anchor Seafoods Ltd
- Andaray Engineering Ltd
- Andrew M Jackson Solicitors
- Anglers Conservation Association
- Anglesey And North Wales Fishermen's Association
- Anglian Water
- Angling Foundation
- Anglo North Ireland Fish Producers Organisation (NIFPO Ltd)
- Anglo-North Irish Fish Producers Organisation
- Anglo-Scottish Fishermen's Association
- Anglo-Scottish Producers' Organisation Ltd
- Animal Transportation Association (ATA)
- Antrim Borough Council
- Aqua Energy Development UK Ltd
- Aquaculture Initiative
- Aquaculture Stakeholder Representative
- Aquatronics Ltd
- Ardclinis Hatchery
- Ardglass Port Office
- Ards Borough Council
- Areva T & D Ltd
- Armagh City and District Council
- Artilus Ltd
- Arun District Council
- Arup
- Asda
- Ashurst Morris Crisp
- Associated British Ports
- Associated British Ports - Fleetwood
- Associated British Ports - Grimsby
- Associated British Ports - Hull
- Associated British Ports - Lowestoft

- Association Of Sea Fisheries Committees
- Association of British Salted Fish Curers & Exporters
- Association of Chief Officers of Voluntary Organisations
- Association of Electricity Producers (AEP)
- Association of Local Government Archaeological Officers' (ALGAO)
- Association of Marine Scientific Industries
- Association of NI Colleges
- Association of Port Health Authorities
- Association of River Trusts
- Association of Salmon Fisheries Board
- Association of Sea Fisheries Committees
- Atkins Ltd
- Atlantic Salmon Federation
- Atlantic Salmon Trust
- Baha'I Council for Northern Ireland
- Ballinamullan Fish Farm
- Ballinderry River Enhancement Association
- Ballyarton Fish Farm
- Ballymena Borough Council
- Ballymena Community Forum
- Ballymoney Borough Council
- Ballywhite Farms
- Banbridge District Council
- Barnardos
- Barrow Borough Council
- Barton Willmore Planning Partnership
- Bass Anglers Sportfishing Society Stakeholder Project
- Beacon Energy
- Beechville
- Belfast Baha'I Community
- Belfast City Council
- Belfast Islamic Centre
- Bendalls Engineering
- Beniah Ltd
- Bickerstaff Fishing Co Ltd
- Billingsgate Market
- Bircham Dyson Bell
- Biscay Dolphin Research Programme
- Black & Veatch Ltd
- Blackrock Lave Nets
- Blackwater Project
- Blackwood Investments
- Blaenau Gwent County Council
- Blue Seafood Company
- Blue Valley Fish Farm
- Blystad Ship Management Limited
- Boat Building and Repair Ltd
- Bolsach Boat Fishing Association
- Bomel Limited
- Bond Pearce Solicitors
- Borough of Poole Council
- Boyd Line Management Services Ltd
- BP Gas, Power and Renewables
- BP Marine Legal
- BR Consultants
- Brett Marine Aggregates Ltd
- Bridgend County Borough Council
- Brighton and Hove City Council
- Brighton and Newhaven Fish Sales
- Bristol Port Company
- Britannia Aggregates Ltd

- British Antarctic Survey (BAS)
- British Chamber of Commerce
- British Chamber of Shipping
- British Deaf Association (NI)
- British Divers Marine Life Rescue
- British Ecological Society
- British Energy
- British Food Importers and Distributors Association (BFIDA)
- British Frozen Food Federation
- British Geological Survey (BGS)
- British Marine Aggregate Producers Association
- British Marine Federation
- British Marine Finfish Association
- British Marine Life Study Society
- British Maritime Technology
- British Oceanographic Data Centre (BODC)
- British Port Association
- British Ports Authority (Scotland)
- British Retail Consortium
- British Shippers Council
- British Trout Association
- British Trust for Ornithology
- British Tugowners Association
- British Waterways
- British Waterways Scotland
- British Wind Energy Association
- Brixham Trawler Agents
- Brixham Trawler Owners Association
- Broads Authority National Park
- BT Subsea Operations
- Burges Salmon LLP
- Burry Inlet Hand Gatherers Association
- Burtonport
- Bushmills Salmon Station
- Business Link South East
- C J Day Associates
- C&N Chambers
- C&O Milligan
- Cabinet Office
- Cable Installations Management Ltd
- Caerphilly County Borough Council
- Caley Fisheries Ltd
- Calshot Oyster Fishermen Ltd
- Campaign Whale
- Canford Renewable Energy Ltd
- Canterbury Christ Church University
- Caradon District Council
- Cara-friend
- Cardigan Bay Fishermen's Association
- Cardium Shellfish
- Carers Northern Ireland
- Carlingford Lough Mussels
- Carlyon Baywatch
- Carmarthen Fisheries Federation
- Carmarthenshire County Council
- Carp Society
- Carrickfergus Borough Council
- Castlereagh Borough Council
- Catfish Conservation Group
- Cattewater Harbour Master Commissioners
- Causeway Chinese Welfare Association
- CB & I John Brown Limited

