Economic Framework for the Marine Environment 2022



Marine Economic Framework 2022

CONTENTS

Executive	e Summary	2
G P F E B	context common Strategic Policy covernment Plan Performance Framework duture Economy Programme conomic Framework for the Marine Environment 2022 dridging Island Plan carbon Neutral Strategy and Energy Plan	3-7
	Conomic Framework Overview and Component Content List	8-10
1. 2.	Sovernance One Gov – Legislative Framework and Service Delivery International Trading Architecture International Commitments	11-13
5.	Support . Marine Economy Support . Fishing Vessel Safety . Marine Support – Justification and Strategic Outcomes	14-16
7. 8.	Resources Management . Resource Management . Blue Ecosystem Services . Marine Spatial Planning	17-18
1(1	nication and Marketing 0. Communication Strategy 1. Marine Economy Advice 2. Marketing the Marine Economy	19-21
1; 1; 1;	Development 3. People in the Marine Economy 4. Marine Research and Development 5. Marine Built Infrastructure 6. Marine Leisure 7. Carbon Neutral Agenda	22-29
Annex A	International Multilateral Agreements	30-31
Annex B	- E Bridging Island Plan (Rural Policies)	32-35
Annex F	Carbon Neutral Roadmap	36

Executive Summary

Initiated in 2010, The Economic Affairs Scrutiny Sub-Panel report on the Rural Economy Strategy recommended that Jersey's marine and fisheries industry 'warrants its own comprehensive strategy.' Consequently, the Department of the Environment (DoE) (now titled Natural Environment) and the then named Economic Development Department (EDD) (now titled the Department for Economy (ED) published a 2013 Marine Strategy Consultation¹ to put forward a series of marine resource management and economy recommendations.

Since the publication of the consultation in 2013 the marine industry has experienced further challenges, reaffirming the need for a marine economy strategy. In March 2021, in response to the economic shocks caused to Jersey's fishing and aquaculture sectors 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.

The Marine Economic Framework will deliver:

- A policy framework that clearly sets out political and governmental accountability for delivery on integrated policies for the management of the marine economy
- Structure to provide financial support for the marine sector in the form of a Fishing Vessel Safety Scheme and Marine Economy Development Fund
- 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.

Initial focus in the delivery of framework components will be placed on how Marine Economy officers can work with industry to enhance Jersey's fisheries and aquaculture sectors in line with the vision stated by the MEAG.

A dynamic policy framework will enable ongoing strategy development with projects to gather evidence and enable ongoing monitoring and reporting on outcomes, thereby providing evidence for future policy making.

¹ Consultation strategy 2013 C Marine Strategy Consultation Document 220713.pdf

Policy Context

Common Strategic Policy

The Common Strategic Policy, which details the priorities agreed by this Council of Ministers in its current term of office, was agreed unanimously by the States Assembly in December 2018 and is supported by the MEF in the following areas:

We will improve islander's wellbeing and mental and physical health:

Supporting new and extended community; health and social care facilities; access
to Jersey's coast and countryside; and major improvements and access to the
walking, cycling, public transport and active travel networks. Focusing on these
areas in the plan is critical to the maintenance of vibrant and sustainable
communities, whilst also supporting islanders' physical and mental wellbeing.

We will create a sustainable vibrant economy and skilled local workforce for the future:

- Giving priority to the maintenance of a productive and diverse economy, with support for new and existing businesses, particularly where they encourage the development of a local market for goods and services, attract small footprint/high value business and foster innovation
- Safeguarding key economic infrastructure throughout the post-pandemic period.

We will protect and value our environment:

- Protecting and improving the island's natural environment, its landscapes, coastline, seascapes, biodiversity, and geodiversity
- Extending the Coastal National Park to provide the highest level of protection to Jersey's most sensitive coast and countryside locations
- Integrating with and supporting the Carbon Neutral Strategy and Sustainable Transport Policy.

Common Strategic Policy 2018 to 2022 (gov.je)

Government Plan

The Government Plan is a detailed one-year plan with a rolling four-year approach that brings together income and expenditure decisions, for the 12 months ahead, as part of a four-year financial outlook. It sets out how public money will be spent to deliver the day-to-day business of Government and on strategic priorities and areas for improvement, including the prioritisation of infrastructure delivery.

The MEF may be supported by growth funding as set out in the Government Plan 2023, as well as business-as-usual (BAU) funding carried forward.

Government Plan

Performance Framework

The Performance Framework is where the Government of Jersey (GoJ) measures the progress that Jersey makes towards achieving sustainable wellbeing. It makes use of objective measures (those that include data and figures) and subjective measures (those that include what people think and feel).

Jersey is one of only a small number of jurisdictions across the world that have made an explicit and binding commitment to promote wellbeing in all their actions.

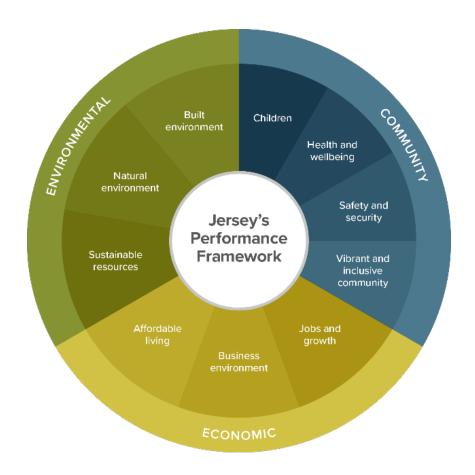
Sustainable wellbeing is a holistic concept that uses different tools to measure how well society is doing across the key areas that contribute to overall quality of life. It supports a focus on long-term progress rather than short-term intervention, and enables community, environmental and economic indicators of wellbeing to be measured.

Community – seeking to protect and improve the quality of people's lives and the island's cultural heritage and identity

- Environment seeking to protect and improve the quality of Jersey's urban, rural and marine environments and biodiversity
- Economy seeking to maintain and improve the performance of the local economy within sustainable limits.

