



Inshore Fisheries Forum
Fóram Iascaigh Chladaigh

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Irish Inshore Fisheries Sector Strategy 2019-2023





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1 CONTEXT

The publication of the Irish Inshore Fisheries Sector Strategy 2019-2023 marks a major milestone in the development of the Inshore Fisheries Forum Initiative which was established in late 2014 to provide a platform for dialogue between the sector, the state and other stakeholders operating inside 6nm. Since their inception, the Inshore Forums have brought forward a number of initiatives, including a number of stock conservation measures.

Despite this progress however it has become clear to those involved in the forums that there is a need for longer term thinking to safeguard the future of a sector which is so important to Irish coastal communities. This strategy sets out the aspirations and objectives for the future of the sector and identifies clear actions to be delivered through an implementation plan that gives effect to the vision outlined for the sector. This 'bottom up' Strategy developed through the Inshore Fisheries Forums not only maps out a sustainable future path for the sector but will inform the implementation of the Seafood Operational Programme 2016-2022, the development of the EU legal framework to replace the European Maritime and Fisheries Fund from 2020 and the development of a Maritime Spatial Plan for Ireland in 2019/2020.

The Strategy development process has been, of necessity, lengthy in order to facilitate input from the Inshore Fisheries Forums and undertake a public consultation under the guidance of an industry led steering group. This industry led approach is in contrast to that adopted 20 years ago with the publication of the report 'Ireland's Inshore Fisheries Sector – Review and Recommendations', a strategy developed in a very different time and manner. A fundamentally different approach has been adopted in the development of this strategy, the engagement and participation of the inshore sector has been paramount from the beginning, allowing the sector to take ownership of the process and the final product.

2018 finds the inshore sector in a very different space, its importance to coastal communities increasingly recognised by the state and EU. Four years of hard work by the sector bedding in the structures of the Inshore Fisheries Forums provides the foundations of industry engagement and participation that will ensure the success of this strategy.

2 STRATEGY DEVELOPMENT PROCESS

2.1 Strategy Development Process

This Strategy seeks to:

- Set out the strategic direction for the sector to 2023;
- Support the development of the sector through identifying key targets and potential sources of financial support; and
- Provide a tool for advocacy for the sector.

The development of this strategy for the inshore sector has been overseen by a Strategy Steering Group comprising representatives of the National Inshore Fisheries Forum and relevant State Agencies which guided the development of sections and provided feedback as part of an iterative process.

At three points in the development of the strategy, wider consultation exercises were undertaken. These sought to:

- Validate information which has been developed through close engagement with the inshore fisheries sector;
- Use the knowledge and experience within the sector to identify solutions to the issues raised in the strategy development process.

The process for developing the strategy is summarised in the diagram overleaf.



Figure 1: Strategy Development Process



Source: RSM

2.2 Framework for the Strategy and Parts of the Strategy

2.2.1 Introduction

This section includes:

