



Economic Framework for the **Marine Environment**

APRIL 2022

The Bailiwick of Jersey is mostly marine waters surrounding small parcels of land: our total land area of 120 km² is dwarfed by the surrounding 2,455 km² of territorial sea. The waters and marine environment underpin our climate, water resources, and several economic sectors.

A clearly defined marine economy strategy is crucial for the sustainability and future viability of Jersey's marine economy and environment.

The Island's territorial waters are valued by many users in many different ways. There are key environmental sites and marine species across and beyond the territorial sea; electricity and telecommunications cabling; shipping routes; commercial fishing by Jersey and French boats; and recreational surfers, divers, and fishers. There are also potential users, including marine renewable energy, who must be integrated with current users.

Government intervention is needed to regulate fisheries and marine resources: environmental resources are often valued by society, but there is rarely any free-market mechanism that will protect them. For example, fisheries are a resource that will be excessively depleted or destroyed, if demand is high, unless there is strong cooperation to restrict fishing. There are many competing interests for use of the marine resource: renewable energy, shipping, recreational boating, aquaculture businesses, commercial and recreational fishermen and surfers to name but a few.

In March 2021, in response to the economic shocks caused by the UK's departure from the EU, Marine Economy established a Marine Economy Advisory Group (MEAG) to bring together Jersey's commercial fishermen, aquaculture producers, and merchants, to work together on an overarching marine economy strategy.

The vision articulated by the MEAG is for Jersey to have a vibrant and sustainable marine sector, providing employment and economic opportunity, and maintaining fisheries and aquaculture as an integral part of the island's cultural identity.

Strategic goals are perhaps less important in this respect than focused, appropriate intervention to manage the use of the marine resource on an ongoing basis. The aims of such intervention will evolve over time, as the ambitions of government change and as the roles and responsibilities of specific departments are defined.

Marine Economic Framework

The Marine Economic Framework (MEF) creates a platform for the delivery of a sustainable, vibrant and inclusive marine economy which enables the following objectives to be met:

1. Ensure ambitions for the marine environment provide net benefit to Jersey's economy and are in line with overall Government strategic aims
2. Provide a framework to ensure that a joined-up approach is maintained between Government departments
3. Enable the continued development of marine economy policies, measure how they are delivered, and monitor performance and outcomes
4. Support and increase the economic resilience of Jersey's marine businesses.

This framework is delivered via the framework document, which summarises the 36 components which make up the framework. It is also delivered via a database application which allows those components to be managed in a manner focussed on delivery, monitoring and measuring outcomes.

The Marine Economic Framework will deliver:

1. A policy framework that clearly sets out political and governmental accountability for delivery on integrated policies for the management of the marine economy

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2. Structure to provide financial support for the marine sector in the form of a Fishing Vessel Safety Scheme and Marine Economy Development Fund
 3. Incentives for all stakeholders to adopt the best environmental working practices and ensure sustainable management of the marine resource.

Within the framework are five strategic component groups with distinct areas of focus:

1. Marine Governance: Management of the marine economy by Government, in both a local and international context
2. Marine Support: A structure to provide direct financial support to the marine sector in a manner compliant with international trade obligations
3. Resources Management: Ways in which to maintain and enhance the marine environment and ensure sustainable uses of resources
4. Communication and Marketing: Greater promotion of the sector locally and internationally
5. Marine Development: Policies designed to enable sustainable development of the sector, some requiring further research to be delivered throughout the life of the framework.

Commercial Fisheries Overview

Commercial landings – shellfish

- Whelks, Brown crab, Scallops, Lobsters, Spider crab, Cuttlefish
- Economically dominated by shellfish especially lobster and crab - around 70% (by financial value) of landings, and whelks and scallops account for around 22% of landed value
- The annual landed weight for lobster and brown crab is declining which, given their economic dominance, is a concern. Spider crab landings have increased steeply due to their abundance and because they are becoming a substitute for picked brown crab meat
- Cuttlefish landings have also increased, perhaps in response to increased prices and declines in other key stocks.

Commercial landings – wetfish

- Blonde ray, Wrasse, Dogfish, Black sea bream, Mackerel, Bass
- Jersey's commercial wetfish industry is relatively small and has recently suffered from problems related to stock health, logistics, markets and designated quota
- The local fishery is mostly low impact (hook and line, pots, etc.) and several species are targeted but often in quite low numbers
- Annual landings are variable often because of individual vessels entering or leaving the fishery or because of regional factors (such as overfishing) that occur outside of Jersey waters.

Aquaculture production

- Production remains focused on the Pacific oyster (*Crassostrea gigas*) and mussels
- King scallops are farmed subtidally at one site. Production has remained steady over recent years as has the area of seashore occupied by aquaculture concessions
- The Island's main aquaculture area is in Grouville Bay (224 hectares) and is covered by a single planning consent held by the Government of Jersey
- In 2020 an emergency holding bed was established on the upper shore of Grouville Bay to allow oysters that were nearing market size to be held for longer at slower growing speeds while markets were depressed due to Covid restrictions.

Marine Economic Framework – Component Content List

- 1. One Gov – Legislative Framework and Service Delivery**
 - Legislative Framework
 - Efficient Public Service
 - Cross Department Co-ordination
- 2. International Trading Architecture**
 - Trade Agreements
 - Statutory Services
- 3. International Commitments**
 - Compliance with International Commitments
- 4. Marine Economy Support**
 - Marine Economy Development Fund Policy MS1a
 - Marine Economy Sustainability Incentive Scheme Policy MS1b
- 5. Fishing Vessel Safety**
 - Fishing Vessel Safety Scheme
- 6. Marine Support – Justification and Strategic Outcomes**
 - Marine Support Justification
- 7. Resource Management**
 - Fisheries Stock Management
 - Licensing and Permit System
- 8. Blue Ecosystem Services**
 - Ecosystem Services
- 9. Marine Spatial Planning**
 - Island Marine Spatial Plan
- 10. Communication Strategy**
 - Marine Issues Communication Strategy Policy CM1a
 - Marine Economy Advisory Group Policy CM1b
- 11. Marine Economy Advice**
 - Business and Industry Advice Policy CM2a
 - Jersey Business Policy CM2b
- 12. Marketing the Marine Economy**
 - Jersey Product Promotion (2017) Ltd Policy CM3a
 - Genuine Jersey Products Association Policy CM3b
- 13. People in the Marine Economy**
 - Skills and Training Policy MD1a
 - New Entrant and Succession Planning Policy MD1b
 - Labour and Migration Policy MD1c
 - Marine Employment Policy MD1d
- 14. Marine Research and Development**
 - Sector Economic Development Plans Policy MD2a
 - Scientific Marine Research Policy MD2b
 - Seafood Processing and Packing Policy MD2c
 - New Markets and Product Diversification Policy MD2d
 - Marine –Tech Policy MD2e
 - Digital Architecture Policy MD2f
 - Use of Key Performance Indicators Policy MD2g
- 15. Marine Built Infrastructure**
 - Marine and Port Facilities Policy MD3a
 - Marine Energy Generation
- 16. Marine Leisure**
 - Marine Leisure and Blue Tourism
- 17. Carbon Neutral Agenda**
 - Marine Carbon Emissions Policy MD5a
 - Marine Carbon Sequestration