- Cedar Foundation
- Cel-f Solar Systems Ltd
- Cemex UK Marine Ltd
- Center for Renewable Energy and Sustainable Technology
- Central Council for Physical Recreation (CCPR)
- Centre for Ecology and Hydrology
- Centre for Environment Fisheries and Aquaculture Science (CEFAS)
- Centre for Marine Resources and Mari-Culture
- Centre for Social and Economic Research on the Global Environment (CSERGE)
- Centre for the Economics and Management of Aquatic Resources
- Centrica Energy
- Ceredigion County Council
- C-Fresh Mussels Ltd
- CG Property
- Chair Anglesey And Gwynedd
- Chair Dee And Clyde LFG
- Chair Gower LFG
- Chair Usk LFG
- Chair West Wales LFG
- Chair Wye LFG
- Chalcroft Construction
- Chamber of Shipping
- Chelonia Research
- Chichester Harbour Conservancy
- Child Poverty Action Group (NI)
- Children's Law Centre
- Chilled Food Association (CFA)
- Chinese Chamber of Commerce
- Chinese Welfare Association (CWA)
- Citizens Advice Bureau
- City And Council Of Cardiff
- City And County Of Swansea
- Civic Forum
- Cleveland Potash Ltd
- Clipper Windpower Europe Ltd
- Cloughmore Shellfish Ltd
- CLRC, Rutherford Appleton Laboratory
- Clyde Fishermen's Association
- Coalition on Sexual Orientation (CoSO)
- Coarse Fish Farmers And Traders
- Coast and Country Project Limited
- Coastal and Marine Environmental Research
- Coastal Fisheries Conservation and Management
- Coastal Management for Sustainability
- Coastal Partnerships Working Group
- CoastNET
- Colchester Borough Council
- Coleraine Borough Council
- Colin Hallmark PR and Communications
- Collett Transport Ltd
- Commission for Rural Communities
- Committee of Scottish Clearing Bankers
- Committee on the Admin of Justice
- Communities and Local Government (CLG)

- Community Development and Health Network (NI)
- Community Foundation for NI
- Community Relations Council (CRC)
- Confederation of British Industry (CBI)
- Connemara Seafoods Ltd
- Construction Industry Research and Information Association
- Convention of Scottish Local Authorities
- Conwy County Borough Council
- Conwy Mussel Fishermen's Association
- Cookstown District Council
- Corgary Trout Farm
- Cornish Fish Producers' Organisation Ltd
- Cornwall and Scilly Isles Coastal group
- Cornwall College
- Cornwall Consulting
- Cornwall County Council
- Cornwall Fisheries Resource Centre
- Cornwall Light and Power Co Ltd
- Cornwall Sea Fisheries Committee
- Cornwall Wildlife Trust
- Coronation Power Limited
- Corus
- Council for British Archaeology
- Council for National Parks
- Council for Nature Conservation and Countryside
- Council of the Isle of Scilly
- Country Land and Business Association (CLA)
- Countryside Alliance
- Countryside Council for Wales
- Countryside Service
- Cpt. A D M McGregor
- Craigavon Borough Council
- Cranfield University - Offshore Technology Centre
- Creative Environmental Networks
- Creekside Forum
- Crown Estate
- Crystal Water Fisheries
- Cuan Sea Fisheries
- Cumbria County Council
- Cumbria Sea Fisheries Committee
- Daily Telegraph
- Danbrit Ship Management
- Dart Estuary Environmental Management
- Dartmouth Harbour Master
- Deal and Walmer Fishermen's Association
- Dee Estuary Partnership
- Dee Fishery Association
- Deepdock Ltd
- Defence Estates
- Democratic Unionist Party
- Denbighshire County Council
- Denholm Fishselling Limited
- Department for Business Enterprise and Regulatory Reform (BERR)
- Department for Constitutional Affairs - Scotland Office
- Department for Enterprise, Innovation and Networks (DEIN)

- Department for Environment Food & Rural Affairs (Defra)
- Department for International Development
- Department for Regional Development
- Department for Social Development (DSD)
- Department for Transport (DfT)
- Department of Agriculture and Rural Development (DARD)
- Department of Agriculture and Rural Development (DARD) Departmental Library
- Department of Agriculture and Rural Development (DARD) Inspectorate
- Department of Agriculture Fisheries and Forestry, Isle of Man
- Department of Culture, Arts and Leisure (DCAL)
- Department of Education (DE)
- Department of Employment and Learning (DEL)
- Department of Enterprise, Trade and Learning (DETI)
- Department of Environment (DOE)
- Department of Finance and Personnel (DFP)
- Department of Health, Social Services and Public Safety (DHSSPS)
- Derrinleigh Fish Farm
- Derry City Council
- Derry Well Woman
- Devloution and Legislation Division
- Devon County Council
- Devon Sea Fisheries Committee
- Devon Wildlife Trust
- Devon Wind Power Ltd
- Disability Action
- Dive Dorset Limited
- Dive Eclipse
- Donegal Prime Fish
- Donegal Seafoods
- Dorset Coast Forum
- Dorset County Council
- Dorset Environmental Records Centre
- Dorset Wildlife Trust
- Dougold Mussels
- Dover Sea School
- Down District Council
- Down Mussels
- Down's Syndrome Association
- DP World London Gateway
- Dragon Baits Ltd
- Drainage Council for NI
- Dunbar Harbour Trust
- Dundas and Wilson CS LLP
- Dundrum Bay Oyster Fishery
- Dungannon and South Tyrone Borough Council
- Durham Heritage Coast Partnership
- DW Consultancy Ltd
- Dynamic Positioning Centre
- E.on ruhrgas UK North Sea Limited
- E.ON UK
- E.ON UK Plc Power Technology
- E.ON UK Renewables
- E4environment Limited
- East Coast Seafoods
- East Devon District Council
- East Dorset Council

