



North East Atlantic Pelagic Stakeholder Symposium

September 2023

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Background

The North East Atlantic (NEA) region is home to highly dynamic and data-rich fisheries, playing a vital role in supporting thriving coastal communities and seafood industries. However, effective management for the region's key pelagic stocks of mackerel, blue whiting, and Atlanto-Scandian herring is facing significant challenges due to an impasse amongst Coastal States and Fishing States on setting an overall quota allocation within scientific advice set by the International Council for Exploration of the Seas (ICES).

Fishing within scientific limits is a foundation of good fisheries management, yet the setting of individual quotas by nations has resulted in combined catches that exceed scientifically advised Total Allowable Catch (TAC), jeopardising the sustainability of these stocks. Consequently, all three stocks have lost their sustainability certifications, indicating an urgent need to get management right, and implement lasting long-term management plans that define quota shares within that exceed the scientifically advised catch limits. Without a quota share agreement for internationally shared stocks, the future sustainability of these stocks is threatened.

Further information on the characteristics of these species, the fisheries and the current management structures can be found in a recently published report; [North East Atlantic Pelagic Fisheries - Management Challenges for Straddling Fish Stocks](#).

Rationale

The North East Atlantic Pelagic Stakeholder Symposium was convened as a way to:

- address critical issues related to the management of NEA pelagic fisheries.
- bring together a diverse and multi-disciplinary range of stakeholders with an interest in the future health of Atlantic mackerel, blue whiting and Atlanto-scandian herring stocks deepen.
- understanding and explore potential solutions to achieve a stock-sharing solution within scientific advice.

Delegates represented key disciplines of science, government, markets, NGOs, and the pelagic fishing industry. Experts across these disciplines were invited to speak and lead discussions centred on the key themes of: science and advice; management and governance; markets, and certification and standards.

The symposium was convened by the Marine Stewardship Council, and supported by [The Fishmongers' Company](#) who kindly hosted this important event.

Opening Address



Erin Priddle, North Europe Regional Director for the MSC, welcomed participants to the symposium. A wide variety of stakeholders were present from across the scientific community, wider seafood supply chain, fishing industry, governance and policy, and NGOs.

The MSC's ambition in convening the symposium aligns with the organisation's vision and mission of helping to end global overfishing. In using its extensive network to bring together the full range of stakeholders invested in the health and future of these fisheries, the MSC seeking to facilitate knowledge-sharing and transparent dialogue between the different groups.

Key questions that the symposium would seek to address were framed as follows:

- What does 'good' look like for the future of NEA pelagic fisheries - and what is the role of science, governance, the markets, and political engagement for achieving that vision?
- How can the voices and knowledge of stakeholders contribute towards breaking political deadlock around TAC and quota-sharing for these species?

Discussion Themes

Science and Advice

- Years of broken agreements on quota sharing mackerel, blue whiting and ASH stocks have resulted in individual quotas that, when combined, far exceed scientific advice for these stocks. Consequently, fisheries for these stocks have had their MSC certificates suspended, and many have withdrawn from the MSC's program for sustainable fisheries.
- While coastal states agree on the scientific advice to limit sustainable catches, they are unable to agree on how to share the quota amongst themselves. This has resulted in total annual catches exceeding scientific advice - a situation which has endured for over a decade.
- The ecosystem of the North East Atlantic is subject to continuous environmental pressures and changes. These changes in the environment make stock assessments more complex, and will profoundly change the marine ecosystem. It's therefore critical that science works with policy to create management systems that can respond and adapt to changes in the environment, such as climate change.

Management and Governance

- There is widely-felt concern with the current management structure, which is considered to lack the tools needed to deliver a lasting quota-sharing agreement in line with science. Additionally, questions related to the role of North East Atlantic Fisheries Commission (NEAFC), RFMO agreement for all three stocks amongst the relevant nations.
- Well-functioning political agreements navigating similar issues could offer a template for success. For example, management bodies on the US Eastern seaboard are working with the fishing industry to resolve issues of stock sharing across state boundaries using adaptive allocation of quotas which change automatically as stocks move into a different State's waters: The concept of 'adaptive allocation criteria' was introduced as a possible solution that could be considered in the context of the North East Atlantic pelagics.
- Other examples of best practice were offered during the event, such as the Russia-Norway bilateral agreement on cod. Despite political difficulties, Russia and Norway agreed to manage the cod as a joint stock with compromise and collaboration being central to year-on-year agreements between these nations. The Chilean jack mackerel fishery in the South Pacific Ocean offered another example where 15 nations reached an agreement on the allocation of sustainable catch quotas.
- While there are only a handful of international quota share agreements that offer up success, the need to scale these examples is clear if we are to secure sustainable, internationally-shared fisheries for the future. Systemic change is needed, including a review of the RFMO framework, to strengthen accountability and build good governance within international fisheries.

Markets

- Market actors made clear that without an agreement there could be significant socio-economic consequences. For instance, some market players are already taking steps to commit to fully sustainable fisheries, such as Followfood, who took the decision to stop sourcing uncertified Atlantic mackerel, opting instead for MSC-certified jack mackerel from Chile, which is now sold in Kaufland, one of Germany's leading supermarkets.
- Feedmeal company Skretting, the world's largest producer of feed for the aquaculture industry, said if there is no agreement they will all 'walk away', and stop purchasing blue whiting from the region. Strong market signals from big players like Skretting provided powerful and clear messaging on their positioning, should the North East Atlantic Pelagic Advocacy Group (NAPA) FIP fail.



Session 1: Science and Advice

Moderator: Katie Longo, Head of Research, MSC

Ecosystem-based Management and Climate Change



Verena Trenkel, Head of Research at French scientific institute Ifremer, presented on **‘Ecosystem-based management, climate change, and small pelagics’**. Climate change impacts observed within the marine environment are increasing with measurable impacts across the whole food-web and ecosystem. Fish spawning and survival rates are changing, and range shifts across the North East Atlantic are being observed in many species. Impacts within marine food-webs are slower to emerge, but are expected to become much stronger and result in ecosystem shifts across the coming decades.