All policy components in the MEF are assessed in terms of the Performance Framework matrix.

Jersey Performance Framework (gov.je)



Future Economy Programme

The Government of Jersey's Future Economy Programme (FEP) has the overall aim of delivering a framework for a sustainable, vibrant and inclusive economy, and skilled local workforce for Jersey's future, supporting delivery of the Common Strategic Policy 2018-22, Government Plan 2020-23, and beyond.

Broadly, and in the context of post-pandemic recovery for the medium-long term, it seeks to:

- Provide a clear overview of Jersey's economic ecosystem, identify threats, constraints and opportunities, and determine how sectors might best evolve under the Government of Jersey's stewardship
- Design and deliver initiatives to improve productivity, support a sustainable and vibrant economy, and to provide a skilled workforce for the future.

The MEF will deliver within the guiding principles for Jersey's future economic strategy:

- 1. SMART Goals Clear and measurable goals for the future economy of Jersey
- 2. Align Activity Unite and guide the activity of Government and Arm's-Length Organisations (ALOs) behind a collective vision
- 3. Government Owned Government leadership as the steward of economic prosperity
- 4. Long-term Running from 2022 to 2040, the strategy should address megatrends
- 5. Five missions for Jersey's economy by 2040 The strategic aims should align with the five missions (below), which are set out in the Outline Economic Strategy for Jersey, and Jersey's wider Performance Framework
- 6. Data Driven Underpinned by economic models and predictive analytics.

Five missions for Jersey's economy by 204 from the Outline Economy Strategy for Jersey

International economy

An international economy which is outward facing, globally connected and that attracts diverse talent and investment.

Objective: A positive net balance of trade surplus

Fair economy

Fair access for all islanders to educational, housing and employment opportunities, collectively benefiting from the green transition and technology revolution.

Objective: Improved housing and rental affordability (JHAI)

Environmentally sustainable & technologically advanced economy

Resilient economy

Internationally competitive, resilient to economic shocks and agile to change.

Objective: Proportionally larger increase in the economic value of sectors beyond finance

Innovative economy

A recognised innovation hub, driven by investment in new opportunities and market making processes, products and services.

Objective: Higher GDP per-worker growth

Skills-led economy

A skills-centric economy where people are the key asset which drives competitiveness and socially cohesive growth.

Objective: Improved tertiary-level education and skills as % population (i.e. level 4+)

Economic Framework for the Marine Environment 2022

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 between various Government Departments is maintained
- 3) Enable the continued development of marine economy policies, measure how these are delivered, and monitor performance and outcomes
- 4) Support and increase the economic resilience of Jersey's marine businesses.

This framework is delivered in two distinct formats:

- i) The framework 'document' [this version] providing a summary of the 36 components which make up the framework, together with an Annex providing supplementary information
- ii) a database 'application' which produces the document version of the framework, in addition to allowing management for each individual component, in a manner focussed on delivery, monitoring and measuring outcomes.

The structure of the framework provides opportunity for the delivery of projects and workstreams in the Marine Economy sector within the Department for the Economy (ED) and indicates responsibility for each component (where not directly ED) to ensure accountability for each element is clear and provides opportunity for economic analysis on all government interventions which impact this area.

The policy development 'framework' approach for the marine sector adopted by ED follows significant stakeholder and ALO consultation and provides a dynamic management tool which directly addresses issues raised by The Economic Council in the recently published New Perspectives report: Economic Council New Perspectives Report FINAL.pdf (gov.je)

"The Economic Council wishes to emphasise the need for [such] sector strategies to be developed through a collaborative but well-led process. Time and again, Jersey has experienced attempts at developing strategies that have either been Government dictated or consultant-led without the participation and following of sector participants or other key stakeholders. Such an approach soon results in the development of competing initiatives or a written strategy report simply being consigned to the bookshelf."

"The Economic Council would urge Government to continue to work collaboratively with the relevant ALOs and other stakeholders to ensure a rigorous approach is taken, with consistency, based around essential criteria and key performance indicators, in the completion of these sector strategies. In addition, that a tracking system be adopted, to identify where there are any potential/actual deficiencies, to enable timetables to be adhered to and thereby monitor progress."

Funding for policy components included within the framework are either business as usual/within existing ED budget or will be subject to a formal proposal for growth under the Government Plan process for 2023-2026. The framework does not, in itself, provide commitment to budget proposals, other than those already agreed under separate process.

Bridging Island Plan

Clearly the Bridging Island Plan (BIP) and the MEF are connected in many senses and it therefore seems appropriate to ensure they are delivered in a parallel and complementary manner. This iteration of the MEF will be adopted alongside the Bridging Island Plan with an intention to deliver a comprehensive MEF update with the next full Island Plan.

The proposed Bridging Island Plan contains a number of policy proposals which impact directly on the marine environment and associated economic activity.

BIP Policy proposals are reproduced as an Annex to the MEF, where relevant, and will be updated as the BIP is adopted by the States Assembly (debate currently underway at time of writing).

Island Plan (gov.je)

Carbon Neutral Strategy and Energy Plan

The Carbon Neutral Strategy sets out a people-powered approach to respond to the aim for Jersey to be carbon neutral by 2030. The strategy builds on the progress made through 'Pathway 2050: An Energy Plan for Jersey' and sets out a strategic framework of principles and a central planning scenario.

The MEF delivers policy components necessary and integral to the Island's response to the climate emergency and Carbon Neutral Strategy.

Carbon Neutral Roadmap (CNP) policy proposals are reproduced in the RES where relevant.

Draft Carbon Neutral Roadmap (gov.je)

Marine Economic Framework - Overview

Marine Economic Framework 2022

Marine Governance – The governance framework for managing the marine economy in both a local and international context.

- 1. One Gov Legislative Framework and Service Delivery
- 2. International Trading Architecture
- 3. International Commitments

Marine Support - A suite of policies, under the remit of Minister EDTSC, designed to provide appropriate financial support to the marine sector in a manner compliant with international trade obligations and designed to achieve the overall strategic objectives of the Government of Jersey.

