REPORT FROM THE TASKFORCE FOR SOUTH DOWN

1. INTRODUCTION

1.1 Ian Pearson MP, Parliamentary Under-Secretary of State established a Taskforce for South Down in January 2003, with a remit to examine the potential socio-economic implications on the local fishing communities of successive EU Agriculture and Fisheries Council decisions. The main focus of the Taskforce's work has been on the fishing communities of Kilkeel, Ardglass and Portavogie. The Taskforce was chaired by the Office of the First Minister and Deputy First Minister (OFMDFM) and comprised officials drawn from several Government Departments, the District Council Chief Executives from Ards, Down and Newry and Mourne and representatives of the Fish Producers and Processors' organisations. Details of membership of the Taskforce are set out at Annex 3. The co-ordination and detailed work of the Taskforce was undertaken by a small Secretariat from the Economic Policy Unit in OFMDFM.

Taskforce Terms of Reference

1.2 The Terms of Reference for the Taskforce were to:

- Identify the potential implications of the outcomes of Council decisions for the fishermen and the communities which depend upon them.
- Assess the needs of the fishermen and their local communities.
- Review the sources of support available or potentially available to these areas.
- Propose an action plan to address the economic and social challenges identified.

Approach

1.3 The Taskforce met on seven occasions between January and September 2003 and arranged consultation events in the three main fishing villages of Ardglass, Kilkeel and Portavogie. The work of the Taskforce complemented activity in support of the fishing industry and the local communities by the Fisheries Division and Rural Development Division of the Department of Agriculture and Rural Development (DARD).

1.4 To supplement the programme of consultation, the Taskforce commissioned economists from the Sea Fish Industry Authority to gather new primary data through a survey of the industry and to report on their current situation, attitudes and aspirations. The Taskforce also drew heavily on available data and analysis from across government to obtain a comprehensive understanding of the socio-economic characteristics of the fishing villages and the state of the industry.

1.5 The Taskforce has also taken account of the developing work of the Review Team established by the Prime Minister's Strategy Unit (PMSU) to outline the options for the sustainable future of the UK sea fishing industry. The strategy development review will guide the policy of UK Fisheries Departments and the UK approach to the EU and other international negotiations.

1.6 The PM's Strategy Unit team is expected to publish its report in December 2003. In considering its approach the Taskforce is aware of the importance of ensuring that any measures adopted as a result of its work should, where appropriate, be consistent with the Strategy Unit's findings on the longer term approach at the United Kingdom level.

Consultation

1.7 As part of the consultation process, the Taskforce, along with the three District Councils (Ards, Down and Newry & Mourne) held three public meetings in Kilkeel, Ardglass and Portavogie to explain the role of the Taskforce and to hear the views of local communities. Written comments were also requested. The Taskforce or its representatives also met with the Tri-Council Fisheries Support Group, (consisting of local councillors from the three Councils affected) on three occasions, and with the NI Fishery Harbour Authority.

Equality Issues

1.8 The Taskforce, which is representative of the main stakeholders, regards equality of opportunity and good relations as complementary and that the Taskforce is committed to adhering to the principles of Section 75 of the Northern Ireland Act 1998 in developing its proposed framework for the way forward.

1.9 The Taskforce has produced an Action Plan, which will involve a number of Departments, District Councils and other agencies in tackling a range of socio-economic and industry-related issues. It would be for the Steering Group, as outlined in Chapter 8 of the Taskforce report, to make arrangements, as part of the implementation process, for consideration of the implications for equality of opportunity of the various measures in the Action Plan, including arrangements for equality impact assessments where this is necessary.

Report Structure

1.10 The Taskforce report is structured as follows:

(i) Chapter 2: The Fishing Villages of South Down – Economic and Social Characteristics
(ii) Chapter 3: Fishing Industry – Characteristics and Trends
(iii) Chapter 4: Fishing Industry Prospects
(iv) Chapter 5: Consultation Findings
(v) Chapter 6: Economic and Social Challenges for the South Down Fishing Villages
(vi) Chapter 7: An Action Plan
(vii) Chapter 8: Delivering the Action Plan
(viii) Annexes 1, 2 and 3

THE FISHING VILLAGES OF SOUTH DOWN – ECONOMIC AND SOCIAL CHARACTERISTICS

2.1 The Taskforce agreed that it should identify the socio-economic characteristics of the three main fishing ports in South Down. This chapter summarises the key points from the socio-economic profile.

2.2 The total population of each of the wards covering the three main fishing villages is set out below.

Table 1 Populations of the Fishing Village Wards (2001)

Ward	Population
Portavogie	3,510
Ardglass	2,925
Annalong	3,036
Kilkeel Central	3,556
Kilkeel South	2,851

Source: 2001 Census of Population

2.3 The socio-economic profile indicates a number of shared characteristics across the Portavogie, Ardglass and Kilkeel areas:

- Whilst some differences exist, **the age structure** of each port area examined does not appear to differ in any significant way from the overall age structure of the Northern Ireland population.

- In each area, the percentage of the 16-74 population which is **economically active** does not differ significantly from the overall figure for Northern Ireland. In each ward the percentage of those aged 16-74 who are unemployed is within 1% of the overall rate for Northern Ireland of 4%.

- Amongst the economically active, relatively high levels of **self-employment** are evident. Whilst overall in Northern Ireland just over 1 in 10 people are self-employed, in the relevant fishing villages the rate is just over 1 in 5 people.

- Each area contains relatively high levels of persons aged 16-74 with no **qualifications**. Correspondingly, each ward contains relatively low levels of persons aged 16-74 with degree level/equivalent or higher-level qualifications.

2.4 Based upon the most recent and most comprehensive assessment of **deprivation** at ward level in Northern Ireland, none of the wards examined falls within the 33% most deprived wards in Northern Ireland.

2.5 Fish catching and fish processing account directly for around one in ten jobs in the Kilkeel and Portavogie areas. A somewhat lower level of dependency – around 6% - is indicated for the Ardglass area. Census data also indicate that Portavogie depends to a relatively greater extent than either Ardglass or Kilkeel on catching rather than processing employment.

2.6 In addition to direct employment, the fish catching and processing sectors support wider employment, as they generate demand for goods and services in each village. Furthermore, those who earn their income directly or indirectly from the industry also support employment as they too generate a demand for goods and services.

2.7 Calculating these indirect impacts (multiplier effect) proves difficult at the scale of an individual village. However, it is important to note that not only those living and working in the area (as reflected in Census of Population data) but all persons employed in the industry regardless of where they live (as reflected in DARD data) generate an economic impact in each village. It is also important to note that the extent to which a locality is dependent on fishing does not automatically correlate with the vulnerability of the industry in a particular locality as this depends on the ability to adapt to changing circumstances. For example, fleet concentrations may occur around the most dependent ports; and communities around ports with current high levels of fishing activity will be better equipped for fishing.

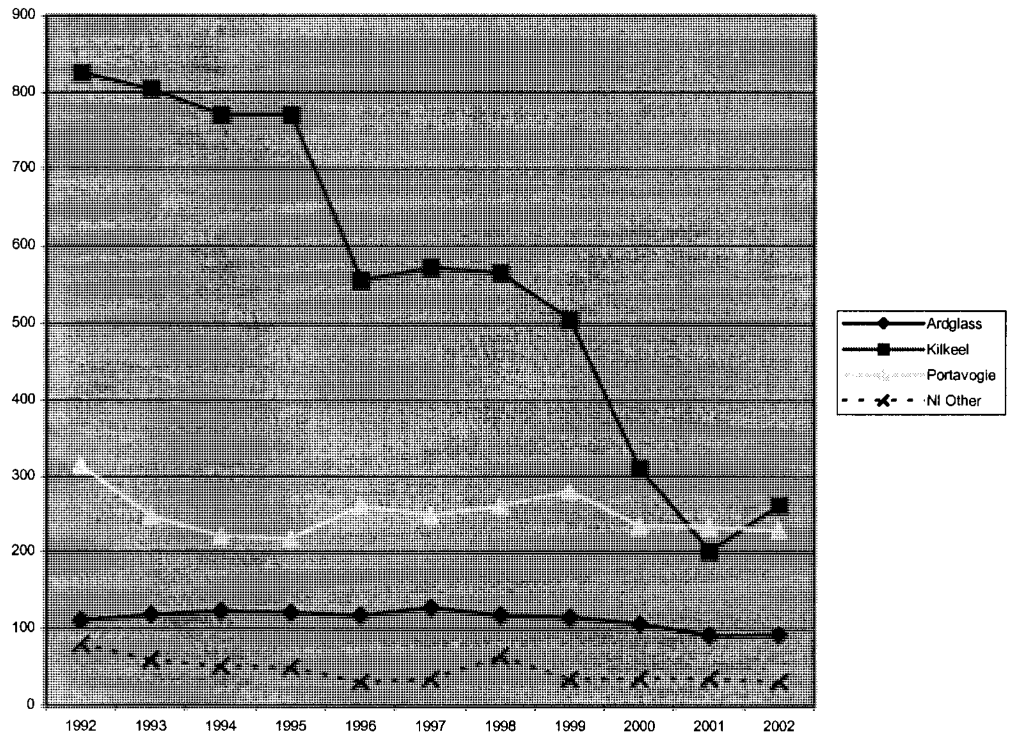
FISHING INDUSTRY CHARACTERISTICS AND TRENDS

3.1 This chapter provides quantitative information on characteristics and trends relating to the fish catching and processing sectors. It draws upon official statistics and a number of Seafish reports, including the survey commissioned by the Taskforce.

Number of Fishermen

3.2 Over the past decade there has been a significant decline - 54% - in the number of fishermen employed in Northern Ireland. Between 1992 and 2002, in both absolute and relative terms, the greatest decline occurred at Kilkeel, where a fall of 565 or 68% was recorded. Over the same period, a 28% fall in the number of fishermen was recorded at Portavogie and the corresponding figure for Ardglass was 17%.

Figure 1 Fishermen Employed in Northern Ireland by Port 1992-2002



Source: DARD

3.3 The 2003 Seafish report indicates that employment in the catching sector is concentrated in the 31-50 age group - which accounts for 45% of those employed as crew of vessels targeting nephrops, and 54% of those targeting whitefish (semi-pelagic). Data from the 2001 Census of Population indicates that the age structure of the fishing industry does not differ significantly from that observed for all industries.