The International Council for the Exploration of the Seas (ICES) uses a complex, multi-layered process to develop scientific advice for fisheries management, and seeks to understand the current ‘state of play’ in terms of the ecosystem within which fish stocks exist. ICES carried out an audit to understand how ecosystem changes are being considered in delivering scientific advice for all 265 stocks covered by ICES. There are different ways through which ICES assessments incorporate information that can indicate changes in the ecosystem. These include data on changing length distributions, weight-at-age, maturity-at-age, natural mortality, sex ratio, and recruitment.

Specifically on small pelagics, ICES provides advice for 39 different species. While scientists incorporate environmental variability within the advice for the majority of pelagics, environmental shifts are affecting stock dynamics’ [at an increasing rate], so these factors must be considered to ensure good forecasting for the stocks is possible. Although stock advice from ICES is on a single-species basis, due to the range of data considered within assessments, environmental shifts in the ecosystem are effectively included within the parameters of the assessment, and therefore the advice process. The impacts of climate change are now sufficiently widespread and measurable, such that including these factors in the advice is essential.

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Climate change is forcing the ecosystem-based approach onto the agenda - it is forcing a broader view.

Verena Trenkel, Ifremer

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The distinction between ecosystem-based advice and ecosystem-based management was highlighted: changes to the advice system may be required to facilitate this holistic shift in management, in response to the ‘profound’ changes observed in marine ecosystems.



Small Pelagics and Management Strategy Evaluations (MSEs)



Andrew Campbell, Fisheries Scientist, Marine Institute Ireland, presented on ‘**Stock assessment and MSE of small pelagics**’.

Characteristics of small pelagics in the North East Atlantic

Mackerel, blue whiting and Atlanto-Scandian herring are significant fisheries in the North East Atlantic - supporting catches of roughly three million tonnes in 2021.

There is no sharing agreement for the stocks between the relevant Coastal States - delegations of the European Union, the Faroe Islands, Greenland, Iceland, Norway, the Russian Federation, and the United Kingdom. This has led to fishing activity that ‘overshoots’ the ICES catch advice for the listed species. This overexploitation of the stocks is significant and resulted in the suspension or withdrawal of MSC certification for these three key North East Atlantic pelagic species.

The stocks are widely distributed - covering multiple Exclusive Economic Zones (EEZs) as well as international waters - and they are highly migratory.

These species have highly dynamic life-cycles - exhibiting variability within year and over-time, linked to distinct patterns within their life-cycles.

Atlanto-Scandian herring is a demersal spawner, leaving its eggs on gravelly substrate on the seabed. They are highly particular about their spawning environment. Adult fish migrate, whilst juveniles stay around nursery areas for their early years - the Barents Sea is a particularly important environment for this species in its early years. Recruitment into the stock is variable, with significant peaks and troughs. For the past 10-15 years, recruitment has almost always been below average.

Blue whiting is an oceanic spawner, gathering in enormous shoals to the west of Ireland and the UK. Spawning distribution fluctuates: it is affected by ocean gyres. Once spawned, the stock spreads out over vast areas - making it extremely challenging to monitor. Recruitment into the stock is also highly variable.

Mackerel has a prolonged spawning season, generally spawning in the south of the Atlantic in January-February. In the past 15 years, the spawning range of the stock has significantly increased. Overall, a ‘massive’ increase in the range of the stock has been observed, with shifts to the west and the north. The stock has generally seen a period of strong growth, although recently there has been some decline - at least in part linked to high catches.

The Mackerel Stock Assessment was established in 2014 and has undergone two rounds of review and retrospective revision since that point, indicative of the scale of the challenge of developing a robust assessment for this stock. The challenges presented for this primarily arise from changes in stock distribution, spawning behaviour, limited survey time frames, methodological aspects, and the relative weighting of data sources for mackerel.

In 2020, a Management Strategy Evaluation (MSE) was carried out for mackerel: identifying management procedures that meet predefined, agreed objectives while accounting for uncertainties in the stock. This MSE allows scientists to cast into the future under different scenarios and judge the performance of individual management procedures, checking which are the most robust. The MSE for mackerel looks at the outcomes of various management scenarios over a time horizon of 40 years.

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This [North East Atlantic Mackerel MSE] is really powerful, and it's only the beginning of what you can do with MSEs
Andrew Campbell, Marine Institute Ireland

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The precautionary management options outlined within the MSE have not been agreed or used by Coastal States.

Science and Policy Interface



Martin Pastoors, Independent consultant at **'Fish and Fisheries'**, presented on **'Can science help resolve sharing arrangements for pelagic stocks?'**, characterising his offering to the symposium as a **'philosophical discussion'** on the role of science in decision-making.

Pastoors set forth the benefits of the ICES model for scientific advice were framed as representing international consensus advice, independent from direct political interference, with genuine transparency on data and methods. However, he characterised interactions between science and policy as 'limited'. In terms of the role of science within Coastal States negotiations for pelagic stocks, scientists act as 'advisers' to individual Coastal States - and this may allow for a politicised or policy-driven view of science, described as 'science becoming argument' rather than 'truth'.

Zonal attachment can be seen as an example of a 'mixed science-policy concept' - whereby numerical data and scientific information may appear as 'truth', but weighting information within the system of zonal attachment can lead to many different 'answers' or outcomes.

Increased use of spatial tools and metrics within science to support decision-making on management of pelagic stocks were seen as an important step in the evolution of science provision, with the need for science to remain 'transparent', 'truth' and 'evidence' based - leaving 'argument' and 'negotiation' in the realm of policy and politics.

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Don't 'load' science with policy - let it be evidence, truth. We need mechanisms to deal with changing distributions, and science can help, but it won't provide you with the one and final answer on how to get there.

Martin Pastoors, Fish and Fisheries

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Climate Change and Policy Implications



Kristin Kleisner, Senior Director, Ocean Sciences, Environmental Defense Fund (EDF), presented on **'Climate change along the US East Coast and implications for regional allocation policies'**.

Ocean temperatures in the North East, including along the US East Coast, are warming faster than the global ocean, in particular in the Gulf of Maine. Much of this is due to natural swings in the Earth's climate that are impacting the region. In addition to changes in temperature, shifts in local hydrography, water chemistry, and local habitat are also being witnessed. This gamut of impacts is affecting where fish are located as well as their productivity.