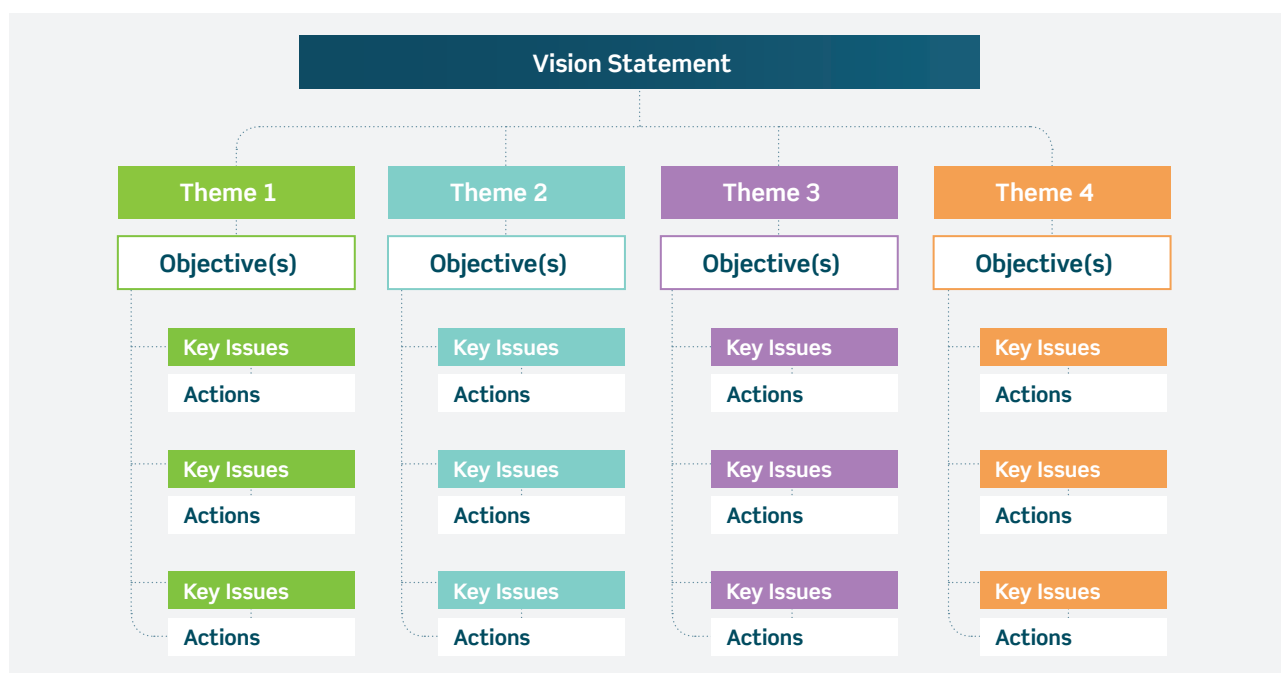
- the overall framework for the strategy – showing the relationships between vision, themes, objectives, key issues and actions;
- the parts of the strategy – describing the chain of expected effects (Objectives – Actions – Outputs) required for the strategy to be considered a success¹.

¹ Outcome and Impact Level Intervention Logic & Indicators – European Commission (2017)

2.2.2 Framework for the Strategy

The diagram below shows the framework for the Inshore Fisheries Strategy.

Figure 2: Strategy Development Framework



Source: RSM

2.2.3 Parts of the Strategy

As set out in the diagram above there are multiple parts to this strategy document. The table below describes each part of the chain of expected effects (Vision - Theme - Objectives - Actions - Outputs)².

Figure 3: Chain of Expected Effects

| Component | Description |
|-----------|---|
| Vision | A short statement of purpose that identifies the scope of the strategy. Basically, describing what it is seeking to achieve. This should be between a single sentence or a short paragraph in length. |
| Theme | Each theme sets out a group of key issues which are similar in nature and which can lead or support the achievement of joint goals. |
| Objective | A specific result that a strategy aims to achieve within a time frame and with available resources. |
| Key Issue | An issue which impacts on the sustainability and security of the Irish Inshore Fisheries Sector |
| Action | Activities which will be supported through the strategy in order to address the issues identified which impact on the sustainability and security of the Irish Inshore Fisheries Sector. The activities may be the responsibility of either industry, state actors or both. |

Source: RSM

² Based on Outcome and Impact Level Intervention Logic & Indicators – European Commission (2017)

3 VISION

Information gathered during the strategy development and consultation process was used to develop a vision statement for the strategy.

The Inshore Fisheries Sector will have a prosperous and sustainable future delivered through a united industry with a strong and influential voice.



4 KEY ISSUES

4.1 Identifying the Key Issues Affecting the Sector

The key issues provide a summary of the main issues, including challenges, which impact on the sustainability and security of the Irish Inshore Fisheries Sector and guide the focus of the strategy.

Key issues were informed by desk-based research including industry profile, policy context and SWOT. They were refined through several rounds of consultation with the Project Steering Group and more widely with the Inshore Forums, drawing on the knowledge and experience of the Project Steering Group, the inshore sector, and other stakeholders through meetings and consultations.