4. Marine Economy Support	Policy MS1
5. Fishing Vessel Safety	Policy MS2

6. Marine Economy Support Justification and Strategic Outcomes Policy MS3

Marine Resources Management – A management regime for the marine resource which encompasses stock management, spatial planning and provides an economic analysis of the effects of resource management.

- 7. Resource Management
- 8. Ecosystem Services
- 9. Marine Spatial Planning

Communication and Marketing - A suite of policies to determine and deliver clear communication of marine issues and promote collaboration within the sector, as well as promotion of products and services to a wide range of stakeholders.

10. Communication Strategy	Policy CM1
11. Marine Economy Advice	Policy CM2
12. Marketing the Marine Economy	Policy CM3

Marine Development - A suite of policies designed to enable a broad range of marine development to maximise productivity within the sector and provide clear pathways to deliver improved environmental, economic and social sustainability.

13. People in the Marine Economy	Policy MD1
14. Marine Research and Development	Policy MD2
15. Marine Built Infrastructure	Policy MD3
16. Marine Leisure	Policy MD4
17. Carbon Neutral Agenda	Policy MD5

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

Marine Governance

The governance framework for managing the marine economy in both a local and international context.

- 1) One Gov Legislative Framework and Service Delivery
- 2) International Trading Architecture
- 3) International Compliance

1 One Gov - Legislative Framework and Service Delivery

The Government of Jersey will adopt a Marine Economic Framework which aims to provide sustainable environmental, social and economic management and development of the marine environment, fishing and aquaculture, which will be delivered across all relevant departments within the organisation.

1.1 Legislative Framework

The States of Jersey will provide an appropriate legislative framework to underpin all activity within the Marine Economy.

Jersey has statutory obligations with regard to trading architecture and commerce, plant and animal health, protection of natural resources and delivery of public goods and must provide the necessary legal framework for this activity.

States of Jersey Minister - All

1.2 Efficient Public Service

The Government of Jersey will provide a public service which will operate to the maximum efficiency to deliver policies within the Marine Economic Framework.

A revised Departmental framework, including a recently formed Department for the Economy, will provide Officers with specific responsibility for the marine sector who will continue to deliver services and advice in an efficient manner.

Department for the Economy Minister - EDTSC

1.3 Cross Department Co-ordination

The Government of Jersey will maintain a clear and joined up approach on the MEF, whilst delivering policies within a cross departmental framework which provides clarity on political accountability for each policy component.

To be achieved through the development and maintenance of a clear policy framework which identifies responsibility for each policy component and enables ongoing monitoring and reporting on each policy component.

All Minister - All

2 International Trading Architecture

The Government of Jersey will consider the impact of the international trading arrangements on the marine sector. The ITA strategy sets out the structures facilitating Jersey's involvement in wider international trade, it is intended over the longer term to review the effectiveness of this architecture for all sectors, including the marine sector. Of particular relevance will be considering new market opportunities, engagement capacity and assessing how new trading relationships have impacted the economy overall.

2.1 Trade Agreements

The Government of Jersey will continue to fulfil its numerous advisory and regulatory activities in pursuance of its obligations under Trade Agreements, pursue Trade Agreement opportunities signalled to be of interest by the marine sector, ensuring economic impacts of agreements are fully considered in the decision-making process.

The Government of Jersey will continue to ensure it is able to maximise opportunities that are identified by the marine sector that would be provided for by the inclusion in International Trade Agreements and that Jersey exerts its influence to ensure adherence of all parties to the terms of such agreements.

Office of the Chief Executive - External Relations Minister - MER

2.2 Statutory Services

The Government of Jersey will continue to provide statutory services where required to facilitate trade under assumed international agreements and aim to ensure the delivery of benefits from the trade liberalising provisions of such agreements.

The relationship with the UK and Trade Agreements specifically impacts on the marine economy and the UK-EU Trade and Cooperation Agreement has been a key driver in changing the market and resource dynamics of the sector since Brexit.

Agreements also require compliance and provision of statutory services in a number of areas:

- Trade in marine products
- Veterinary legislation
- Animal health legislation
- Food legislation
- Quality and marketing standards.

ΑII

Minister - EDTSC, MENV, MER, MI

3 International Commitments

The Government of Jersey will adhere to international agreement obligations and consider compliance, impacts and opportunities of international commitments on the marine sector.

3.1 Compliance with International Commitments

The Government of Jersey has signed up to several Multilateral Environmental Agreements and will ensure compliance with the provisions of these agreements and provide assessment of impacts on the marine economy.

These treaties commit Jersey to the protection of its biodiversity and marine environment, and legislation is translated into policy through the implementation of the Jersey Island Plan which ensures that habitats and species are protected through a development control regime, and the protection of landscape through the designation of the Jersey National Park.

The Multilateral Environment Agreements extended to Jersey through the UK's membership listed in Annex A.

ΑII

Minister - EDTSC, MENV, MER, MI

Marine Support

A suite of policies, under the remit of Minister EDTSC, designed to provide appropriate financial support to the marine sector in a manner compliant with international trade obligations and designed to achieve the overall strategic objectives of the Government of Jersey.

Policy MS1 Marine Economy Support

Policy MS2 Fishing Vessel Safety

Policy MS3 Marine Support - Justification and Strategic Outcomes

4 Marine Economy Support

Policy MS1

The Government of Jersey will deliver direct and indirect support to the Marine Economy, taking into account the economic sustainability of the sector and the value and type of support provided in other jurisdictions.

4.1 Marine Economy Development Fund

Policy MS1a

The Government of Jersey will establish a Marine Economy Development Fund (MEDF) to provide direct financial support to Island businesses working in the marine economy in a manner which will deliver the objectives and outcomes envisioned in the CSP and Future Economy Programme.