- East Lothian Council
- East Midlands Biodiversity Forum
- East Midlands Development Agency (EMDA)
- East Midlands Regional Assembly
- East of England Development Agency (EEDA)
- East of England Energy Group
- East of England Regional Assembly
- East Riding Coastal Forum
- East Riding of Yorkshire Council
- East Sussex County Council
- Eastbourne Charter Boat Association
- Eastern England Fish Producers' Organisation Ltd
- Eastern Sea Fisheries Joint Committee
- Ecotricity Ltd
- EDF Energy
- Edmund Nuttall Limited
- Elmore Fish Ltd
- Embley Energy Limited
- Employers' Forum on Disability
- EMU Ltd
- Energy Developments (UK) Limited
- Energy Institute
- Energy Sector Consult Ltd
- Enertrag UK Ltd
- Engineering Business Limited
- Engineering Technology Applications
- English Heritage
- English National Parks Authorities Association (ENPAA)
- English Regions Network
- Entec UK Ltd
- Envirolink Northwest
- Environment Agency
- Environment Council
- Environment Council
- Environmental Audit Committee
- Environmental Campaigns (ENCAMS)
- Environmental Health News
- Environmental Investigation Agency
- Environmental Management Dept
- Environmental Resources Management
- Environmental Services Association
- Environmental Studies Department, Portsmouth Outdoor Centre
- Enviros Consulting
- EOG Resources United Kingdom Limited
- Equality Coalition
- Equality Commission for NI Statutory Duty Team
- Equality Forum NI
- Erkan or Gitte Salvari
- Erne and Melvin Enhancement Co.Ltd
- Essex Biodiversity Project
- Essex County Council
- Essex Wildlife Trust
- European Cetacean Bycatch Campaign
- European Federation of Sea Anglers
- European Parliament
- Eurus Energy UK Limited

- Eversheds LLP
- Ewing's Seafoods
- Exe Estuary Partnership
- Exmoor National Park Authority
- Eyemouth Harbour Trust
- Fairgreen Oysters
- Falck Renewables Limited
- Falls Community Council
- Falmouth Fishselling Co Ltd
- Falmouth Marine School
- Family Planning Association
- Farm Energy Ltd
- farmcare (Co-operative Group (CWS) Limited
- Fauna and Flora International
- Federation of British Aquatic Societies
- Federation of British Port Wholesale Fish Merchants' Association
- Federation Of Clwyd Angling
- Federation of Dredging Contractors
- Federation of Highlands and Islands Fishermen and Western Isles Fishermen's Association
- Federation of Petroleum Suppliers
- Federation of Scottish Aquaculture Producers
- Federation Of Welsh Anglers
- Federation of Wholesale Distributors
- Felix Fish Company
- Fermanagh District Council
- Fermanagh Women's Network
- Fichtner Consulting Engineers Limited
- Fife council
- Fife Fishermen's Association
- First Nature
- Firth of Clyde Forum
- Fish Co. Ireland (1990) Ltd
- Fish Producers' Organisation Ltd
- Fish Stall
- Fish Vet Group
- Fisheries and Angling Conservation Trust
- Fisheries Biology Technician
- Fisheries Research Services
- Fisheries Research Services (MARLAB)
- Fisheries, Ecology and Recreation Advisory Committee (FERAC)
- Fishermen's Association Ltd
- Fishermen's Mutual Association (Pitteneem/ Ltd)
- Fishgate (Hull Fish Auction Ltd.)
- Fishing News
- Fishmongers Company
- Fitzpatrick Contractors
- Five Star Fish
- Fleetwood Fish Forum
- Fleetwood Fish Producer's Organisation Ltd
- Flintshire County Council
- Fluor Limited
- Focus Offshore
- Follett Stock Solicitors
- Food and Drink Federation
- Food Industry Leadership Group and Scottish Food and Drink Federation
- Food Industry Representative
- Food North West
- Food Processors Association (FPA)

- Food Standards Agency (Scotland)
- Foodaware
- Foras na Gaelige
- Force 9 energy
- Forth Ports plc
- FOSNNI Maritime Operations Officer
- Foulkes and Sons
- Fowey Estuary Partnership
- Fowey Harbour Commissioners
- Fraserburgh Port Authority
- Fresh Catch
- Freshwater Biological Association
- Friel Fishing Co Ltd
- Friends Of The Earth Cymru
- Frozen at Sea Fillets Association
- Fruits of the Sea Ltd
- Fugro Engineering Services Ltd
- Fugro Global Environmental and Ocean Sciences
- Gamesa Energy UK
- Gangmasters Licensing Authority
- Garden Centre Association
- Garrad Hassan and Partners Ltd
- Gay Lesbian Youth Northern Ireland (GLYNI)
- GE Energy
- General Consumer Council
- George Cully and Son
- George Miligan and Sons (Fish Merchants)
- Geotrupes Energy
- Gilleasbuig Carmicha Black
- Gingerbread Northern Ireland
- Glasgow Marine Technology Centre
- Glen Oak Fisheries Ltd
- Glenariffe Fish Farm
- Glengomma Fish Farm
- Glenluce Fishing Co Ltd
- Glenrossan Fish Products
- Glensawick Burn
- Global Marine Systems Ltd
- Gloucester Harbour Trustees
- GMB – Britain’s General Union
- Golder Associates
- Good Energy
- Good Relations
- Gosport Borough Council
- Government Office for the East Midlands (GOEM)
- Government Office for the East of England
- Government Office for the North East (GONE)
- Government Office for the North West (GONW)
- Government Office for the South East (GOSE)
- Government Office for the South East (GOSE)
- Government Office for the South West (GOSW)
- Government Office for the West Midlands (GOWM)
- Government Office for Yorkshire and the Humber (GOYH)
- Government Officer for the West Midlands (GOWM)
- Grampian Enterprise Ltd
- Green Party
- Greenpeace
- GreenPower
- Greenwich Forum

