

PROJECT UK



**DELIVERING FISHERY IMPROVEMENTS
IN THE NORTH EAST ATLANTIC**



**Annual Report
2020–2021
June 2021**

£1.25bn

In 2020-21, consumers in the UK spent an estimated £1.25 billion on MSC labelled fish and seafood



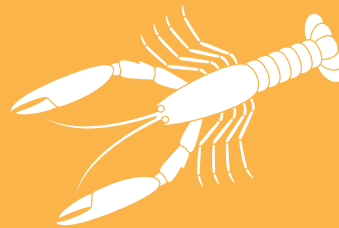
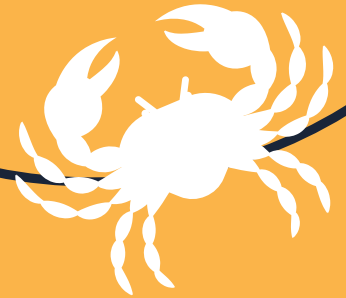
71%

of seafood consumers believe product claims about sustainability and the environment need to be clearly labelled by an independent organisation

(Source: Globescan 2020)

47 species

Between 2015 and 2020, the number of species sold bearing the MSC blue ecolabel in the UK and Ireland increased from 33 to 47



Future

8 in 10 UK seafood consumers believe we need to protect fish for future generations, with 7 in 10 believing that in order to do this we need to consume fish and seafood only from sustainable SOURCES (Source: Globescan 2020)

Tenfold

Over the past 10 years, consumption of MSC certified fish in the UK has increased tenfold in volume

+100%

Between 2015 and 2020, the number of certified consumer-facing products in the UK doubled from over 800 to over 1,600



MSC markets



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Executive summary

This report summarises the activities of Project UK following the 2020-21 external annual review of each Fishery Improvement Project (FIP). Much progress has been made through the hard work and dedication of over 120 participants across the FIP Steering Groups.





Through eight Fishery Improvement Projects, representing 12 fisheries, Project UK is addressing 61 individual improvement actions, each consisting of multiple milestones across a five-year timeframe. These fisheries all bring commercial, economic, and cultural benefits to UK communities and are an important part of the UK's fishing heritage.

Project UK represents best practice in working towards an environmentally sustainable future for all fisheries that partake in the project. The progress made would not be possible without the drive and commitment of Steering Group members and funders, and their continued hard work and support has led to many achievements to date.

Highlights for this past year include:

- Completion of three university Masters projects related to the environmental impacts of fishing;
- Commissioning of five reports by the Centre for Environment, Fisheries and Aquaculture Science (Cefas), each assessing the catch composition of a given fishery;
- A comprehensive review of the impacts of EU Exit on UK fisheries management, related to Principle 3 of the MSC Fisheries Standard;
- Significant progress on Fishery Management Plans by all FIP Steering Groups;
- Establishing the Project UK Advisory Board, to support cross-cutting topics and contribute to future strategic decisions for the wider project;
- Launch of the Project UK website and short promotional film, featured at the virtual MSC Awards.

This year, Steering Groups have encountered multiple unforeseen challenges, including the impact of EU Exit on UK fisheries and the global Covid-19 pandemic. The consequences of this include a delay in progressing some FIP actions while other more urgent issues were prioritised, and a reduction in scores for Principle 3 performance indicators (PIs), resulting from the need for clarity on new legislative processes related to the Fisheries Act and the Trade and Cooperation Agreement (TCA). As legislative and management changes become formalised over the following months, the annual reviews for 2021-22 will bring another opportunity to meet the >80 objectives on those relevant PIs.

Despite these significant changes, substantial progress has still been possible, with 19 performance indicator (PI) scores improving over the past year. The Project UK Secretariat is working closely with all FIP Steering Groups to ensure progress continues throughout the remaining timeline of the FIPs.

While the ambition and scale of Project UK is already delivering successful outcomes, there is further potential to continue to scale the project with the right level of financial and in-kind investment, commitment, and partnership. With Round 1 FIPs in their final year, we are beginning to think about the future of Project UK, both by supporting Round 1 FIPs on a pathway to becoming MSC certified if they choose to, and in thinking about options for the next fisheries to be included in a Project UK Round 3. To support us in such a pivotal year for the project we have established an Advisory Board to input on future strategic decisions. We look forward to working with all Steering Groups to continue the delivery of credible and comprehensive fishery improvement projects in the UK.



Retailers committed to sustainable UK fisheries

“Responsible sourcing is important to our customers and to us. We are longstanding supporters of the MSC and continue to work towards 100% certification for our wild caught fish, through active engagement in Fisheries Improvement Projects and dialogue with our supply base. The progress towards sustainability made by Project UK FIPs is crucial to Sainsbury’s sourcing policy.”

Ally Dingwall, Aquaculture and Fisheries Manager, Sainsbury’s

“All Co-op seafood must meet our standards for sourcing fish responsibly, from well-managed farms and fisheries, minimising our impact on the marine environment. In 2020, over 75% of Co-op wild-caught seafood products were Marine Stewardship Council certified and we strive to source more MSC products with time. We support Project UK FIPs as a key step towards sustainability and we look forward to sourcing sustainable options from even more UK fisheries.”

Aisla Jones, Fisheries & Aquaculture Manager, Co-op

“Fish is one of the most important categories to Waitrose customers and our customers demand of us that we source responsibly. We have committed to only source independently certified fish by 2025 and we’re well on our way to ensure all fish is certified. Only through certification will we be able to increase this, and Project UK is key to allowing us to extend our range of British-sourced fish. We want to thank the hard work made by all parties of the FIP, particularly the catching sector. The progress of Project UK FIPs is key to us having the widest possible range of certified British fish.”

Andy Boulton, Partner & Aquaculture and Fisheries Manager, Waitrose

“Tesco is committed to achieve 100% sustainable seafood by 2030. We source from most of the fisheries involved in Project UK and closely monitor their progress. We have now reached a key point in the journey and the months ahead finalising the actions on the plan are critical. Laying the grounds for that next step will be very important to achieve a smooth and successful process and reach certification! We all have a part to play, and the proactiveness, collaboration and willingness to improve shown in this project is the way to go. Together we can make the UK take a leap forward to achieve a sustainable seafood industry.”

Helena Delgado Nordmann, Responsible Sourcing Manager – Marine, Tesco



Overview

Project UK is a collaborative partnership between the fishing industry, scientists, NGOs and the seafood supply chain. The project aims for an environmentally sustainable future for UK fisheries, through implementation of credible Fishery Improvement Projects (FIPs).

Project UK FIPs use the Marine Stewardship Council (MSC) pre-assessment processes to identify areas where improvements are needed and develop fishery-specific Action Plans to address these improvements. Together, these tools help UK fisheries to meet a globally accepted sustainability criteria.

Each FIP has an associated Steering Group comprising relevant stakeholders who inform, support, and contribute to the success of the FIP. Steering Group members provide information and expertise, and are essential in defining and delivering each Action Plan – which outlines a series of steps for fishery improvement. FIPs run for a pre-determined timeline, usually five years, agreed by the Steering Group using the draft Action Plan to inform their approach. This timeline is set in motion following formal agreement of the Action Plan by all relevant Steering Group members. The most up-to-date Action Plan for each FIP can be found on the [Project UK website](#).

Project UK currently comprises eight FIPs. The Round 1 FIPs include six fisheries: crab, lobster and monkfish in the South West of England; plaice and lemon sole in the North Sea; and scallops in the English Channel. The Round 1 FIPs are due for completion in April 2022, having started in 2017. The Round 2 FIPs began in 2019 and cover scallop and *Nephrops* fisheries in the North Sea, West of Scotland and the Irish Sea. These FIPs have just completed their second year and are due for completion in 2024.

All Project UK FIPs adhere to the MSC definition of a [credible FIP](#) (see Appendix on MSC processes). Each FIP is publicly listed and updated on the tracking website [fisheryprogress.org](#), ensuring actions are transparent and that Steering Groups are held accountable for maintaining progress. All documents, including pre-assessments, Action Plans, minutes and annual reviews are available to download from [www.ProjectUKFisheries.co.uk](#) and [fisheryprogress.org](#).

Project UK is facilitated by the MSC, building on the organisation's unique relationship with the fishing industry, supply chain and wider network, to support UK fisheries as they improve their sustainability credentials to a level that meets best practice according to the MSC Fisheries Standard.





Project UK highlights for 2020-21

This year, across the project we have seen two scores move from <60 to 60-79, and 17 scores move from 60-79 to >80. The uncertainty around post-EU Exit legislation has also led to some Principle 3 scores moving from best practice (>80) to a conditional pass (60-79).

Alongside the specific progress that has been made by each of the FIP Steering Groups, the Secretariat (MSC) has been involved in several other activities on behalf of Project UK:

- Organisation of 24 online Steering Group meetings, and 14 sub-group meetings.
- Presentation of Project UK progress at external seminars and meetings, including the Shellfish Industry Advisory Group, Crab Management Group, Scallop Industry Consultation Group, Marine Scotland and Defra, and introducing new partners to the project.
- Organisation of Sustainable Seafood Coalition webinar for all Steering Group members.
- Organisation of Fisheries Management Plan workshop for all Steering Group members.
- Updating FisheryProgress.org throughout the year, enabling all FIPs to maintain their A-C ratings.
- Establishing the Project UK Advisory Board, to support on cross cutting topics and feed into future strategic decisions for the wider project.
- Launch of the [Project UK website and short promotional film](#), featured at the virtual MSC awards 2020.

While 2020-21 has seen a high level of activity across Project UK, there was significant impact from the Covid-19 global pandemic, which changed the way we have all been able to operate since March 2020. Alongside this global shift, the UK has started to see the impacts of EU Exit, which has created a political and management shift for fisheries that has not been seen on this scale for many of our lifetimes. These factors have impacted the direction and progress of fisheries involved in Project UK from 2020-21 and will likely continue to do so in the coming year.

In November 2020, the Fisheries Act 2020 gained royal assent and became law, giving the UK full control of its fishing waters for the first time since 1973. There is hope that the Joint Fisheries Statement (JFS), due in November 2022, and associated Fishery Management Plans will provide stability and certainty for the management of sustainable UK fisheries.

MSC, as Secretariat of Project UK, will continue to support each FIP whilst this uncertain period continues. There is a growing demand for sustainable seafood in the UK and around the world, and increased expectation from UK suppliers wanting to access shorter supply chains and support local fisheries. The MSC has received an increasing number of requests over the past year for certified seafood products from UK fisheries, and there is increased interest in the progress of the FIPs and their transition to MSC assessment at the end of the FIP timeline.

With Round 1 fisheries entering their final year, now is a crucial time to consider how best to organise time and resources for maximum impact over the remainder of the timeline. Round 2 fisheries are also entering a crucial point, having completed two years and planning to demonstrate real change on the water in Year 3.



Advisory Board

As detailed in the Project UK Terms of Reference, the Secretariat has taken steps over the last year to set up a Project UK Advisory Board. This board will consist of:

Optional chair from each Steering Group

- Young's Seafood, Plaice and Lemon Sole Chair
- Western Fish Producer Organisation, Monkfish Chair

Industry representative (catching sector; two people)

- Northern Ireland Fishermen's Federation
- Scottish White Fish Producers Association

Industry representative (retail / supply chain; two people)

- Flatfish Ltd
- New England Seafood International

Industry representative (retail / supply chain or catching sector; one person)

- Macduff Shellfish

NGO (one person)

- WWF-UK

Public authority (two people)

- Natural England
- One position still available

Scientist or academic (one person)

- Bangor University

Seafish (one person)

Marine Stewardship Council (one person)

The Advisory Board will support the high-level delivery of cross-cutting Project UK topics by providing advice and expertise, and playing an important role in advising the Secretariat on strategic issues beyond the scope of the Terms of Reference. For example, any issues that might: affect all Steering Groups; cause conflict; draw media attention, or other issues that have cross-cutting nature such as communication strategies and funding opportunities. Any decision making specific to each FIP will still be made by the relevant FIP Steering Group, but the Advisory Board may be consulted for advice on these decisions.

The individuals representing their organisations on the Advisory Board will do so for an initial period of four meetings, at which point there will be an opportunity for membership review and rotation.





Communications

In our previous annual report, we presented the newly designed branding for Project UK to give it an identity of its own. Since then, we have delivered several communications tools and Steering Group members are now able to use these tools, like the website, branded templates and even the first annual report itself, to support their own communications. Notably, we:

- Launched a website in October 2020: www.projectukfisheries.co.uk. This provides up to date information about each FIP including the Action Plan, latest minutes and who sits on the Steering Groups.
- Finalised a short film (1m50s) showcasing the journey from sea to supermarket, and this is available on the new website.
- Have supported requests from Steering Group members to use the Project UK logo in their own communications.

We have seen an increased interest in Project UK from stakeholders across the supply chain, in academia and in government, demonstrated by the number of requests to join Steering Groups and requests for regular updates on the progress of the FIPs.