3.4 The 2003 Seafish report indicates that the fall in numbers of fishermen employed is relatively greater in Northern Ireland over this period compared with other areas of the UK.

The Northern Ireland Registered Fleet

3.5 At December 2002, the registered fishing fleet in Northern Ireland comprised a total of 319 boats. Of these, 152 (48%) were over 10 metres in length. European Regulations and domestic law apply in greater measure to the over 10 metre fleet, eg these vessels are statutorily obliged to declare and provide details of fishing activity and landings of quota species. Under 10 metre vessels are under no such obligation (other than for nephrops) although may do so voluntarily.

Table 2 Northern Ireland Fleet[1] at December 2002 by Length and Port

	10m and under	over 10m	total
Kilkeel	43	74	117
Ardglass	9	20	29
Portavogie	15	43	58
Other	100	15	115
Total	167	152	319

Source: DARD

3.6 The significant number of small boats which are located in 'other ' ports includes many based in non-fisheries harbour ports along the north coast.

3.7 The Irish Sea Semi-Pelagic/Twin Rig sector (based in Portavogie and Kilkeel, which operates a mixed fishery, targeting mainly cod, haddock and whiting) and the Irish Sea Nephrops[2] Trawl sector (based in Portavogie, Ardglass, and Kilkeel) account for 137 (89%) of the 152 vessels within the over 10 metre fleet. The remaining 15 boats are: 3 Beam Trawlers which fish exclusively in the North Sea; 3 full pelagic vessels which fish all around the UK Coast; and 9 scallopers which operate in the Irish Sea and West of Scotland.

[1] Due to differences in date of data collection, number of vessels for a given year may vary slightly between tables.
[2] Nephrops are also known as Dublin Bay Prawns, Langoustine and Norwegian Lobster.

Table 3 Over 10 metre South Down Fleet by Sector Fished and Port 2002

Port	Irish Sea Semi-Pelagic/Twin Rig	Irish Sea Nephrops Trawl
Portavogie	8	37
Ardglass	0	25
Kilkeel	33	34
Total	41	96

Source: DARD

3.8 Compared with 1996, in 2002 there were 25 fewer over 10 metre boats in Kilkeel. This represents a 25% reduction in the number of this category of boats in this port. Over the same period, there were 6 fewer over 10 metre boats in both Portavogie and Ardglass.

3.9 In relation to fishing capacity it is notable that in the same period the total power (KW) of vessels in each of the three ports also declined.

Age of fleet

3.10 Four out of five boats (81%) in the Northern Ireland fleet are over 20 years old. In Kilkeel three out of four boats (77%) are over 20 years old, whilst in Portavogie (88%) and Ardglass (86%), almost 9 out of 10 boats fall into this category. The 2003 Seafish report notes that the Northern Ireland fleet is an older fleet compared with the UK fleet as a whole. The average age of the Northern Irish fleet is now 28 years, compared to 25 years for the UK fleet.

Quotas

3.11 Between 1998 and 2003, UK quotas have significantly reduced for a number of stocks of interest to the Northern Ireland fleet. A major traditional fishing ground of the Northern Ireland fleet is the Irish Sea (designated by the International Council for the Exploration of the Seas (ICES) as Area VIIa), whose coastal areas fall within the jurisdiction of Scotland, Northern Ireland, the Republic of Ireland, Wales, England and the Isle of Man respectively. The fleet is also active in the West of Scotland (Area VIa). These areas comprise mixed fisheries – which render selective fishing, by way of gear and net configurations, more challenging – and the Irish Sea in particular has unique benthic or seabed characteristics.

Table 4 UK Quota distribution for some stocks of NI interest

	Final UK Quota (tonnes)	Final UK Quota (tonnes)	Initial UK Quota (tonnes)	% Change 1998 - 2003
	1998	2002	2003	
Anglers VII	4,640	3,876	2,843	-39
Cod VIIa	2,510	1,377	562	-78
Haddock VIIa	1,985	686	281	-86
Herring VIIa	6,660	3,525	3,550	-47
Nephrops VII	7,590	5,526	5,836	-23
Plaice VIIa	885	1,223	428	-52
Saithe VII	1,350	1,340	1,337	-1
Sole VIIa	220	267	224	2
Whiting VIIa	3,730	443	193	-95
TOTAL	29,570	18,263	15,254	-48%

Source: DARD

Note: Final UK Quota includes swaps with other Member States. Final 2003 figures not available until year end.

3.12 Northern Ireland has two Producer Organisations. Across Europe, Producer Organisations are responsible to Member States and the European Commission for managing quota allocations. The relative share of Northern Ireland's quota allocations, within the available UK quota, has been maintained over successive years, while in relation to almost all stocks of interest to Northern Ireland, the end of year share of quota is consistently greater than the start of year quota share.

Landings – liveweight and value

3.13 In 2001, the recorded value of landings into the three South Down ports represented 63% of the total tonnage and value of landings into Northern Ireland.

Table 5 Volume and value of landings into Northern Irish ports by UK vessels, by landing district and species 2001

		tonnes (000s)	value (£million)
Ardglass	Demersal[3]	0.4	0.4
	Pelagic[4]	4.2	0.8
	Shellfish[5]	1.3	2.3
	Total	5.9	3.5
Portavogie	Demersal	2.2	2.6
	Pelagic	-	-
	Shellfish	2	3.5
	Total	4.2	6.1
Kilkeel	Demersal	2.8	2.8
	Pelagic	-	-
	Shellfish	3.2	3.9
	Total	6	6.7
Northern Ireland	Demersal	9.4	9.3
	Pelagic	14.5	4.7
	Shellfish	8.1	11.6
	Total	32	25.6

Source: Seafish 2003 Report (Table 2.5)

3.14 Between 1998 and 2002, the **liveweight** of registered landings by Northern Ireland vessels fell in each of the three South Down ports. The decline was greatest in Kilkeel, where the liveweight of landings was 40% lower in 2002 than in 1998. The corresponding reduction for Ardglass was 19% and for Portavogie 15%.

3.15 Between 1998 and 2002, the **value** of registered landings by Northern Ireland vessels also fell in each of the three South Down ports. However, the percentage fall in the value of landings was lower than the percentage fall in liveweight. Decline was greatest in Kilkeel, where the value of landings was 22% lower in 2002 than in 1998. The corresponding figure for Ardglass was 5% and for Portavogie 1%.

3.16 Information on the estimated value of recorded landings of various fish species by Northern Ireland vessels in 1999 and 2002 shows that, whilst in 1999, pelagic species accounted for only 4% of total value of wet fish landed, this figure increased to 13% in 2002. Significant reductions in the

[3] Fish living at or near the sea bed, e.g. cod, haddock, plaice, commonly referred to as "whitefish"
[4] Fish swimming mid-water, e.g. mackerel, herring.
[5] Includes nephrops, scallops, crabs and lobsters.

value of landings of a range of whitefish species occurred between 1999 and 2002. Of particular note are the decreases in Cod (-27%), Haddock (-56%), Hake (-47%) and Whiting (-74%). The level of decrease in reported landings broadly reflects the reduction to fishing quota allocations over the period. During the same period 1999-2002, both the estimated liveweight and value of whitefish species landings decreased, the former by 26% and the latter by 43%.

3.17 In 2002, in terms of value, nephrops contributed 44% of all recorded landings into Northern Ireland by Northern Ireland vessels. Between 1999 and 2002, however, the estimated liveweight of nephrops fell by 26% and the estimated value by 29%.

Income

3.18 Information on income indicates a significant decline in gross earnings and average net profits between 1998 and 2003.

Table 6 Average Net Profit by Sector 1998 and 2003[6]

Irish Sea	1998	2000 -2001	2002	2003 Seafish estimate	% change (98-03)
Semi-Pelagic/Twin Rig	£42,836	£16,086	£44,177	£10,400	-76%
Nephrops Trawl	£29,750	£22,375	£34,987	£15,600	-48%

Source: Seafish 2003 Report (Tables 4.1 and 4.2)

3.19 There is considerable variation in net profit from one year to the next. However, net profit in the Irish Sea Semi-pelagic/twin rig trawler sector is estimated by Seafish to have fallen by just over three quarters between 1998 and 2003. Average net profit in the Irish Sea Nephrops Trawl sector is estimated to have fallen by just under a half in the same period.

The Processing Sector

3.20 There are 34 fish processors and merchants in Northern Ireland employing just over 900 staff, with 24 fish processing businesses based in the three South Down ports. Table 7 gives a profile of the structure of the fish processing sector in Northern Ireland. (Primary processing refers to

[6] Profit shown is before bank loan repayments or depreciation are taken into account.

gutting, filleting, and skinning. Further cooking or processing is referred to as secondary processing.)