These stock shifts cause challenges - particularly where stocks move across jurisdictional boundaries, creating conflict over access and a sense of 'unfairness'. Renegotiation of access is costly and difficult, with fishers who are witnessing fish move out of their traditional waters allegedly seeking to overfish the stock before it shifts to a new jurisdiction. At the same time, fishers working in areas where stocks are moving to may also run the risk of overfishing if appropriate management measures are not in place.

To illustrate where the challenges of quota sharing and access issues across borders are taking hold elsewhere, the Lenfest Ocean Program funded a project entitled 'Managing across boundaries: seeking to explore and address scientific and governance issues created by shifting stocks'. The purpose of the project is to develop and test a model for evaluating policy options for managing fish stocks across policy borders and assess socio-economic and environmental trade-offs in this context.

The project is exploring options for adaptive allocation: looking at allocation methods that vary from fully 'static' to fully 'dynamic', with a range of levels in between. Researchers are examining the hypothesis that an adaptive quota allocation key (based on empirical changes in species distribution, and weighted to reflect individual communities' priorities, values, and tolerance for rapid re-allocation), would

- Reduce fuel use;
- Increase economic benefits generated by these fisheries; and
- Reduce conflicts.

While the research has not concluded findings at this stage, next steps are focused on exploring economic outcomes of the various levels of static vs. dynamic allocation options, as well as evaluating impacts of different fuel prices and consumer demand.

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These policies were developed in consultation with the Atlantic States Marine Fisheries Commission and management councils. There is a real interest in moving towards dynamic allocation, so this collaborative effort to lay foundations is important.

Kristin Kleisner, EDF

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Session 1: Science and Advice

Panel Discussion

Summary

- **Science is a ‘snapshot’** of a moment, and it is **shaped by the information available** - the scale and age of that information - as well as the questions asked of it.
- **Climate change** is reshaping the scientific and advice system and **will reshape management**.
- **Speakers** offered an argument for science as ‘seeking the truth’ and **outlined the boundaries of science as it pertains to policy** - underscoring that ‘more science is not always the answer’; a policy or management process is different to advancing scientific understanding. For example, advice can incorporate ecosystem factors, but delivering ecosystem-based management, which is based on that information, is a separate process.
- The timeframe for advice feeding into management is a factor - **stock advice is yearly, but models underpinning assessments and MSEs can project decades into the future**. This creates challenges in translating management decision-making to industry and the market - **an immediate and a 50-year perspective are available, but a view on the 10-20-year timeframe is extremely challenging**. Cognisant of this, US scientists are exploring options for in-year or seasonal forecasting of stock shifts and abundance levels.
- Assessments suffer ‘growing pains’ – data, and analysis is far from perfect regarding the current state of play on NEA pelagics insights. There may be more information available to provide more practical underpinnings for ambitions regarding better management such as increased spatial information.
- Science and policy co-development with communities is one method seen in the US that can help to navigate rapidly changing stock patterns and develop adaptive and responsive allocations in line with this. **Climate change is already demanding greater responsiveness from managers and policy-makers**.

Discussion

Following presentations on science and advice for pelagics, a discussion was conducted with participants. Many were interested to know how to pursue an agreement between parties where ‘someone is bound to lose’, and how to foster a ‘sharing’ mentality in a context where everyone may walk away from a negotiation ‘not completely happy’. Drawing on the abovementioned case study from the US East Coast, there was agreement across the symposium that the North East Atlantic political deadlock urgently required a compromise - and it may mean looking for a new mechanism through which to achieve this.

Some attendees queried the extent to which pelagic stocks have been impacted by ‘overfishing’, suggesting that the total combined catch for the species has been relatively stable for decades. Scientists cautioned that the situation in the North East Atlantic is effectively ‘playing with fire’ - there is limited data available to fully understand recruitment of these species, particularly in the mackerel stock. Andrew Campbell said Coastal States may have been ‘lucky’ that the recent period in the North East Atlantic has seen good productivity for mackerel, but emphasised that this trend cannot be relied upon.

Questions around a previous mackerel assessment that underestimated the total stock size led to further exploration of the nature of science, and what is asked of science. Speakers underscored that science ‘is not right or wrong - it is based on what we know at the time’, and spoke of the importance of not basing an assessment on one particular evidence source, but pulling together all available data sets to provide the best possible assessment. Linked to the variance in mackerel assessments, participants questioned whether ICES could set advice at a lower level, in anticipation of a certain level of overfishing - this was refuted. At the opposite end of the advice spectrum, supply chain voices in the room questioned how advice for blue whiting - an ‘overexploited stock’ - could increase by 80% in the previous year. This was seen as undermining

messaging from the supply chain to industry: one delegate questioned how their business could justify only buying from certified stocks (or stocks in fishery improvement projects (FIPs) in order not to endorse overfishing of the stock, whilst scientists have advocated for such a significant increase in catches. Again, the complexity of the advice process was brought to the fore - in the case of blue whiting, the underlying 'stock dynamics' (with big swings in recruitment) affected this advice, creating a snapshot that did not align with the overall perspective of the stock's status.

Participants spoke of a need for a '10 to 20 year view' of a stock, rather than the year-by-year assessment incorporated into advice, and the 50-year perspective offered by MSE models. It was agreed that this offers real challenges to adapting management and responding to climate change. In the US, the Lenfest-funded project is exploring options for in-year or even seasonal forecasting - and is 'making gains' on this front. With regards to pelagics specifically, it was highlighted that knowledge gaps pertaining to the species' life-cycles make this particularly hard. The need to maintain long time-series was raised in this context - offering a longer-term perspective from which to learn for the future.

Discussions further unpacked the distinction between ecosystem-based advice and ecosystem-based management in fisheries. Verena Trenkel emphasised that, despite the uncertainty in monitoring and predicting ecosystem shifts in response to climate change, the priority of the ICES community is to get 'as close as possible' to understanding these shifts, take them into account, consider changes to how advice is developed, and then implement those changes. However, policy makers are then responsible for what is then done with those advice changes - how they are implemented through negotiations between states and on the water.