4.2 Key Issue 1 – Attracting People to the Sector

In recent times, for a variety of reasons including the perceived poor image of the sector, the industry has struggled to attract the next generation. The age profile of the workforce in the inshore sector is dominated by older workers. The National Strategic Plan for the Fisheries Sector 2007-2013 estimated that 51% of the workforce was aged over 40 years. Without new talent in crews and vessel owners coming into the industry, it will not be sustainable nor will it offer secure employment opportunities.

There are many key issues impacting the working age of the sector; some are specific to vessel owners, some are specific to crew and some apply to both:

- Lack of exiting strategy
- Lack of entry opportunity
- High cost of entry
- Perceived poor career pathway
- Limited opportunities for qualification and skills development
- Variable levels of profitability and therefore security

There is a fear amongst many in the industry that the trades, skills and craft of the inshore fishing may come under threat and the culture, heritage and history of the industry could be lost.

4.3 Key Issue 2 – Opportunities & Obstacles to Diversification

The inshore fleet has relied on diverse economic activities to sustain the sector. The number of economic activities open to the sector is limited and has declined over the years. There are obstacles to diversification of economic activity within the inshore sector through:

- dual licensing restrictions (fishing vessels in Ireland cannot carry passengers unlike those in many other EU member states); and
- pressure on stocks (which has led to an increased reliance on a small number of fisheries).

There are also obstacles to diversification outside the sector.

4.4 Key Issue 3 – Decline and Loss of Fisheries

The inshore fisheries sector has been negatively impacted by a decline and loss of certain fisheries. Some stocks will continue to remain low unless specific actions are taken to restore them. The loss of stocks results in a domino effect where effort is displaced to a dwindling number of stocks and increased specialisation.

4.5 Key Issue 4 – Competition for Space

The competition for space for inshore fisheries is greater than ever. Space required by fishing is also in demand for aquaculture, shipping, marine leisure and, more recently, renewable energy.

The increased level and diversity of activity in the maritime space highlights the need for efficient and co-ordinated management to avoid conflict and to identify, where possible, synergies both within and between. Ireland's future Marine Spatial Plan (MSP) will also impact on the inshore sector.

4.6 Key Issue 5 – Constraints posed by Environmental Legislation

Ireland is required to conserve habitats and species by the EU Habitats and Birds Directives, through the designation of conservation areas. This is implemented through the designation of SACs (Special Areas of Conservation) and SPAs (Special Protection Areas).

In addition, the Marine Strategy Framework Directive sets out certain environmental requirements which must be complied with.

The perceived complexity of the environmental legislation has contributed to a lack of understanding regarding the implementation and impact on the inshore sector.

4.7 Key Issue 6 – Lack of Organisation and Engagement

The Inshore Forums now provide a forum for the sector to have a voice, however it is vital that the structures maintain and increase buy-in from general industry. This should be focused on strengthening representation from the inshore sector on the Inshore Forums. There is also scope to improve the level of organisation, communication and engagement within the sector as a whole through the structures (such as industry organisations) underpinning the Inshore Forums.

4.8 Key Issue 7 – Protecting Profitability

The level of profitability in the sector is unpredictable and uncertain due to a number of market, environmental and policy related drivers.

4.9 Key Issue 8 – Infrastructure at Smaller Inshore Ports and Harbours

Poor quality infrastructure will affect the sustainability of the sector. There is a lack of investment and management which has implications for the profitability, efficiency, safety and attractiveness of the sector.

4.10 Key Issue 9 – Profile of the Inshore Sector is Poorly Defined

It is difficult to demonstrate the economic importance of the inshore sector to coastal communities due to the dearth of information available. The limited information on the sector is an obstacle to developing and investing in the sector.

4.11 Key Issue 10 – Failure to Maximise and Identify Market Opportunities

There has been a history of inshore operators selling individually and being price takers. Access to markets is key to the economic viability of the sector but markets have become more competitive and demanding in terms of traceability, provenance and sustainability.