Looking ahead

FisheryProgress.org scoring and social policy updates

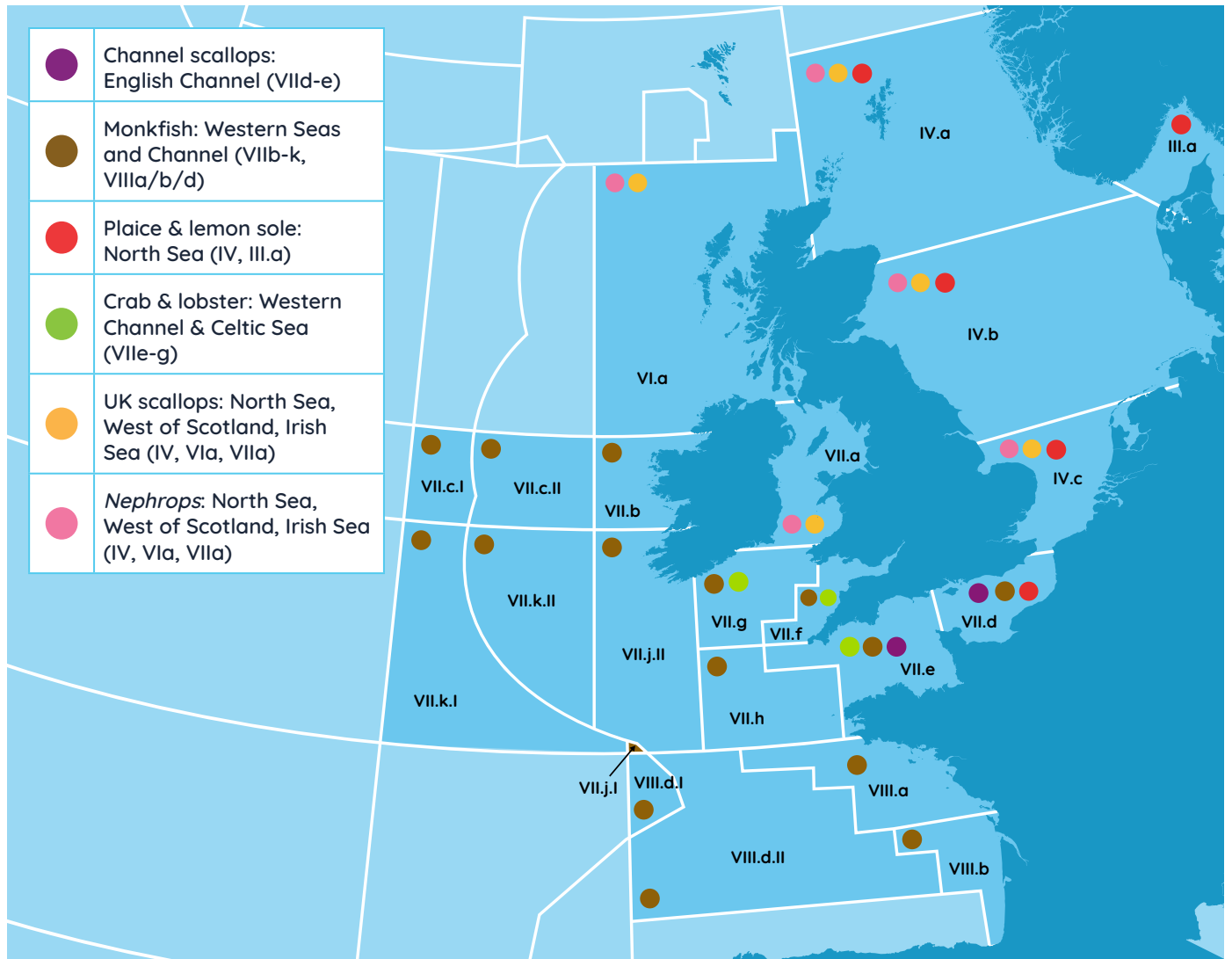
The Steering Groups have been discussing upcoming changes in requirements for FisheryProgress.org. The recent release of the new FIP Review Policy and Human Rights and Social Responsibility Policy by FisheryProgress.org will impact the Project UK FIPs over the next year (2021-22). In the short term, the scoring implications will be limited, but over the timeline of the FIPs more regular progress will need to be demonstrated across all MSC Principles.

The new social policy will require all FIPs listed on fishery progress to undertake a self-assessment, sign the FisheryProgress.org Human Rights Code of Conduct, and provide a vessel list, amongst other requirements. The Secretariat intends to work closely with all Steering Group members to ensure compliance with these new policies.





ICES areas covered by Project UK



STEERING
UK FISHERIES
TOWARDS
SUSTAINABILITY



Round 1 progress

Channel scallop, South West crab and lobster, South West monkfish, and North Sea plaice and lemon sole.

The first round of fisheries to participate in Project UK have now reached the end of their fourth year and have one year remaining to the end of the Action Plan. Some key changes across Round 1:




- Draft Fishery Management Plans (FMPs) have progressed, with thanks to support from the relevant local and national fisheries management bodies. These FMPs help to build structured, comprehensive strategies that demonstrate how each fishery adheres to the MSC Standard. The Steering Groups hope the FMPs will also contribute to the requirements for species-specific management plans outlined in the UK Fisheries Act.
- Commissioning seven reports to contribute to changes in scoring, including an external review of management in the monkfish fishery, a review of ICES Category 3 species assessments and the implications of this on the lemon sole fishery, and a full review of updated catch composition data.

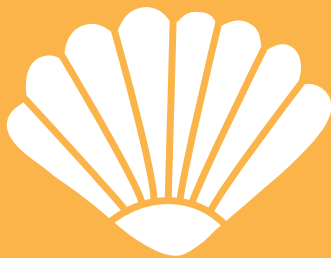
- Discussions around the formation of client groups and the delivery of presentations on the MSC certification process. Steering Groups requested the next meetings include MSC commercial market updates to understand how third party certified sustainable products could contribute to the success and security of their fishery.

This final year of the Round 1 FIP timeline is an opportunity for any potential client groups to step forward, as the MSC shifts from its role as Secretariat into a position where the MSC Fisheries Outreach team can provide support on what is required for fisheries entering the MSC assessment process. As a result of the impacts of EU Exit and the Covid-19 pandemic, there are discussions in some FIP Steering Groups regarding the potential need to extend their Action Plans for up to an additional six months. Outcomes of these decisions will be recorded on the [Project UK website](#) under each FIP.



Channel scallop

 SPECIES	King scallop <i>Pecten maximus</i>
 AREA	English Channel (VIIId-e)
 GEAR TYPE	Dredge

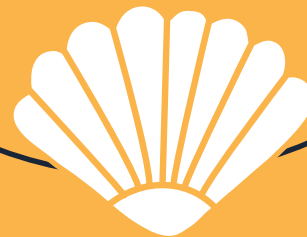


25 countries

In 2020-21, MSC labelled scallops were sold in 25 countries

6 fisheries

Globally there are six certified scallop fisheries, with another three currently in assessment. Only one of these certified fisheries is for *Pecten maximus*



16%

In 2020-21, over 5,600 tonnes of MSC labelled scallops were sold globally, a 16% increase on the previous year

£10.76m

In the UK, nine retailers offer MSC labelled scallops with consumer spend estimated to be £10.76 million in 2020-21





Key progress

The Channel scallop FIP Action Plan identified 11 actions to address over the five-year duration of the FIP. These actions cover 18 of the MSC Standard performance indicators (see Appendix on MSC processes) and have multiple milestones associated with them. Progress in Year 4 was significantly affected by the Covid-19 pandemic and associated lockdown restrictions and resource capacity implications, together with uncertainty related to EU Exit negotiations and subsequent establishment of the Trade and Cooperation Agreement (TCA). The main progress this year was the improved assessment of scallop stock status, leading to a score change for performance Indicator (PI) 1.1.1 (stock status) from <60 to 60-79 for two stocks (Lyme Bay and Eastern North). Progress was also made on several other milestones, including:

- A review of alternative measures to minimise unwanted catch
- A review of endangered, threatened and protected (ETP) species interactions
- Developing a draft a Fisheries Management Plan

TOWARDS
HEALTHY
SUSTAINABLE
SEAS

Stock status

The Scallop Industry Consultation Group (SICG) and Centre for Environment, Fisheries and Aquaculture (Cefas) continue to work together to deliver the fourth annual survey and stock assessment, providing an improved score for stock status PI (1.1.1). The stock status for each of the four Channel scallop stocks have been reviewed by comparing their harvest rates (HR) with the defined HR MSY, based on stock assessments from 2016 to 2020.

This produced the following results: 7.e.I (inshore Cornwall) 60-79, 7.e.L (Lyme Bay) 60-79, 7.e.O (offshore) >80 and 7.d.N (eastern north) 60-79. Reduced harvest rates in 2019 and 2020 indicated improved status relative to HR MSY for two stocks, leading to increased scores from what was previously a fail (<60) for Lyme Bay and eastern north.





Alternative measures

The key requirements of an alternative measures document are:

- Identifying if there are better ways to catch the target stock,
- Considering whether the alternative measure will negatively impact other species, or the safety of the crew,
- Considering whether the alternative measures are cost-prohibitive to fishers; and,
- Considering whether it is feasible and legal to implement these changes.

A comprehensive review of alternative measures to minimise unwanted catch has been drafted and a report circulated to the Steering Group. This report will be reviewed annually to add any new gear trials or alternative measure that may be appropriate in minimising the impact of this fishery on bycatch or ETP species interactions.

Endangered, threatened and protected (ETP) species interactions

A comprehensive list of all potential ETP species present in the English Channel has been drafted and reviewed by Steering Group members, including NGOs and the catching sector, to understand the likelihood of interaction with the fishery.

Fisheries Management Plan

Macduff Shellfish is leading on the development of a draft Fisheries Management Plan (FMP) to use as a tool for preparing the fishery for full assessment, with input from Steering Group members including Cefas, Defra and the relevant Producer Organisations and Fishing Associations. The draft FMP will document all current management in the fishery, as well as meeting the needs of the MSC's requirements for effective fisheries management.

Year 5: Priorities and challenges for Channel scallop

While the Channel scallop FIP continues to make some progress against milestones in its Action Plan, some actions are now behind the progress expected for Year 4. The priorities and challenges are listed below, and correspond to the three principles of the MSC Standard:

Principle 1: Sustainable fish stocks

The SICG has made progress in proposing a harvest strategy and associated harvest control rules for Channel scallops, but there is still no overall change in the score for these performance indicators (PIs). A harvest strategy has not yet been agreed, and HCRs have not been defined. Significant work remains on agreeing the most appropriate form of management strategy (such as total allowable catch (TAC), effort, spatial, temporal) and harvest control rules and tools.

A gap analysis of available stock information revealed the need for more information on the larval interaction between dredged and un-dredged areas. This was planned research for Cefas to undertake in 2020 but was postponed while they focussed on similar issues in the Dogger Bank. The research is now planned for 2021.



Principle 2: Minimising environmental impact

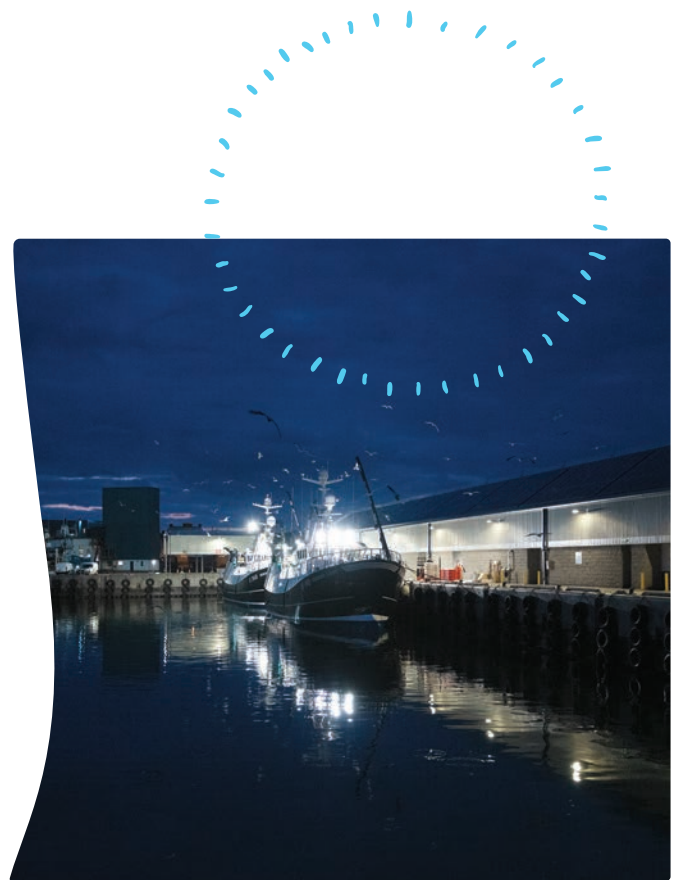
The Steering Group awaits an analysis of catch data from the long-term observer programme from Cefas, specifically to transform numbers of individuals and length analysis to generate proportion of species biomass within the total catch. This will allow the identification of primary and secondary ‘main’ species, which is required for a full MSC assessment. The Cefas catch weight data should move three PIs (primary, secondary and ETP information) to best practice (>80) level. Once the Steering Group has the catch profile, this will inform how the outcome status and management is scored.

The statutory nature bodies need to confirm that the current management provides sufficient protection of ETP species; this will then be documented in the draft Fisheries Management Plan (FMP). Ongoing monitoring on ETP interactions is needed, and the Steering Group has been discussing trialling an Interaction Log or bycatch app to record this data.

A two-year Bangor University Post-Doc provided evidence on the impact of scallop dredging on commonly encountered habitat and vulnerable marine ecosystems (VMEs). This work recommended additional management measures for one marine conservation zone (MCZ) within the English Channel before PIs 2.4.1 (habitat outcome) and 2.4.2 (habitat management) can score >80, and those measures will also influence the ecosystem outcome score (PI 2.5.1). The introduction of voluntary measures has raised significant debate in the scallop industry. This action will depend on the Marine Management Organisation’s (MMO) implementation timeline for the roll out of management in marine protected areas (MPAs) and may not align with the final year of the FIP.