- Griggs of Hythe
- Grimsby Fish Dock Enterprises Ltd
- Grimsby Fish Merchants Association
- Grimsby Fishing Vessel Owners' Association
- Grimsby Seiners Association
- Guernsey Department of Fisheries
- Guernsey Fisherman's Association
- Guide Dogs for the Blind Association
- Guiding Star Fishing Co Ltd
- Guildhall Asset Management Ltd
- H S Fishing 2000 Ltd
- Halcrow Group Ltd
- Hamble Berth Holders Association
- Hamble Harbour Office
- Hamish Currie
- Hammonds
- Hampshire and Isle of Wight Wildlife Trust
- Hampshire and Wight Trust for Maritime Archaeology
- Hampshire County Council
- Hampshire Wildlife Trust
- Hanson Aggregates Marine Ltd
- Harbour Marine Services Ltd
- Harbour Office
- Hartlepool Borough Council
- Harwich Fisherman's Association
- Harwich Haven Authority
- Harworth Power Ltd
- Haskoning Uk Ltd
- Hastings Borough Council
- Hastings Fishermen's Co-operative Ltd
- Hastings Fishermen's Protection Society
- Haymarket Professional Publications
- Health Protection Agency
- Heiploeg and Lynn Shrimpers
- Help the Aged, Northern Ireland
- Henning Brothers. Limited
- Her Majesty's Treasury (HMT)
- Herpetological Conservation Trust
- Herring Buyers Association Ltd.
- Hertfordshire County Council
- Hibernian Wind Power
- Highland Council
- Highlands and Islands Enterprise
- Highlands and Islands Fishermen's Association
- Historic Scotland
- HM Treasury
- Holman Fenwick & Willan
- Holmes Frozen Seafood Specialists
- Holy Island Fishermen's Society Ltd
- Honourable Company of Master Mariners
- Hooktone Limited
- House of Commons
- Humber INCA
- Humberside and East Coast Inshore Fishermen's Association
- Hutchison Ports
- Hydro-Logic Ltd

- Iberdrola Renewable Energies Ltd
- Iceberg Ltd
- Icebrit Ltd
- Ilfracombe Harbourmaster
- Imperial College
- Ince & Co
- Independent Health Coalition
- Indian Community Centre
- Infocoast
- Inland Fisheries Stakeholder Group
- Inner Camber Fishermen's Association
- Inside Consulting/Hispanagar SA
- Institute for Environment and Sustainability Research
- Institute for European Environmental Policy
- Institute of Biology
- Institute of Chartered Shipbrokers
- Institute of Civil Engineers
- Institute of Ecology and Environmental Management
- Institute of Environmental Management & Assessment
- Institute of Estuarine and Coastal Studies
- Institute of Fisheries Management
- Institute of Marine Engineering, Science & Technology (IMarEST)
- Institute of Marine Sciences
- Institute of Maritime and Heritage Studies
- Institute of Outdoor Learning
- Interfish Limited
- International Agriculture & Technology Centre
- International Association of Geophysical Contractors
- International Fishmeal and Fish Oil Organisation
- International Fund for Animal Welfare (IFAW)
- International Marine Contractors Association
- International Port Services Ltd
- International Whaling Commission
- Invest in Fish in South West
- Irish Federation of Sea Anglers (IFSA)
- Irish Sea Forum
- Isle Of Anglesey County Council
- Isle of Wight Centre for the Coastal Environment
- Isle of Wight Council
- Isle of Wight Estuaries Partnership
- Isles of Scilly Sea Fisheries Committee
- ITV West Country
- J & K Hanlin
- J Marr & Sons Ltd
- J W Holdings Ltd
- J&C Greene
- James McKee Coffey & Sons Fishing Ltd
- Japan Ship Centre
- JBI Technology Limited
- JH Turner & Sons
- John Moore University
- John Sutcliffe & Sons Grimsby Ltd
- John West Foods Ltd

- Joint Nature Conservation Committee (JNCC)
- Joint Nautical Archaeology Policy Committee
- Jones Peckover
- Jubilee Fish Farm
- Judestream Fish Farm
- Kearney Trawlers Limited
- Keenan Seafood Limited
- Kent & Essex Sea Fisheries Committee
- Kent County Council
- Kent Downs Area Of Natural Beauty Unit
- Kent Police Headquarters
- Kent Wildlife Trust
- Kilkeel Kippering Company Limited
- Kilkeel Port Office
- Killough Oysters
- Killowen Shellfish
- King's Lynn Fishing Industry Co-Operative
- Kingfisher (Brixham) Ltd.
- King's Lynn & West Norfolk Friends of the Earth
- King's Lynn Fishing Industry Co-operative
- King's Lynn Fishing Vessel Owners & Skippers Association
- Kings's Lynn Fishermen's Association
- Kingston Upon Hull City Council
- Kongsberg Simrad Limited
- Lake District National Park Authority
- Lancaster City Council
- Landauer Seafoods Ltd
- Langstone Harbour Board
- Larne Borough Council
- LDA Design Consulting LLP
- Leigh-on-Sea Shellfish Association
- Lesbian Advocacy Services Initiative
- Lesbian Line
- Lexington Communications
- Liberal Democrat Environment Team
- Lifesavers Royal Life Saving Society
- Limavady Borough Council
- Lincolnshire County Council
- Lincolnshire Wildlife Trust
- Lisahally Port Office
- Lisburn City Council
- Littlehampton Skippers Association
- Liverpool City Council
- Livestock & Meat Commission for NI
- Living Coasts
- Llanelli Town Council
- Llansteffan Community Council
- Llyn Aquaculture
- Llyn Fishermen's Association
- Llyn Peninsular Inshore Fishermen's Association
- Lobster Ponds
- Local Authorities Coordinators of Regulatory Services (LACORS)
- Local Government Association
- Local Government International Bureau
- Local Government Staff Commission
- London Array Wind Farm
- London Councils
- London Development Agency

