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NWWAC feedback to future fisher profiles by the "Fishers of the Future" foresight study

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The North Western Waters Advisory Council (NWWAC) welcomes the opportunity to provide feedback on the Fishers of the Future project, and in particular on the various profiles of future fishers. While we acknowledge the effort to address the evolving challenges and opportunities for the fishing industry, we have several concerns regarding the direction and feasibility of the project's outcomes. Our response aims to critically assess the assumptions, gaps, and the overall vision laid out in the profiles, particularly as they relate to the realities of the commercial fishing sector in the North Western Waters.

The first comment is that the profiles place a significant emphasis on the fishing component of the profession but overlook a crucial aspect: the administrative and managerial roles that fishers increasingly need to fulfil. With the rise of automation, AI, and remote working technologies, there are questions about how these developments will fit into the daily responsibilities of fishers. While automation on board may help with some tasks, it will not eliminate the need for human intervention, especially for tasks such as species identification. Relying on remote data collection and automated systems could exacerbate the complexity of the job, rather than simplifying it.

The project seems to suggest that technological advancements will make life easier for fishers, but this is an oversimplified view. The NWWAC highlights that these innovations could lead to further costs, including the need to invest in new vessels or equipment. Given the current financial challenges within the industry, many fishers may choose to exit the sector rather than adopt expensive and complex technologies. There are also unresolved safety and capacity issues that may arise with the introduction of new technologies.

A significant gap in the profiles is the lack of acknowledgment of the role of Producer Organisations (POs) in marketing and price negotiation. The project suggests that fishers should take on these responsibilities themselves, which is both unrealistic and counterproductive. Marketing, particularly in today's competitive global market, requires dedicated expertise and resources. It is not feasible to expect fishers to market their products effectively or negotiate prices while also managing the daily demands of fishing operations. These tasks require a full-time, specialized focus that fishers simply cannot provide alongside their primary duties.

Another concern is the assumption that there will be enough manpower to support the increased reliance on technology, data collection, and processing. The profiles envision a future where data-driven decision-making is central to fishing operations, but the NWWAC doubts whether there will be enough trained personnel to manage these tasks. Data collection, processing, and analysis require specific skills that may not be readily available within the existing workforce. Without sufficient human resources, the project's vision of a tech-driven fishing industry is unlikely to materialize.

One of the more problematic assumptions in the project is the notion that a single framework could be created to encompass all EU Member States (MS) active in fishing. The AC believes this is impractical due to the vast differences in national and local practices, regulations, and

capacities across the EU. Fishing communities in different regions face unique challenges, and a one-size-fits-all approach would fail to address the specific needs of individual MS. Future scenarios and profiles should be flexible to reflect these national and regional nuances to ensure relevance and practicality.

The NWWAC identifies a key limitation in the use of only two broad profile categories, "large-scale" and "small-scale," as the baseline for this project. These categories fail to accurately reflect the diversity of vessel types and fishing practices across European fisheries. A significant portion of the European fleet consists of vessels in the >12 m to <24 m range, which includes many varied profiles. For example, a 12.1 m vessel should not be grouped under the same category as one larger than 24 m. While large companies do operate in European fisheries, many vessels in the 12-24 m range are family-owned, with most families owning just a single vessel. The project descriptions do not account for this distinction, overlooking a significant part of Europe's coastal fishing communities. A more inclusive approach is needed to ensure the project better represents the full spectrum of the European fishing industry.

The profiles also place an unrealistic expectation on fishers to engage in digital marketing and social media promotion of small-scale products. This expectation fails to take into account the limited time and resources fishers have. Marketing is a full-time job requiring specialized skills, and it is not feasible to expect fishers to manage their own digital presence in addition to their other responsibilities. Such assumptions ignore the logistical and time constraints of fishing operations.

The NWWAC recommends that if the objective of the project is to influence future policies and encourage DG MARE to develop solutions, then the profiles need to focus more on the legislative changes required to achieve the most favourable scenarios. The project should include recommendations for policymakers on how to adapt legislation to support the proposed future scenarios or to mitigate potential negative outcomes. For instance, what new regulations or incentives would be necessary to ensure that the technological advancements envisioned in the profiles are accessible, affordable, and safe for fishers?

Within Scenario 3, the concept of diversification into the blue economy is introduced as a fallback option for fishers if traditional fishing becomes unviable. However, the profiles fail to address the critical issue of skills and training. Transitioning to a new role in the blue economy requires significant investment in education and training, which is not addressed in the current framework. Without a clear pathway for acquiring the necessary skills, this scenario remains speculative.

Furthermore, the NWWAC believes that the project fails to address a critical scenario that could emerge in the near future. At present, fleets from non-European nations, such as China and Russia, are increasingly replacing European fleets in key fishing grounds across the Atlantic (particularly in Africa), as well as in the Indian and Pacific Oceans. The absence of a well-defined EU political strategy is creating significant economic challenges for the European fishing fleet, leading many operators to exit the industry, either through vessel scrapping or sales to third countries. This situation is contributing to a growing reliance on imported fishery products from regions where fleets may not adhere to the same sustainability and good practice standards as those upheld by the EU. Additionally, in some cases, these imports may be linked

to illegal, unreported, and unregulated (IUU) fishing, which poses further risks to the long-term sustainability of global fisheries. These factors should be integrated into the Fishers of the Future project to ensure a comprehensive and forward-looking approach.

Finally, the NWWAC believes it is essential to ground these future scenarios in the current legislative and regulatory framework. A thorough analysis of which scenarios are achievable under existing laws, and which would require significant policy changes, is necessary to make the project more realistic. Without this grounding, the profiles risk becoming overly aspirational and disconnected from the practicalities of the industry.

In conclusion, while the Fishers of the Future foresight study offers an interesting perspective on the potential evolution of the fishing industry, it ignores important administrative and marketing roles and assumes unrealistic capacities for both technology adoption and workforce readiness. To be truly effective, the project must align its scenarios with the current regulatory framework, consider the diversity of the EU Member States, and propose concrete legislative and policy recommendations. Only then can it provide meaningful insights and a viable roadmap for the future of the fishing sector.