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The winners of today are the losers of tomorrow - things change, and this needs to be accounted for in management, too. Everyone needs to shift a bit

Verena Trenkel, Ifremer

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Session 2: Management and Governance

Moderator: Erin Priddle, North Europe Regional Director, MSC

Management Challenges for Straddling Fish Stocks



Suzannah Walmsley, Independent consultant at ABPmer, presented on ‘**Management challenges for straddling fish stocks**’, sharing the findings of a newly-released [report](#) on the North East Atlantic region commissioned by the MSC.

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These are very important fish stocks, supporting large-scale fishing activities in all nations surrounding the North East Atlantic... Since 1996 there has only been one year with effective agreements in place for both Coastal States and Fishing States

Suzannah Walmsley, ABPmer

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Evidence shows that the stock biomass for the species under discussion fluctuates in line with both environmental drivers and fishing pressure. In 2007, there were agreements in place for all three stocks that effectively limited catches to the level of scientific advice. An agreement was already in place for mackerel, and an agreement was reached for blue whiting in 2006, facilitated by an industry-level agreement on quota shares for this species. The following year, an agreement was reached for herring, but by 2008 the agreement on mackerel was no longer effective at constraining catches; shifting stock distribution meant that coastal states that were not part of the agreement started setting their own unilateral quotas.

Governance for Pelagics in the North East Atlantic

UNCLOS (United Nations Convention on the Law of the Sea) sets out that states are expected to collaborate on management of straddling stocks, either directly or through regional / subregional management bodies. The UN Fish Stocks Agreement sets out more detail: prescribing that states should agree on mechanisms for obtaining scientific advice, and ensure compliance with management measures. Within the North East Atlantic region, the relevant Regional Fisheries Management Organisation (RFMO) is NEAFC.

NEAFC only sets management measures for the parts of the stock(s) that are in international waters. For these pelagic fisheries, Coastal States have chosen to set management measures directly, rather than work through NEAFC. A TAC is agreed, and then a sharing arrangement is needed to ensure that catches do not exceed the TAC.

As it stands, pelagic sharing arrangements do not have any mechanisms for new entrants to participate and influence the agreement process or on revising allocations and have no dispute resolution mechanism to refer to when negotiations have stalled. This means that the only option, under the circumstances of a disagreement, is to withdraw from the process entirely and set a unilateral quota. This is seen clearly in the case of mackerel, where shifting stocks moved further into the waters of Iceland and the Faroes but there was no change in the quota allocations - leading to unilateral quota-setting that results in combined individual TACs far greater than the scientific TAC. In real terms, the percentage of the TAC caught by these two nations has increased from 2% to 25% since 2004. As agreements for all three stocks are handled separately, there is no penalty for withdrawing from the agreement for one stock, in relation to the other stocks.

These factors illustrate several ways in which the current governance of the stocks could shift to provide more likelihood of stable and resilient agreements in future. While fixed allocations provide clear and stable quota shares, they can be put under strain as distributions start to shift. An alternative mechanism would be the introduction of adjustable quota shares: adjusted based on distribution of stocks or different criteria, although these may be more difficult to reach agreement on initially.

The structure of agreements could also be amended, which could include building in mechanisms for dispute resolution, to prevent withdrawal, and combining several stocks into a single agreement. This would allow opportunities for trade-offs between the different stocks and potentially facilitating agreement e.g. agreeing a higher share for one stock, and a lower share for another.

Currently, decision-making for pelagics is based on consensus decisions. An alternative could be to use majority voting when consensus cannot be obtained, as in the Chilean jack mackerel fishery in the Pacific.

Ultimately, agreements should:

- Involve all parties
- Ensure robust management, including Harvest Control Rules (HCRs)
- Provide flexibility or options for adjustment
- Incorporate objection procedures and / or mechanisms for dispute resolution.

Finally, it was highlighted that data and science could both inform and obstruct these kinds of political agreements, meaning that there would always be uncertainty. More data is not the answer: compromise will be essential, with an understanding that all parties may need to accept a lower share of the TAC.

Changing Climates: Politics, Environment, and Fisheries Management



Arni Mathieson, Senior Adviser to the Iceland Ocean Cluster, presented on ‘**Change in our times**’, highlighting the developments in politics, climate, and fisheries management that has led to the status quo for the North East Atlantic and its fisheries. He emphasised the need for something ‘new’ to overcome the challenges presented by biology, ecosystems and politics in managing pelagic stocks.

Change is a constant. Within political decision-making processes of any kind, and in particular when it comes to environmental issues, there has been huge democratisation in decision-making, with civil society acting to influence political initiatives. There is easier access to information informing decisions, greater sharing of information online, and a wider array of concerns connecting to fisheries management: food security, health, the environment, marine pollution, and more. Society no longer waits for political decisions to be made, but seeks to influence them before the outcome. He noted that environmental change has been profound - with climate change impacts seen across the North East Atlantic region.

Fisheries management itself has changed, starting with H. Scott Gordon’s 1954 article on The Economic Theory of a Common Property Resource, through to Game Theory entering into the discourse in the 1970s, and the FAO’s conclusions that cooperation matters in every context. However, the management procedures for North East Atlantic pelagics have not changed since before the UK entered the European Union.

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We are still trying to manage fisheries under a set-up that has been in place since the 1970s. These mechanisms have been in place since before the UK joined the EU, let alone left it.

Arni Mathieson, Iceland Ocean Cluster

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UN Fish Stocks Agreement Article 11

New members or participants

In determining the nature and extent of participatory rights for new members of a subregional or regional fisheries management organisation, or for new participants in a subregional or regional fisheries management arrangement, States shall take into account, inter alia:

- (a) the status of the straddling fish stocks and highly migratory fish stocks and the existing level of fishing effort in the fishery;
- (b) the respective interests, fishing patterns and fishing practices of new and existing members or participants;
- (c) the respective contributions of new and existing members or participants to conservation and management of the stocks, to the collection and provision of accurate data and to the conduct of scientific research on the stocks;
- (d) the needs of coastal fishing communities which are dependent mainly on fishing for the stocks;
- (e) the needs of coastal States whose economies are overwhelmingly dependent on the exploitation of living marine resources; and
- (f) the interests of developing States from the subregion or region in whose areas of national jurisdiction the stocks also occur.