- London Fish and Poultry Retailers' Association
- London Offshore Consultants
- London Port Health Authority
- Lough Neagh Fishermen's Co-operative Society Ltd
- Loughinsholin Fish Farm
- Loughs Agency
- Lovells
- Lower North Belfast Community Council
- Lowestoft Fish Producers' Organisation Ltd
- Lunar Energy Limited
- Lundy Island
- Lymington Harbour Commissioners
- MacAlister Elliot & Partners
- Magherafelt District Council
- Magherafelt Women's Group
- Maldon District Council
- Mallaig & North West Fishermen's Association
- Mallaig Port Authority
- Mammal Society
- Manhood Peninsula FOE Coastal Strategy Group
- Manning Impex Ltd
- Manx Fish Producers Organisation
- Margaret Laverty Montgomery
- Marina Developments Ltd
- Marine and Fisheries Agency
- Marine Biodiversity Working Group of the Scottish Biodiversity Committee
- Marine Biological Association of the UK
- Marine Connection
- Marine Conservation Society
- Marine Conservation, University of York
- Marine Current Turbines Ltd
- Marine Data Information Partnership
- Marine Ecology & Sailing
- Marine Ecology & Technology
- Marine Fisheries Agency (MFA)
- Marine Fisheries Section
- Marine Leisure Association
- Marine Policy Officer WWF Cymru
- Marine Resource Assessment Group Ltd
- Marine South East
- Marine Stewardship Council
- Marintet
- Maritime & Coastguard Agency (MCA)
- Maritime and Coastguard Agency
- Maritime Plymouth
- Marks & Spencer PLC
- Marlec Engineering Co Ltd
- Marr Fishing Vessel Management Ltd
- Marr Foods Ltd
- McGrigors
- McNicholas Construction Services Ltd
- Medway and Swale Estuary Partnership
- Medway Ports
- Melia
- Members of Scottish Parliament
- MENCAP
- Mersey Docks & Harbour Company

- Merthyr Tydfil County Borough Council
- Mervyn Collins
- Methodist Church in Ireland
- Methodist Office
- Metropolitan Borough of Wirral
- Mevagissey Harbour Trustees
- Mevagissey Fishermans Protection Association
- MG Coast
- Middleton Seafoods
- Milford Haven Shellfishermen's Association
- Milltown Mills
- Ministry of Defence
- Ministry of Justice (MoJ)
- Moneycarragh Fish Farm
- Monmouthshire County Council
- Monteum Ltd
- Morecambe Bay Fishermen's Association
- Morecambe Bay Partnership
- Mourne Shellfish
- Movanager Fish Farm
- Mowlem Plc
- Moyle County Council
- Mudeford and District Fishermen's Association
- Mullion Manufacturing Limited
- Multi-Cultural Resource Centre
- Multi-Science Publishing Co Ltd
- Murray Seafoods Ltd
- Myti Mussels Ltd
- Nabarro Nathanson
- National Alliance of National Governing Bodies of Sport and Recreation
- National Association for Areas of Outstanding Natural Beauty
- National Association of British Market Authorities (NABMA)
- National Association of Fisheries & Angling Consultatives
- National Association of Local Councils (NALC)
- National Association of the Parish & Town Council Association in Norfolk
- National Centre for Ocean Forecasting
- National Consumer Council
- National Consumer Federation
- National Farmers' Union (NFU)
- National Federation of Anglers
- National Federation of Fish Friers Ltd
- National Federation of Fishermen's Organisations (NFFO)
- National Federation of Fishmongers Ltd
- National Federation of Inland Wholesale Fish Merchants
- National Federation of Sea Anglers
- National Federation of Sea Anglers (NFSA)
- National Flood Forum
- National Forest Company
- National Grid
- National Lobster Hatchery
- National Maritime Museum
- National Oceanography Centre
- National Oceanography Centre Southampton
- National Skills Academy for Food and Drink Manufacturing

- National Society for the Prevention of Cruelty to Children (NSPCC)
- National Trust
- National Union of Marine, Aviation and Shipping Transport Officers
- Natural England
- Natural Environment Research Council (NERC)
- Natural History Museum
- Natural Trust
- Nautical Archaeology Society
- Nautilus Consultants Ltd
- Navital Ltd
- Neath Port Talbot County Borough Council
- Neil Urey
- Network Seafoods Ltd
- New and Renewable Energy Centre
- New England Seafoods
- Newbiggin Fishermen's Association
- Newbiggin Shellfish
- Newlyn Fish Merchants' Association
- Newport City Council
- Newry & Mourne District Council
- Newry and Mourne Women Ltd
- Newtownabbey Borough Council
- Newtownabbey Senior Citizens Forum
- NI African Cultural Centre
- NI Anti-Poverty Network
- NI Commissioner for Children and Young People
- NI Council for Ethnic Minorities (NICEM)
- NI Council for Voluntary Action
- NI Environment Link
- NI Human Rights Commission (NIHRC)
- NI Islamic Centre
- NI Muslim Family Association
- NI Rural Women's Network
- NI Women's Aid Federation
- NI Women's European Platform (NIWEP)
- Noble Energy (Europe) Limited
- Nordex UK Ltd
- Norfish
- Norfolk Coast Partnership
- Norfolk County Council
- North Coast Charter Boatmen's Association
- North Coast Lobster Fisherman's Association
- North Devon Area of Outstanding Natural Beauty
- North Devon Fishermen's Association
- North Down Borough Council
- North Down Ulster Unionist Office
- North East Assembly
- North East Boating Federation
- North East Coast Lobster Fisherman's Co-Operative
- North Eastern Sea Fisheries Committee
- North Norfolk District Council
- North Sea Fishermen's Organisation Ltd
- North Shields Fish Quay Company Ltd
- North Wales Wildlife Trust
- North West And North Wales Sea Fisheries Committee