Principle 3: Effective fisheries management

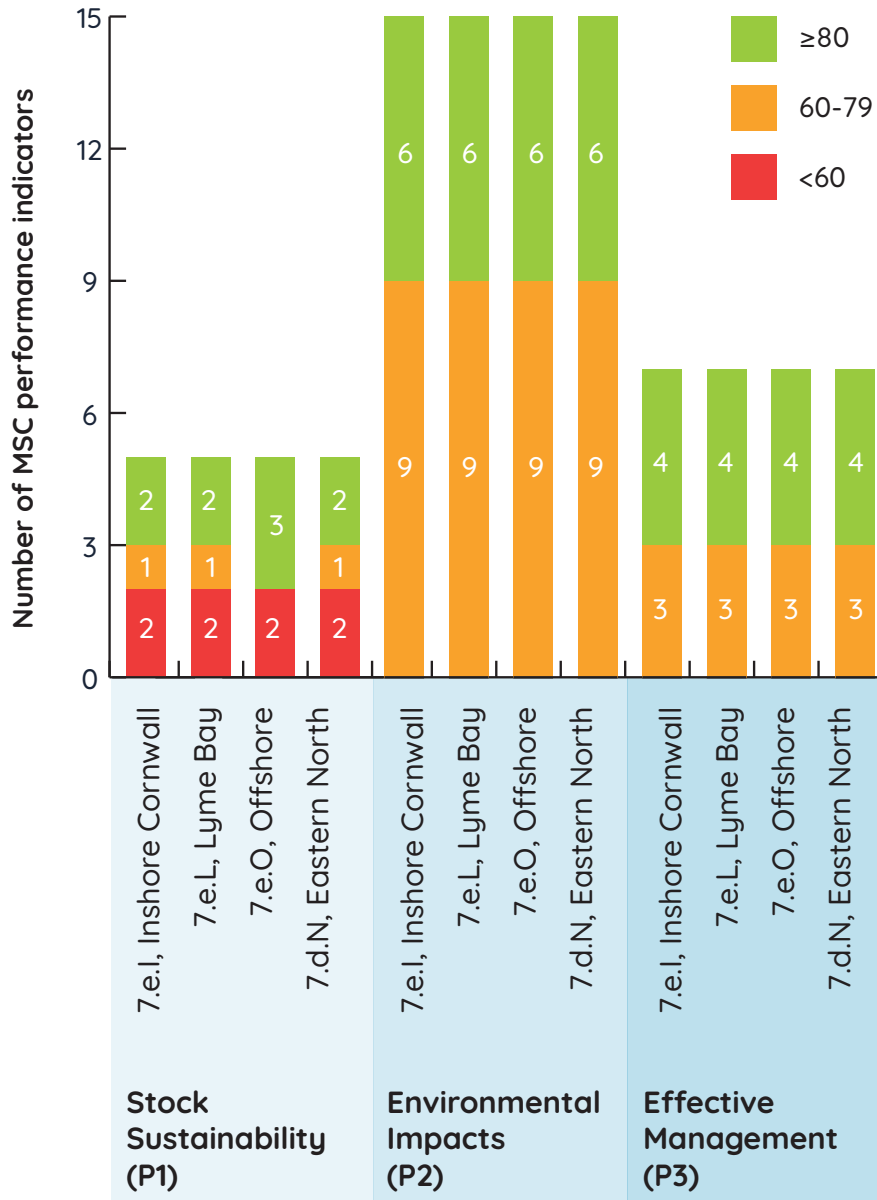
The Steering Group will focus on consulting on and progressing with the Fisheries Management Plan, including documenting current management strategies. This will include updating on progress made by the SICG to develop an appropriate harvest strategy and harvest control rules, through co-management with industry and government.








MSC Performance Indicators

Scoring levels across MSC Performance Indicators for each Channel scallop fishery at the end of Year 4





Monkfish

 SPECIES	Monkfish <i>Lophius piscatoris</i> , <i>Lophius budegassa</i>
 AREA	Western Seas and Channel (VIIb-k, VIIIa/b/d)
 GEAR TYPE	Beam trawl, demersal trawl, trammel/tangle net

One

Currently there is only one MSC certified monkfish fishery, ISF anglerfish in Iceland, which became the world's first MSC monkfish fishery in 2018

Retailers

In the UK, four different retailers offer certified monkfish on their fish counters

In 2020-21, MSC labelled monkfish products were sold in Belgium, Netherlands, Luxembourg, Germany, Sweden and Switzerland

72%

Since this fishery's certification, sales of MSC certified monkfish have increased by 72% in two years



Key progress

The South West monkfish Action Plan identifies 11 actions to address over the five-year duration of the FIP, and these actions cover 17 of the MSC Standard performance indicators. As with the other FIPs, each action consists of multiple milestones. The Steering Group made some great progress this year, resulting in eight score changes across Principle 1 and 2 performance indicators, including:

- Improved understanding of stock status;
- A review of secondary species and endangered, threatened and protected (ETP) interactions;
- A review of impacts of the fishery on ecosystems; and
- External evaluation of fishery management.

Stock status

Based on the 2020 ICES stock assessments, the ICES Category 1 white-bellied monkfish (*Lophius piscatorius*) stock is robust and could be expected to achieve >80 in an MSC assessment. The stock assessment for the ICES Category 3 black-bellied monkfish (*L. budegassa*) is less certain but a full stock assessment is expected within the next two years. However, continuing uncertainty over how to account for the catches of the two different monkfish species, owing to their almost indistinguishable appearance, still exists. This uncertainty has been exacerbated by new knowledge from the recent report by [Aguirre-Sarabia et al. \(2021\)](#) which found that that the two *Lophius* species naturally hybridise, leading to a population of hybrids of up to 20% in certain areas, further complicating the possible identification and separation of these two species.

Secondary species and endangered, threatened and protected (ETP) species

A comprehensive catch composition analysis by Cefas (Ribeiro-Santos, 2021) re-examined the catch composition of these fisheries and produced a definitive list of primary or secondary species (based on whether there is management in place) and main or minor species (based on the percentage presence in the catch). This, together with the formalising of alternative measures to reduce non-target bycatch, has improved the score of secondary species management and information PIs to best practice (>80).

A detailed literature review of the post-discard survival of elasmobranchs (sharks, skates and rays) has also contributed to increased scores for ETP outcome and information (PI 2.3.1 and 2.3.3). However, there is still a need to formalise the treatment of ETP elasmobranch bycatch in the two mobile fisheries.

Ecosystem outcome

The Marine Management Organisation (MMO) provided data on the number of vessels operating each of the three gears in the FIP Unit of Assessment, which showed that the majority of beam trawlers are >12m Eurocutters with vessel monitoring systems (VMS). Only a handful of beam trawlers are 8-12m in length and these mainly target sole and plaice, with limited monkfish catch. Most of the <12m vessels fall under the remit of Devon and Severn IFCA and may already have VMS installed. This information, together with the Scale Intensity Consequence Analysis (SICA) in [Lambert et al. \(2019\)](#) that explored the impacts of the fishery on the wider ecosystem, moves the ecosystem outcome score (PI 2.5.1) to >80.



External evaluation of fishery management

The Steering Group commissioned a Principle 3 expert, Lisa Borges, to undertake an external review of the fisheries management for this fishery. The report advised that PI 3.1.1 (legal and customary framework), PI 3.1.2 (consultation, roles and responsibilities) and PI 3.2.3 (compliance and enforcement) should all reduce scores from >80 to 60-79. This mainly results from the UK's exit from the EU, changing the effectiveness of the UK-EU bilateral negotiation on fishing opportunities for shared stocks, and the lack of clarity on the role and function of the Specialised Committee on Fisheries. As these aspects are largely outside the remit or influence of the FIP, the Steering Group will need to consider the most appropriate course of action to address this during 2021-22.

Year 5: Priorities and challenges for South West monkfish

The South West monkfish FIP continues to make progress against its Action Plan, but some actions are now behind target, particularly as a result of the impact that the uncertainty from EU exit has had on Principle 3. The priorities and challenges are listed in relation to the three principles of the MSC Standard:

Principle 1: Sustainable fish stocks

The Steering Group will need to consider the available options for certification of this fishery, given the separation issues between the two species. Further engagement with the industry on recording the two monkfish species separately is needed if this fishery is to progress towards MSC certification. A full assessment of *L. budegassa* by ICES might be possible by 2023, which could then allow a full Principle 1 pass for both species. The Steering Group needs to consider the implications of the monkfish genetic report ([Aguirre-Sarabia et al. 2021](#)) on species-specific catch reporting and agree way forward to address PI 1.2.2 (harvest control rules), which currently scores 60-79, and would therefore result in a condition in an MSC full assessment.





Principle 2: Minimising environmental impact

The Steering Group has discussed the use of a code of practice for releasing vulnerable elasmobranchs. This could include the widespread use of species identification guides and the possible introduction of an endangered, threatened and protected (ETP) interactions log which is currently being piloted in the Project UK Round 2 FIPs. All information on ETP monitoring and management will be included in the draft Fisheries Management Plan (FMP).

The action to address habitat interaction in the fishery remains unaddressed, although the MMO is proposing the introduction of management measures for marine protected areas (MPAs) by 2024. The Steering Group needs to summarise the identified MPAs and IFCA-related habitat-protection measures and review their effectiveness against the habitat outcome and management requirements (PI 2.4.1 and PI 2.4.2).

Defra will require all licensed British fishing boats <12m to install and maintain inshore vessel monitoring systems (iVMS) when fishing in English waters, although the date for implementation is still to be confirmed. Combined with the MMO's catch reporting for vessels <10 metres in length, the installation of iVMS will provide the government and fisheries management authorities with a greater understanding of fishing activity in English waters.



Principle 3: Effective fisheries management

The external review of UK fisheries management in relation to Principle 3 of the MSC Standard, conducted by Lisa Borges, recommended that the Steering Group works with Defra to:

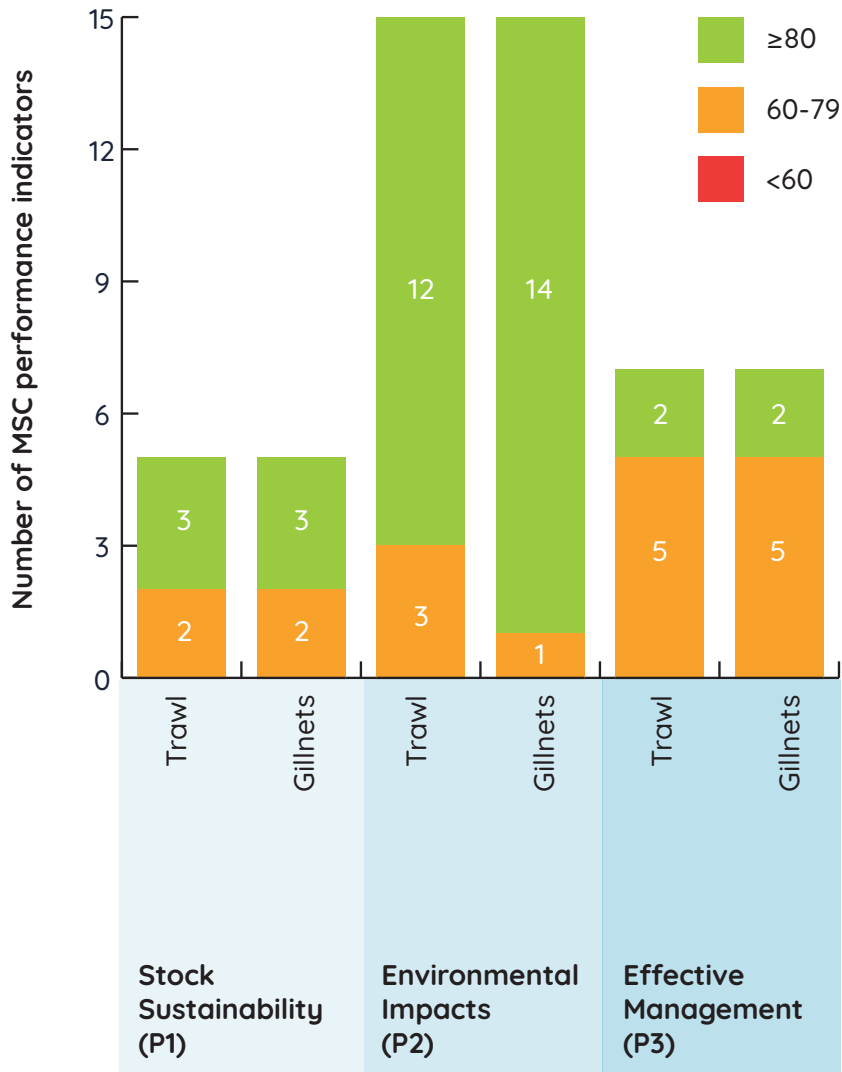
- Develop long and short-term objectives for this fishery, such as precautionary and MSY-related objectives; and
- Seek clarification regarding both the annual bilateral negotiations between UK-EU to set fishing opportunities for monkfish, and on the role and function of the Specialised Fisheries Committee.








MSC Performance Indicators

Scoring levels across MSC Performance Indicators for each monkfish fishery at the end of Year 4.





Plaice and lemon sole

 SPECIES	Plaice <i>Pleuronectes platessa</i> Lemon Sole <i>Microstomus kitt</i>
 AREA	North Sea (IV, VIId and III.a)
 GEAR TYPE	Demersal trawl, seine

48%

In 2020-21, more than 7,000 tonnes of MSC labelled plaice was sold globally, a 48% increase since 2019-20

There is currently only one MSC certified lemon sole fishery, the ISF lemon sole fishery in Iceland, which was certified in 2019

MSC labelled lemon sole was sold by three different brands in the UK and Sweden last year

18 countries

In 2020-21, MSC labelled plaice was sold in 18 countries

76%

There has been a 76% increase in sales of MSC labelled plaice from 2016 to 2021, from £32 million to £56.5 million

Waitrose is currently the only retailer in the UK to sell MSC labelled lemon sole, which was first introduced on their fish counters in 2020



Key progress

The plaice and lemon sole Action Plan identifies seven actions to address over the five-year duration of the FIP, which together cover 16 of the MSC Standard performance indicators. As with the other FIPs, each action consists of multiple milestones. Progress in Year 4 was significantly affected by the Covid-19 pandemic, including lockdown restrictions and resource capacity implications, together with substantial uncertainty related to EU Exit negotiations and subsequent establishment of the Trade and Cooperation Agreement (TCA). The main progress this year was towards the management performance evaluation of the fishery, leading to a score change for performance indicator (PI) 3.2.4 (management performance evaluation) from 60-79 to >80. Progress was also made on several other milestones, including:

- Stock status
- Harvest strategy
- Catch composition review
- Developing a draft a Fisheries Management Plan

The plaice and lemon sole Steering Group agreed that the Unit of Assessment should include ICES Area 7d, as some catch is recorded from this area and it is part of the same total allowable catch (TAC) allocation. The implications of including ICES Area 7d for information collated to date will need to be explored.