The aim of the MEDF will be to improve the brand value of Jersey marine resources, improve levels of economic and environmental sustainability, and support the sector to provide food for both local and export consumption in a competitive manner and support the wider development of economic activity in the sector.

Department for the Economy Minister - EDTSC Delivery Date - 2022

4.2 Marine Economy Sustainability Incentive Scheme

Policy MS1b

The Government of Jersey will establish a Sustainable Marine Incentive Scheme to provide grant support for sector specific projects which enable business development and contribute to improved sustainability for the sector.

For commercial fisheries - provide grant support for projects with payment rates based on a combination of business turnover, strategic objectives, and comparative schemes in neighbouring jurisdictions.

For the wider marine economy - provide grants to support projects which improve productivity, innovation, environmental performance, skills, efficiencies, diversification, marketing and promotion across all businesses in the supply chain.

5 Fishing Vessel Safety

Policy MS2

The Government of Jersey will deliver grant support to incentivise the adoption of fishing vessel safety codes in a manner which replicates support available in neighbouring jurisdictions.

5.1 Fishing Vessel Safety Scheme

The Government of Jersey will work with Ports of Jersey to help support the implementation of the new Jersey Small Fishing Vessel Code of Practice 2021 by delivering a Vessel Safety Support Scheme in line with mirroring support in wider jurisdictions.

In order to ensure Jersey's fishing fleet up to safety standards a new Jersey Small Fishing Vessel Code of Practise 2021 is being brought in to improve safety in the less than 15 metres Length Overall (LOA) sector of the Jersey fishing industry and to raise the safety awareness of all those involved with the construction, operation and maintenance of such vessels.

Department for the Economy Minister - EDTSC Delivery Date - 2022

6 Marine Support - Justification and Strategic Outcomes

Policy MS3

The Government of Jersey will appraise the requirement for direct and indirect support to the Marine Economy taking into account the economic sustainability of the sector, the economic, social and environmental value of marine activity and the type and levels of support provided in other jurisdictions.

6.1 Marine Support Justification

An annual appraisal for the provision of marine economy support will be undertaken by Rural and Marine Economy officers to provide a report to the Minister EDTSC which will factor the following KPIs:

- Overall contribution to CSP objectives
- Socio-economic performance of businesses within the sector
- Direct economic return of the sector to the Exchequer
- Contribution to Island food security
- Contribution of the sector to Island culture, heritage and sense of place
- Wellbeing of Island inhabitants
- Contribution to the Net Carbon Neutral plan
- Comparable levels of support in other jurisdictions
- Review of support delivery mechanisms.

The provision of grants and subsidy through the Island's Marine Development Programme should aim to incentivise activities that are consistent with business and Government objectives. Measures are required that increase productivity, help businesses become more sustainable, ensure the highest environmental standards are maintained and meet the demands of domestic and global markets ensuring food production remains a core component of marine economic activity.

An effective support scheme should provide a mix of business, marketing and technical advice, identify training needs and provide a financial incentive linked to cross-compliance in order to deliver public goods that are not automatically provided by the market. This will ensure that the impacts of business on the marine environment are minimised, genuine public goods and services are delivered and our international obligations are met.

Marine Resources Management

A management regime for the marine resource which encompasses stock management, spatial planning and provides an economic analysis of the effects of resource management

- 7) Resource Management
- 8) Blue Ecosystem Services
- 9) Marine Spatial Planning

7 Resource Management

The day-to-day management of marine resources within Jersey's Territorial Waters is delivered by IHE – Marine Resources. The main areas of work cover research, policy, legislation, regulation and licensing, together with education, advice and stakeholder engagement. Whilst responsibility for these aspects rests with MENV, their success is critical as the basis of many economic policies and therefore Ministers and officers from respective Departments will collaborate closely to ensure the synergistic and complementary delivery of policy goals. Specific aspects of marine resources work that impacts on the economic policies set out in this framework have been set out in more detail below.

7.1 Fisheries Stock Management

GoJ will continue to provide the necessary framework to manage fish stocks in a manner which is sustainable, responsible and ensures that the long-term interests of Islanders and the marine environment are protected.

The assessment of species' stocks in Jersey waters will require the collection of detailed data from commercial operators and scientific trials. The results from these surveys will be used locally and will be shared with local, regional and other partners such as the Marine Stewardship Council, Ifremer and CEFAS.

GoJ will continue to use science-based stock assessment as a principal tool for determining the management measures necessary to ensure populations meet the biological and economic sustainability thresholds required locally and by the UK-EU Trade Cooperation Agreement (TCA).

IHE - Marine Resources Minister - MENV

7.2 Licensing and Permit System

With respect to licensing and permitting of commercial fishing activity, GoJ will deliver a system to ensure sustainable and regulated management of the fishery resource.

This permit system will provide the tools needed to manage the fishery sustainably, will be fair to all stakeholders and provide opportunities for future development and cooperative working with organisations inside and outside the island.

IHE - Marine Resources Minister - MENV

8 Blue Ecosystem Services

The Government of Jersey will establish methodology and collect data and evidence to value and report on blue ecosystem services.

8.1 Ecosystem Services

GoJ will investigate, measure, value and enhance the ecosystem services delivered by the marine economy for the benefit of the Island and the Community and develop evidence driven policies which can deliver meaningful long-term economic benefits using natural capital and ecosystem service assessments and principles.

Some of this workstream may be derived from evidence gathering and analysis associated with the Marine Spatial Plan.

IHE - Marine Resources Minister - MENV

9 Marine Spatial Planning

GoJ will develop a Marine Spatial Planning Strategy, using standardised methodologies and principles, to enable a co-ordinated plan to manage the marine environment.

9.1 Island Marine Spatial Plan

The Island Marine Spatial Plan will capture evidence relating to key physical, environmental and socioeconomic aspects of Jersey's coastal and marine area. This will include sectors such as biodiversity, food/energy security, fishing/aquaculture, public utility, climate change, tourism and recreation.