Table 7 Profile of sea fish processing companies in Northern Ireland, 2003

Type of fish processed:	▪ 8 process mainly demersal fish ▪ 3 process mainly pelagic fish ▪ 13 process mainly shellfish ▪ 10 process a mix of fish types
Company size:	▪ 24 employ 1-25 FTEs ▪ 4 employ 26-50 FTEs ▪ 4 employ 51-100 FTEs ▪ 2 employ over 100 FTEs
Type of processing:	▪ 11 primary processors ▪ 0 secondary processors ▪ 23 mixed processors (primary and secondary)

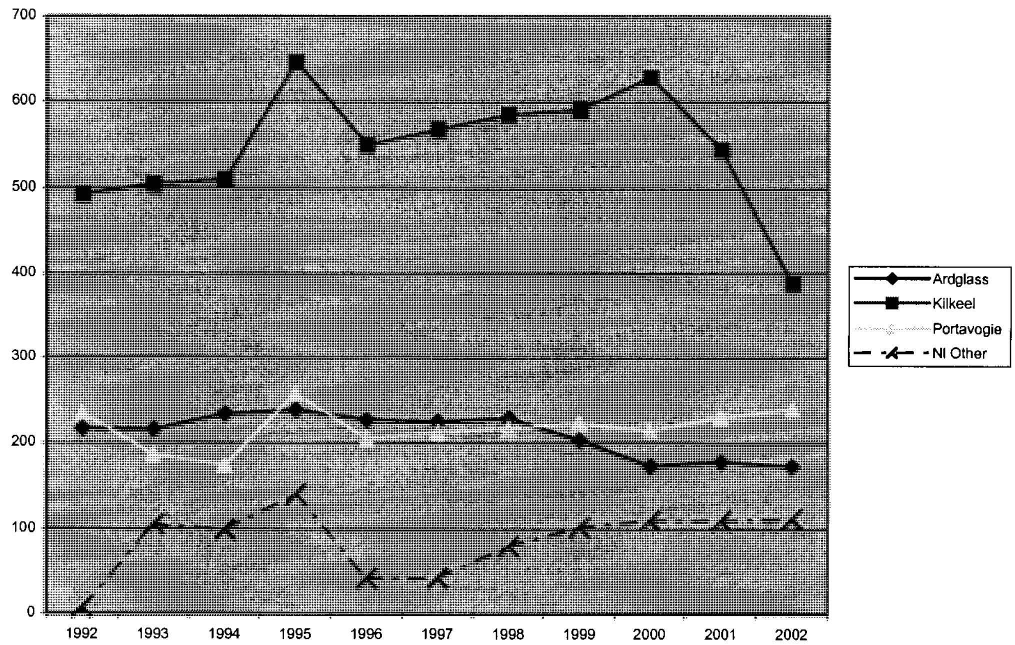
Source: Seafish 2003 Report

3.21 Almost 90% of the total fish processing employment in Northern Ireland is based in the three South Down ports. It is estimated that the numbers employed in each port are: 173 in Ardglass; 387 in Kilkeel and 240 in Portavogie. Processors are small operators: 70% of companies employ up to 25 FTEs. In the UK as a whole, the corresponding figure is 78%.

3.22 Mixed (primary and secondary) processing is the main processing type carried out in Northern Ireland. Although starting from a relatively low level, processors are increasingly trying to add value to their activities to improve their margins and maintain market share.

3.23 Between 1992 and 2002, there was a 4% fall in the number of employees in the fish processing and marketing sector. In this period, however, whilst part-time employment increased by 26%, full-time employment fell by 10%. Figure 2 below shows employment in processing and marketing in NI between 1992 and 2002. The significant decline, 240 jobs (-38%), which took place in Kilkeel between 2000 and 2002 as a result of the closure of one large employer.

Figure 2 Employment in Processing and Marketing by Location 1992-2002



Source: DARD

3.24 Employment within the processing sector is dominated by female employees, especially within the part-time sector. There are few young people employed in the industry with the majority of employees falling into the 31-50 age group.

3.25 Comparative data indicate that the fish processing sub-sector is characterised by relatively low pay, when compared with other sub-sectors of the food and drinks processing industry. Indeed, the fish processing sub-sector has the lowest average wage[7] across a range of sub-sectors.

Supplies

3.26 Just over half (51%) of the total value of purchases of fish made by Northern Ireland producers are made in Northern Ireland, whilst just under half (45%) are imports from other EU countries (mainly from the Republic of Ireland). The remaining 4% of supplies come from Scotland.

---

[7] There are difficulties however in calculating the average wage in a piece rate environment.

3.27 Comparing Northern Ireland with other regions of the UK shows a relatively high dependence of Northern Ireland fish processors on landings at auction, as compared to other methods of obtaining supplies (eg direct contract or direct imports).

The Catching Sector

3.28 Over the past decade, there has been a significant decline in employment in the catching sector in Northern Ireland. As has been noted at paragraph 3.2 above, this decline is relatively greater than that which has occurred in other areas of the United Kingdom. This is consistent with the reduction in the number of fishing vessels under successive decommissioning schemes, which is relatively greater in Northern Ireland (and England) than in Scotland. Within Northern Ireland, the greatest decline in employment, in both actual and relative terms, has occurred in Kilkeel.

3.29 The age structure of those who remain employed in the sector does not appear to differ significantly from that observed in all industries across Northern Ireland. However, during public meetings, fishermen raised the problem of attracting young people into the industry. The issue of crew retention was also a common theme throughout consultation.

3.30 The number of over 10 metre boats in each of the three villages has declined over recent years and, as with the decline in employment, the actual and relative decline has been greatest in Kilkeel. Those boats which remain are older on average when compared with the UK fleet as a whole. However between 1998 and 2003, the number of vessels in the under 10m fleet has remained stable (albeit with an upward trend in engine power and tonnage).

3.31 Between 1998 and 2002 UK quotas have significantly reduced for a number of stocks of interest to the Northern Ireland fleet, with the greatest cuts occurring to main whitefish species quotas. It is perhaps not surprising, therefore, that the value of registered landings by Northern Ireland vessels has fallen in recent years.

3.32 Net profit in both the Irish Sea Semi-pelagic/twin rig trawler (ie a vessel using two nets joined together) and the Irish Sea Nephrops trawl sectors fell by just under a half in the same period. However, variation in net profit is not only related to value of fish landed but also to outgoings such as running costs, and notable variations occur from one year to another.

3.33 The predominant message coming forward was the need to restore confidence in the industry itself. This is reflected in the report and action plan which places a strong focus on the industry while simultaneously seeking to stimulate the wider regeneration of the three villages.

FISHING INDUSTRY PROSPECTS

Background

4.1 As a Member State of the European Union, the United Kingdom is required to implement the Common Fisheries Policy (CFP), which is the European Union's policy and legislation framework for the management of fisheries and aquaculture. The CFP was created in order to manage a common resource and to meet the obligation set in the original Community Treaties, which stated that there should be a common policy, (ie common rules adopted at Community level and implemented in all Member States) in this area.

4.2 A fundamental aim of the CFP, as described in the key UK policy document *Safeguarding our Seas*, is to ensure the sustainable exploitation of fishing stocks through conservation and management policies designed to protect resources and reflect the needs of the fishing industry and consumers.

4.3 The CFP also encompasses a common structural policy (aimed at balancing fleet capacity and available resources) and market policies. Initially, fisheries structural actions were financed by the European Agriculture Guidance and Guarantee Fund (EAGGF). However, following the reform of the Structural Funds in 1993, a separate fund, the Financial Instrument for Fisheries Guidance (FIFG) was set up for the fishing industry.

4.4 A review of the CFG drew to a close in 2002 and the Agriculture and Fisheries Council agreed in December 2002 the first tranche of ongoing reforms. The main changes relate to:

- *A long-term approach*: The Council has agreed an approach which sets objectives for attaining and/or maintaining safe levels of adult fish stocks, and the measures needed to reach these levels.
- *A new fleet policy*: The Council has agreed to make Member States responsible for matching capacity to fishing opportunities, and phasing out public aid for private investment in renewal or modernising fishing vessels.
- *Better application of the rules*: The creation of a single inspection structure is part of a raft of measures to improve co-operation across Member States, between those who control and sanction rule breakers, and greater powers for European Inspectors. The Commission will make available an internet "comparative scoreboard" on catch, fleet and inspection data from Member States.

- *Stakeholder Involvement*: Fishermen, scientists and other interests will work together to identify how to attain sustainable fisheries in a particular defined sea fisheries area. A Code of Conduct for responsible fisheries in Europe will be presented in 2003.
- *Aquaculture*: The first ever strategy for the sustainable development of European aquaculture has been adopted.
- *Structural aid*: Recent reprogramming favours the reduction of fleet capacity and social measures, improving the image of the sector, and support for sustainable coastal development.
- *Improving scientific and technical advice*: The Council has agreed proposals for better resourcing and organisation of this advice.

4.5 The UK policy document "Safeguarding our Seas" reflects the focus of EU policy. The objective of the UK policy is "To help establish responsible and sustainable fisheries that ensure healthy marine ecosystems, maintaining the quality, diversity and availability of the marine resources and habitat."

The Regulatory Context

4.6 Northern Ireland operates fisheries management arrangements which reflect local needs and UK policies, and which are consistent with the over-arching European Common Fisheries Policy (CFP). Policies at European level are negotiated between Member States, on the basis of Commission recommendations consistent with scientific advice on sustainable levels of fish across a range of commercial stocks in defined areas of European Waters. Effort control, technical conservation measures, multi-annual management plans, closures (full and partial, time-bounded and geographically defined) and Total Allowable Catches or fishing quotas, are part of a "toolkit" of measures used. The Commission aspires to move to multi-annual recovery and management regimes, introduced by way of Council regulation, and directed at sustaining stocks which are fished beyond precautionary levels. Many stakeholders doubt the ability of a regime negotiated at Council to properly deliver fishery management regimes which reflect local needs and circumstances.

4.7 Some key stocks (cod and whiting) account for some 45% by value of recorded landings by the local fishing fleet into Northern Ireland ports. However, scientific advice from the International Council on the Exploration of the Seas (ICES), ratified by the European Commission's own scientific advisers, indicates that fishing effort on cod and whiting in the main Northern Ireland fishing grounds of the Irish Sea and West of Scotland exceeds sustainable levels. ICES scientists advise that Irish Sea cod stocks are at risk of collapse, sustained only by occasional good year classes of strong recruitment (which occur apparently randomly and are not predictable or reliable).

4.8 Local whitefish trawlers have traditionally fished in the Irish Sea and off the West of Scotland, with only a few vessels venturing to the North Sea and beyond. The distribution and age structure of cod stock in these areas (and the North Sea) show low incidence of mature spawning stock, indicating a risk that they are being fished beyond sustainable levels. The local fleet's fishing opportunities have been further challenged by diversion and competition from (and protection of) the Scottish fleet's opportunities. The last decade has therefore seen a succession of ever-tighter management measures in the NI fleet's main fishing grounds of the Irish Sea and West of Scotland, including 4 years' closures of grounds adjacent to Northern Ireland during the traditional high cod fishery at the spring and spawning season, and swingeing cuts to quotas.

4.9 However, local fishermen dispute both the scientific evidence and the methodologies. By way of example they indicate the high incidence of haddock in the Irish Sea, compared with the particularly severe cut in haddock quota imposed at December 2002 Fisheries Council.