Stock status

Following changes to the lemon sole ICES stock assessment, re-scoring has indicated that stock status (PI 1.1.1) and assessment (PI 1.2.4) continue to meet best practice (>80). The Steering Group commissioned research in 2021 which reviewed the ICES assessment and WKLIFE project. Results indicated that lemon sole could be assessed using the default MSC decision tree rather than the Risk Based Framework (RBF) for data limited stocks, and would score >80 on stock status (PI 1.1.1).

Harvest strategy

Lemon sole is managed under a precautionary combined TAC for lemon sole and witch. ICES states that “*Management of lemon sole and witch under a combined species TAC prevents effective control of the single-species exploitation rates and could potentially lead to overexploitation of either species*”. Currently the North Sea multi-annual plan (MAP) forms the basis of the harvest strategy for lemon sole, but as an un-named bycatch species, it lacks specific harvest control rules so the joint TAC may not be effective.

Some progress has been made in exploring what an additional harvest strategy and associated harvest control rules may involve, and a survey was undertaken improve understanding of the location of lemon sole hotspots and how these vary seasonally. Industry discussions on next steps are a priority for the Steering Group in Year 5.





Primary and secondary species

North Sea cod is considered a primary species for the lemon sole fishery and is currently in a FIP, being managed by the Scottish Fisheries Sustainable Accreditation Group (SFSAG), due to the stock level dropping below biologically sustainable limits (Blim). A cod recovery strategy is in place and the Steering Group will monitor future ICES advice for this species, but the result is a reduced score on PI 2.1.1 (primary species outcome).

Fisheries management plan

The main Principle 3 actions focus on addressing fisheries specific management, which is being progressed through the drafting of a Fisheries Management Plan (FMP). A review of the current status of UK fisheries management suggests that PI 3.1.1 (legal and customary framework), PI 3.1.2 (consultation, roles and responsibilities) and PI 3.2.3 (compliance and enforcement) have all reduced scores from best practice (>80) to a conditional pass (60-79). This mainly results from the UK's exit from the EU, changing the effectiveness of the UK-EU bilateral negotiation on fishing opportunities for shared stocks, and the lack of clarity on the role and function of the Specialised Committee on Fisheries. As these are largely outside the remit of the FIP, the Steering Group will need to consider the most appropriate course of action to address this.

Year 5: Priorities and challenges for plaice and lemon sole

Progress in Year 4 was challenging, and some Year 4 actions are still outstanding. With several milestones and actions now behind target, there is a need to consider the remaining time and resources and focus on the actions where change can realistically be achieved in the next year. The main areas where this FIP can directly impact the scores is on developing harvest control rules and finalising the draft FMP. The priorities and challenges are listed in relation to the three principles of the MSC Standard:

Principle 1: Sustainable fish stocks

A change to a single species TAC is unlikely for lemon sole in the coming years, so the key action in Year 5 is to progress the development of the harvest strategy and harvest control rules and include this in the draft FMP. These should detail what measures would be introduced and when, to ensure ongoing delivery of the North Sea Multi Annual Plan (MAP) objectives. Harvest control rules need to be well-defined to ensure exploitation rates reduce as limit reference points are approached. The Steering Group needs to prioritise a consultation with the catching sector on what measures would be workable and acceptable to ensure the exploitation rate can be reduced when required.





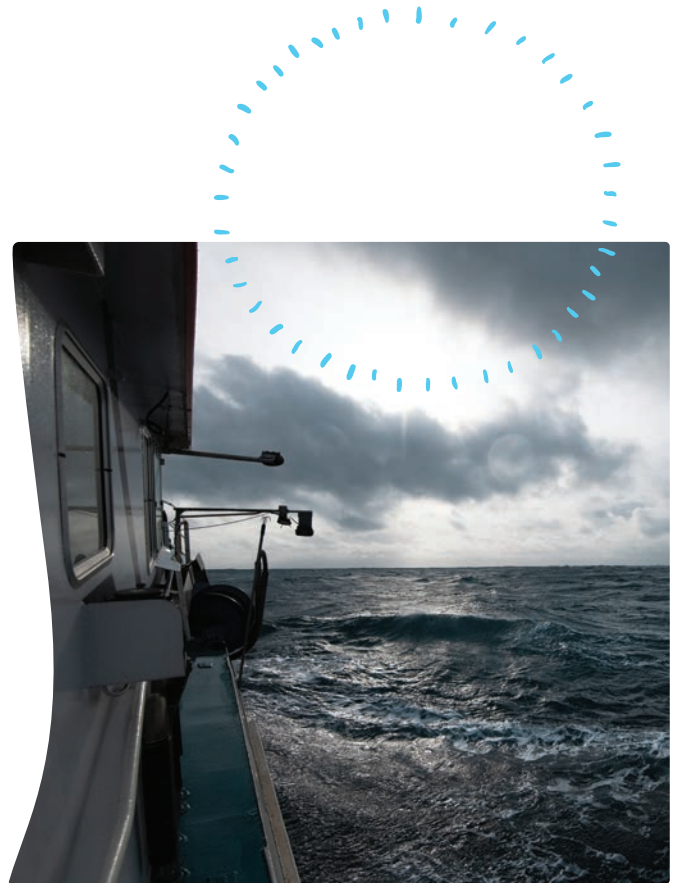
Principle 2: Minimising environmental impact

When being assessed against the MSC Fisheries Standard, existing certified fisheries provide working examples of how similar gear types, fishing areas or species might meet specific scoring requirements. Therefore, the outcomes of the current recertification of the SFSAG Northern Demersal Stocks may contribute to scores relating to Principle 2 performance indicators for the gear type and region covered by this FIP. The FIP Action Plan will need to harmonise with the SFSAG public comment draft report (PCDR) when it is published in summer 2021, particularly regarding endangered, threatened and protected (ETP) and habitats actions. ETP actions for outcome and management are currently behind schedule and appropriate alignment of ETP lists need to be agreed on across FIPs and on across fleets (SFSAG and Osprey) in the Unit of Assessment.

Habitat actions are also now behind schedule. Harmonizing with the SFSAG PCDR will determine whether additional habitat management actions are needed. The extent and level of fishery interaction with priority marine features (PMFs) in the North Sea needs to be confirmed to determine the likely habitat scores for this FIP. There is overlap of FIP vessel activity and MPAs for Central Fladden, East of Gannet and Montrose Fields, in relation to burrowed mud, and this may raise a condition in full assessment. To score >80, proof of vessels avoiding MPAs would be required and the Steering Group need to discuss options to achieve this.

Principle 3: Effective fisheries management

Clarification of the structure and functioning of UK fisheries management will feed into the completion of the draft Fisheries Management Plan (FMP). The draft FMP will also help to document the information collated and developed by the FIP in preparation for the fishery to enter full assessment on completion of the FIP.

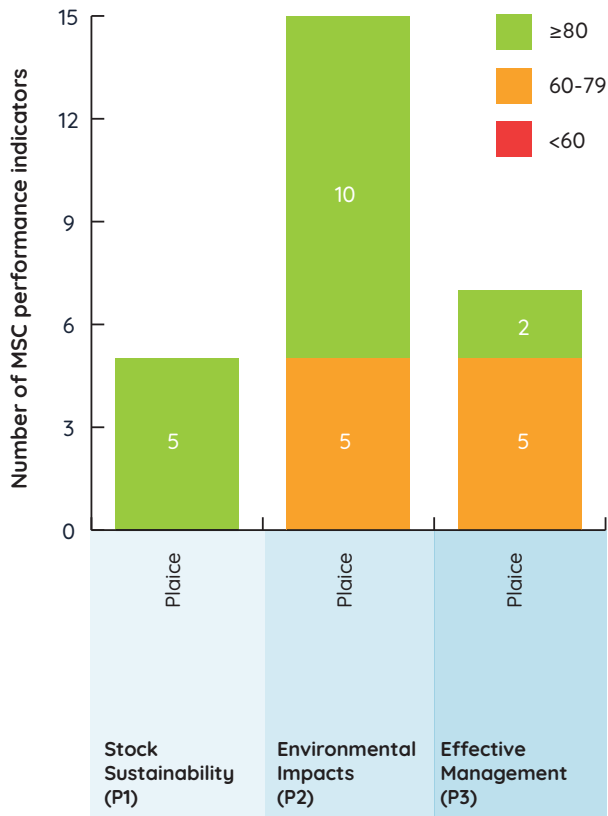




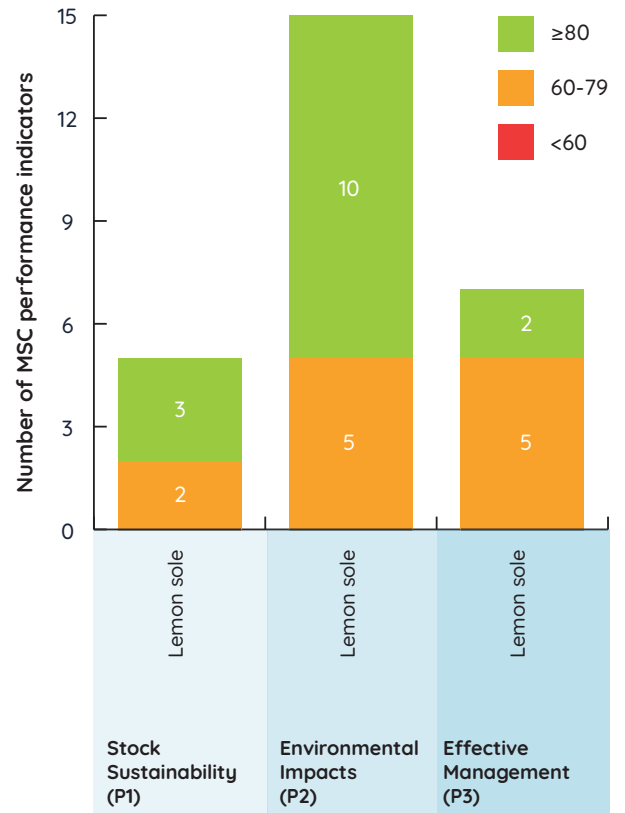
MSC Performance Indicators

Scoring levels across MSC Performance Indicators for each plaice and lemon sole fishery at the end of Year 4.

Plaice






Lemon sole





Crab and lobster

 SPECIES	Brown/edible crab <i>Cancer pagurus</i> European lobster <i>Homarus gammarus</i>
 AREA	Western Channel & Celtic Sea (Vlle-g)
 GEAR TYPE	Pots/traps

In 2020-21, MSC labelled lobster was sold at Waitrose, Tesco, Iceland, Lidl, Whole Foods, M&S, Selfridges, Morrisons, Aldi and Sainsbury's

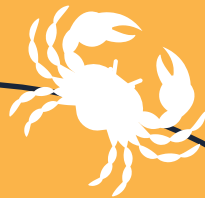
Globally, there are nine certified crab fisheries (covering six different species), and another three in assessment. Only one certified crab fishery is for brown crab (*Cancer pagurus*)



£58m

Between 2016 and 2021, MSC labelled crab product sales more than doubled globally, with consumer spend reaching nearly £58 million in 2020-21

 Two thirds of frozen lobster sold in UK retail is MSC labelled



£60m

In 2020-21, global consumer spend on MSC lobster reached nearly £60 million

96%

In 2020-21, the United States and Canada accounted for 96% of MSC labelled crab sales by value



Key progress

The crab and lobster Action Plan identifies six actions to address over the five-year duration of the FIP, and these actions cover nine of the MSC Standard performance indicators. Each action consists of multiple milestones. The Steering Group made some great progress this year, resulting in score changes for five Principle 2 performance indicators, including:

- Catch composition review of primary and secondary species
- Review of bait species in the fishery
- Review of endangered, threatened and protected (ETP) species interactions
- Developing a draft Fishery Management Plan (FMP)

Primary and secondary species (including bait analysis)

An updated review of catch composition by Cefas produced a definitive list of primary or secondary species (based on whether there is management in place) and main or minor species (based on the percentage presence in the catch). The only main primary species identified is mackerel, which should meet best practice (>80) under PI 2.1.3 (primary species information). For those species with limited stock information, a Productivity Susceptibility Analysis (PSA) was conducted to determine their vulnerability, based on life history traits and the level of susceptibility to the fishery, with some small shark species scoring 60-79. Whilst most are discarded alive with very good post-discard survival likelihood, the report recommended that the FIP might reduce its current dependency upon small sharks as bait.

Endangered, threatened and protected (ETP) species

An updated ETP risk assessment was produced and has been added into the draft FMP. While the ETP performance indicators (PIs) now all reach best practice (>80), some actions remain for continual monitoring and improvement, including a continued review of the strategy and demonstration of its successful implementation.

Fishery Management Plan

The draft Fisheries Management Plan (FMP) has continued to develop over the last year, with input from scientists, government and management bodies to ensure accurate and appropriate content. The draft FMP will document all current management in the fishery, as well as meeting the needs of the MSC's requirements for effective fisheries management.