Data will be analysed and assessed to determine how individual areas are used (and by whom), their value (economic, environmental and otherwise) and how they might best be utilised going forwards.

The objective of the plan will be to develop zonal systems (integrated with other GoJ strategies and plans) which are defined by their usage and which identify potentially compatible and incompatible activities.

This will produce an evidence-based spatial model which can be interrogated to assist with decision making in relation to development and management.

IHE - Marine Resources Minister - MENV

Communication and Marketing

A suite of policies to determine and deliver clear communication of marine issues and promote collaboration within the sector, as well as promotion of products and services to a wide range of stakeholders.

Policy CM1 Communication Strategy

Policy CM2 Marine Economy Advice

Policy CM3 Marketing the Marine Economy

10 Communication Strategy

Policy CM1

The Government of Jersey will work to establish a framework to enable clear communication of all relevant issues by all stakeholders within the marine economy.

10.1 Marine Issues Communication Strategy

Policy CM1a

The Department for the Economy will develop a communication strategy for the marine sector to ensure all matters pertaining to the marine economy are considered by stakeholders on an informed basis.

As part of a communication strategy, use of e-media will allow development of a responsive, feedback enabled system to deliver and gather information and opinion rapidly.

Department for the Economy Minister - EDTSC Delivery Date - 2023

10.2 Marine Economy Advisory Group

Policy CM1b

The Government of Jersey will formalise the establishment of a Marine Economy Advisory Group, representing all sectors of marine commercial activity, to consider and inform on all matters related to the marine economy.

The MEAG provides independent advice with a view to delivering the following key objectives:

"To ensure Jersey has a vibrant and sustainable marine sector which provides economic opportunity, strengthens cultural identity and maintains marine economic activity as an essential element of Island life."

"To consider socio-economic consequences of licencing, regulation, trade, logistics and facilities, marketing and promotion, financial support, environmental protection and enhancement, skills and training and recommend actions to improve and enhance [the above] prioritised into short, medium and long-term goals."

11 Marine Economy Advice

Policy CM2

The Government of Jersey will maintain the ability to provide industry specific advice to inform policy issues as well as assist business development.

11.1 Business and Industry Advice

Policy CM2a

The Department for the Economy will provide advice and commentary on issues related to the marine economy.

Advice will be tailored to meet statutory, operational and environmental obligations whilst also providing Government with specialist advice on marine economy and policy issues.

Department for the Economy Minister - EDTSC Delivery Date - BAU/ongoing

11.2 Jersey Business

Policy CM2b

Jersey Business will provide advice to marine economy businesses to promote and assist the sustainable economic development of the sector.

Advice will be tailored to assist business to meet statutory, operational and commercial obligations whilst also providing specialist advice on financial and business operations.

Department for the Economy Minister - EDTSC Delivery Date - BAU/ongoing

12 Marketing the Marine Economy

Policy CM3

The Government of Jersey will establish methods to support the marketing efforts of the marine economy, some of which may be delivered via JPPL (2017) Ltd.

12.1 Jersey Product Promotion (2017) Ltd

Policy CP3a

The Department for the Economy will work alongside the ALO Jersey Product Promotion (2017) Ltd (JPPL) to establish a work plan to enable the economic development of Jersey's marine industries and facilitate export initiatives.

The Government of Jersey will work with JPPL across an agreed portfolio of work to support the economic development of Jersey's marine industries.

Work can include the promotion of the contribution that fishing and aquaculture industries make to the 'look and feel' of Jersey, and pursuit of opportunities to develop viable export trade.

12.2 Genuine Jersey Products Association

Policy CM3b

The use of the Genuine Jersey membership scheme will be promoted and supported to assist with the marketing of marine produce to local and export consumers.

Genuine Jersey will be key to the branding and marketing of Jersey's marine industry and products. As revealed by the SWOT analysis undertaken by the Department for Economy there is an invested local support and appreciation of Jersey fish and shellfish, as well as worldwide recognition of Jersey quality products which can lead the industry towards opportunities for wider marketing and branding.

The development of the Genuine Jersey brand could work to promote and showcase the fishery sector in local markets and abroad. The Department for Economy will work to provide support, through Genuine Jersey, for market research and development that leads to successful, sustainable development of the sector.

Marine Development

A suite of policies designed to enable a broad range of marine development to maximise productivity within the sector and provide clear pathways to deliver improved environmental, economic and social sustainability.

Policy MD1 People in the Marine Economy

Policy MD2 Marine Research and Development

Policy MD3 Marine Built Infrastructure

Policy MD4 Marine Leisure

Policy MD5 Carbon Neutral Agenda

13 People in the Marine Economy

Policy MD1

The Government of Jersey will continue to monitor ways to support the people involved in Jersey's marine industries to deliver improved environmental, economic and social sustainability.

13.1 Skills and Training

Policy MD1a

The Government of Jersey and associated ALOs to act as a training facilitator, identifying skills gaps and responding to industry requests, in order to up-skill industry generally.

Achieving higher productivity and attracting local people to the industry will require the marine sector to invest in training for existing staff, as well as career development, apprenticeships, education and training for future entrants into the industry to address succession issues.

In addition, there will be a need for further investment in higher value products, better technical performance to increase output and reduce costs and new innovations to increase economic performance which utilise a more efficient labour force.

Consultation with industry indicates that business management training is required amongst the fishing fleet on the island with many businesses and organisations being family inherited and run, with some gaps in business and commercial knowledge.

Additionally, as the maritime sector develops the skills profile required will change. The importance of STEM subjects will increase as jobs becomes more skilled and data-driven in response to new technology. Those within the industry will need to adapt, potentially requiring the ability to create, operate and maintain autonomous and technological systems.

13.2 New Entrant and Succession Planning

Policy MD1b

Government of Jersey to consider mechanisms to attract new entrants to the sector, assist succession planning and Jersey Business to provide business advice support to fishermen and to new entrants within a 'succession matching service'.