EU Fisheries Council Decisions

4.10 Quota cuts and other fisheries access constraints are managed in line with Fisheries Council decisions, and are deemed necessary for future sustainable fisheries exploitation, particularly to preserve the long-term future of commercially exploitable cod stocks in the Irish Sea. Irish Sea recovery measures over the past 4 years, 1999-2003, have prevented vessels that target cod (and other whitefish species) from fishing for these species across the main traditional fishing grounds during the normal "peak" period from mid-February to the end of April. Fishermen have responded to the closures in various ways. Inspectorate monitoring indicates high compliance, with the majority of vessels tying up and facing reduced earnings, while others, who can change gear configuration, have diversified into nephrops targeted fishing for the period – with adverse consequences for quayside prices of nephrops, and resulting pressure on the already reduced nephrops quota allocations.

4.11 At the overall level, Northern Ireland has maintained its share of the UK quota in a range of stocks, but the fleet's quota-based fishing opportunities are still declining. Year on year reductions to key UK quotas in 2003 broadly reflect the extent of reduced fishing opportunities (and potential for generating earnings) for the NI demersal or semi-pelagic fleet this year:

a. 39% reduction in Cod VIIa;
b. 55% reduction in Haddock VIIa;
c. 52% reduction in Plaice VIIa;
d. 50% reduction in Whiting VIIa.

4.12 Cuts in the Total Allowable Catch (TAC) and relevant Member State quotas in the Irish Sea (ICES and VIIa) have direct impact on the Northern Ireland fleet, which has a major share of the UK quota for this sea area. These constrain the amount of fish which may be landed. As quotas reduce, the difficulties of swapping in quota from other Member States or indeed from other UK fishermen's organisations increase.

4.13 These reductions in TAC translate directly into reduced quotas, ie cuts in legal fishing opportunities, and are reflected in recorded landings into Northern Ireland, which show a clear decline in both volume and value of landings since 1999.

Table 8 Liveweight and Estimated Value of Recorded Landings of Fish by Northern Ireland Vessels into Northern Ireland 1999-2002

	1999		2000		2001		2002		1999-2002	
	TONNES	(£000s)	TONNES	(£000s)	TONNES	(£000s)	TONNES	(£000s)	Tonnes	Value
Pelagic										
Herring	2,674	276	2,133	213	4,074	833	2,074	243	-22%	-12%
Mackerel[8]	453	82	3,100	700	1,010	211	1,044	473	130%	+480%
Horse Mackerel	551	57	624	57	902	92	499	52	-9%	-9%
Pelagic Total	3,677	415	5,858	970	5,985	1,136	3,617	768	-2%	+85%
Demersal										
Cod	1,632	2,464	885	1,412	775	1,228	1,120	1,792	-31%	-27%
Haddock	1,552	1,597	1,121	1,334	1,190	1,343	649	697	-58%	-56%
Hake	617	1,361	463	970	259	626	275	716	-55%	-47%
Monk/Angler	268	504	175	315	179	364	225	461	-16%	-9%
Plaice[9]	152	111	137	75	151	81	197	135	30%	22%
Saithe	274	122	177	61	199	95	251	105	-8%	-14%
Whiting	1,173	744	622	376	480	276	316	197	-73%	-74%
Other Demersal	3,072	2,363	2,303	1,625	3,087	2,503	3,466	2,930	13%	24%
Demersal Total	8,741	9,266	5,883	6,168	6,320	6,516	6,500	7,033	-26%	-24%
Total Wet Fish	12,418	9,681	11,741	7,138	12,305	7,652	10,118	7,801	-19%	-19%
Total Shellfish	7,374	11,867	7,506	9,474	6,913	10,059	6,975	9,500	-5%	-20%
of which Nephrops	6,316	10,658	4,926	7,792	4,766	8,399	4,689	7,592	-25%	-29%
Total All Fish	19,792	21,548	19,247	16,612	19,218	17,711	17,092	17,301	-13%	-20%

Source: DARD

[8] Increases in Mackerel partly due to new harbour opened in Derry.
[9] All this changed in 2003 due to new quotas.

Hague Preference

4.14 The decline in cash value of landings (by over a quarter in real terms over the 3-year period) indicates an urgent need for the catching sector to seek to maximise the value of fish landed. This will likely include core of the catch and quality practices, and other actions to access the market more effectively. However the availability of cheap imports may also distort the market. On the other hand, quality and traceability are increasingly important for both buyers and niche retailers, and restaurants. Thus the decline in value is not likely (if proper quality and market-led practices are embraced) to be a long-term feature of the market.

4.15 Hague Preference is a mechanism which Member States may invoke when the Agriculture and Fisheries Council reduces TACs of certain stocks below a certain level. The Hague Preference formula is intended to alter the annual allocation of EU Fisheries TACs in favour of those Member States whose coastal communities are dependent on fishing, thus reducing the socio-economic impact of reduced TACs.

4.16 In practice, however, its invocation militates against the local fleet. In 2003, for example, it reduced the UK's quota for Irish Sea cod by 270 tonnes, Irish Sea plaice by 428 tonnes and Irish Sea whiting by 71 tonnes. (The UK as a whole does have some gains resulting from its invocation. In 2003, 133 tonnes of West of Scotland cod and 143 tonnes of West of Scotland whiting were secured through Hague Preference.)

Fleet Profitability

4.17 A recent Seafish survey of fishing incomes, commissioned by the Taskforce, confirms the pressure on fleet profits across all sectors. An analysis of the financial performance of the whitefish semi-pelagic fleet has shown that earnings increased in 2002 compared to the 2000/2001 period. However, based on preliminary analyses of estimates, expected earnings for the 2003/2004 period will fall again, likely reflecting the increase in restrictions placed on the fleet as a result of 2002 December Fisheries Council decisions. Fishing expenses on the contrary are expected to rise by 10%, largely due to the increase in fuel prices. This will have an impact on the crew share, meaning reduced crew earnings for the period. Also, a substantial number of vessel owners reported an increase in their insurance premiums of between 20 - 30%, a further increase in vessel owner expenses. It is likely that many vessel owners may choose to make a balancing reduction in expenditure on non-essential repairs and vessel maintenance.

4.18 Earnings in the Nephrops fleet during 2002 also rose compared to earnings in 2001. However, as in the whitefish fleet, earnings are expected to fall once again in the 2003 period due to the continued fall in prawn prices. This is a major issue amongst the prawn boats owners and there are concerns that, should prices continue to fall, it would no longer be economically viable for them to fish. The 20% increase in insurance premiums has affected the prawn fleet. Fishing expenses in the nephrops fleet have risen by an estimated 5% compared to the 10% in the whitefish sector.

Impact of Supply Problems on Processors

4.19 As part of the industry survey work commissioned by the Taskforce, Seafish Industry Authority compared the financial performance of the Northern Ireland processing sector with that of similar processing units UK wide, according to the type of unit:

- Primary Processors with 1-25 employees
- Mixed Processors with 1-25 employees
- Shellfish processors with 1-25 employees
- All shellfish processors

4.20 The financial data indicates that across all four sectors in the UK there have been substantial losses as the sector has been operating with lower margins. Issues over continuity of supply have a major impact on the sector, particularly on the smaller processing companies which are less able to purchase imports and rely on local supplies.

4.21 Fish purchases account for the largest proportion of operating costs with shellfish processors' purchases of raw material accounting for almost 60% of their turnover. Mixed and primary processors typically spend 67.8% and 75.8% respectively on raw material. The lowest margins exist in the primary processing sector and it is not uncommon to find processors moving into mixed processing in an attempt to improve profitability by adding value to their products. This report does not comment in detail on the characteristics of the market for processed seafoods – but issues of quality, traceability, market demands and access to markets are clearly critical.

Government Responses to Pressures on the UK Fishing Industry

4.22 Nationally, the Prime Minister's Strategy Unit has set up a Review to make recommendations on the medium term prospects for the UK Fisheries Industry. Ian Pearson MP, is a member of the Steering Group for this exercise, and representatives from the two Producer Organisations form part of the advisory Stakeholder Group. The Review Team visited Northern Ireland for a fact-finding visit during a series of UK wide on the spot investigations.

4.23 In the wake of December EU Council decisions the 3 UK Fisheries Ministers announced a Decommissioning Grant of £60million for the fishing industry in January 2003. This was an urgent response to the December Council decisions, and Ministers indicated that the new money should be directed to help support restructuring, and a sustainable UK fishing industry with a long term future.

4.24 The DARD contribution of £5m for a new decommissioning scheme is assisted from an FIFG funded scheme under the Building Sustainable Prosperity Programme. DARD has conducted a consultation with industry on the detailed criteria and eligibility arrangements for the proposed decommissioning scheme. The business case for the scheme argued that it would help balance fishing opportunities with actual fishing effort, allowing redistribution of legal fishing opportunities to make remaining vessels more competitive, enabling further investment in a smaller, more environmentally sensitive, better targeted fishing fleet and enabling those fishermen who wish to leave the industry, to do so with adequate compensation to diversify or retire (subject to individual circumstances).

4.25 In addition, DARD is developing a scheme, which will also be the subject of detailed industry consultation, to encourage sustainable fishing practices by compensating vessel owners for temporary compulsory tie up. Such a scheme would cover short term closures, consistent with FIFG Regulations, and would be part-funded from European Structural Funds. This scheme is planned in response to four successive years of emergency cod recovery closures, and the incremental impact of quota reductions.

4.26 Commission proposals for longer-term cod recovery also envisage the introduction of effort control measures not only in the North Sea and West of Scotland, but also its extension to the Irish Sea. Associated European Council Regulations allow Member States to provide short-term, temporary and non-recurring compensation for closure or tie-up, linked to clear evidence of significant loss of earnings as a result of recovery measures. The Scottish Executive has embarked on such a scheme, and DARD is drawing on SEERAD experience to assist in developing a robust scheme as part of a range of measures which help promote sustainable fisheries, without encouraging dependency.

4.27 Issues under consideration by the Strategy Unit's work to develop a strategy for the future of the UK sea fishing industry are pitched at a UK level. They will include broad recommendations on fisheries management, science and policy for a sustainable future of the industry. These recommendations will need to be taken forward and implemented by government departments and the industry.