Year 5: Priorities and challenges for South West crab and lobster

The South West crab and lobster FIP continues to make progress against its Action Plan, but some actions are now behind target, particularly in relation to Principle 1 and the development of a robust harvest strategy and harvest control rules. The priorities and challenges are listed in relation to the three principles of the MSC Standard:

**THRIVING
UK FISHERIES
FOR THE
FUTURE**



Principle 1: Sustainable fish stocks

The most recent (2019) stock assessments show South West crab and lobster stocks to be in a reasonable condition and moderately exploited. A preliminary harvest strategy has been drafted and requires a definitive strategic approach to how the fishery will be managed, including clarity on what adaptive management approaches will be adopted across the Unit of Assessment. For example, this might include input controls (such as licence or pot limits), outputs controls (catch limits), or a combination of both. A new milestone has been identified for monitoring and enforcement (PI 1.2.3), which requires the Steering Group to gather reliable effort data to support the harvest strategy.

This will need to be addressed for IFCA management areas (inside 6nm) as well as offshore waters (outside 6nm) before moving on to formalising current harvest control rules (HCRs) and introducing adaptive management measures where needed. HCRs should consist of existing management mechanisms (e.g. IFCA byelaws and permitting processes) but may require additional mechanisms to ensure that the fishery is adaptive to changing stock levels across its different management jurisdictions. This should be progressed ahead of, but in synergy with, national fisheries management planning efforts by the Shellfish Industry Advisory Group (SIAG) and the Crab Management Group (CMG). Lack of agreement on a harvest strategy and HCRs will prevent any interested client group in entering this fishery to MSC assessment.

Principle 2: Minimising environmental impact

The Steering Group needs further consideration of the possible impact of the fishery on secondary main species (those without reference points for management that make up >5% of the total catch) used as bait, such as red gurnard, and 'secondary minor' species such as nursehound and smooth-hounds. A review of management for bait species will help determine whether those destined for use as bait are included in fishing mortality estimates for this species, whether bait use is having an impact on their status and, if so, whether additional management measures are necessary. The Steering Group also needs to consider whether it is possible to discourage the use of small sharks for use as bait in this fishery, in relation to the PSA analysis described above, and whether there are more sustainable alternatives available.

Principle 3: Effective fisheries management

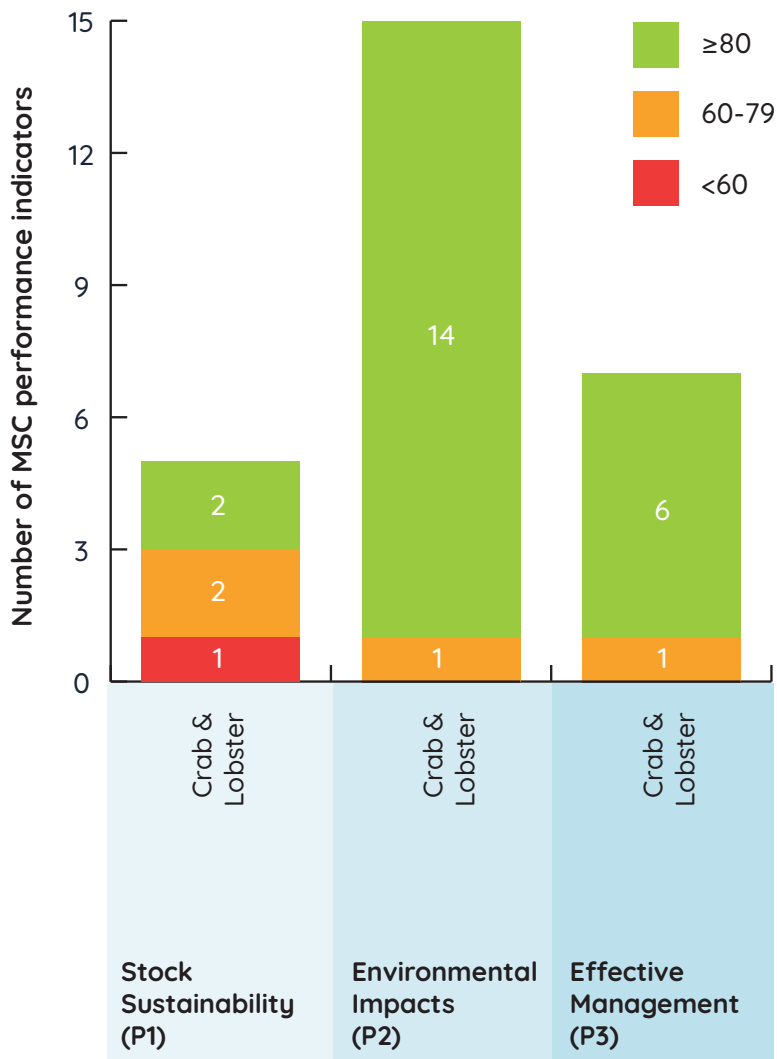
The draft FMP needs to be harmonised with the new, post-EU Exit fisheries governance and policy regime (PI 3.1.1) and with the fisheries-specific objectives (PI 3.2.1). These may need to wait until the finalisation of the Joint Fisheries Statement (JFS), expected in November 2022, and any shellfish-specific management plans being developed through co-management by industry and Defra.





MSC Performance Indicators

Scoring levels across MSC Performance Indicators for each crab and lobster fishery at the end of Year 4.





Round 2 progress




The Round 2 fishery improvement projects (FIPs), for UK-wide scallop and *Nephrops*, are a larger scale than the fisheries in the first round of FIPs. The pre-assessments and FIP Actions Plans were signed off in spring/summer 2019 by the Steering Groups. Their second annual review showed some key progress against milestones in their Action Plans:

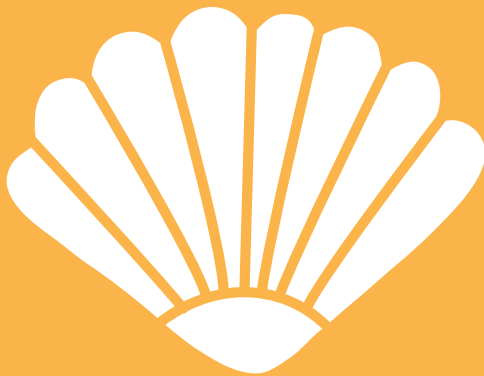
- A Scale Intensity Consequence Analysis (SICA) workshop was held for both species with environmental experts in attendance to discuss the ecosystem interactions of the fishery and identify the most important aspects of these to consider in a fishery management strategy.
- Delivery of multiple reports, including three Masters projects focussing on the fishery interactions with endangered, threatened and protected (ETP) species and habitats, reports on alternative measures to minimise unwanted catch and improve selectivity in the fishery, and a full review of updated catch composition data from Cefas.
- Based on requests during Steering Group meetings, the Secretariat conducted further outreach with Scottish Regional Inshore Fisheries Groups (RIFGs) to bring them into the project and ensure their representation in any actions undertaken by the FIP. This has resulted in attendance at meetings from North & East Coast RIFG, West Coast RIFG, and Orkney Management Group, Orkney Sustainable Fisheries, as well as commitment from Shetland Shellfish Management Organisation to engage in meetings going forward. We will continue to develop these opportunities over the coming year with support from Steering Group members.
- Continued progress with draft Fishery Management Plans (FMPs), with contributions from the relevant statutory bodies, scientists and supply chain. These plans will help to build structured, comprehensive strategies that demonstrate how each fishery adheres to the MSC Standard. The Steering Groups hope that these will contribute to the requirements for species-specific management plans outlined in the UK Fisheries Act.
- MSC commercial market updates were provided to support Steering Group members in understanding how third party certified sustainable products could contribute to the success and recognition of their fishery.

The Round 2 FIPs are now at a point where change on the water is expected, and over the course of Year 3 the Secretariat will continue to support the FIP Steering Groups to progress all performance indicators to a score of 60–79, as expected in the benchmarking and tracking tool (BMT).



UK scallops

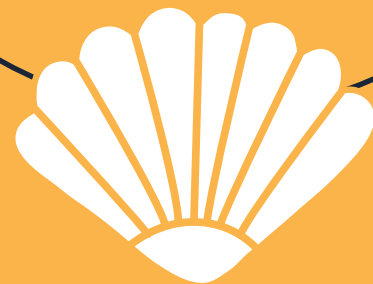
 SPECIES	King Scallop <i>Pecten maximus</i>
 AREA	North Sea, West of Scotland, Irish Sea (IV, VIa, VIIa)
 GEAR TYPE	Dredge



The majority of MSC labelled scallop products are sold frozen (70.5%), with fish counters accounting for another 16% of all sales

56%

Between 2019 and 2020, there has been a 56% increase in the total UK consumer spend on MSC certified scallops



125

In 2020-21, MSC labelled scallops were sold by 125 brands around the world

USA

The United States is the largest market for MSC certified scallops, accounting for 36% of the volume and 46% of the value of all labelled products sold





Key progress

The UK scallop FIP Action Plan identifies 15 actions to address over the five-year duration of the FIP, and these actions cover 20 of the MSC Standard performance indicators. Each of these actions consist of multiple milestones. Year 2 saw improved scores for two performance indicators and progress was also made on several other milestones, including:

- A review of catch composition
- A review of alternative measures
- Endangered, threatened and protected (ETP) species risk assessment
- An analysis of the fishery footprint on habitats in the Unit of Assessment
- Developing a draft Fishery Management Plan (FMP)

Catch composition

Marine Scotland Science's (MSS) scallop dredge surveys show indications of presence, absence, and diversity of bycatch species. The survey uses scientific gear on one side of the vessel and commercial dredges on the other, so comparison between the two gear types and methods can be made. The catch data from 2009–2019 scallop surveys provide quantitative data on the proportion of catch.

MSS continues to work on an analysis of bycatch species and progress has been made recently on writing up the report. Bycatch data on total catch from scallop dredge surveys has been presented to the assessment team, indicating proportion of catch by weight and leading to an increased score for PI 2.2.3 (secondary species information) from a conditional pass (60-79) to to best practice (>80).

In Northern Ireland, Agri-Food and Biosciences Institute (AFBI) is currently analysing bycatch data based on scallop survey work and hopes to publish this as a report. Due to this, it is not possible for AFBI to release the bycatch records, but information on a particular species may be feasible to provide if required by the Steering Group.





Alternative measures

Seafish led a comprehensive assessment of alternative measures for scallop dredge gear and management. The review documented the effectiveness of different measures at minimising mortality and unwanted catch. This is relevant for both target species (Principle 1) and secondary species (Principle 2). Seafish has assembled information on survival of secondary species and will next incorporate that into the review. This has increased scoring for PI 2.2.2 (secondary species management) from a fail (<60) to a conditional pass (60-79).

The review includes consideration of the following dredge gear types: ECODREDGE, n-virodredge, Oban dredge, Hydrodredge, Skid dredge and ring size. The skid dredge was noted as a significant alternative gear option for reducing habitat interaction; but in the UK it is currently prohibited from use due to a ban on attachments to dredge gears. The Steering Group agreed to undertake an annual review of ongoing research into alternative measures.



Endangered, threatened and protected (ETP) risk assessment

A GIS based risk assessment was undertaken by a Masters student from the University of York, and focused on aerial overlap and the likelihood of encountering ETP species. The report provided a detailed review of national legislation to determine all ETP species present in the Unit of Assessment (UoA) and allocated a potential risk level for each species. The Steering Group noted some challenges in the data and methodology used:

- Some key datasets were not included as they may have been hard to access,
- VMS was for >12m vessels only, with information of vessels <12m absent from study,
- A lack of ETP point data did not necessarily mean there were no ETP species in those areas,
- Habitat suitability needs to account for full spatial distribution of ETP species,
- Scale of aerial overlap was considered too broad,
- The ETP list did not adequately consider data deficient and/or low risk species.

The Steering Group agreed that this report was a useful basis for further analysis, and that additional sources of data should be collated to inform any follow up research.

Funding was received from NorthConnect to develop an ETP recording protocol. An ETP Interaction Log has been designed, and the intention is to trial it on a few vessels before updating and rolling out more widely to all FIP participants that work directly with the catching sector.



Habitats

A scallop habitat PhD at Heriot-Watt University research has progressed significantly with the delivery of detailed habitat mapping for commonly encountered habitats and vulnerable marine ecosystems (VMEs), assessed against current knowledge available on the scallop dredging footprint. The maps are based on the best available scientific data, including scallop dredge fishing intensity for vessels >12m in length. The inshore fleet modernisation programme continues with the aim of enhancing information available on the locational activity of vessels, including in relation to Marine Protected Areas (MPAs). Work is underway to predict occurrence of VMEs and potential implications of dredge interaction, as well as to analyse trip level vessel monitoring system (VMS) data. The PhD has undertaken a review paper on examples of scallop fishery management worldwide, with a focus on management of seabed habitat impacts.

Fisheries Management Plan

The Steering Group has continued to focus on addressing fisheries-specific management, through development of a draft Fisheries Management Plan (FMP). Macduff Shellfish is coordinating the input from individual Steering Group members responsible for relevant sections of the FMP.

Year 3: Priorities and challenges for UK scallops

The combination of the Covid-19 pandemic and the state of flux brought about by the uncertainties of EU Exit negotiations, and subsequent establishment of the Trade and Cooperation Agreement (TCA), have affected the rate of progress for many of the actions. Overall, the UK scallop FIP is making good progress against its Action Plan, and all actions are currently on target. The priorities and challenges for the next year are listed in relation to the three principles of the MSC Standard:

Principle 1: Sustainable fish stocks

Significant work remains on agreeing the most appropriate form of harvest strategy and harvest control rules (TAC, effort, spatial, temporal) and ensuring an inclusive approach that can be agreed by all stakeholders across this Unit of Assessment, including inshore and remote fleets (e.g. Scottish islands). While this process has been driven effectively by the Scallop Industry Consultation Group (SICG), consideration is required from the Devolved Administrations who, as the managing authorities, will ultimately implement the strategy and control regime taken forward.





Principle 2: Minimising environmental impact

Subject to receiving and reviewing the Marine Scotland Science bycatch report on total catch from scallop dredge surveys (using both scientific dredge and commercial dredge gear), the Steering Group will consider how to address collection of total catch data. To collect comprehensive total catch data, it would be necessary to have observers on board vessels, but there are no current proposals for this.