New entrants may be encouraged to join the marine economy given appropriate mechanisms to promote and facilitate new ventures across all sectors, which will require a coordinated plan of activity.

Operators approaching retirement may have the opportunity to support new entrants to the industry by allowing an increasing level of responsibility and even investment in their operations.

Department for the Economy Minister - EDTSC Delivery Date - 2023

13.3 Labour and Migration

Policy MD1c

The Department for the Economy to provide an evidence-based assessment of the socioeconomic impact on marine businesses of employment, labour and migration policies adopted by the Government of Jersey.

Contingent on development and delivery of population policy and migration strategy, and to provide ongoing commentary of the economic implications of wider Government strategic policies.

Department for the Economy Minister - EDTSC Delivery Date - 2023-2025

13.4 Marine Employment

Policy MD1d

To promote and encourage opportunities for employment in the sector and develop long term ambitions to maintain diverse employment opportunities on the Island.

To consider the opportunities and value of marine employment in the context of the wider strategic objectives of the Government of Jersey, to be delivered as a report in 2023 and factoring issues including wage levels (minimum and living wage), social security contributions and personal taxation, provision of accommodation and benefits of diverse opportunity within the employment market.

To provide evidence of the benefits of employment in the marine sector.

14 Marine Research and Development

Policy MD2

The Government of Jersey will encourage investment into marine research and development to support the sustainability of Jersey's marine economy.

14.1 Sector Economic Development Plans

Policy MD2a

The Department of the Economy will work with relevant stakeholders to deliver a series of sector specific economic development plans for marine based activities.

To create and deliver economic development plans which are tailored to specific industry sectors, prioritising capture fisheries and the need to develop a clear strategy for environmentally sustainable and economically resilient businesses.

Sector development plans will be linked to a number of policy components within this framework and are to be delivered under the following priority areas:

- Capture Fisheries
- Aquaculture
- Marine Leisure and Blue Tourism
- Marine Energy Generation

Department for the Economy Minister - EDTSC Delivery Date - 2022-2025

14.2 Scientific Marine Research

Policy MD2b

GoJ will work to maintain appropriate capacity to co-ordinate and undertake R&D activities in support of the marine industry with scientific marine research providing an essential evidence base for policy proposals and stock management.

GoJ will operate a diverse portfolio of marine research projects whose results can be used to direct and inform local, regional and international workstreams, strategies, plans and agreements.

These projects will operate according to accepted scientific methodologies and principles and, where possible, will be undertaken in cooperation with external partners and reviewers.

Summaries of the results from marine research projects will be made available through open access publication, presentations to key stakeholder groups such as the Marine Resources Panel and the media.

IHE – Marine Resources Minister - MENV

14.3 Seafood Processing and Packing

Policy MD2c

Department for the Economy will undertake analysis of the processing infrastructure in Jersey with a view to considering what support could be provided for infrastructure investments that add value through processing, packaging and branding for Jersey caught fish and shellfish.

The widening of food processing and packaging functions on Jersey could provide protection against the challenges brought about by over-reliance on traditional markets.

Diversification of the fishing industry has limited but relevant potential. Further processing of the catch is not necessarily a trade that fishermen would immediately adopt, but it provides the scope to add value.

Whilst boats are run with very few hands there is limited capacity for fishermen themselves to involve themselves in such businesses. However, Jersey's food businesses (including fishmongers) are relatively well developed and there is the potential for these to develop packaging and branding for Jersey caught fish, as has already been achieved in aquaculture.

Consideration of processing and packing options will be considered as part of the sector specific development plans for capture fisheries and aquaculture.

Department for the Economy Minister - EDTSC Delivery Date - 2023

14.4 New Markets and Product Diversification

Policy MD2d

The Government of Jersey will work to identify options for diversifying product range as well as exploration of new markets to provide alternative economic opportunities to marine based businesses.

A key part of successfully diversifying the market within Jersey's marine industries includes investigating the potential to diversify the product offering, including exploring opportunities for Jersey's fleet to target different available species, for processors to add value to products and or process product to alternate forms to supply local and export markets.

This work may involve investigating available species for product diversification in the aquaculture sector, examining the steps required to effectively and sustainably farm identified areas and market product into new alternative destinations.

This component to be included as part of the sector specific development plans for capture fisheries and aquaculture.

Department for the Economy Minister - EDTSC Delivery Date - 2022–2025 14.5 Marine-Tech Policy MD2e

The Government of Jersey will continue to monitor emerging fishing technologies and identify those which would be of potential benefit to Jersey's marine economy.

As fishing and processing technologies develop fishing becomes more advanced, providing efficiencies and enhancements throughout the sector. As the UK have identified in their Maritime 2050 plan "big data analytics, digitalisation and more advanced communications will lead to better connectivity, efficiency gains and cost savings but also present risks to business continuity such as through cyber-attack."

Potential utilisations have been suggested by stakeholders on the Island such as digital solutions to the paperwork requirements under the new trade rules as a means of easing the delays on exports currently being experienced by the industry.

Additionally, Jersey has the potential to follow the UK's lead in utilising technology for communication, navigation and exploration and build on their mapping of UK waters by substantively mapping Jersey waters. As such there is a continued need to monitor emerging fishing technologies to identify those which would help support the sustainability of Jersey's marine economy, and which could be evaluated or supported under the Rural Initiative Scheme. This is a 'watching brief' that is dependent for its success on the continued links with research institutes in France and the UK.

Department for the Economy Minister - EDTSC Delivery Date - Q1 2023

14.6 Digital Architecture

Policy MD2f

The Government of Jersey will work with Digital Jersey and other partners to increase integration of digital technology to the marine sector.

Discussions with key stakeholders around future-proofing the fishing industry have highlighted the need for better digital presence of Jersey's fishing industry. Jersey Business have emphasised the importance of this not only in terms of improving access to local fish by consumers via catch data, timing and live pricing, but also in terms of timely and visible analysis of catch volumes and vessel data to demonstrate Jersey's commitment to a sustainable and ecologically sound marine environment.