4.12 Key Issue 11 – Changing Environmental Conditions

Fisheries may be affected by environmental events such as pollution, biotoxins, and adverse climatic conditions arising from climate change. Those involved in the inshore sector require additional information, education and training to futureproof their businesses by mitigating the potential impact of changing environmental conditions.

4.13 Key Issue 12 – Clarity of Regulation and Governance

Many state agencies are involved in the governance of the inshore sector and there is a perception that these agencies lack understanding of the sector. There is also a perception that the enforcement of the rules is not consistent.

The inshore fisheries sector is bound by many complex regulations and relationships. Within the sector there is not a shared understanding of all the many and various rules and relationships which govern the sector.

5 THEMES

5.1 Theme 1 – Organisation & Profile

Description of the Theme

This theme focuses on capturing the issues that relate to the organisation and representative structures of the sector as well as the development and improvement of the profile of the sector, for example:

- Representation and organisation of the sector to allow the sector to arrive at a unified and coherent voice on economic, management and all other issues which impact the sector;
- How the sector engages internally and communicates with state agencies and other marine sectors/users to foster mutual understanding;
- How industry and state actors are encouraged to work together to optimise governance arrangements to fulfil shared ambitions for the sector; and
- Demonstrating the economic and social significance of the sector.

5.2 Theme 2 – Management & Planning

Description of the Theme

This theme focuses on:

- **Stock Management:** long term sustainability of the biological resource on which the sector relies. Capturing issues in relation to CFP;
- **EU and national environmental legislation** – e.g. Habitats and Birds Directives which establish Special Areas of Conservation & Special Protection Areas, Marine Strategy Framework Directive which requires maintenance of good environmental status in all areas.
- **Spatial Management:** e.g. The Marine Spatial Planning Directive which require Ireland to develop a Marine Spatial Plan.

5.3 Theme 3 – Infrastructure & Resources

Description of the Theme

This theme focuses on capturing the physical aspects of the sector, for example

- The human resources including people (skills, experience) / support for training, skills development and capacity development.
- The capital resources available to the industry e.g. infrastructure, vessels or financial resources (e.g. funding support available to the sector whether that be private or public).

5.4 Theme 4 – Profitability

Description of the Theme

This theme focuses on capturing the issues that impact on profitability of the sector, for example:

- Optimising access to existing and new markets & maximising the benefit of collective action e.g. sharing best practice / skills transfer
- Opportunities and obstacles to diversification
- Improving efficiency in the sector

6 OBJECTIVES

6.1 Theme 1 – Organisation & Profile

Objective 1: To build an accurate profile of landings, value and socio-economic impact of the inshore fisheries sector

Rationale for Objective 1:

It is difficult to define or demonstrate the importance of the inshore sector to coastal communities because of a lack of sufficient information on economic performance (e.g. landings, value, employment). Limited information on the sector is an obstacle to developing and investing in the sector. It also presents a problem for those advocating on behalf of the sector. This objective aims to provide supports to promote more accurate profiling of the sector thus giving the sector a well-defined footprint based on credible evidence which will support sector initiatives and calls for change.

Objective 2: To strengthen existing representative structures

Rationale for Objective 2

The sector has improved local representation considerably through the inshore forums process. This objective builds on this progress, and has two main aims:

- to support and strengthen the fisheries structures underlying the RIFFs (e.g. co-operatives and industry organisations) by building up local capacity to communicate local issues to the RIFFs – through local participation, including involvement in generation of the hard evidence to support arguments; and
- to strengthen Inshore Forum structures through review/scrutiny of how these function, canvas and capture local views, and best present and promote these views

Objective 3: To build the capacity of the sector to collectively negotiate on non-policy (such as price and markets) as well as on policy issues

Rationale for Objective 3

The sector needs to recognise when its interests are better represented collectively and also how to negotiate on critical issues with a unified voice. There is also scope to build the capacity of the sector to negotiate collectively. This objective seeks to strengthen the sector's ability to take the initiative (rather than be reactive) on crucial policy and non-policy issues and through this enhance its ability to better represent itself.