The ETP Interaction Log will be trialled by Steering Group members for feedback, and if successful will hopefully be rolled out to all FIP participants. The ETP recording protocol will contribute to improved information on the fishery and inform any required management.

The report from the SICA workshop will be finalised by Poseidon, with recommendations provided. The Steering Group will need to discuss these recommendations and agree which ones are feasible to implement.

Principle 3: Effective fisheries management

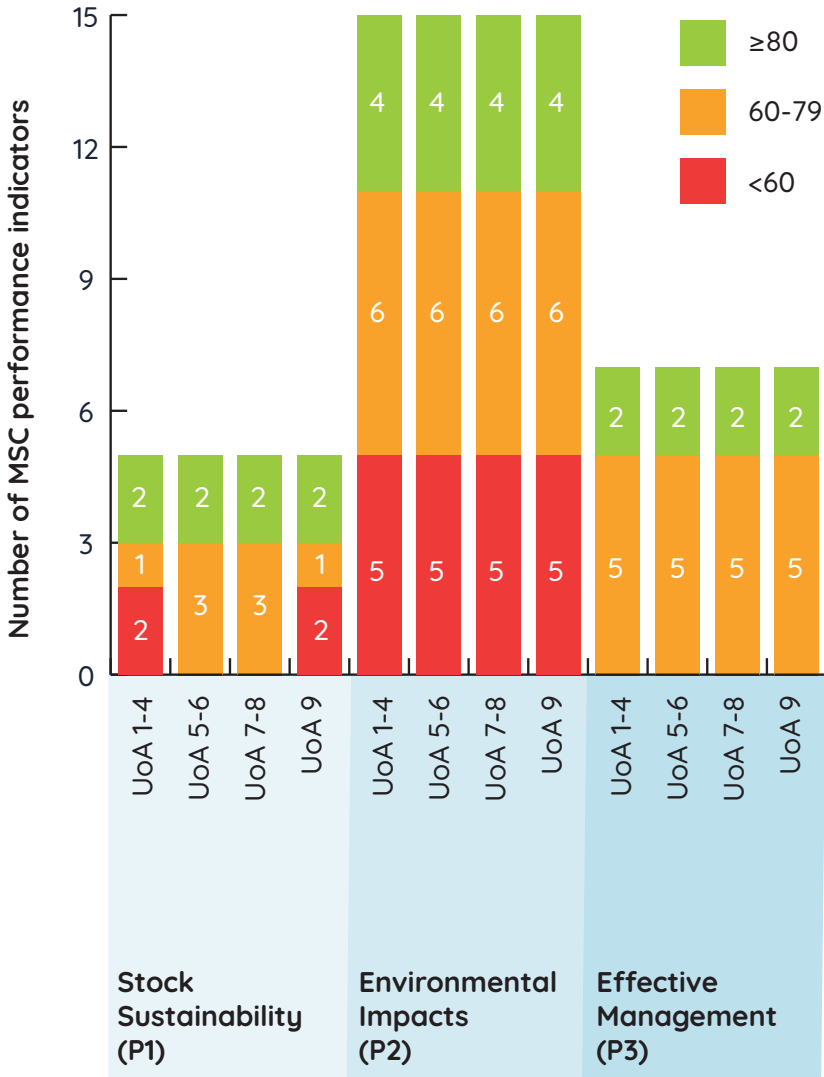
The Steering Group will continue to progress a draft Fishery Management Plan (FMP) to use as a tool for preparing the fishery for full assessment. This requires input from Steering Group members including Cefas, Defra and the relevant Producer Organisations and Fishing Associations. The draft FMP will document all current management in the fishery, as well as meeting the needs of the MSC's indicators for effective fisheries management.





MSC Performance Indicators


Scoring levels across MSC Performance Indicators for each scallop dredge fishery at the end of Year 2.



Unit of Assessment	Stock
UoA 1	West of Kintyre
UoA 2	North West
UoA 3	North East
UoA 4	East Coast
UoA 5	Clyde
UoA 6	Orkney
UoA 7	North Sea South
UoA 8	Dogger Bank
UoA 9	Irish Sea



Nephrops

 SPECIES	<i>Nephrops Nephrops norvegicus</i>
 AREA	North Sea, West of Scotland, Irish Sea (IV, VIa, VIIa)
 GEAR TYPE	Demersal trawl, creel

10 times

Since 2015, sales of MSC labelled *Nephrops* have increased nearly tenfold

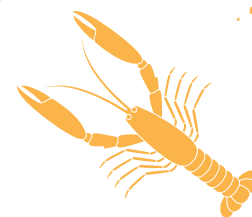
There is currently only one MSC certified *Nephrops* fishery: the Joint Demersal Fisheries in the North Sea

40 products

Between 2015 and 2021, the number of MSC labelled *Nephrops* products increased from 6 to 40



In 2020-21, MSC labelled *Nephrops* product were sold in Belgium, Netherlands, Italy, Switzerland, Sweden, Denmark, Norway and Finland





Key progress

The UK *Nephrops* FIP Action Plan identifies 11 actions to address over the five-year duration of the FIP, and these actions cover 14 of the MSC Standard performance indicators. Each of these actions consists of multiple milestones, on which progress has been mixed over the last year. There has been an increase in scores for performance indicators (PIs) across all trawl Units of Assessment (UoA) for secondary species management (PI 2.2.2) from a conditional pass (60-79) to best practice (>80). There has been an increase in score for North Sea trawl UoAs for primary species management (PI 2.1.2); and for creel secondary species outcome status (PI 2.2.1), both from 60-79 to >80. Despite some obstacles, progress has been made on:

- Stock status
- A review of catch composition
- A review of alternative measures
- Endangered, threatened and protected (ETP) species risk assessment
- Developing a draft Fishery Management Plan

Stock status (biomass reference points)

The Steering Group agreed that based on the assessment of an MSC certified fishery in the North Sea, the Joint Demersal Fishery, it is appropriate to consider MSYBtrigger as a limit reference point – i.e. a proxy for Blim. This is because MYSBtrigger represents the lowest abundance measured in the timeseries of UWTV surveys undertaken for (most) functional unit stocks. The next step for this action will focus on defining the spawning stock biomass (SSB) that results from a level of fishing mortality consistent with maximum sustainable yield (BMSY) or an appropriate proxy for BMSY.

Catch composition review

Cefas provided an analysis of catch data that distinguished between TR1, TR2, and creel gear types. This enabled a more accurate profile of the catch to be considered as primary or secondary species (based on whether there is management in place) and main or minor (based on the percentage presence in the catch), and supported the subsequent Productivity Susceptibility Analysis (PSA). This has improved the score for secondary species outcome from 60-79 up to best practice level (>80).

North Sea cod was previously considered a primary main species, and the recently implemented management plan for this stock has been recognised as a precautionary plan by ICES. This increases the score for North Sea cod management under PI 2.1.2 (primary species management) from 60-79 up to >80.

Alternative measures review

The Steering Group completed a comprehensive review and assessment of alternative measures to minimise unwanted catch, including a database of studies and comprehensive written report, leading to an increased score from a fail (<60) to a conditional pass (60-79) for PI 2.2.2 (secondary species management). This process included significant input from the Steering Group on recent gear trials and studies, as well as technical measures and national legislation, such as regulations on square mesh panels. The Steering Group agreed to continue discussing ongoing work into alternative measures on a regular basis to consider any gear modifications and gear trials that could improve selectivity in the fishery for *Nephrops* under the minimum conservation reference size (MCRS) and for primary/secondary species.



Endangered, threatened and protected (ETP) species risk assessment

A GIS based risk assessment was undertaken by a Masters student from the Queens University Belfast, and focussed on aerial overlap, reported bycatch frequency, and the likelihood of encountering ETP species. The report identified six species as high risk to trawl gear: porbeagle, spurdog, starry ray and tope, white skate and white cluster anemone. For creel gear, humpback and minke whale were considered most at risk of entanglement – based on literature review – but did not have final scores due to absence of creel data. The report concluded that trawling posed a significant risk to ETP species and recommended improving elasmobranch interaction records and best practice through consultation with ICES Working Group on Elasmobranch Fishes (WGEF), Shark Trust UK and Cefas. The Steering Group agreed that a habitat suitability analysis would provide a more accurate indication of where ETP species may actually be present, and that greater industry consultation to ‘ground-truth’ some of the results is required.

Funding was received from NorthConnect to develop an ETP recording protocol. An ETP Interaction Log has been designed, and the intention is to trial it on a few vessels before updating and rolling out more widely to all FIP participants.

Fisheries Management Plan

Steering Group members continue to address Fisheries-Specific Management (PI 3.2.1) by working together to draft an FMP that documents all current management measures in place across the fishery. This will continue to be updated as post-EU Exit legislation becomes clearer. Whitby Seafoods is coordinating the input from individual Steering Group members responsible for relevant sections of the draft FMP.

Year 3: Priorities and challenges for *Nephrops*

Overall, the *Nephrops* FIP is making progress against its Action Plan, although the Principle 3 scores have been impacted by the uncertainty around post-EU Exit legislation, leading to reduced scores for four performance indicators (PIs). The Covid-19 pandemic has affected the rate of progress so the timelines for some of the actions and milestones have been amended. By the end of Year 3, all PIs are expected to meet 60-79 or above, which requires five PIs to move from a fail (<60) to a conditional pass (60-79), and three PIs to move from 60-79 to best practice (>80). The priorities and challenges for the next year are listed in relation to the three principles of the MSC Standard:





Principle 1: Sustainable fish stocks

The establishment of *Nephrops* Management Groups for the North Sea, West of Scotland and Irish Sea has progressed through the initial identification of members for each regional group. However, the pandemic - and being unable to meet face to face - has impacted the progress anticipated on this crucial action. Further outreach is required to engage all relevant stakeholders in the process. Workshops will be arranged to discuss limit reference points and agree appropriate technical measures to be implemented if trigger points are reached. These will build on and strengthen the commitments already set out within the North Sea and Western Waters Multi-Annual Management Plans. It is essential that this process ensures an inclusive approach that can be agreed by the appropriate stakeholders across these Units of Assessment.

There is continued focus on documenting current functional unit specific management measures within the draft Fisheries Management Plan (FMP).

Principle 2: Minimising environmental impact

For the ETP species identified in the Masters project as being of high or medium risk, the level of interaction and management will need to be documented, including any release practices or management strategies. The ETP Interaction Log will be trialled by Steering Group members for feedback, and if successful will hopefully be rolled out to all FIP participants. The ETP recording protocol will contribute to improved information on the fishery and inform any required management.

Based on the Masters project on *Nephrops* habitat interactions, further work has been identified to map overlap and consider Relative Benthic Status of fished areas. We are seeking funding for a Post Doc position to deliver this research through Bangor University. The fishery needs to demonstrate that it is unlikely to reduce structure and function of the vulnerable marine ecosystem (VME) habitats to a point where there would be serious or irreversible harm.

Stock status has been monitored for West of Scotland and Irish Sea cod and whiting, but there have been no improvements for these stocks which remain at <60 for PI 2.1.1 (primary species outcome). The impact of the reduced total allowable catch (TAC) for cod and whiting, and decision by ICES to consider whiting a Category 5 species, continues to impact the scores for primary species performance indicators.

The report from the SICA workshop will be finalised by Poseidon, with recommendations provided. The Steering Group will need to discuss these recommendations and agree which ones are feasible to implement.

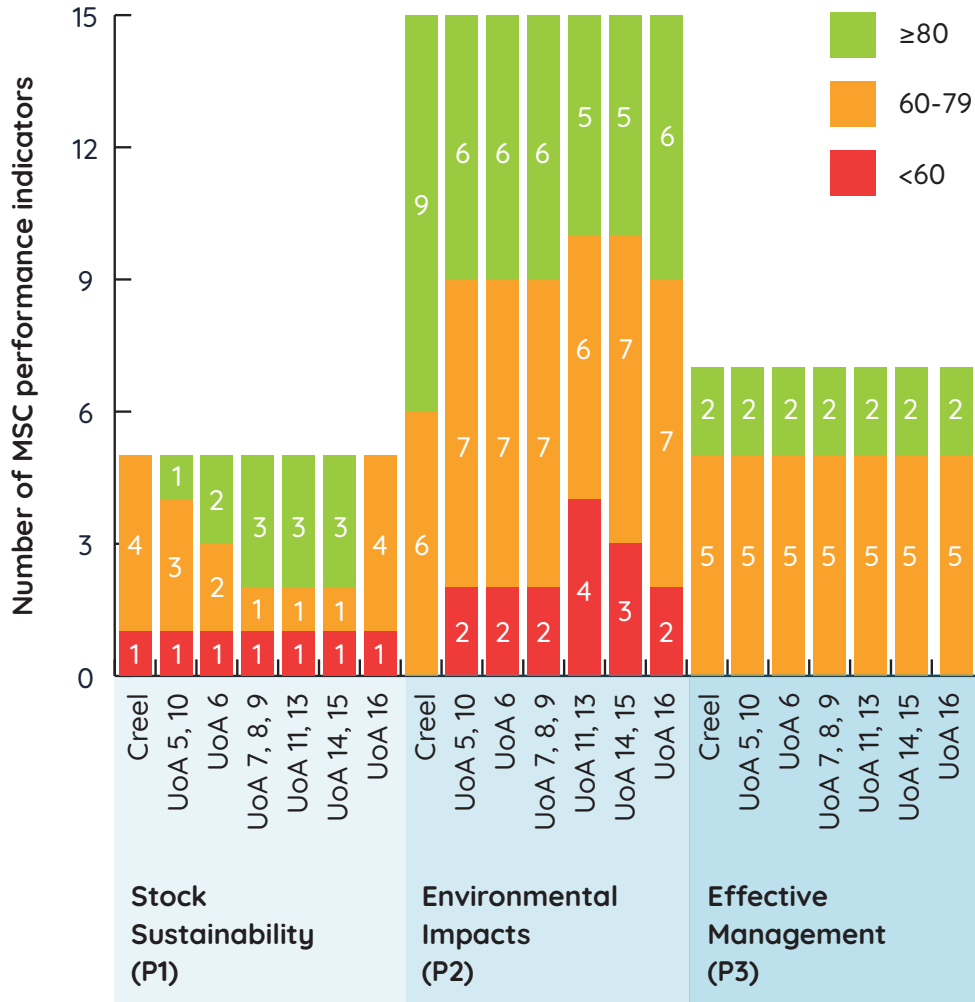
Principle 3: Effective fisheries management

The UK is now an independent coastal state and has established the UK Fisheries Act 2020. The outcomes of EU Exit and the Trade and Cooperation Agreement (TCA) has impacted some scores. To assess the implications of these changes a general review of Principle 3 scoring across Project UK FIPs was undertaken, and for this FIP it resulted in the reduction of scores for four Principle 3 performance indicators (PIs) from >80 to 60-79. Further clarification on the functioning of UK fisheries management with respect to the Multi-Annual Management Plans and TCA processes will contribute to restoring these scores to >80.