Considering the UN Fish Stocks Agreement, it was posited that the ‘main issues’ for ‘new, dynamic’ management of international fisheries in the North East Atlantic would be based on an agreement around zonal attachment, catch history, a discussion on the length of reference periods informing these elements and the frequency with which these periods should be revised. In addition, such agreements would need to be based on the ‘will and means’ to deliver consensus. In summary, whilst the fundamental change of parties demonstrating the willingness to compromise is an evident need, broader structural changes to how stocks are assessed and managed is also overdue.



Fisheries Management Negotiations



Geir Hønneland, Research Professor at Fridtjof Nansen Institute, presented on **‘Multilateral fisheries management cooperation in the North East Atlantic - lessons from the Barents Sea’**, providing insights from other internationally managed fisheries in the region.

In the Barents Sea, the Joint Norwegian-Russian Fisheries Commission, supplemented by bi-lateral and multilateral agreement, is working well. The Barents Sea is a very productive fishing ground, with the world’s largest cod stock. The region’s fisheries have been under joint Norwegian-Soviet/Russian management since 1975, with a Joint Fisheries Commission setting TACs and most important fish stocks divided 50/50 between the two parties. In addition, there are quota exchange arrangements in place with the EU, the UK and the West Nordics. This system of management has been successful in maintaining sustainable stock levels and stable political cooperation. Significantly, in terms of stock biology, Norway would theoretically be owed a larger percentage of the stock - but its agreement to the 50/50 split with Russia has helped to foster the stability from which both parties benefit, and has put Norway in a position to bargain with Russia when revisiting allocation keys for other stocks. In turn, despite the large cod stock shifting towards the Russian zone under climate change, Russia has not demanded any additional changes in allocation.

Regarding negotiation mechanisms between Norway and Russia, Hønneland pointed to the ‘most striking feature’ of cooperation as ‘patience’. Specific issues have been negotiated for years, if not decades: for example, joint minimum mesh sizes and fish sizes was a point that the two States discussed from the 1970s through to an agreement in 2009. There is significant participation from stakeholders within negotiation meetings, from many nations and organisations, with scientists being an important part of the negotiations - not just providers of advice. There are many layers to the ‘negotiation architecture’ - plenary sessions, a permanent committee, a scientific level, and enforcement and control. Crucially, discussions at all levels must be characterised by pragmatism and compromise, and the collaboration between the two States has been able to withstand wider geopolitical pressures, providing stability in the management regime in the Barents Sea regardless of external political allegiances or conflicts.

Lessons for the management of pelagics in the North East Atlantic were summarised as:

- The need to foster a culture of pragmatism and compromise;
- Building a stronger management regime, including better integration of all elements of fisheries management - i.e. science, regulation and enforcement - and incorporating a longer-term perspective into negotiations;
- The possibility of overcoming the adversarial stance of Coastal States within pelagics management by examining the wider geo-political lens: in this instance, pelagic adversaries are political allies. This may be thrown into sharper relief given the war in Ukraine.

Fisheries Decision-making and Stakeholder Engagement



Steven Adolf, Senior Policy Advisor at Accountability.Fish, presented on **‘Time to open up fisheries decision-making’** - this is the mission of Accountability.Fish, which aims to bring more stakeholders into the RFMOs and their decision-making processes.

The NEAFC convention area has all the promise and resources of a potential ‘leader’ for RFMOs, with a well-developed science base within participating nations, forward-looking policies, and a small number of contracting parties around the table. However, it is now seen as a negative example by other RFMOs, such as the IOTC and the WCPFC, due to the loss of certification of key fisheries, and associated market impacts.

The role of the markets as related to NEAFC was highlighted: NAPA has issued a ‘policy Fisheries Improvement Plan (FIP)’, using this as a vehicle to drive pressure on politicians. This and the fact that the MSC certificates for key NEA pelagics in the region are suspended, serve to highlight that effective management is not being delivered in the region.

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The markets are buying time with the policy FIP via NAPA, but this doesn’t mean things don’t have to change

Steven Adolf, Accountability.Fish

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Fisheries management as ‘a political choice’ was highlighted - as part of wider policy initiatives and commitments such as the Sustainable Development Goals (SDGs). Countries in the North East Atlantic region are ‘committed to SDG14’ (life below water) and this will have consequences for the way RFMOs are organised - potentially leading to more stakeholder engagement and a broader set of sustainability issues coming into play during decision-making. Marine Protected Areas (MPAs) and the impact of the Marine Biodiversity of Areas Beyond National Jurisdiction (BBNJ) were seen as the ‘next big challenges’ for RFMOs, bringing in a new range of civil society actors who are interested in decisions and management.



Session 2: Management and Governance

Panel Discussion

Summary

- Evidence shows that industry / **stakeholder agreements can underpin** - or act as precursors to - **political agreement**.
- The current situation in the North East Atlantic is **'all in or all out' by nature of the governance structure** - there is no recourse within the existing governance model to object to proposals or to resolve disputes. There are models elsewhere in the world that can be drawn upon to provide structures that may be more adaptable, and prevent a lack of agreement in one area leading to a total collapse of negotiations.
- The only constant is change, and more is coming: the system in the North East Atlantic is still rooted in the fisheries management of the 1970s, and **has not responded to evolving science and participation effectively**.
- Nations responding to a commitment to deliver against SDG14, and the advent of international MPAs through the BBNJ, will mean more, and significant, changes for how RFMOs function. Greater civil society interest in decision-making will drive changes in participation and transparency.
- Long-term political cooperation is possible: the Norway-Russia joint management example in the Barents Sea shows the value of a single negotiation move creating a precedent for agreement. **The example of patient decision-making, based around pragmatism and compromise, is of value to the North East Atlantic region**. Structures that bring science and stakeholder engagement into governance in a more integrated and consistent way show value in decision-making in this region, too.