Objective 4: Improve compliance and enforcement of current legislation

Rationale for Objective 4:

Industry believes that the regulatory processes are cumbersome and complex and place an unnecessarily high administrative burden on businesses. This objective aims to support activities that clarify regulatory processes for the inshore sector.

There is a perception within the sector that current legislation is unfairly and unevenly enforced throughout the industry. This objective aims to provide greater equity with how regulation is enforced and thereby improve perceptions. Consultation provides a means by which these issues can be better understood and potential resolutions identified.

6.2 Theme 2 – Management & Planning

Objective 1: Improve the management of stocks to deliver maximum sustainable yield

Rationale for Objective 1:

Those involved in the inshore sector recognise the need for greater management of stocks to deliver the maximum sustainable yield.

Objective 2: Encourage greater communication with the Inshore Forums on future fisheries and environmental legislation which could have an impact on the inshore sector

Rationale for Objective 2

The sector requires a clear understanding of fisheries and environmental legislation that affects it both directly and indirectly. This objective aims to build this support by encouraging greater communication between fishermen and Inshore Forums to allow for knowledge exchange and sharing of information relating to environmental legislation, ensuring the sector is kept up to date.

Objective 3: Develop greater co-operation between fisheries, local coastal communities and government agencies to use marine spatial planning effectively as a tool to enhance economic activity

Rationale for Objective 3

Many stakeholders have influence and interest in coastal areas and the competition for marine space is increasing. Support is needed to improve the co-operation and networking among fishermen and coastal communities to enhance their voice in relation to marine spatial planning and management. The aim is to provide fisheries and coastal groups with a stronger, unified voice to represent themselves in the decision-making processes, whilst also improving the networking and consultation between actors and agencies as well. This will enable the sector to shape its own future through increased engagement and influence in decision making.

The actions under this objective seek to support initiatives that encourage meaningful communication between fisheries and other users of the marine space and encourage greater co-operation between all relevant stakeholders.

6.3 Theme 3 – Infrastructure & Resources

Objective 1: Improve the attractiveness of the sector to encourage new entrants and retain talent

Rationale for Objective 1:

The inshore sector struggles to attract new talent. This objective aims to support actions which will improve the awareness and attractiveness of the sector both for younger people considering career options in the sector and retaining existing talent already employed in the sector. Recognition also needs to be given to the role that women play in the sector through highlighting existing involvement as well as developing and promoting further opportunities to involve women.

Objective 2: Improve facilities available at piers and harbours

Rationale for Objective 2

Piers and harbours are critical to the success of the sector, many require re-development and improvement of facilities. This objective seeks to explore what resources are required at piers and harbours in Ireland.

Objective 3: Improve the awareness of supports available to the sector

Rationale for Objective 3

There is a lack of awareness of the resources available amongst those within the sector and also potential new entrants to the sector. This objective seeks to support the dissemination of information and skills at a coastal community level.

6.4 Theme 4 – Profitability

Objective 1: Improve and optimise the economic efficiency of inshore fishing enterprises

Rationale for Objective 1

The efficient operations of inshore fishing enterprises are critically important to the viability of the inshore sector. This includes the operational efficiency of the vessels but also the business efficiency of the enterprises themselves. This could be achieved through provision of appropriate advice and business mentoring.

Objective 2: Improve the connectivity and communication between fisheries and markets

Rationale for Objective 2

There is a perception in the industry that there is a lack of understanding between fishers and their markets and that this adversely impacts on prices paid. This objective aims to improve the communication and cooperation among fishermen such as rationalisation of supply chain logistics and their markets.

Objective 3: Support improved added value to existing landings at sea and through the value chain

Rationale for Objective 3

There is a need in the industry to maximise the value of landings. Value can be added to the existing catch through product differentiation, selective harvesting, small scale processing, direct sales, marketing and promotion.