- North West Community Network
- North West Development Agency (NWDA)
- North West Forum of People with Disabilities
- North West Regional Assembly
- North West Shellfish
- North York Moors National Park Authority
- North Yorkshire and Cleveland Coastal Forum
- North Yorkshire County Council
- North/South Ministerial Council (NSMC)
- Northcoast Seafoods Ltd
- Northern Ireland Agricultural Producers Association
- Northern Ireland Assembly
- Northern Ireland Biodiversity Group
- Northern Ireland Committee ICTU
- Northern Ireland Fish Producers Organisation
- Northern Ireland Fish Salesmen's Association
- Northern Ireland Fishery Harbour Authority
- Northern Ireland Food and Drink Association
- Northern Ireland Local Government Association (NILGA)
- Northern Ireland Marine Task Force
- Northern Ireland Office, Human Rights and Equality Unit
- Northern Ireland Public Service Alliance
- Northern Ireland Scallop Fishermen's Association
- Northern Ireland Seafood
- Northern Ireland Tourist Board
- Northern Ireland Trawlermens Trading Co
- Northern Salmon Co Ltd
- Northumberland County Council
- Northumberland Sea Fisheries Committee
- Northwest Development Agency (NWDA)
- Novera Energy
- Npower Renewables
- NUS USI
- Oakford Oysters Ltd
- Ocean Power Technologies Ltd
- Ocean's Harvest Ltd
- OCP Cable Protection Ltd
- Office of the First Minister and Deputy First Minister (OFMDFM)
- Office of the First Minister and Deputy First Minister (OFMDFM) Central Management Unit
- Office of the First Minister and Deputy First Minister (OFMDFM) Machinery of Government Division
- Offshore Environmental Solutions Ltd
- Offshore Renewable Energy Alliance Ltd
- Offshore Wave Energy Ltd
- Oi Kwan Chinese Women's Group
- Oil and Gas UK
- Olive Kimmins
- Omagh

- Omagh Ethnic Communities Support Group
- Omagh Women's Area Network
- One North East
- Oneida Viviers Ltd
- Onward Fishing Company
- Ordnance Survey
- Orkney Fishermen's Association
- Orkney Islands Council
- Orrick Herrington & Sutcliffe
- Osborne Bros.
- Oscar Associates (UK) Ltd
- Otterburn Trout Farm
- Paddy's Point Shellfish Ltd
- Parents & Professionals & Autism
- Parkgate Foods / Euro Shellfish
- Parliamentary Maritime Group
- Partnership of Irish Sea Coast & Estuary Strategies (PISCES)
- Paulona Fisheries Limited
- PB Power Ltd
- PD Ports
- Peel Holdings Plc
- Pembrokeshire Coast National Park Authority
- Pembrokeshire County Council
- Pembrokeshire Fisheries Development Association
- Pembrokeshire Rivers Trust
- Penclawdd Shellfish Producers Ltd.
- Pendragon Consultants Ltd
- Peninsular and Oriental Steam Navigation Company
- Penlon
- Penwith District Council
- People 1st
- Personal Watercraft Partnership
- Pig Production Development Committee
- Pinsent Masons
- Piscatorial Society
- Planning Inspectorate
- Planning Officers' Society
- Pluckmill Fish Farm
- Plymouth Marine Laboratory
- Plymouth University
- Pobal Culturlann McAdam O Fiaich
- Polish Association NI
- Poole & District Fishermen's Association
- Poole Harbour Commissioners
- Port of Boston Ltd
- Port of London
- Port of London Authority
- Portavogie Port Office
- Portland Fishermen's Association
- Ports and Terminals Group
- Portsmouth City Council
- Poseidon Aquatic Resource Management Ltd
- Power Technology
- Powys County Council
- Press for Change
- Prestopets Ltd
- Professional Boatman's Association
- Progressive Unionist Party
- Project AWARE Foundation (International)
- Prospec Ireland
- Provision Trade Federation
- Q&A Shellfish
- QinetiQ

- Queens Harbourmaster
Portsmouth
- Queer Space
- Quintus Political Consultancy
- Rainbow Project
- Ramblers Association
- Rare Breeds Survival Trust
- Rawlings Trawling
- Ray Seafoods Ltd
- Recreational Sea Angling
Stakeholder Representative
- Redcar & Cleveland Borough
Council
- Rees and Freres
- Regen SW
- Regional Aggregates Working
Party
- Regional Flood Defence
Committees Anglian (Central)
Region
- Regional Flood Defence
Committees Anglian (Northern)
Region
- Regional Flood Defence
Committees North West
Region
- Regional Flood Defence
Committees Northumbria
Region
- Regional Flood Defence
Committees South West
Region
- Regional Flood Defence
Committees Southern Region
- Regional Flood Defence
Committees Wessex Region
- Regional Flood Defence
Committees Yorkshire Region
- Renewable Energy Association
- Renewable Energy Systems
Group
- Renewable Power Association
- Renewable Resources
Assessment Group
- Renewables East
- Renewables North West
- ReSoft Ltd
- Rhondda Cynon Taf County
Borough Council
- Rhyl Fisherman's Association
- Ribble Estuary Partnership
- Ridge Wind Ltd
- River Hamble Harbour
Authority
- River Hamble Mooring Holders
Association
- Roach Brothers
- Rockall Seafoods
- Rocks & Killowen
- Rocks Lodge Trout Farm
- Rocks Shellfish
- Rooney Fish
- Royal Commission on
Environmental Pollution
- Royal Haskoning Ltd
- Royal Institute of Chartered
Surveyors (RICS)
- Royal National Institute for
Deaf People
- Royal National Institute of Blind
People
- Royal National Lifeboat
Institution
- Royal Society
- Royal Society
- Royal Society for Protection of
Birds (RSPB Cymru)
- Royal Society for the
Prevention of Cruelty to
Animals (RSPCA)
- Royal Society for the
Protection of Birds (RSPB)