4.28 Since 2000, and consistent with Common Fisheries Policy, Northern Ireland schemes have not included any grant aid to new build or modernisation which might increase effort. Although there has, over the past decade, been a generous grants regime in Northern Ireland, linked to its Objective 1 and transitional status, the fleet renewal subsidies in the Republic of Ireland (currently being phased out), have attracted critical comparison from Northern Ireland's fishing industry, many of whom see fleet renewal as an essential element of fleet restructuring. In addition, the industry seems to have been more transparently engaged in preparations for European negotiations.

Scotland and the Republic of Ireland

4.29 While acknowledging that the fisheries management measures which have been adopted by the European Union over the past decade are often focused on controls to prevent over-fishing, evidence of a continued confidence in the future of the fishing industry is found in the relatively recent publication in the Republic of Ireland and Scotland of strategic frameworks setting out the future development of the industry.

4.30 In both countries, the strategic development of the industry is located within the wider context of rural development. Common also to the strategic approaches is an emphasis on the protection or conservation of stocks to ensure the longer term sustainability of the fishing industry. That the latter implies a restructuring within the fishing industry, particularly in relation to the whitefish fleet, is recognised in each strategic approach. In addition, the need to diversify both within the fishing industry and into non-fishing activities likewise is recognised.

4.31 Underlining its commitment to the industry set out in its strategic framework, the Scottish Executive, in January 2003, announced an aid package of up to £50m to assist Scotland's fishing communities. The policy objectives were:

- to pursue sustainable development in the fisheries sector, as the Executive viewed sustainable fisheries as the best long-term guarantee of economic prosperity for Scottish fishing communities; and
- to facilitate rational economic planning, and a process of structured change in the sector.

4.32 A transitional element of the package consisted of up to £10 million (linked to a tie-up scheme) to secure a six-month breathing space for the industry to adjust in a structured manner to the December 2002 Fisheries Council Decisions. In the Republic of Ireland it appears that no specific aid package was announced in relation to the December 2002 Fisheries Council Decisions.

4.33 The Taskforce also sought information from Maine in the United States of America for a comparative view. Following recent receipt of the information, which mainly covered fisheries issues, further consideration will be given by the Steering Group responsible for overseeing the implementation of the Action Plan.

CONSULTATION FINDINGS

5.1 The Taskforce was very keen that all interested bodies and individuals not directly represented on the Taskforce itself should have an opportunity to express their views on the likely implications of the EU Council decisions, including those for the wider community, and suggest any appropriate measures which might be required to address the anticipated problems. It was important therefore that all those who had an interest in the fishing industry and the communities supported by it had an opportunity to contribute to the consultation.

Purpose

5.2 Consistent with the Taskforce terms of reference, the purpose of the consultation was to receive:

- views on the problems facing the fishing industry, with particular regard to the implications of the most recent EU Council decisions;
- views on the potential impacts for the fishermen, their families and the local communities; and
- contributions to inform the work of the Taskforce on what remedial actions should be undertaken by Government, District Councils and others.

District Council meetings

5.3 The three Councils arranged and chaired the public meetings with affected local groups. Meetings at which the Taskforce representatives were in attendance were held in Kilkeel, Ardglass and Portavogie respectively.

5.4 The points raised during the public meetings were recorded and reported back to the Taskforce. Written comments to the Taskforce were also requested with views accepted up to the end of April 2003. A total of 18 written submissions were made during the consultation period. These can be found at www.consultationni.gov.uk/.

Consultation outcome

5.5 A number of key themes emerged from the work of the Taskforce:-

(i) Fishing Industry – diversification and sustainability
(ii) Fishing Industry – consolidating infrastructure
(iii) Fishing Industry – improved training and education
(iv) Enhanced Tourism
(v) Effective Communications and Public Relations
(vi) Environmental improvement

5.6 The themes provided the basis for the draft Action Plan set out in Chapter 7.

5.7 *Diversification and Sustainability*: A wide range of proposals was received in this area, with the focus upon how to support those within the industry, but also provide opportunities for those wishing to leave. The industry expressed concern that grant schemes are focused on reducing the capacity of the fleet rather than helping the fleet adjust and consolidate within an increasingly difficult industry. Key themes to emerge were:

(i) Quotas: A number of respondents stated that a mechanism should be adopted to ensure that quotas are retained within the Northern Ireland industry and proposed the establishment of a fund to purchase quotas that have been/are to be decommissioned.
(ii) Decommissioning: Some respondents emphasised the need to ensure that decommissioning schemes were not so restrictive as to prevent reinvestment in the industry. In addition, some felt that white fish stocks should not necessarily receive the bulk of any decommissioning funds but that others such as prawn boats should be given parity of access.
(iii) Aquaculture: Some respondents commented that there should be support for those wishing to invest in aquaculture, allowing for diversification within the industry and traditional fishing operations to continue.
(iv) Leisure-Tourism possibilities: Some respondents stated that this could include water based activities, angling opportunities or recreational infrastructure to reflect the strong fishing heritage of the villages. Others commented that fishing village 'package holidays' could be developed.
(v) New product development: A few respondents stated that consideration should be given to new produce development, building upon the notion of catch to table and promoting local produce. It was suggested that this could be taken forward through a Seafood Cookery School.
(vi) More generally the need for better marketing and a market-led process was raised. Other issues raised included the impact of removing industrial derating; and queries concerning the validity of scientific research relating to the current level of fish stocks.

5.8 *Consolidating Infrastructure*: A significant number of respondents consider that infrastructure improvements are needed in the three main fishing villages, with some arguing the need for a new harbour at Kilkeel. It was also suggested that any such plans could be incorporated into tourist interfaces, improving both leisure and commercial potential. A further argument was the need for increased safety. Road access to the ports was also identified as an area of concern.

5.9 *Improved Training and Education*: Respondents commented that appropriate training is needed both for those in the industry and those wishing to diversify into other areas. A "centre of excellence" was also proposed, which could incorporate training, laboratory provision and facilitate the wider industry. Some concern was expressed that more would need to be done to attract young people into the industry through appropriate training.

5.10 *Enhanced Tourism*: In terms of the consultation responses this theme was inter-related with those of environmental, infrastructure and sustainability improvements aimed at raising the standard of amenities in the villages more generally. The three villages should be made more attractive as tourist destinations, with the provision of improved facilities and attractions for those visiting the areas. A number of respondents stated that a marketing initiative could be adopted through which the three villages could be marketed on an integrated basis.

5.11 *Effective Communications and Public Relations*: Concerns were expressed in relation to the negative image of the fishing industry and the adverse impact this can have on profitability and recruitment. It was considered that action should be taken to redress this problem, putting forward a more positive image of the industry and capitalising upon its success factors and the proximity of local produce. It was also proposed that a marketing strategy should be taken forward in respect of both the commercial sector and tourist attractions. In order to address this, a number of respondents felt that broadband access would be beneficial.

5.12 *Environmental Improvement*: Respondents expressed widespread support for environmental improvements to the three villages on the basis of either health or tourism-related grounds. It was envisaged that this would lead to improved commercial and industry facilities, while also bringing a much needed facelift to the villages in order to attract tourists. A range of proposals was made in relation to coastal paths/walkways, the maintenance of harbour facilities and general street improvements.

5.13 The predominant messages from the public meetings and the consultation more widely were about the need to restore confidence in the industry itself. Some respondents expressed a desire to see the implementation of a programme of economic regeneration aimed at not only the fishing industry but also the wider wellbeing of the three villages. There was also limited support for the provision of increased business development and a request for a co-ordinator to help with obtaining grant advice from departments and elsewhere.

Tri-Council Fisheries Support Group, District Councils, Other Key Stakeholders

5.14 Taskforce representatives met directly the Tri-Council Fisheries Support Group on three occasions. A meeting was also arranged with the Fishery Harbour Authority, a statutory body responsible for managing harbour infrastructure.

Seafish Survey

5.15 The Taskforce commissioned Seafish to carry out research to ascertain the views of those involved in the industry. Seventy six face to face interviews were conducted with representatives from the various sectors, that is, processing, catching and onshore related businesses. In addition questionnaires were distributed to fishermen. A number of key themes emerged as follows.

5.16 *Workforce*: The research highlighted that fewer young people are coming into the fishing industry, a factor exacerbated by the difficulties of recruiting and retaining staff, and the relatively low levels of training that are undertaken. Respondents felt that these difficulties could be tackled through improved terms and conditions and the provision of a "Centre of Excellence". However, it was recognised that the industry itself must also take steps to ensure more active training participation by staff.

5.17 *Financial Performance*: It is anticipated that earnings in both the white fish and nephrops sectors will fall during the current year. In addition there have been substantial losses in the processing sector due to the low margins at which they operate.

5.18 *Industry Support*: Interviewees expressed concern in relation to obtaining Jobseekers' Allowance, with two thirds of interviewees contending that fishermen should be treated as a special case. Over 90% of interviewees had not claimed JSA in the last 12 months, due to the problems in applying and difficulties in claiming JSA for short periods while unable to work.

Share Fishermen and Social Security Matters

5.19 During the work of the Taskforce and public consultation, a number of organisations and individuals have raised the issue of access to social security benefits as a particular problem for share fishermen. While Unemployment Benefit legislation recognised the position of share fishermen, Job Seekers' Allowance (JSA) does not.

5.20 Share fishermen claim JSA when they are unable to work due to circumstances outside their control such as:

- Closure of Irish Sea fisheries;
- Quota restrictions;
- Repairs to vessels; and
- Dangerous weather conditions.

5.21 Fishermen feel that they are not really job seekers in these circumstances. The need to be interviewed by a client advisor before a claim can be processed was seen as a particular problem. The fishermen are not looking for alternative employment and by the time the interview is arranged they are often back at sea and unable to attend. Fishermen believe that JSA regulations need to be amended to take account of the circumstances of this industry.

5.22 The Taskforce agreed that this is likely to be a UK wide problem and the issue should be formally drawn to the attention of the PM's Strategy Unit with a recommendation that it is taken up with the Department for Work and Pensions - see Action Plan under Effective Communications and Public Relations.

THE ECONOMIC AND SOCIAL CHALLENGES FOR SOUTH DOWN

6.1 This chapter looks at the challenges to the fishing industry and also covers the on-going support to the industry.

6.2 The Taskforce has attempted to identify the social and economic implications of the changes in the fishing industry and the needs of the fish catching, fish processing and wider population of the three villages in a co-ordinated way. The evidence base included: comparative research; a socio-economic profile of the three villages; consultation exercises across the three villages; and an in depth survey of both the catching and processing sectors (including PEST and SWOT analyses).