Department for the Economy Minister - EDTSC Delivery Date - Q1 2023

14.7 Use of Key Performance Indicators

Policy MD2g

Investigate the potential net value to be gained by promoting the use of key performance indicators and benchmarking amongst Jersey's commercial fishermen.

The use of key performance indicators has been successfully introduced in many areas of agriculture and food production. Whilst the costs are minimal, the cultural and behavioural changes that are necessary for producers to share performance measures can be significant. As such, for many producers the use of key performance indicators has only taken off subsequent to intervention by training and development organisations.

Reducing operating costs to a large extent means fishing more effectively. Areas in which operating costs may be optimised in shell-fishing include a) using fuel efficiently, b) ensuring that the hands used on the boat match the pot numbers fished and c) making better use of fewer pots. Clearly there are balances to be struck in each of these areas and it would be prudent for Jersey fishermen to adopt and promote a small number of key performance indicators in order that they can benchmark their activities against each other.

Department for the Economy Minister - EDTSC Delivery Date - Q2 2023

15 Marine Built Infrastructure

Policy MD3

The Government of Jersey will work with Ports of Jersey to ensure all ports infrastructure on the island of Jersey is fit for purpose and in line with international commitments and supports the sustainable development of the marine economy.

15.1 Marine and Port Facilities

Policy MD3a

To work within the provisions of the proposed Bridging Island Plan to ensure suitability of current marine and built infrastructure and work with Ports of Jersey to ensure all port facilities are fit for the sustainable economic development of the marine sector.

Ports of Jersey Limited is the incorporated business that operates the Island's Airport and Harbours and provides the necessary infrastructure to allow Jersey Airport and Harbours' operations to take place. The work involves developing the facilities, services and products for the benefit of residents, visitors and businesses, operating through four main brands: Jersey Airport, Jersey Harbours, Jersey Marinas, Jersey Coastguard.

The majority of the commercial fishery fleet is based at St Helier harbour, where there is a presumption in favour of development which is related to port activities, including fishing and ancillary activity.

Fishing for shellfish, wet fish and fish farming are important economic activities which need to be safeguarded and supported. As such, it is important that the industry is assisted in terms of its land-based needs such as access, servicing, processing, packing facilities and cold storage.

The provision of new or additional landside facilities for aquaculture should be as close as possible to the existing concessions to minimise trip generation as much as possible.

Proposals for the development of these facilities will be considered on a similar basis to that for agriculture under the provisions of those policies relating to new or extended farm buildings, and the reuse of modern farm buildings. Where possible, new entrants or existing operators, should seek to make use of existing buildings and facilities.

See Annex C - Bridging Island Plan Policy ERE8 - Fishing and Aquaculture.

Department for the Economy/IHE Minister - EDTSC/MENV Delivery Date - BAU/ongoing

15.2 Marine Energy Generation

See Annex D - Bridging Island Plan Policy ME6 – Offshore Utility-scale Renewable Energy Proposals.

16 Marine Leisure Policy MD4

The Department for the Economy will consider opportunities to develop Jersey as a centre for marine leisure and consider the economic benefits of these options.

16.1 Marine Leisure and Blue Tourism

The Department for the Economy will consider opportunities to develop the marine leisure sector, factoring in the economic benefits of these options and how they may assist diversification of the economy.

Marine leisure and blue tourism offer opportunities for the diversification of Jersey's economy. This includes delivery of activities and services for visitors and residents within the marine environment which provide diversity within the economy in a manner compatible with sustainable management of the precious marine resource.

17 Carbon Neutral Agenda

Policy MD5

The Department for the Economy will consider implications of the carbon neutral agenda on the marine economy, factoring carbon emissions and opportunities for carbon sequestration.

17.1 Marine Carbon Emissions

Policy MD5a

The Department for the Economy will work with sector stakeholders to consider marine carbon emissions and ensure carbon neutral ambitions are attained in the timeframe set by the Carbon Neutral Roadmap (CNR).

In March 2007, the UK's ratification of the Kyoto Protocol was extended to the Bailiwick of Jersey. The protocol requires Jersey to reduce its carbon emissions by 80% by 2050, relative to 1990 levels. In 2014, the States Assembly adopted the energy plan for Jersey detailing a set of actions designed to help Jersey achieve the 80% emission reduction target.

Following this the Government of Jersey have published a Carbon Neutral Strategy 2019 outlining proposal for a people-powered approach to deliberating and recommending a climate emergency action plan. The plan also sets out an initial delivery plan of foundation policies that will be implemented in 2020, alongside the development of the long-term climate action plan, governance, and next steps.

Marine Economy will work to support the Government's carbon neutral agenda by considering the implication on the marine economy and undertaking a review of carbon emissions from marine sector stakeholders.

Department for the Economy Minister EDTSC Delivery Date 2023

17.2 Marine Carbon Sequestration

See Annex F – Carbon Neutral Roadmap - EN5 Blue Carbon, Biodiversity and Sequestration.

Government of Jersey Minister - MENV

Annex A

International Multilateral Agreements

- Agreement on the Conservation of African-Eurasian Migratory Waterbirds
- Agreement on the Conservation of Populations of European Bats
- Agreement on the Conservation of Small Cetaceans of the Baltic and North Seas
- Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal
- Convention for the Conservation of Antarctic Seals
- Convention for the Establishment of the European and Mediterranean Plant **Protection Organisation**
- Convention for the Protection of the Marine Environment of the North-East Atlantic (OSPAR Convention)
- Convention on Biological Diversity
- Convention on Environmental Impact Assessment in a Transboundary Context
- Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)
- Amendment to Article XI paragraph 3(a) of the Convention on International Trade in Endangered Species of Wild Fauna and Flora
- Amendment to Article XXI of the Convention on International Trade in Endangered Species of Wild Fauna and Flora
- Convention on Long-Range Transboundary Air Pollution
- Protocol to the 1979 Convention on Long-Range Transboundary Air Pollution concerning the Control of Nitrogen Oxides or their Transboundary Fluxes
- Protocol to the Convention on Long-Range Transboundary Air Pollution concerning the Control Emissions of Volatile Organic Compounds or their Transboundary Fluxes
- Protocol to the Convention on Long-Range Transboundary Air Pollution on Further Reduction of Sulphur Emissions
- Convention on the Conservation of Migratory Species of Wild Animals
- Convention on the Prevention of Marine Pollution by dumping of Wastes and other Matter
- 1996 Protocol to the Convention on the Prevention of Marine Pollution by dumping of Wastes and other Matter
- Convention On Wetlands Of International Importance Especially As Waterfowl Habitat (Ramsar Convention)