Objective 4: Explore and prioritise diversification opportunities using the knowledge and expertise of the sector

Rationale for Objective 4

Where there is robust evidence for diversification opportunities the sector should be supported in their sustainable development.

7 ACTIONS

7.1 Theme 1 – Organisation & Profile

7.1.1 Objective 1: To build an accurate profile of landings, value and socio-economic impact of the inshore fisheries sector

Theme 1 Objective 1: Proposed Actions

- Implement an appropriate data collection system for the Irish inshore sector
- Communicate accurate and up to date industry-relevant socio-economic information to raise awareness of and support for the sector

7.1.2 Objective 2: To strengthen existing representative structures

Theme 1 Objective 2: Proposed Actions

- Raise awareness, participation and engagement of industry in existing representative structures/forums
- Enhance skills and build capacity of RIFF members so that they can effectively represent and develop the voice of the sector
- Encourage and support effective representation through regular communication with industry members and relevant state agencies
- Promote industry engagement in policy making through active participation in consultations

7.1.3 Objective 3: To build the capacity of the sector to collectively negotiate on non-policy (such as price and markets) as well as on policy issues

Theme 1 Objective 3: Proposed Actions

- Build capacity to facilitate the formation of new, and enhancement of existing, collective structures to strengthen cohesion in the sector
- Raise awareness of supports for collective organisations (e.g. EMFF)
- Develop skills and voice of members of sector through appropriate training in areas such as management skills, business skills, collective bargaining, etc.

7.1.4 Objective 4: Improve compliance and enforcement of current legislation

Theme 1 Objective 4: Proposed Actions

- Improve understanding of industry practice and advise on changes to ensure satisfactory compliance with legislation
- Assist industry to improve understanding and engagement in compliance with regulation and legislation

7.2 Theme 2 – Management & Planning

7.2.1 Objective 1: Improve the management of stocks to deliver maximum sustainable yield

Theme 2 Objective 1: Proposed Actions

- Investigate opportunities to develop and implement new protocols for the sustainable management of inshore resources
- Implement improved initiatives that adopt a strategic approach to sustainable stock management in the industry
- Increase industry awareness and engagement through representative structures that seek to assist and inform current best practice in sustainable stock management and planning

7.2.2 Objective 2: Encourage greater communication with the Inshore Forums on future fisheries and environmental legislation which could have an impact on the inshore sector

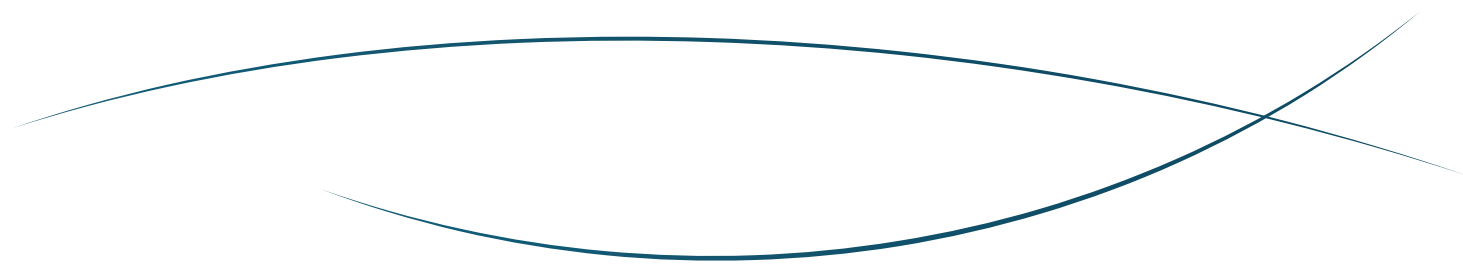
Theme 2 Objective 2: Proposed Actions

- Implement initiatives which improve communication by disseminating user-friendly information on current and future environmental legislation
- Support and facilitate greater direct engagement and co-operation between the sector, representative structures and relevant state agencies on environmental legislation to improve effectiveness of participation and influence on relevant consultations