6.3 The evidence set out in Chapter 2 of this report indicates that the three South Down villages do not differ significantly on key socio-economic indicators from what might be described as the Northern Ireland average. Furthermore, in relative terms none of the fishing villages could be described as experiencing significant deprivation. A key challenge for the villages, therefore, is to maintain, and where possible enhance, this position in the face of the pressures on the fishing industry.

6.4 Over the last decade, the number of boats in the over 10m fleet has reduced in each port. Few over 10 metre vessels are modern – none are less than 10 years old. There has also been a substantial reduction in employment in the fishing industry and recent years have seen notable declines in net profit. Furthermore, confidence within the sector is perceived to be low and, partly as a result, recruitment and retention problems are evident. There are crew vacancies on the boats and it is anticipated that any redundancies resulting from the Decommissioning Scheme could potentially be absorbed on other vessels – although owners are known to have been cutting down on crew size to reduce costs and increase profitability (sometimes with adverse effect on safety and quality on board). (This assumes also that final quotas (see note at 3.11) will be purchased from within the NI fleet, and that catch levels per vessel, and crew shares, will increase. However, to retain market prices and share, care of the catch, and rationalisation and co-operation, must also become stronger features of the local catching sector.)

6.5 The fishing industry has expressed concern at increasing financial pressures including increases to fuel and insurance costs. Businesses must, in order to meet these challenges, review their strategies, eg through providing high quality fish which attracts premium rates in certain markets and through exploring higher value-added products delivering better margins, as well as examining cost reduction measures throughout the business.

6.6 Whilst the processor sector has not experienced the same level of employment decline as the producer sector, financial data indicate that right across the sector, profit margins have been reducing. Northern Ireland processors appear to have a relatively high dependency on landings at auction, but also face challenges about continuity of supply of raw material at the right price and quality.

6.7 The catching industry in Northern Ireland may indeed be reduced to a size where critical mass becomes an issue. Strategic alliances and a more pro-active involvement in promoting a coherent action plan for the industry are essential, and fishermen's representatives face challenges here. Further development of European Fisheries policy will inevitably continue to require a modern industry which can hold its own in competition with others. Sustainable development of the fishing industry has the potential to help contribute to the long-term social and economic prosperity of the South Down Villages. Sustainable development however implies a process of structured change in the industry and diversification within and beyond the industry.

6.8 A significant focus of the Taskforce work has been the challenges facing the industry itself. This report has mentioned difficulties with recruitment and retention; lack of confidence; and the ageing nature of the fleet. A decommissioning scheme is currently being implemented and this will cause a further reduction in the NI fleet by approx 15-30 vessels affecting an estimated 70-100 crew. It is important that the industry uses this opportunity to re-invest in the fleet, and to consolidate quota holdings, without increasing fishing effort on stocks, subject to recovery and management plans.

Wider Socio-Economic Issues

6.9 The Taskforce considered the wider socio-economic challenges for the local areas. During consultation, the potential to improve tourism opportunities was identified. Environmental improvements were a priority, and would, it was suggested, complement approaches to improving tourism potential. The fishing industry noted that improvements in areas of tourism, environment and economic and social regeneration should be taken forward in a way which does not have an adverse impact on the fishing industry in these areas.

Fishing Villages Initiative 1994-1999

6.10 In recent years there have been a number of Government interventions to address the socio-economic needs of the fishing villages. The Rural Development Programme (NI) 1994-1999 had as a key objective 'to stimulate the economic and social revitalisation of the most disadvantaged rural areas of Northern Ireland through partnership between the public, private and voluntary sectors'. The former Department of Agriculture worked on the basis that local people were best placed to identify local needs and that those communities should be encouraged to manage local actions.

6.11 In February 1994, the Department of Agriculture and the International Fund for Ireland (IFI) announced a new initiative as an integral part of the Rural Development Programme. The Fishing Villages Initiative aimed to develop community-led economic and social regeneration projects within Northern Ireland's main fishing dependent communities, namely Annalong, Ardglass, Kilkeel and Portavogie.

6.12 An initial £4 million was allocated to the Programme at its launch in February 1994, and by the end of the Programme, the Fishing Villages Initiative had invested £5.1 million in projects worth £7 million in total in Co Down's main fishing dependent villages.

6.13 To date the projects have contributed to the regeneration of the fishing villages through community-based actions. The benefits of the investment range from the provision of workspace and direct job creation in Annalong, Portavogie and Kilkeel to the creation in Ardglass of Phennick Cove Marina.

EU PESCA Programme

6.14 County Down's four most fishing dependent villages also benefited (during 1997-2001) from £2.025 million investment through the EU's PESCA Initiative. This funding was available to public, private and community organisations who wished to initiate regeneration projects focusing on training, the fishing industry and general infrastructure, to assist in addressing the adverse effects within the NI fishing industry due to the introduction of quotas and decommissioning. In total, 60 projects were supported within the fishing dependent communities.

Co Down Fishing Villages Network

6.15 During 1999, the four community groups that had benefited from support through the DARD/IFI Fishing Villages Programme formed an informal network that meets on a regular basis in order to work together for the collective benefit of the villages. The forum was created to share experiences of community regeneration and also to undertake projects through collective action. PESCA funding of £20,000 was initially awarded to the Network to undertake a number of educational and fact-finding visits within the British Isles to areas experiencing similar problems that had implemented successful regeneration strategies. Funding was also provided for the generation of newssheets on the groups' activities. Since then, the group has continued to meet and has recently been instrumental in securing funding for a number of European visits and delivering an annual "Festival of Fish" within the four target villages. The Secretariat of the Network is provided by Kilkeel Development Association.

On-going Community Work

6.16 The Rural Development Programme provides support to the Rural Community Network (RCN) to build sustainable rural communities. RCN's functions include the identification of needs in rural communities and aims to encourage participation within communities by building the capacity of local communities to represent themselves as key stakeholders.

6.17 Funding, training, community consultations and research can be provided by the RCN via the Rural Support Network. In the Mourne Area of Outstanding Natural Beauty (AONB), such support is provided by ROMAL Ltd, while East Down Rural Community Network provide the same service for Ardglass and Portavogie's communities.

Financial Support to the Fishing Industry

6.18 Direct financial support to the fishing industry is provided through Fisheries Division in DARD and in the current financial year amounts to nearly £8.4 million. This covers expenditure on the Decommissioning Scheme, Safety Equipment and Training Scheme, Ports and Marketing. In addition financial support is available through the Rural Development Programme 2001-2006.

6.19 Over the period 2000-2006, DARD has available a range of grant schemes to improve the competitiveness and sustainability of the NI Fishing Industry. These comprise:

Building Sustainable Prosperity

Scheme Description	Funding available by way of grant
Decommissioning	£9.746m
Safety Equipment & Training	£0.145m
Scrap & Build	-
Marketing & Quality on Board Fishing Vessels	£0.655m
Ports Infrastructure	£7.341m
Aquaculture	£1.164m
Processing & Marketing	£1.820m
Joint Marketing Initiatives	£1.293m

Collective Operations – Fishing Industry	£1.239m
Small Scale & Coastal Fisheries Initiatives	£0.459m

PEACE II
Scheme Description

Cross Border Fishing & Aquaculture Co-operation	£0.651m

INTERREG II
Scheme Description

Cross Border Marine Safety & Port Infrastructure	£4.777m

The current state of spend and future management of these schemes is summarised at Annex 2.

Enterprise

6.20 The Northern Ireland Business Start Programme (NIBSP) is funded by Invest Northern Ireland in association with Northern Ireland's District Councils and the European Union. Start-up rates resulting from the NIBSP are on target in each of the three Council areas, with approximately 660 new businesses created in the last two years across those areas. NIBSP is available to those moving into self-employment and is therefore relevant to fishermen or those in the processing industry considering diversification into new activities.

Marketing

6.21 Invest NI is involved in a wide range of activities to promote Northern Irish produce (including locally produced fish products) in external markets. Fish processing companies can avail of a range of Business Improvement Services such as profit improvement and finance programmes, guidance on marketing and new product development and advice on ICT, broadband, quality, and health and safety issues.

Training

6.22 The Department for Employment and Learning (DEL) provides labour market support services to the three fishing ports. Programmes provided include New Deal, Training for Work, and Job Skills. Young people under the age of eighteen are supported by local Careers Officers. Other support and advice is also provided.

6.23 The Taskforce wishes to highlight in particular the potential for development of training for the fishing industry. The local industry training forum, Sea Fishing Industry Training Association (NI) Ltd (SFITA), is nearing completion of the development of NVQ Levels 2 and 3, and accredited assessors are in place.

6.24 Due to the development of both NVQ Levels 2 and 3, the industry will shortly be in a position to deliver Modern Apprenticeship training subject to the framework being adopted by DEL, who advise that the next stage is to contract with one or more recognised training organisations to deliver the qualification. DEL also advise that the delivery processes could be operational within weeks and that it anticipates that the agreed framework will be that only NVQ Level 3 training for the fisheries industry will be acceptable for Jobskills funding. Achievement of the Modern Apprenticeship is also dependent upon successful completion of a number of mandatory courses.

6.25 To date no provision is available or planned for existing employees under Accreditation of Prior Learning/Achievement. This is due mainly to the fact that there are no suitably qualified Industry assessors. It may take a number of years to put the process in place.

6.26 There are numerous accredited "off the shelf" Northern Ireland-adapted qualifications and training programmes for the fish processing industry. The majority of these qualifications including the Modern Apprenticeship fall within the remit of Food Preparation and Meat Processing (eg fish filleting).

6.27 In the aquaculture sector, there is no accredited Modern Apprenticeship qualification route in Northern Ireland. There are a number of practical "on the job" courses including NVQ Level 2 traineeship in Fish Husbandry. DEL has no immediate plans to develop any course, however, they would willingly pursue the matter if approached by the industry.

6.28 Aquaculture in Northern Ireland encompasses the Finfish and Shellfish Sectors. The Finfish sector is primarily freshwater trout farming which provides direct employment for 60 people and with an estimated further 70 jobs in activities supporting the sector. Marine Finfish (Atlantic salmon) is represented by a single salmon farm situated off the Antrim Coast employing c18 people with approximately a further 20 in support.