- Protocol to amend the Convention on Wetlands of International Importance especially as Waterfowl Habitat
- Amendments to Articles 6 & 7 of the Convention On Wetlands Of International Importance Especially As Waterfowl Habitat
- <u>European Convention for the Protection of Animals during International</u> Transport
- Additional Protocol to the European Convention for the Protection of Animals during International Transport
- International Plant Protection Convention
- <u>United Nations Framework Convention on Climate Change</u>
- Kyoto Protocol to the United Nations Framework Convention on Climate Change
- Doha Amendment to the Kyoto Protocol to the United Nations Framework Convention on Climate Change
- Vienna Convention for the Protection of the Ozone Layer
- Montreal Protocol on Substances that Deplete the Ozone Layer

Annex B

Bridging Island Plan

Policy PL5 - Countryside, Coast and Marine Environment

Development proposals in the countryside, around the coast and in the marine environment should protect or improve its character and distinctiveness. Where relevant, they should also protect or improve the special landscape and seascape character, and special qualities, of the Coastal National Park and its setting, and be compatible with the purposes of the park.

To protect the countryside and coast and to ensure development is concentrated in the most sustainable locations, the development of new homes will not be supported except in very limited circumstances.

Where a coast or countryside location is justified, and where any impact will be limited, the provision or enhancement of sports, leisure and cultural facilities that supports the health, wellbeing and enjoyment of Islanders and visitors will be supported.

Agricultural land will be protected, particularly where its characteristics mean the land is of high-quality and value to the agricultural industry.

Economic development that supports the maintenance and diversification of the rural and Island economy will be enabled here, where the location of development is justified and appropriate; or where it involves the reuse or redevelopment of already developed land and buildings, where it is appropriate to do so.

The development of sites and infrastructure that help meet the Island's strategic needs for minerals, waste management, energy and water will be supported in the countryside, around the coast and in the marine environment, where it is demonstrated to be in the Island's strategic interest, and where its impact can be avoided, minimised, mitigated or compensated.

Development proposals located in the marine environment will not be supported except where a marine location is demonstrated to be essential.

Annex C

Bridging Island Plan

Policy ERE8 – Fishing and Aquaculture

Proposals to provide facilities and infrastructure which are essential for the fishing industry will be supported within the operational port of St Helier.

Proposals to provide new or extended landside facilities outside the built-up area to support the aquaculture industry will be considered as if they were proposals for agriculture.

Proposals for new or extended aquaculture facilities outside the built-up area must be accompanied by a business plan which justifies the location of the development and demonstrates its contribution to the rural economy. This will need to demonstrate why existing premises or buildings in the locality are unsuited to the proposed use(s). Where the supporting information is insufficient proposals will not be supported.

The aquaculture box in the Royal Bay of Grouville will be safeguarded from other forms of development which might harm the viability and integrity of this area for the purposes of aquaculture. The development of new, or the extension of existing, aquaculture infrastructure in the Royal Bay of Grouville aquaculture box will be supported.

The development of new, or the extension of existing, aquaculture infrastructure in other parts of the inter- or sub-tidal zone will only be supported where:

- It is required to meet a proven need, which cannot be met elsewhere
- It would not harm marine biodiversity value.

Annex D

Bridging Island Plan

Policy ME6 – Offshore Utility-scale Renewable Energy Proposals

Development proposals for exploratory, appraisal or prototype offshore utility-scale renewable energy schemes will be supported, where their environmental impact is considered to be acceptable.

Proposals for full-scale offshore renewable energy generation schemes will be supported where it can be demonstrated that:

- a. The energy return is proven to be in the island's strategic interest delivering significant and long-term benefits to the community, and that these benefits are deemed to sufficiently outweigh any environmental impact that will arise as a result of the development
- b. The anticipated environmental impact of the development will be acceptable, with anticipated effects mitigated as far as possible, and appropriately compensated for.

All proposals must be supported with an appropriate monitoring programme and detailed restoration proposals, including funding and management mechanisms to ensure their implementation.

Planning permission for all types of offshore renewable energy proposals will be subject to a time-limited permission.

Annex E

Bridging Island Plan

Policy ME5 - Carbon Sequestration Schemes

Carbon sequestration schemes, including in the marine environment, will be supported where it is demonstrated that the development will lead to effective sequestration of carbon, in a location that is considered to be appropriate and will not otherwise lead to the unacceptable loss of agricultural land or have adverse impacts upon biodiversity or landscape or seascape character.

Where a carbon sequestration scheme is proposed as part of a carbon offsetting package, as will be required as part of another development, it may be necessary to provide evidence of how this has been calculated.

Annex F

Carbon Neutral Roadmap

EN5 – Blue Carbon, Biodiversity and Sequestration

The Government of Jersey will: Promote Jersey as a centre of excellence for blue carbon sequestration, with an ambition to double the extent of sea grass beds and recognise that tackling the climate emergency by using nature-based solutions that also address the biodiversity crisis provides multiple benefits for our land, air and sea.

Government will develop a Marine Spatial Plan (MSP) by the end of 2023 that can provide the necessary regulatory and consenting frameworks to manage marine activity in order to support blue carbon sequestration and will work with international partners to promote the recognition of marine sequestration in greenhouse gas inventories.