MSC Performance Indicators

Scoring levels across MSC Performance Indicators for each *Nephrops* fishery at the end of Year 2.



Unit of Assessment	Gear	Stock Area
UoA 1	Creel	FU 6 Farn Deeps
UoA 2		FU 34 Devil's Hole
UoA 3		FU 5 & FU 10
UoA 4		FUs: 7, 8, 9, 11, 12, 13, 14, 15
UoA 5	TR1 & TR2 demersal trawl	FU 5 Botney Gut - Silver Pit
UoA 6		FU 6 Farn Deeps
UoA 7		FU 7 Fladen Ground
UoA 8		FU 8 Firth of Forth
UoA 9		FU 9 Moray Firth
UoA 10		FU 10 Noup
UoA 11		FU 11 North Minch
UoA 12		FU 12 South Minch
UoA 13		FU 13 Clyde & Jura
UoA 14		FU 14 Irish Sea East
UoA 15		FU 15 Irish Sea West
UoA 16		FU 34 Devil's Hole



Concluding remarks

Both rounds of Project UK FIPs continue to make good progress towards reaching a level where they could successfully pass an MSC assessment, should they wish to do so. Initial discussions in some of the Round 1 FIPs indicate an interest in identifying client groups for this purpose.

Challenges remain in understanding the implementation of the Fisheries Act and what this means for UK fisheries management in practice. Despite this, the Steering Groups will continue to focus on moving forward key aspects of the project. These include:

- Finalising draft Fishery Management Plans (FMPs) ready for consultation with fishery managers.
- Demonstration of successful implementation of an ETP recording protocol.
- Agreement of appropriate harvest strategies that can be expected to achieve stock management objectives and establishing well defined harvest control rules with respect to point of recruitment impairment and MSY.
- Improved communication of the aims of Project UK amongst wider stakeholders who may become involved in future FIPs.
- Development of management measures for *Nephrops*, through regional Management Working Groups to focus on bespoke management solutions.

- Formation of client groups ready to take responsibility for moving the fishery through MSC assessment.
- Considering options for future fisheries to be included in Project UK Round 3.
- Implementation of the FisheryProgress.org social policy.

Project UK is an ambitious project and its aims could not be achieved without the drive, investment and commitment of Steering Group members and funders. The Secretariat (MSC) looks forward to continuing working with Steering Group members, whose expert input provides an invaluable contribution in realising the success of Project UK.



Appendix: MSC processes

MSC definition of a credible FIP

To meet the MSC definition of a credible Fishery Improvement Project, the project must:

- Conduct an initial **gap analysis** against the MSC Standard (MSC pre-assessment).
- Produce an **Action Plan** inclusive of activities, budgets, roles and responsibilities, that is linked to the MSC performance indicators and scoring guideposts and is ultimately capable of delivering an unconditional pass against the MSC Standard.
- **Regularly report progress** against the Action Plan.
- Have a **mechanism** to verify and provide assurance about the robustness of the process and progress being made in the FIP (i.e. pre-assessment and progress reports prepared or reviewed by an MSC assessor or an independent technical consultant).
- Have a **pre-determined limit to the amount of time** spent as a FIP, which should generally be no longer than five years.
- **Aim** to reach a level where the fishery could choose to enter full MSC assessment and achieve MSC certification through a transparent, third-party process, to verify the success of the FIP.

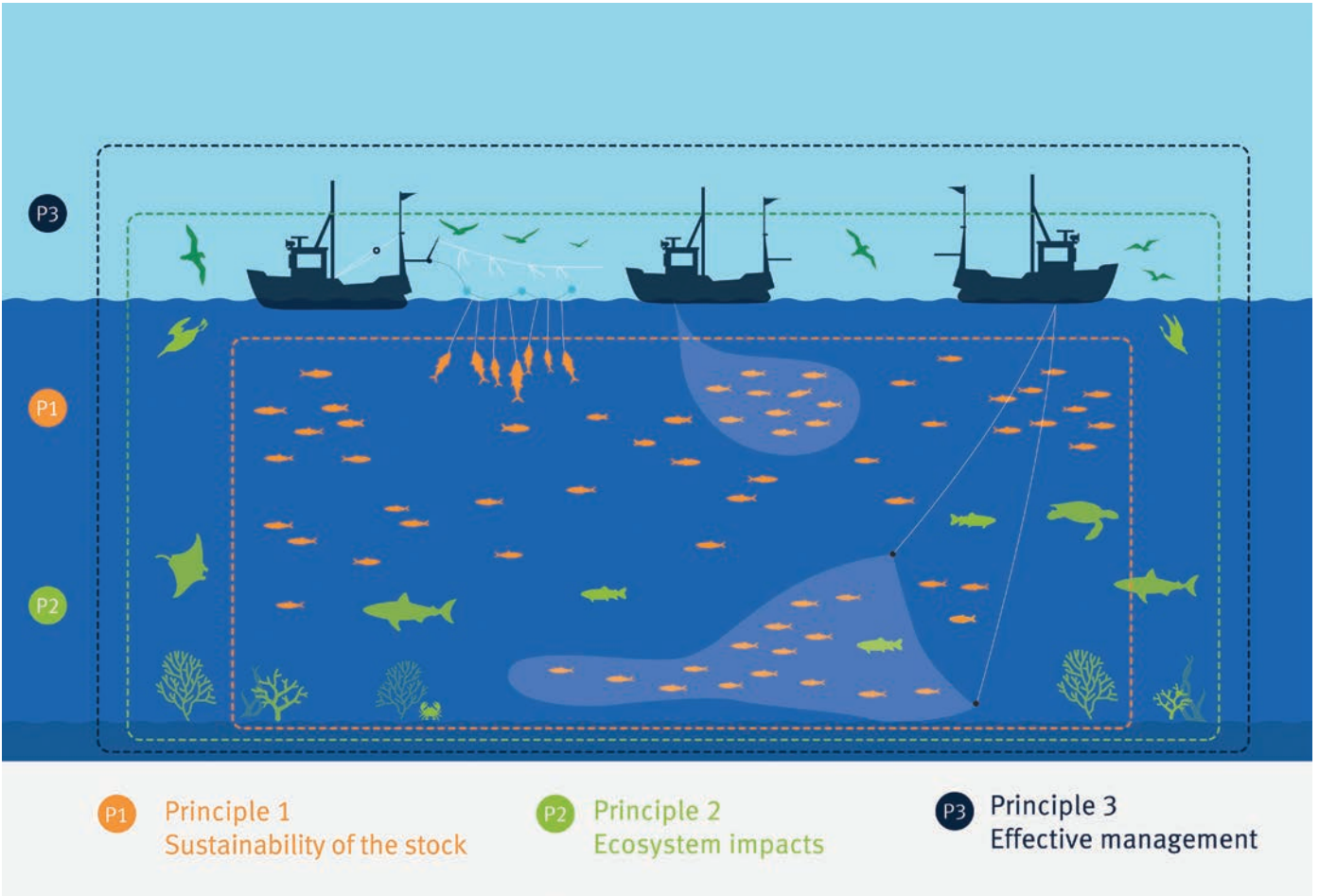
MSC Fisheries Standard (MSC Standard)

The MSC Fisheries Standard is used to assess whether a fishery is well-managed and sustainable. Fisheries are assessed by accredited independent certifiers called Conformity Assessment Bodies (CABs) – also called certification bodies.

The MSC Fisheries Standard has three core principles (Principles 1, 2, and 3) that every fishery must meet:

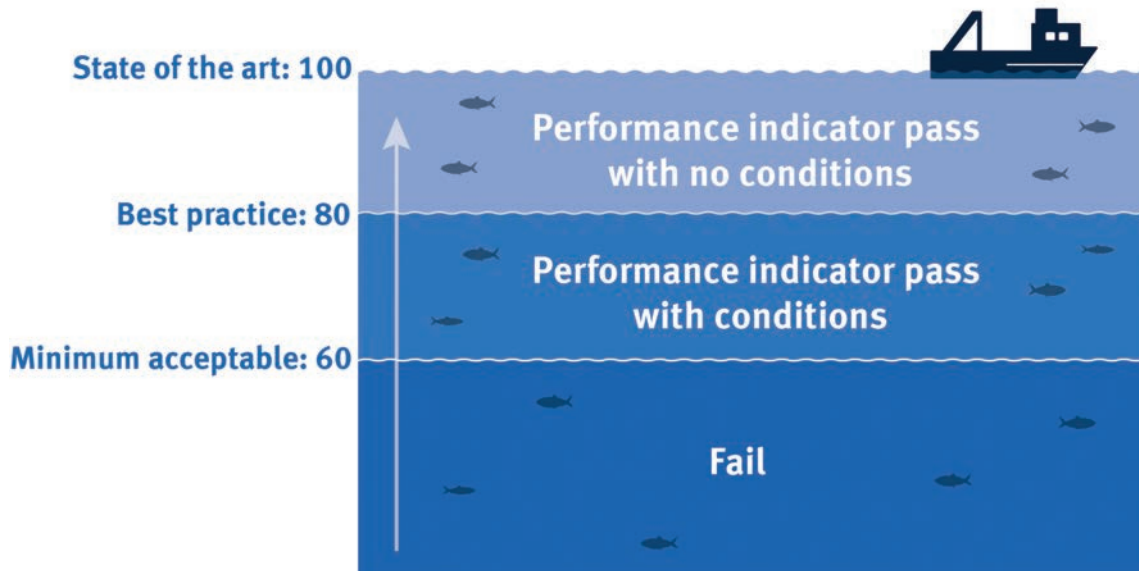
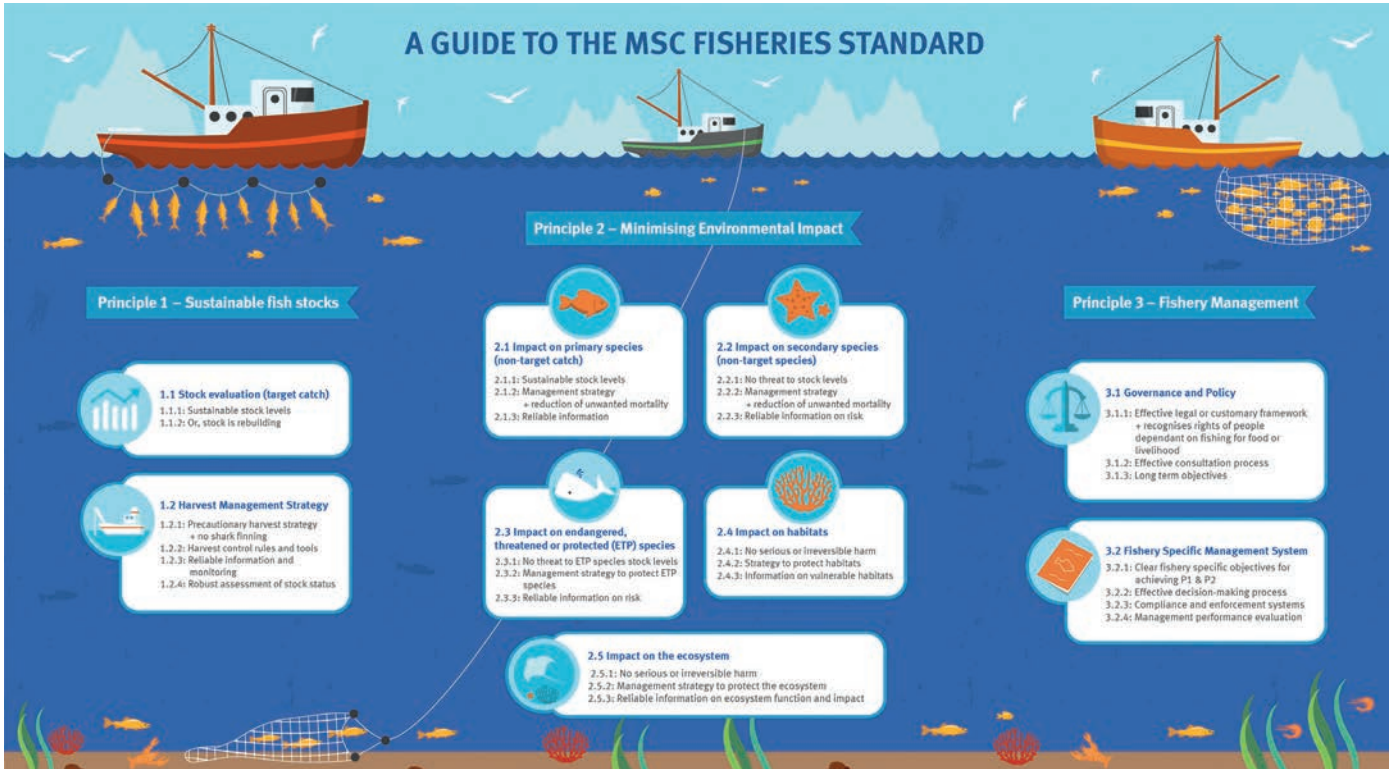
- 1. Sustainable fish stocks:** Fishing must be at a level that ensures it can continue indefinitely and the fish population can remain productive and healthy.
- 2. Minimising environmental impact:** Fishing activity must be managed carefully so that other species and habitats within the ecosystem remain healthy.
- 3. Effective fisheries management:** MSC certified fisheries must comply with relevant laws and be able to adapt to changing environmental circumstances.