- Royal Society of Wildlife Trusts
- Royal Town Planning Institute (RTPI)
- Royal Town Planning Institute Task Group
- Rural Affairs and Environment Committee
- Rural Community Council
- Rural Community Network
- Rural Development Council
- Rural Payments Agency (RPA)
- Rural Support
- Rural Surveying
- Ruston Wheb Search & Selection
- S&P Milligan
- Salcombe Harbour Office
- Salmon & Trout Association
- Salvage Association
- Salvesen (UK) Ltd
- Saundersfoot Fishermen's Association
- Save Our Sharks
- Scarborough Borough Council
- School of Biological Sciences
- Scientific Advisory Committee on Nutrition
- Scotland Food and Drink
- Scottish Association for Marine Science
- Scottish Association of Fish Producers' Organisation Ltd. & Scottish Fishermen's Organisation
- Scottish Borders Council
- Scottish Coastal Forum
- Scottish Enterprise Dumfries & Galloway
- Scottish Enterprise Grampian
- Scottish Environment LINK
- Scottish Environmental Protection Agency
- Scottish Fish Merchants Federation
- Scottish Fisheries Protection Agency
- Scottish Fisheries Protection Agency
- Scottish Fishermen's Federation
- Scottish Food & Drink Federation
- Scottish Natural Heritage
- Scottish Pelagic Fishermen's Association
- Scottish Renewables
- Scottish Salmon Producers Organisation
- Scottish Sea Angling Conservation Network
- Scottish Seafood Processors Federation
- Scottish Shellfish Growers Association
- Scottish White Fish Producer's Association
- Scrabster Harbour Trust
- SDLP Headquarters
- Sea and Water
- Sea Anglers Conservation Network (Wales)
- Sea Fish Industry Authority
- Sea Mammal Research Unit
- Sea Palling Fishermen's Association
- Sea Vision UK
- Seabed Scour Control Systems Ltd
- Seacore Ltd
- Seafood Cornwall
- Seafood International

- Seafood Scotland
- Seahouses Fishermen's Association
- SeaRoc UK Ltd
- SeaWatch Foundation
- Sefton Coast Partnership
- Sefton Metropolitan Borough Council
- Selonda UK Ltd
- Selsea Fish & Lobster Co Ltd
- Senior Citizen's Consortium, Sperrin Lakeland
- Sense NI
- Seven Springs Trout Hatchery
- Seymour Henry Sweeney
- Shark Angling Club Of Great Britain
- Shark Trust
- Shaw Power Technologies International
- Sheffield Hallam University
- Shell UK
- Shell WindEnergy Ltd
- Shellfish Association of Great Britain
- Shellfish Network UK
- Shepway District Council
- Shetland Aquaculture
- Shetland Fish Processor's Association
- Shetland Fishermen's Association
- Shetland Islands Council
- Shetland Isles Council
- Shingle Bay Shellfish
- Shipwreck & Coastal Heritage Centre
- Siemens Power Generation
- Sikh Community Centre
- Sikh Women's and Children's Assoc.
- Silverfin Fish Merchants
- Silverstream Fisheries
- Simmons & Simmons
- Simpsons
- Sinn Fein Office
- Sir Alister Hardy Foundation for Ocean Science
- SJ Berwin LLP
- SLSFC
- Society for Underwater Technology
- Solent Forum
- Solent Protection Society
- Something Fishy (Sussex) Ltd
- South & West Wales Fishing Communities Ltd
- South Devon & Channel Shellfishermen Ltd
- South Devon Area of Outstanding Natural Beauty
- South Downs Campaign
- South East England Development Agency
- South East England Regional Assembly
- South Solway Foreshore Owners Group
- South Tyneside Metropolitan Borough Council
- South Tyneside Metropolitan District Council
- South Wales Sea Fisheries Committee
- South West England Regional Development Agency (SWERDA)
- South West Fish Buyers' and Processors' Organisation
- South West Fish Merchants' & Processors' Federation

- South West of England Regional Development Agency (SWERDA)
- South West Pesca Ltd
- South West Regional Assembly
- South West Rivers Association
- South West Wales Association of Sea Angling Clubs (SWWASAC)
- South Western Fish Producers' Organisation Ltd
- Southampton City Council
- Southampton Solent University
- Southend-on-Sea Borough Council
- Southern Sea Fisheries Committee
- Southern Sea Fisheries District
- Southwold Harbour Master's
- Sperrin Mountain Spring
- St Mawes & District Fishermen's Association
- Stanswood Bay Oystermen Ltd
- State of Jersey Government - Environment Department
- Statoil (U.K.) Limited
- Stefanie M Fishing Company Ltd
- Stirling University
- Strabane
- Straid Trout Fisheries
- Strangford Lough Management Committee
- Strangford Lough Shellfisherman's Co-operative
- Sub-Aqua Association
- Subaquaculture
- Suffolk Coast and Heaths Area of Natural Beauty Unit
- Suffolk Coastal District Council
- Suffolk Coastal Fishing Organisation
- Suffolk County Council
- Sunderland City Council
- Surf Life Saving Association of Great Britain
- Surfers Against Sewage
- Survey Association
- Sussex Fish Sales Ltd
- Sussex Sea Fisheries Committee
- Sustain: the Alliance for Better Food & Farming
- Sustainable Development Commission (SDC)
- Sustainable Fishing Solutions Ltd
- Sutton Harbour Company
- Swyddfa'r Sir
- T Quality Ltd
- T.N. Trawlers
- Taff Landfill Gas
- Tarbert Port Authority
- Taw Torridge Estuary Forum
- Tees & Hartlepool Port Authority
- Teifi Trout Association
- Teign Estuary Partnership
- Teign Fishermen & Watermen's Association
- Teign Fishermen & Watermen's Association
- Teignbridge District Council
- Teignmouth Harbour Master
- Thames Angling Preservation Society
- Thames Estuary Partnership
- Thanet Coast Project
- Thanet Fishermen's Association
- Thistle Seafoods Ltd