Discussion

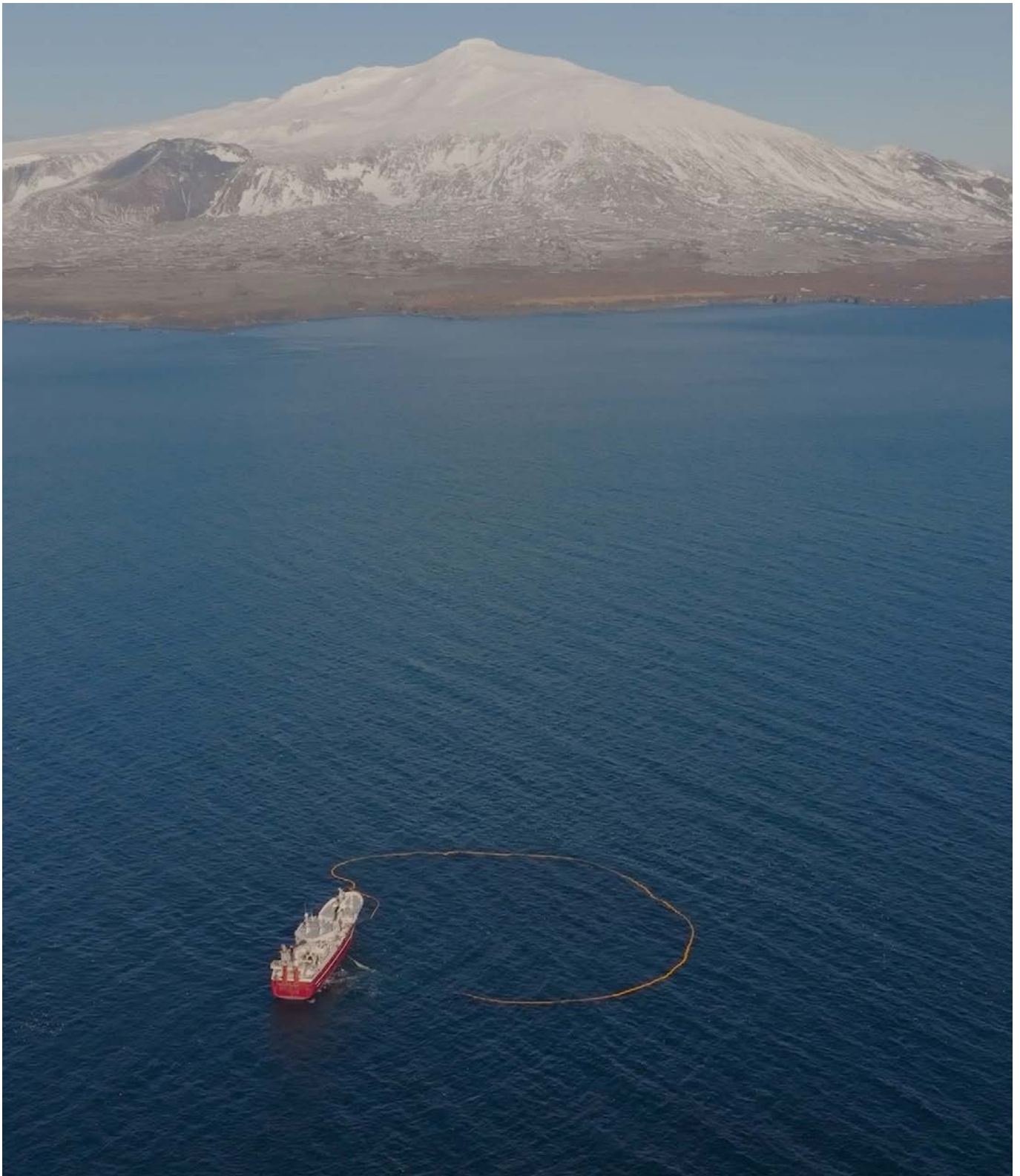
Following presentations on management and governance, a wide-ranging discussion was held with all participants. The subject of integrating stakeholders into decision-making and raising awareness of the function and processes of RFMOs more broadly within interested society was discussed. Some felt it was vital that there was more participation and transparency, but this was also countered by those who felt there was a 'balance to be struck' in the interests of action. It was broadly agreed that stakeholders can, however, drive political will effectively - referencing again that industry-level sharing agreements for pelagics have been a precursor to shifts in political will. A belief that stakeholders should engage directly with 'contracting parties' (or States), rather than through the vehicle of the RFMO was put forward.

Speakers underscored that within an effective negotiation, all parties are likely to have a sense of 'losing out', but underpinning this with pragmatism and a wider lens on relationships between States is essential. Arni Mathieson pointed to a 'well-functioning' agreement between Iceland, Greenland and Norway - a deal on capelin. He said this was part of a 'vital relationship' with a neighbouring country. Geir Honneland spoke of Russia acting as an influential and pragmatic broker in quota negotiations between Norway and Iceland. Steven Adolf noted the progress in other RFMOs like IOTC and WCPFC to adapt in the name of retaining sustainability certifications and finding compromised solutions to do so.

Presenters and other participants were concerned that a 'stock crisis' may ultimately drive a change in decision-making, and all agreed that this should be avoided at all costs. Equally, there was concern in the room that - due to the perception that stocks currently appear to be in 'good shape' despite being overfished according to scientific advice - urgency is lacking.

The areas and ways in which Coastal States do collaborate was highlighted, which includes through decisions on TACs, and mechanisms for enforcement. This was seen as a promising signal that overcoming barriers to joint decision-making for pelagics is possible - with the main barrier seen as allocation keys.

The possibility of incorporating dynamic allocation keys was of significant interest. Suzannah Walmsley emphasised that 'some kind of adjustability is needed with dynamic stocks', suggesting that a 'periodic review' of allocation keys may work - alongside a combination of zonal attachment and historic allocations. This was characterised by others as a 'good start - a kind of harvest strategy, focused on allocation'.



Session 3: Market and Industry

Moderator: Gisli Gislason, North Atlantic Program Director, MSC

Market Dynamics and Access



Krishan Kent, Chairman of the Swedish Seafood Association, presented on **‘Sustainability and market access’**, underscoring the importance of herring to Swedish culture and the importance of pelagic stock sustainability. The EU is one of the largest seafood markets in the world. This huge market is comprised of cross-border companies. In each Coastal State, companies are adding value to the stocks through processing, and working internationally - dependent on free trade and on predictability of the resource. This predictability is essential for business planning, as building a brand or launching a product takes many years and significant cost.

