

Phase 1

The first phase will entail assembling and analysing the following data and information:

- The commercial stocks that are currently of interest to the industry in East Anglia, and the stocks that could be of interest if the industry had access to those stocks (the working assumption at this stage is that this will comprise stocks in the Southern North Sea).
- The condition of the stocks where known and the extent to which additional stock data are likely to be required.
- The current regional fleet structure, fleet and vessel capacities, the number of fishermen and the levels of income and profitability.
- Where existing vessels fish, the types of gear used, the volumes and values of fish landed, the extent to which vessels currently have access to quota stocks and where and how the fish are landed and are sold.
- The current structure of the marine aquaculture industry, the number of farms and jobs, and the levels of profitability.
- Training facilities for seafarers and fishermen in the region.
- Barriers to new entrants to the catching sector.
- The port and harbour services available, and their capacity and suitability.
- The extent to which there are processing facilities within the region, and the operation of the associated services, such as transport, storage, chandlers, boat repairs, and electrical equipment suppliers.
- The onward supply and value chains, including end sales in the domestic and international markets, and where there might be opportunities or difficulties when seeking to introduce improvements.
- Known information about the social and economic contribution of the industry made to coastal communities in the region.
- The current fisheries management regulatory structure and interface with the industry, and any issues arising that affect the efficiency of the industry or restrict coastal communities deriving benefits from the fishing industry.

It is envisaged that this phase will involve making contact with local fishermen, businesses and communities to glean information about current practices and future priorities.

Phase 2

This phase will be about exploring the potential and setting out regional policy and structural options as the basis for the proposed long-term strategy. It will include:

- Options for the future allocation of fish stocks in ways that would bring social and economic benefits to coastal communities in East Anglia, such as intra-UK zonal attachment.
- Proposals for changing the existing fisheries management and control systems that could afford the fleet greater flexibility and improve efficiency whilst continuing to support environmental sustainability.
- Considering the future structure and capacity of the fleet required to harvest the available fish stocks and the steps that could be taken to improve efficiency (within sustainable limits). This will include gear adaption or replacement, new vessels, reviewing emerging vessel and equipment design and applications.
- The supporting port and other land-side infrastructure required in future, including processing, storage and transportation.
- Marketing opportunities for locally landed fish, such as potential new markets here in the UK and abroad, product development, adding value, and branding.
- Training needs and the scope for building on existing training services in the region.
- Introducing efficiencies through the value and supply chains.
- Proposals on how to move from the existing situation to the desired outcomes, including how any necessary investment and funding might be secured.
- The scope for synergies between the aquaculture industry and the commercial catching sector.
- How the development and application of technology could assist the regional fishing industry.
- The scope for increased cooperation and collaboration between Cefas and other scientific bodies and the regional fishing industry.
- An assessment of the potential economic and social costs and benefits to Lowestoft and other coastal communities.
- The current regulatory controls and any changes required in order to ensure that the region's fishing industry can be sustainable and profitable.

The report on this phase will make no fixed assumptions about the future regulatory management systems and the rules pertaining, except where there have been firm declarations of government policy and intent. We are keen that as far as possible all feasible options are explored, including those for adapting and modernizing the fleet, ensuring that there are the necessary land-based services available to support a vibrant industry, enhanced marketing opportunities, creating

opportunities for added value services such as processing, and enabling the regional industry to play a more active and collaborative role in the future management systems.

As part of the assessment of options, we will expect an assessment of the relative costs and benefits – financial and non-financial. These will include consideration of the environmental impacts and health and safety issues.

Phase 3

Building on evidence gathered and the analysis undertaken in the previous two phases, this phase will involve preparing a long-term strategy.

Deliverables:

The following will be expected.

- An inception report agreed and signed off by the project steering group, which will include a summary of the agreed aims of the project and will set out the methodology and proposed timescales.
- Monthly updates on project progress.
- A report on completion of phase 1 setting out the findings and next stages.
- A report on completion of phase 2, presenting options and the basis of those options. This should include an executive summary and be accompanied by a presentation. The presentation will be to the steering group and to colleagues in East Anglia.
- A final report using the assessments and issues identified in phases 1 and 2. This should include an executive summary and be accompanied by a presentation. The presentation will be to the steering group and to colleagues/stakeholders in East Anglia.

The reports will be required to be written in a style that is accessible to a non-expert audience.