- Three Rivers Estuary Action Group
- Thurrock Borough Council
- TNEI Services Limited
- Torbay & Babbacombe A.S.A
- Torbay Coast and Countryside Trust
- Torbay Council
- Torbay Development Agency
- Torfaen County Borough Council
- Torrent Trout Farm
- Towy Coracle Association
- Traveller and Gay (TAG)
- Traveller Movement NI
- Trevor Lineham (Shellfish) Ltd
- Trinity House Lighthouse Service
- Trout Hatchery
- TS Foods Limited
- Tubney Charitable Trust
- Tyfi River Trust
- Tyndall Centre for Climate Change Research, University of East Anglia
- UCL Institute of Archaeology
- UK Association of Fish Meal Manufacturers
- UK Association of Fish Producers' Organisations Ltd
- UK Association of Frozen Food Producers (UKAFFP)
- UK Cable Protection Committee
- UK Climate Impacts Programme
- UK Fisheries Offshore Oil and Gas Legacy Trust Ltd
- UK Harbour Masters Association
- UK Hydrographic Office (UKHO)
- UK Major Ports Group (UKMPG)
- UK Offshore Operators Association
- Ullapool Harbour Authority
- Ulster Farmers' Union
- Ulster People College
- Ulster Wildlife Trust
- Ulster-Scots Agency
- UNISON
- United Fish Selling Ltd
- United Kingdom Maritime Pilots' Association
- United Kingdom Petroleum Industry Association (UKPIA)
- United Marine Aggregates
- United Marine Dredging Limited
- United Utilities
- Unitymark Ltd
- University College London
- University of Birmingham
- University of East Anglia
- University of Hull
- University of Leicester
- University of Liverpool
- University of Manchester, School of Informatics
- University of Newcastle Upon Tyne
- University of Nottingham
- University of Plymouth
- University of Portsmouth
- University of Southampton
- University of the West of England
- University of Wales, Bangor
- University of Wolverhampton
- Uwphoto UK

- Vale Of Glamorgan Council
- Valverde Fisheries Ltd
- Van Oord UK Ltd
- Venture Diving
- Vinson & Elkins
- Visit Britain
- Viviers UK
- Voyager Fishing Company Limited
- W Kearney Ltd
- Wales & West Coast Producer Organisation
- Wales Environment Link
- Wardell Armstrong International
- Warrior Boats
- Warwick Energy Limited
- Wash Estuary Strategy Group
- Waste Research Advisory Group
- Water UK
- Waterfront Partnership
- Waterman Environmental
- Waterways Ireland
- Watson Farley and Williams
- Wave Dragon Ltd
- Wealden District Council
- Weber Shandwick Public Affairs
- Welsh Assembly Government
- Welsh Carp Conservation Group
- Welsh Federation Of Coarse Anglers
- Welsh Federation Of Coarse Angling
- Welsh Federation Of Fishermen's Associations
- Welsh Federation Of Sea Anglers
- Welsh Inshore Fishermen's Association
- Welsh Local Government House
- Welsh Salmon And Trout Association
- Welsh Tope, Skate And Conger Club
- Welsh Tourist Board
- Wessex Salmon & Rivers Trust
- West Belfast Economic Forum
- West Dorset District Council
- West Lancashire District Council
- West Midlands Regional Assembly
- West Quay Fishery
- West Sussex County Council
- West Wittering Estate
- Western Isles Council
- Westminster Dredging
- Westminster Gravels
- Weymouth & Portland Fishermen's and Licensed Boatmen's Association
- Whale & Dolphin Conservation Society
- Whitby Fishing School
- Whitby Seafoods
- White & Case
- Wichita Co Ltd
- Wildfowl & Wetlands Trust (WWT)
- Wildlife & Countryside Link (WCL)
- Wildlife Trust
- Wildlife Trust for Lancashire, Manchester & North Merseyside
- Wildlife Trust Wales

- Windpower Developments (UK) Ltd
- WindPro
- Windsupply
- Wing of St Mawes Ltd
- Wirral Traditional Cocklers Association
- Women in Fisheries
- Women of the World (WOW)
- Women's Centre
- Women's Information Group
- Women's Resource & Development Agency
- Women's Support Network
- Worker's Party
- World Society for the Protection of Animals
- World Society for the Protection of Birds
- World Wide Fund for Nature
- Worldwide Fund for Nature
- Worthing Fishermen's Association
- Wragge & Co
- Wrexham County Borough Council
- Wrigleys Solicitors
- Wynns Limited
- Wyre Borough Council
- Yorkshire & Humber Seafood Group
- Yorkshire and Humber Assembly
- Yorkshire Forward
- Youngs Bluecrest
- Your Energy Ltd
- Youth Council for Northern Ireland

ENDS