Retailers have exacting policies on sustainability because consumers expect fish on the shelf to come from a sustainable source. Fish is quite a ‘small category’ in overall supermarket sales - but the reputational risk of unsustainable fish is significant, so retailers recognise the high associated ‘opportunity cost’. Big companies in the seafood sector have strong sustainability requirements, built around MSC or ASC certifications, the WWF Sustainable Seafood Guide, fisheries being within FIPs, and catches based on ICES advice.

Given that the three pelagic fisheries under discussion have lost MSC certification, it may seem surprising that retailers are still purchasing these species. This can be attributed to the fact that, despite certification being lost, the latest WWF Seafood Guides still rate mackerel and herring as green-or-yellow, the NAPA ‘policy FIP’ covers these stocks, latest ICES advice is still positive, and Autonomous Tariff Quotas (ATQs) are still available for the EU market. Looking ahead, new ICES advice for the stocks will appear later in 2023, as well as an update to the WWF Guide. The NAPA FIP has only eight months left until its deadline in April 2024, and ATQs for the European market will be renegotiated in 2024. The fact that this is taking place against a backdrop of no agreement for the stocks between the EU and Norway means that the fisheries may be approaching a tipping point in terms of whether the market will continue to source.

“

The impact of losing certification has been postponed [but] we, as a market, want to highlight what is coming in terms of impact on the marketplace

Krishan Kent, Swedish Seafood Association

”

Market-driven Seafood Sourcing



Julius Palm, Head of Strategy and Brand, Followfood GmbH, presented on **‘Followfoods’ mackerel story** - emphasising the company’s desire to present only the ‘most sustainable’ seafood products. MSC certification is used as the ‘baseline’ for every fish product sold by Followfood, and on top of this requirement additional criteria and guidelines are added by the company. Mackerel fisheries no longer fulfil Followfood’s sourcing criteria, which include the following guidelines for fisheries:

- Selectivity: 80% of catch must be MSC certified, not only target species
- Healthy stock status: for all fish caught >5%, not only target species
- No endangered species: no evidence that endangered species are threatened by fishing
- Protection of ecosystems: fishing gear must not disturb vulnerable habitats
- Social conditions at sea and on land: combination of risk index and social certification for socially sustainable fisheries.

*Autonomous Tariff Quotas (ATQs) are set by the EU every three years to determine the quantity of certain fish and fish products that can be imported into the EU at a reduced tariff rate.

Having identified that mackerel could not fulfil these criteria, an alternative product was sought and identified: Chilean jack mackerel. Fisheries for this species fulfil all MSC and Followfood criteria, allowing the company to bring an MSC certified mackerel product to the market - this attracted new consumers, and the initial forecast for sale in 2023 is 180,000 pcs.

This new product development also fostered a new partnership between Followfood and Orizon processing, who are now collaborating on several additional products. The case study was presented as evidence that the market wants sustainable alternatives and will find them. The short-term sacrifice of adapting and developing a new product pays off in long-term profits and in increased credibility with consumers.

Collective Industry Advocacy



Leif Kjetil Skjæveland, Manager of Sustainability and Public Affairs, Skretting gave a presentation entitled **‘We need certified marine ingredients’**, noting that his remarks came on behalf of Skretting itself, as well as the company’s competitors - united via their engagement in NAPA, and calling collectively for a science-driven quota sharing arrangement for small pelagics in the North East Atlantic.

“
We are calling on the NEAFC Coastal States to agree quotas in line with scientific advice and implement a long-term science-based management plan for blue whiting.
Skretting Norway”

“
We call on stakeholders to engage actively and sincerely in the progress in line with broader commitments to ocean stewardship as part of a sustainable economy.
Cargill”

“
If the FIP should fail, we will stop purchasing blue whiting fishmeal and oil.
Biomar”

Buyers of blue whiting have issued sourcing statements outlining that if the NAPA FIP fails, they will ‘walk’ away from sourcing this stock. Skretting, Biomar and Cargill stopped purchasing blue whiting from the North East Atlantic on ‘day one after it lost MSC certification’. This has significant implications for the market’s ability to provide fishmeal for Norwegian farmed salmon production. Although farmed salmon is considered the ‘poster boy’ for marine sustainability issues, fishmeal producers have developed and adapted to ensure a sustainable supply of feed into aquaculture - and have an absolute focus on long-term sustainability of the stocks they rely upon.

“
We are a BIG buyer. We are 124 years old. We don’t think in two-year terms, we think in terms of 100 years - we would like to be able to produce salmon food for a hundred years. We would like to buy your fish for a hundred years. That’s why we need sustainable resources.
Leif Kjetil Skjæveland, Skretting”

NGO and supply-chain collaborative projects in the realm of ensuring sustainable fishmeal production were characterised as ‘kicking in open doors’ - Skretting, and others in the marketplace, hold themselves to high sustainability standards (sourcing only from certified fisheries or fisheries within a FIP), which are threatened by the political deadlock around a sharing agreement for pelagics. It was highlighted that the Prime Minister of Norway is also the Co-Chair of the High-Level Panel for a Sustainable Ocean Economy: something that was seen as a ‘golden opportunity’ in terms of political will to reach an agreement on NEA pelagics.

Skretting is calling on the Norwegian Government to respond to a suggestion during a previous Coastal States meeting to return to the sharing agreement reached in 2005. Stock abundance is higher now than at that point: giving hope that an agreement along those lines may be palatable.

Skretting is additionally seeking to highlight the high level of traceability in marine ingredients supply, against a backdrop of decreasing certification in relevant fisheries - the presentation urged the MSC not to add ‘extra demands’ on fisheries, risking the availability of certified materials.