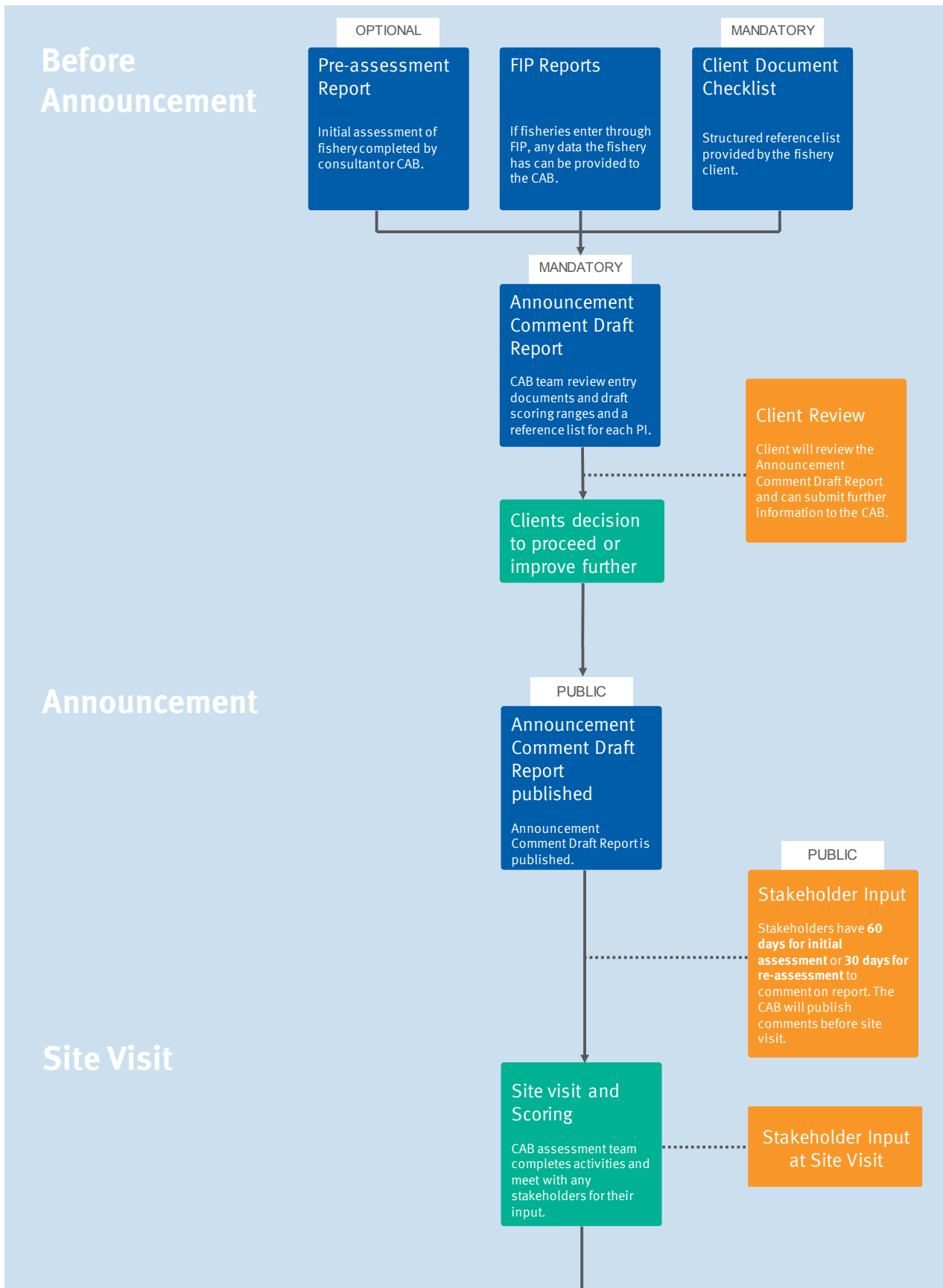
There are 28 performance indicators that sit under the three principles of the MSC Fisheries Standard. A fishery is assigned a score for each performance indicator, where 60 is the minimum acceptable performance, 80 is global best practice and 100 is state of the art performance.

To become certified, a fishery must score at least 60 for each of the 28 performance indicators. If a fishery scores between 60 and 79 for any performance indicator, it will be required to take appropriate action as a condition of certification. This action needs to improve the performance of the fishery so that it scores 80 or above for that indicator. The timeframe to make these improvements is typically five years or less. The fishery must also score an average score of 80 across all performance indicators under each of the three principles.



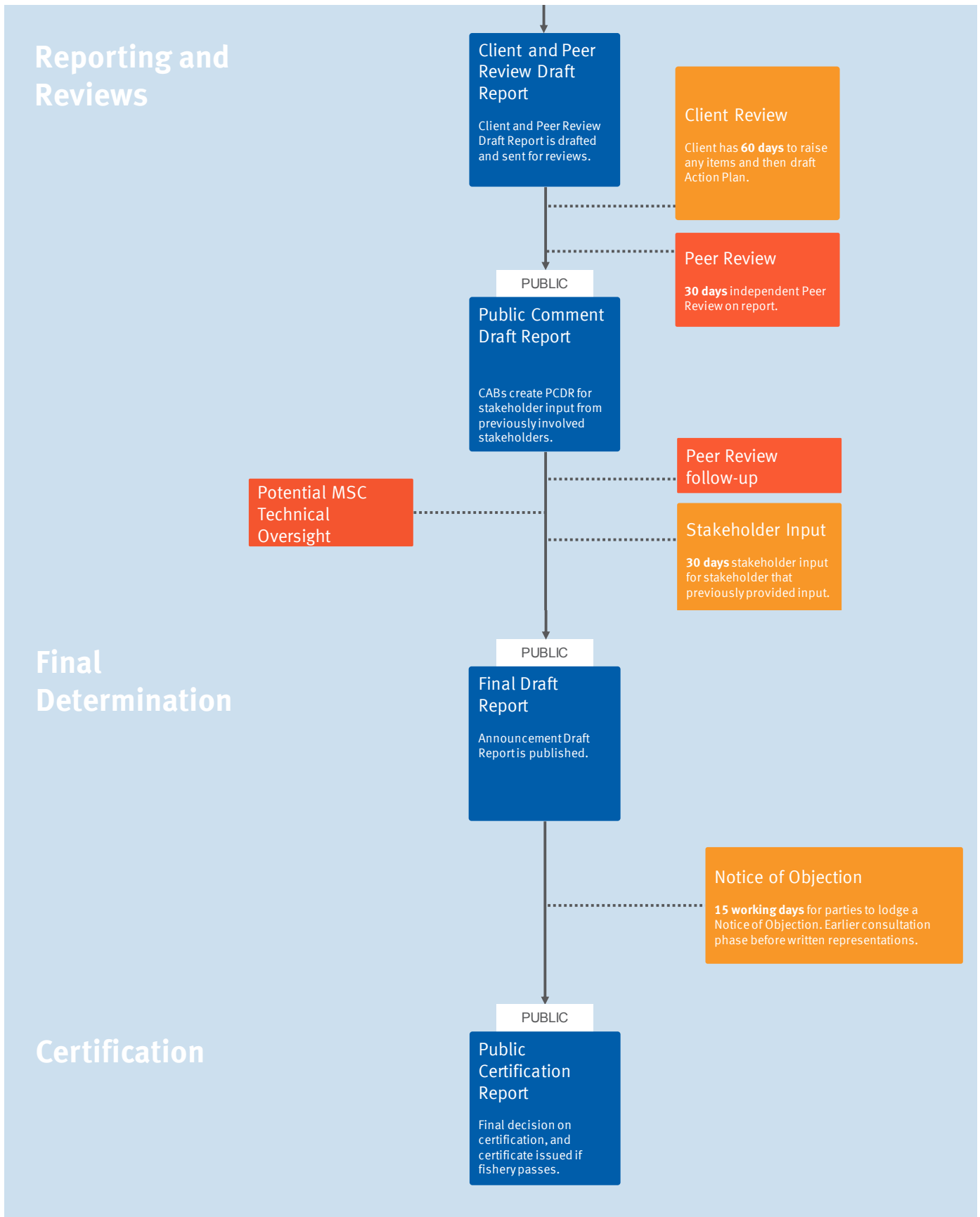


MSC Fisheries Certification Process





MSC Fisheries Certification Process (cont.)





Glossary

Much of the glossary terms were sourced and can be found in the MSC-MSCI Vocabulary document here: tinyurl.com/MSCDdefinitions. Unless stated otherwise, these terms are as defined by the MSC.

B_{lim}

Limit reference point for spawning stock biomass (SSB), defined by ICES.

B_{trigger}

Value of spawning stock biomass (SSB) that triggers a specific management action, defined by ICES.

Bycatch Species

Organisms that have been taken incidentally and are not retained (usually because they have no commercial value).

Ecosystem

Referred to as the fisheries impact on the wider ecosystem structure and function, including consideration of the removal of the target stock, the impacts of the fishery on both the ecosystem's inherent health and balance (e.g. structure, trophic relationships and biodiversity) and the impact on the services provided by the ecosystem.

ETP

Endangered, Threatened or Protected (ETP) species are 'in scope' species that are recognised by national threatened species legislation or species that are listed in binding international agreements such as the Convention on International Trade in Endangered species (CITES). Species classified as 'out-of scope' (amphibians, reptiles, birds and mammals) that are listed in the IUCN Redlist as vulnerable (VU), endangered (EN) or critically endangered (CE) are recognised as ETP species.

FIP

Fisheries Improvement Project. Multi-stakeholder initiatives that aim to help fisheries work towards sustainability.

Fish Stock

The living resources in the community or population from which catches are taken in a fishery. Use of the term fish stock implies that the particular population is a biological distinct unit. In a particular fishery, the fish stock may be one or several species of fish or other aquatic organisms.

Habitat

The chemical and bio-physical environment, including biogenic (made by organisms) structure, where fishing takes place.

Harvest Control Rule (HCR)

A set of well-defined pre-agreed rules or actions used for determining a management action in response to changes in indicators of stock status with respect to reference points.

Harvest Strategy (HS)

The combination of monitoring, stock assessment, harvest control rules and management actions, which may include a management plan.

Main primary or secondary species

Species that form a significant part of the total catch weight, accounting for more than 5% of the total catch weight, or 2% of the total catch weight if they are deemed a less resilient species.

Maximum Sustainable Yield (MSY)

The highest theoretical equilibrium yield that can be continuously taken (on average) from a stock under existing (average) environmental conditions without affecting significantly the reproduction process.



Minor primary or secondary species

Applies to both Primary and Secondary species, these are species that are more rarely caught in the fishery accounting for less than 5% of the total catch weight, or 2% of the total catch weight if they are deemed a less resilient species.

Priority Marine Feature (PMF)

A variety of habitats and species that are a priority for conservation in Scotland's seas, which were developed by Marine Scotland, the Joint Nature Conservation Committee (JNCC) and Scottish Natural Heritage (SNH).

Primary species

Species caught in the fishery that are not the targeted stock (not covered by Principle 1) or ETP but are managed by tools and measures that are intended to achieve stock management objectives.

Productivity and Susceptibility Analysis (PSA)

Used as the 'Level 2' analysis in the Risk Based Framework. This semi-quantitative approach examines several attributes of each species that contribute to or reflect its productivity or susceptibility, in order to provide a relative measure of the risk to the scoring element from fishing activities.

Reference Points

Biological reference points; stock status reference points used to define management action in response to stock status.

Risk Based Framework (RBF)

Used for assessing data-poor fisheries – this is a framework of assessment tools for scoring 'outcome' Performance Indicators in cases where insufficient information is available to score a fishery using the default Scoring Guideposts. See PSA and SICA for examples of tools.

Secondary species

Species caught in the fishery that are not the targeted stock (not covered by Principle 1) or ETP. Are not considered 'primary' as they are not managed to achieve stock management objectives; or are species that are out of scope of the of the program, but where the definition of ETP species is not applicable.

Scale Intensity Consequence Analysis (SICA)

Scale Intensity Consequence Analysis (in relation to using the RBF) – used as the 'Level 1' analysis in the RBF. This qualitative approach identifies the activities mostly likely to be associated with 'worst case' impacts on any species, habitat or ecosystem. A SICA is best conducted with the participation of a diverse group of stakeholders who are able to provide a range of knowledge about the fishery under assessment.

Spawning stock biomass (SSB)

Total weight of all sexually mature fish in the stock.

Steering Group

A collaborative group made up of NGOs, government, retailers and supply chain to help drive forward improvements identified in each FIP.

Unit of Assessment (UoA)

The target stock(s) combined with the fishing method/gear and practice (including vessel type/s) pursuing that stock, and any fleets, or groups of vessels, or individual fishing operators or other eligible fishers that are included in an MSC fishery assessment. In some fisheries, the UoA may be further defined based on the specific fishing seasons and/or areas that are included.

Vulnerable Marine Ecosystem (VME)

These are ecosystems that are classified as vulnerable due to their respective characteristics and processes; such as rarity, fragility, life-history dependency by various species, structure complexity and the functional significance of the ecosystem. See FAO guidelines for more information. www.fao.org/in-action/vulnerable-marine-ecosystems/en



A word of thanks

With thanks to all Project UK funders, and Steering Group members for ongoing support both financially and in-kind; and to Poseidon for ongoing advice and input to all FIPs.

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The report was produced with support from Mindfully Wired Communications.



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