6.29 Diversification of the range of aquaculture products is the key to the overall future development of the finfish sector. Species such as charr, pollan, eels and perch are of significant interest to NI's freshwater sector, while species such as cod, turbot and haddock are of increasing interest for development in the marine sector.

6.30 Shellfish farming has taken place in NI since the 1970's and is an important component of the coastal communities activities. Employment is estimated at around 70 on-farm jobs of which 32 are full time. Further employment is generated in the supply and maintenance sectors, packing, depuration etc to the extent of c 25 additional jobs. The main shellfish production areas are Larne Lough, Strangford Lough, Dundrum Bay, Carlingford Lough, Foyle, Killough and Belfast. The principal species are Pacific and Native oysters, and blue mussels. Scallops and Manila clams are also being cultivated to a smaller extent and more recently abalone. At present the primary markets for shellfish produced in NI are France, Holland, UK and ROI.

Aquaculture in Northern Ireland

6.31 Aquaculture in Northern Ireland has tremendous potential for expansion but in order to achieve this, further investment must be found from both the private sector and via grant aid. An early assessment of the amount of investment, in order to treble NI's production from 5,511 tonnes to 28,901 tonnes with an estimated value of £14.2m, is £4.7m.

6.32 Should an increase in production occur, it would have an impact on the processing sector in the fishing villages of Ardglass, Kilkeel and Portavogie as it would ensure supply of product to the processors and sustain employment.

6.33 In support of the direction in which EU policy is taking, the Department of Agriculture and Rural Development is currently developing its own Aquaculture Strategy in order to support the industry in achieving its maximum potential.

Other Central and Local Government Support

6.34 The Department for Social Development administers the Urban Development Programme (UDP) on behalf of the IFI. The aim of the programme is to bring vacant or partially vacant property in town and village centres back into commercial use. Since 1999 the total amount awarded to the three fishing ports is £218k. UDP funding is still available.

6.35 Other departmental programmes underway or planned in the three main fishing villages and surrounding areas include infrastructure improvements in the road network such as road realignments and provision of new footpaths. The villages are also scheduled to benefit from major investment in the water distribution and sewage treatment network by the Department for Regional Development amounting to £8m across the 3 main fishing villages over the next 10 years.

6.36 Local Government financial support is also available to the fishing villages and includes both direct and indirect support to the fishing industry and affected communities. This ranges from business development support and start up schemes, advice, to support for tourism and community activity and provision of community facilities.

Conclusion

6.37 For some time now the Northern Ireland fisheries industry has been operating in a highly uncertain and changing environment. Despite this difficult climate a number of ways to improve opportunities and efficiency for the industry do exist. Key to meeting the challenges faced by the villages and surrounding areas is a co-ordinated and integrated approach and the pursuit of appropriate policy objectives and measures for the areas. The Action Plan outlined in Chapter 7 includes steps to assist the industry as part of a wider approach.

ACTION PLAN

Introduction

7.1 This chapter reviews the way in which the Taskforce has sought to address the Terms of Reference set for it by the Minister, as listed in Chapter 1.

7.2 The Taskforce is mindful that the work of the Prime Minister's Strategy Unit on developing a strategy for the future of the UK sea fishing industry will continue after the Taskforce has itself reported. Within the Action Plan there are a number of issues that the Taskforce has referred to the Strategy Unit team. Equally, there are likely to be proposals emerging from the Strategy Unit review that will be relevant to Northern Ireland. Nonetheless, the Taskforce believes it should be possible for work to proceed at an early date to take forward the Action Plan.

7.3 The potential implications of successive EU Fisheries Council outcomes for the fishermen and the communities which depend upon them have been addressed mainly in Chapter 4 of the report. The needs of the fishermen and their local communities have been identified in Chapters 2 to 6 of the report. A review of the sources of support available or potentially available to the fishing villages is shown in Chapter 6.

Action Plan

7.4 The actions within the Action Plan which follows are grouped within the key themes identified in consultation and agreed by the Taskforce. The Action Plan also sets out, under each theme, recommended supporting policy objectives and actions in support of those objectives.

7.5 The industry is facing significant challenges at present, but many in the industry see a sustainable future for it in the long term. Adaptation to change will be necessary, but fishing communities have always by necessity been adaptable and resourceful communities. Their way of life is in many ways unique. It is not only vulnerable to the elements: where fish can be found, and of which species, depends on nature and man's interaction with it, both of which are difficult to observe accurately and to control. Fishermen argue that supra-national initiatives are not well placed to legislate or respond flexibly or speedily to changes in the fisheries' environment and have therefore not been properly accounted for by EU and other industry legislation-making bodies.

7.6 It is clear from the work of the Taskforce that the fish catching and processing industries wish to remain at the heart of the social and economic life of these communities. It is equally clear that fish are an extremely significant natural resource for these communities which people in Northern Ireland and beyond wish to consume, and to be able to continue consuming for generations to come. This Action Plan is about ensuring a sustainable fishing industry in NI; about ensuring an appropriately skilled workforce to provide and process the product; and about developing the social and economic life of the fishing villages in ways which complement the fisheries industry and their existing identities.

7.7 The recommendations in the Action Plan should be taken forward in a way which builds on the spirit of partnership which has characterised the Taskforce's own work. This will involve effort on all sides: from Government, central and local, and at European level, from the industry and from other organisations with which the industry must engage in order to implement the Plan effectively.

Themes, Objectives and Supporting Actions

7.8 Theme: Fishing Industry – Diversification and Sustainability

Objectives

1. To develop an over-arching Strategic Plan for the industry
2. To ensure a sustainable and viable fishing industry
3. To identify diversification opportunities within fishing communities

Actions Supporting Objectives	Lead Responsibility	Supporting Partners
• Develop a Strategic Plan with associated actions and targets engaging all relevant stakeholders as appropriate	DARD	DETI/DSD/ DEL/ District Councils
• Explore possibility of acquiring quota for local use	DARD	FPOs
• Decommissioning/Tie up scheme: Transitional aid	DARD	
• Research into new product development/new markets particularly for existing businesses	DARD/INI	
• Identify opportunities for aquaculture	DARD	

• Provide start-up and development support to new aquaculture enterprises (Note also ongoing NIBSP at para 6.20)	DARD/INI	District Councils
• Identify opportunities for development into other sectors (Note also ongoing NIBSP at para 6.20)	DARD/INI	District Councils
• Identify leisure-tourism possibilities	DARD/District Councils	DETI/PO's

7.9 Theme: Fishing Industry – Consolidating Infrastructure

Objectives

4. To sustain harbour infrastructure to facilitate development of the fishing and tourist industries.

Actions Supporting Objectives	Lead Responsibility	Supporting Partners
• Carry out feasibility study for infrastructure improvements at Ardglass, Kilkeel and Portavogie harbours – revise strategic investment plan	DARD	NI Fishery Harbour Authority
• Undertake a health and safety review of harbour facilities and on fishing boats	DARD	DETI/ NIFHA
• Implement Health & Safety Review proposals	DARD	DETI/ NIFHA
• Provision of Workspace Units in Ardglass, Kilkeel and Portavogie	DETI	DARD/ District Councils
• Examine access/roads (Ards/North Down Area Plan), (Newry & Mourne Area Plan) in and around Ardglass, Kilkeel and Portavogie and surrounding areas.	DRD/DoE	DARD

7.10 Theme: Fishing Industry – Improved Training and Education

Objectives

5. To enhance the area's skills base for those in the seafood industry and those leaving the industry

Actions Supporting Objectives	Lead Responsibility	Supporting Partners
• Identify industry skills: levels, strengths, gaps in the seafood industry	DARD/DEL	GTA
• Identify key education and training requirements in the seafood industry	DARD/DEL	GTA
• Implement career/profession route training standards	DARD/DEL	GTA/FE Colleges
• Develop a schools training promotion programme	DARD/SEE&LB	GTA/PO's
• Develop a programme of outreach training eg with FE colleges in three villages	DARD/FE Colleges	GTA/DEL
• Consider feasibility of establishing training centre of excellence/expansion of Portavogie centre	DARD/DEL	GTA/FE Colleges/ NI Seafood

7.11 Theme: Enhanced Tourism

Objectives

6. To encourage the sustainable development of tourism in the fishing villages and the surrounding area.

Actions Supporting Objectives	Lead Responsibility	Supporting Partners
• Produce a Tourism/Fishing Industry development plan in conjunction with local stakeholders	DARD/DETI	District Councils
• Develop areas in Ardglass, Kilkeel and Portavogie as tourist locations, including harbour estates	DETI/NITB	District Councils/ NIFHA
• Marketing/Promotional activities and care of the catch initiatives including seafood school/restaurants	DARD/District Councils	DETI/ NI Seafood/ DCAL/ NITB
• Build on success of "Festival of Fish"	District Councils	Co Down Fishing Villages Network

7.12 Theme: Effective Communications and Public Relations

Objectives

7. To improve industry communications ie between catchers, processors and others
8. To promote a positive image of the fishing industry
10. To encourage collaborative working and a better understanding between the fishing industry and scientists
11. To maintain and develop relationships between government and the fishing industry by building on the collaborative work of the Taskforce
12. To ensure that the specific concerns of the Northern Ireland fishing industry are voiced and clearly heard, in London and Brussels, and in other key forums

Actions Supporting Objectives	Lead Responsibility	Supporting Partners
• Audit of industry communication infrastructure	DARD	PO's/ Processors
• Better use of IT in industry, community and schools (eg potential for roll-out of broadband)	DETI	DARD/DE/ District Councils
• Promotion and development of locally caught and processed produce	DARD	INI/ Processors
• Appointment of a fisheries/science liaison officer	DARD	POs
• Appointment of a Co-Ordinator	DARD	Project Steering Committee
• Develop programme of visits and seminars	DARD	POs
• Establish working group of fisheries and scientists	DARD	POs
• Support and promote initiatives to improve transparent scientific advice (eg Publish Irish Sea research cruise outcomes)	DARD	POs/NI Seafood
• Marketing/Promotional activities and care of the catch initiatives. (See also Tourism Theme)	DARD	District Councils/ DETI/ NI Seafood
• Raise the issue of access to Social Security Benefits with Department for Work and Pensions	DSD	
• Arrange awareness sessions for SSA staff and share fishermen to clarify procedures and raise benefit knowledge.	SSA/DSD	POs

7.13 Theme: Environmental Improvement

Objectives

13. To enhance the natural and built environment of the villages in order to promote tourism, recreation and rural development

Actions Supporting Objectives	Lead Responsibility	Supporting Partners
• Develop integrated environmental programme for three main fishing villages of Ardglass, Kilkeel and Portavogie	DARD/DSD	District Councils/ DoE
• Support for specific environmental projects, in partnership with community-based organisations, in the Ardglass, Kilkeel and Portavogie areas in conjunction with tourism/regeneration considerations.	DARD/DSD	District Councils/ DoE

DELIVERING THE ACTION PLAN

Delivery Mechanism – Taskforce Steering Group

8.1 The actions outlined in the Action Plan in Chapter 7 would be taken forward and implemented by a Steering Group responsible for overseeing its implementation. The membership of the Steering Group should be broadly similar to the Taskforce with representatives from the fishing industry, District Councils and relevant Government Departments. Given the operational focus of the Steering Group's work it will be chaired by DARD in recognition of that Department's responsibilities both for Fisheries and Rural Development. OFMDFM would continue to have a monitoring role as the work of the Steering Group progresses.