“
Markets and industry: talk to politicians. We are your biggest buyer, and we will walk away in 18 months.
Leif Kjetil Skjæveland, Skretting”

Session 3: Market and Industry

Panel Discussion

Summary

- The supply chain places significant importance on the sustainability and management of North East Atlantic pelagic stocks, with **high engagement, internal standards, and deadlines being set**.
- The **MSC is seen as a baseline for sustainability**, and certain supply chain businesses are going further.
- **Marine product sustainability is under scrutiny** from consumers, particularly for supermarket seafood - acting as a symbol of wider sustainability efforts, despite its limited share in retail. This means there is **no appetite for risk** in this space, as losing a customer due to seafood choices carries substantial impact.
- **Regulatory changes are driving greater seafood sustainability** across product categories, to which the markets are highly sensitive.
- **Current conditions outside of MSC certification enable sourcing of North East Atlantic pelagics to continue**, notably the NAPA FIP, and the WWF seafood guides. But **further changes in the system - the end of the FIP, and/or changes to the WWF guide, as well as review of ATQs, could represent a crucial tipping point**.
- On a global scale, whilst continuing to sell products is possible, **losing markets in and around the EU - one of the largest markets in the world - would damage / limit the value chain, shifting sales towards a commodity-based model**.
- **The possibility of a return to the agreed 2005 sharing model** was seen as a positive potential solution to the current impasse.

Discussion

Following the presentations, a discussion was held on the role of markets in resolving the sharing issue for pelagics in the North East Atlantic. Voices from the market echoed their frustrations at Coastal States' lack of cooperation - noting that when they communicate with their own Governments, other nations are blamed for the failure to reach an agreement.

When discussing whether retailers should, or would, distinguish between individual Coastal States to inform purchasing decisions in the absence of MSC certification, there was a division of opinion. Some market voices felt that reflecting the inequity of quota sharing within sourcing policies was important: a way of shining a light on better practices that was / is important to retailers and consumers. Others, citing Game Theory's prisoner's dilemma as a frame for making this decision, characterised that option as 'betraying' neighbours, adding 'this is an international problem, we are advanced democracies: we should solve it as one'.

Reflecting on sustainability standards and the possibility of a market for pelagic products more globally, speakers countered that this would not be a beneficial focus. Countries outside of Europe, the UK, and Norway may be keen to buy uncertified seafood products, or engage with fisheries outside of FIPs, but this would add carbon emissions to fisheries products being sent across the world - and does not meet the sustainability goals and criteria of the businesses under discussion. Market voices said they would use their influence 'where they could' - focused on creating impact and selling products around the North East Atlantic. Retaining local markets was also a crucial part of maintaining a 'value chain' for fisheries products - with one speaker noting that markets outside of the region were more 'commodity based' and would therefore remove the layers of value from within the current supply chain.

A discussion on whether the NAPA FIP should be extended to allow more time for Coastal States to reach an agreement met with a conclusive 'no' from NAPA members present.

Session 4: Certifications and Standards

Moderator: Erin Priddle, North Europe Regional Director, MSC

Marine Ingredient Certification and Sustainability



Emily McGregor, Fisheries Manager at MarinTrust, presented the **MarinTrust Standard**, which certifies marine products globally, namely fishmeal and fish oil. Currently, 50% of marine products across the globe are certified against the MarinTrust Standard, and the organisation is aiming for this to increase to 75% by 2025.

Certification focuses on increasing the factory standards for fish oil and meal production, ensuring product integrity across the chain of custody, and driving sustainability improvements and better practices through an Improver Programme.

The MarinTrust Improver Programme (IP) is a global programme that operates through time-bound, peer-reviewed action plans, and by fostering collaboration between factories and fisheries. The North East Atlantic blue whiting FIP is one such Improver Programme project, beginning in October 2021, and aiming for the fishery to be approved according to MarinTrust criteria. There are 23 fishmeal factories accepted on the IP in the North East Atlantic at present. In parallel, factories comply with the MarinTrust standard by using raw materials from approved fisheries.

Version 3 of the MarinTrust Standard has been under public consultation in July 2023, and is expected to launch in late 2023. This version aims to:

- Increase accessibility for responsibly sourced and produced marine ingredients
- Encourage the use of by-products
- Progress the standard's focus on environmental and social impacts, at both the factory and vessel level
- Lay the foundations for fully traceable marine ingredients, through standardisation of data.

“

Sustainability isn't static, and neither are standards. MarinTrust is committed to continuous improvement, in order to increase programme accessibility and move marine ingredients forward.

Emily McGregor, MarinTrust

”



Revised MSC Fisheries Standard



Polly Burns, Head of Fisheries Standard Policy at MSC, presented the **MSC Fisheries Standard Version 3.0**, highlighting the most recent revisions - designed to align with global best practices - which are relevant to North East Atlantic pelagic fisheries.

MSC Fisheries Standard Version 3.0: Latest Updates

A new systematic **evidence requirement framework** will enable assessors to evaluate the accuracy of information, increasing confidence in the assessment of a fishery's impact and compliance.

Stronger requirements have been set around **ghost fishing and gear loss**, with fisheries now required to implement effective management strategies to reduce gear loss and its impact.

Harvest strategies receive extended implementation time, granting new stocks a decade to deliver the new level of performance required.

The **Fisheries Certification Process** has been amended to promote market stability through harmonisation requirements. The certification process, now encompassing vessel inclusion, is clearer, while traceability reporting is enhanced.

“

This is the most comprehensive review of the MSC Standard we've undertaken - spanning four years - and the result has yielded strong sustainability claims and improved accessibility to the program.

Polly Burns, MSC

”

The MSC has raised the standards in many key areas of Version 3.0, increasing fisheries' performance. Alongside the new version of the standard, the 'In transition to MSC (ITM)' pilot program has been improved and expanded, with no entry restriction on geography and size of operation, and is now open to any interested fishery. This initiative is a stepping stone for fisheries aiming to enter MSC assessment, and provides an additional layer of credibility through yearly independent evaluations – similar to a FIP.

Discussion

Following the presentations, there was a discussion on fishmeal landings in relation to traceability within the EU's control regulation. Emily McGregor highlighted that MarinTrust-certified factories are required to possess information about the source of raw materials, ensuring traceability in this aspect. McGregor underscored ongoing efforts to enhance traceability, noting the latest version of the MarinTrust standard which aims to standardise data and further reinforce traceability measures.

A point was raised by a participant regarding fishmongers and the desire to promote MSC-certified fish at their counters, balanced with the perceived burden of certification on small businesses. In response, Polly Burns highlighted that the issue is related to supply chain standards, noting that the chain of custody standard is set to undergo review. Active engagement in this review process was recommended, providing an opportunity to voice concerns and insights, ensuring they are heard and considered.



Contact us

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