7.2.3 Objective 3: Develop greater co-operation between fisheries, local coastal communities and government agencies to use marine spatial planning effectively as a tool to enhance economic activity

Theme 2 Objective 3: Proposed Actions

- Improve cooperation and communication between all relevant parties in the marine spatial planning process to share information, recognise the inshore sector spatial footprint and promote economic activity
- Investigate and identify management and planning issues identified by actions under Theme 1



7.3 Theme 3 – Infrastructure & Resources

7.3.1 Objective 1: Improve the attractiveness of the sector to encourage new entrants and retain talent

Theme 3 Objective 1: Proposed Actions

- Explore options to incentivise transfer of ownership to facilitate entry to /exit from the industry
- Promote the sector through the development of clear, accessible information on it and the career path for those entering, within and exiting the industry
- Provide training and development opportunities for those within the industry to encourage new entrants and retain current talent

7.3.2 Objective 2: Improve facilities available at piers and harbours

Theme 3 Objective 2: Proposed Actions

- Audit the quality, functionality, facilities and management of inshore piers and harbours that are or could be used by the inshore fisheries sector
- Improve communication with relevant agencies regarding the condition and management arrangements of inshore piers and harbours
- Provide support to improve facilities at piers and harbours used by the inshore fisheries sector
- Improve management arrangements at piers and harbours used by the inshore fisheries sector

7.3.3 Objective 3: Improve the awareness of supports available to the sector

Theme 3 Objective 3: Proposed Actions

- Develop and publicise a single central information portal on current funding, resources and training available to support the inshore sector
- Support additional complementary initiatives that raise awareness of current financial support available to the industry

7.4 Theme 4 – Profitability

7.4.1 Objective 1: Improve and optimise the economic efficiency of inshore fishing enterprises

Theme 4: Objective 1: Proposed Actions

- Develop and implement initiatives that provide training and build capacity to develop business related skills
- Facilitate enhanced sectoral engagement and consultation on current and future market and diversification opportunities

7.4.2 Objective 2: Improve the connectivity and communication between fisheries and markets

Theme 4: Objective 2: Proposed Actions

- Improve product value by supporting fishing enterprises to engage more effectively with the market through initiatives such as increased use of digital technologies, networking/collective actions, marketing, branding and promotion
- Provide accurate and up to date information on current market trends to allow fishing enterprises to negotiate in the marketplace more effectively

7.4.3 Objective 3: Support improved added value to existing landings at sea and through the value chain

Theme 4: Objective 3: Proposed Actions

- Add value to the inshore catch through supporting activities such as direct sales and small scale processing
- Develop initiatives to differentiate market and promote inshore sector products
- Increase industry awareness of sales regulations

7.4.4 Objective 4: Explore and prioritise diversification opportunities using the knowledge and expertise

Theme 4: Objective 4: Proposed Actions

- Identify and facilitate changes in current practice, policy and legislation that will facilitate diversification within the industry.
- Investigate new diversification opportunities where supported by solid evidence

8 IMPLEMENTATION

8.1 Implementation Plan

BIM will lead the implementation of the Strategy in partnership with NIFF and the inshore sector. Many of the Actions identified in the Strategy align with and complement those identified in the BIM Strategy 2018-2020 Enabling Sustainable Growth and their implementation will therefore be more easily facilitated. BIM is also the Implementing Authority for many of the industry supports being implemented through the Seafood Operational Programme under the EMFF and is thus well placed to effect the appropriate changes to these supports. Other Actions however fall outside the remit of BIM and will require the engagement of other agencies, service providers and stakeholders. BIM will draw up an Implementation Plan for the Strategy and will be advised in this regard by an Inshore Strategy Implementation Group. It will comprise nominees from NIFF, DAFM and its agencies, BIM, MI and the SFPA and will advise BIM in developing the Implementation Plan in the first instance and thereafter monitoring and driving implementation progress.



The Inshore Fisheries Forums can be contacted through BIM below or through their website inshoreforums.ie



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