8.2 While DARD would be the lead department important elements would rest with other departments and bodies for funding and delivery of the Action Plan. A Co-ordinator would be specifically appointed for a set period, say three years, to work under the auspices of the Steering Group. Hence, it will be important for the Co-ordinator to be able to liaise effectively with a range of interests. There will be a need for delegated, selective decision-making, subject to Steering Group approval. The Co-ordinator would require a visibility among the communities, and hence should have a local base. Adequate secretarial/administrative back up would be required.

8.3 The Taskforce has worked well and, if implementation is the key issue, then the interests represented on the Steering Group are best placed to do that. The structure already exists and requires to be transformed into a delivery mechanism. Additionally the Co-ordinator would execute a leadership role, providing impetus and direction, which may be absent or diluted otherwise and would also provide a more streamlined approach. Finally the Steering Group should incorporate members who have first-hand knowledge of the problems within their sphere of activity and local areas.

REPORT FROM THE TASKFORCE FOR SOUTH DOWN

Table A(1).1 Economic Activity - All Persons (Percentages)

	All persons aged 16-74	Persons aged 16-74:									
		Economically active:					Economically inactive:				
		Employee - full-time[1]	Employee - part-time[1]	Self-employed	Unemployed	Full-time student	Retired	Student	Looking after home/ family	Permanently sick/ disabled	Other
Northern Ireland	**1,187,079**	**38%**	**10%**	**8%**	**4%**	**2%**	**11%**	**6%**	**7%**	**9%**	**4%**
Ards	52,878	40%	11%	10%	3%	2%	12%	4%	7%	7%	3%
Portavogie	**2,549**	**34%**	**10%**	**14%**	**3%**	**1%**	**11%**	**4%**	**9%**	**10%**	**4%**
Down	44,249	37%	10%	12%	4%	2%	11%	6%	7%	9%	4%
Ardglass	**2,006**	**29%**	**10%**	**13%**	**5%**	**2%**	**11%**	**6%**	**8%**	**12%**	**5%**
Newry and Mourne	59,568	32%	9%	11%	5%	2%	9%	6%	10%	11%	6%
Annalong	**2,080**	**31%**	**11%**	**14%**	**3%**	**2%**	**11%**	**5%**	**10%**	**10%**	**5%**
Kilkeel Central	**2,354**	**33%**	**10%**	**13%**	**4%**	**2%**	**10%**	**4%**	**10%**	**10%**	**6%**
Kilkeel South	**1,970**	**30%**	**10%**	**12%**	**3%**	**2%**	**11%**	**5%**	**10%**	**10%**	**6%**
Kilkeel & Annalong	**6,404**	**32%**	**10%**	**13%**	**3%**	**2%**	**10%**	**4%**	**10%**	**10%**	**5%**

Source: Census of Population 2001

Notes:
(1) For the Census; part-time is defined as working 30 hours or less a week. Full-time is defined as working 31 or more hours a week.

Table A(1).2 Qualifications and Students (Percentages)

Area	All persons aged 16-74	Percentage of persons aged 16-74 with: No qualifications	Highest qualifications attained: Level 1[1]	Highest qualifications attained: Level 2[2]	Highest qualifications attained: Level 3[3]	Highest qualifications attained: Level 4[4]	Highest qualifications attained: Level 5[5]
Northern Ireland	**1,187,079**	**41.6**	**17.23**	**16.36**	**8.98**	**10.93**	**4.87**
Ards	52,878	39.3	19.90	17.46	8.86	10.39	4.09
Portavogie	**2,549**	**45.9**	**20.67**	**15.69**	**8.67**	**6.75**	**2.28**
Down	44,249	38.1	18.14	18.33	9.33	11.29	4.73
Ardglass	**2,006**	**43.8**	**17.30**	**16.45**	**9.17**	**10.22**	**2.99**
Newry & Mourne	59,568	44.0	17.21	16.46	8.60	9.44	4.23
Annalong	2,080	47.7	18.32	16.63	8.46	6.68	2.16
Kilkeel Central	2,354	50.8	19.75	14.91	6.54	5.90	2.04
Kilkeel South	1,970	50.8	18.02	14.52	8.98	5.53	2.13
Kilkeel & Annalong	**6,404**	**49.8**	**18.75**	**15.35**	**7.92**	**6.04**	**2.11**

Source: Census of Population 2001

Notes:

(1) GCSE (Grades D-G), CSE (Grades 2-5), 1-4 CSEs (Grade 1), 1-4 GCSEs (Grades A-C), 1-4 'O' level passes, NVQ level 1, GNVQ Foundation or equivalents.

(2) 5+ CSEs (Grade 1), 5+ GCSEs (Grades A-C), 5+ 'O' level passes, Senior Certificate, 1'A' level , 1-3 AS levels, Advanced Senior Certificate, NVQ level 2, GNVQ Intermediate or equivalents.

(3) 2+ 'A' levels, 4+ AS levels, NVQ level 3, GNVQ Advanced or equivalents.

(4) First Degree, NVQ level 4, HNC, HND or equivalents.

(5) Higher Degree, NVQ level 5 or equivalents.

(6) All students and schoolchildren are counted at their term-time address.

Deprivation

The most recent and most comprehensive assessment of deprivation at ward level in Northern Ireland was published in 2001. In the *Measures of Deprivation in Northern Ireland Report,* measurement of deprivation was based on the premise that multiple deprivation is made up of separate dimensions, or 'domains' of deprivation. These domains, the report's authors assert, reflect different aspects of deprivation. Each domain is made up of a number of indicators which cover aspects of this deprivation as comprehensively as possible. The domains used were:

(i) Income
(ii) Employment
(iii) Health deprivation & disability
(iv) Education, skills and training
(v) Geographical access to services
(vi) Social environment
(vii) Housing

Information on domain scores and relative position of the wards examined in this profile is detailed below for multiple deprivation. The ward rank of 1 indicates that the ward is the most deprived in Northern Ireland, with a rank of 566 indicating the least deprived.

Table A(1).3 Multiple Deprivation Score[10]

Ward Name	Multiple Deprivation Measure Score	Rank of Multiple Deprivation Measure Domain*		*The overall Multiple Deprivation Measure describes the ward by combining information from all seven domains: Income, Employment, Health, Education, Housing, Access and Social Environment.
Portavogie	18.17	289		
Ardglass	23.83	206		
Annalong	20.76	249		
Kilkeel Central	22.79	221		
Kilkeel South	24.66	194		

[10] To arrive at a measure of multiple deprivation, the seven separate domain scores for every ward were combined in the report using a variety of statistical operations. In this operation, domains were weighted in the following way: Income 25%; employment 25%; health Deprivation and Disability 15%; Education, skills and training 15%; Geographical Access to Services 10%; Social Environment 5%; Housing 5%.

FISHERIES GRANTS SCHEMES – STATUS AT SEPTEMBER 2003

Scheme	Total Allocation £m 2000-2006	Total Awarded £m to date	Total Remaining £m	Over allocated £m	Spend to Date £m
Decommissioning	9.746	4.408	5.338	Nil	4.408
Safety Equipment and Training	0.145	0.009	0.136	Nil	0.002
Scrap and Build	Nil	Nil	Nil	Nil	Nil
Marketing and Quality on Board	0.655	Nil	0.655	Nil	Nil
Ports	7.341	0.745	6.596	Nil	0.421
Aquaculture	1.164	0.337	0.827	Nil	Nil
Processing and Marketing	1.820	1.416	0.404	Nil	0.134
Joint Marketing	1.293	0.384	0.909	Nil	0.227
Collective Operations	1.239	1.349	Nil	0.056	0.115
Small Scale and Coastal	0.459	Nil	0.459	Nil	Nil
TOTAL	**23.862**	**8.648**	**15.324**	**0.056**	**5.307**
INTERREG	4.777	Nil	4.777	Nil	Nil
PEACE II	0.651	0.651	Nil	Nil	0.083

Note: The total value of applications currently being accessed is £13.375m.
Source: DARD

Taskforce Membership

Edgar Jardine (Chairman), Office of the First Minister & Deputy First Minister

David Fallows, Chief Executive, Ards Borough Council

Tom McCall, Chief Executive, Newry & Mourne District Council

John McGrillen, Chief Executive, Down District Council

Dick James, NI Fish Producers Organisation

Alan McCulla, Anglo-North Irish Fish Producers Organisation

Wesley Newell, Rockall Seafood

Noel Cornick, Department of Agriculture & Rural Development

Eugene Rooney, Office of the First Minister & Deputy First Minister

Liam Quinn, Department for Social Development

Graham Davis, Invest NI

Daragh Shields, Department for Employment & Learning

Vincent McKevitt, Department of Agriculture & Rural Development

Secretariat

Colin Jack, EPU, OFMDFM

Eileen Sung, DARD

Tim Moore, NI Assembly (seconded to EPU)

John Carson, EPU, OFMDFM