

Fishing in an ever- busier blue economy – the 'spatial squeeze'

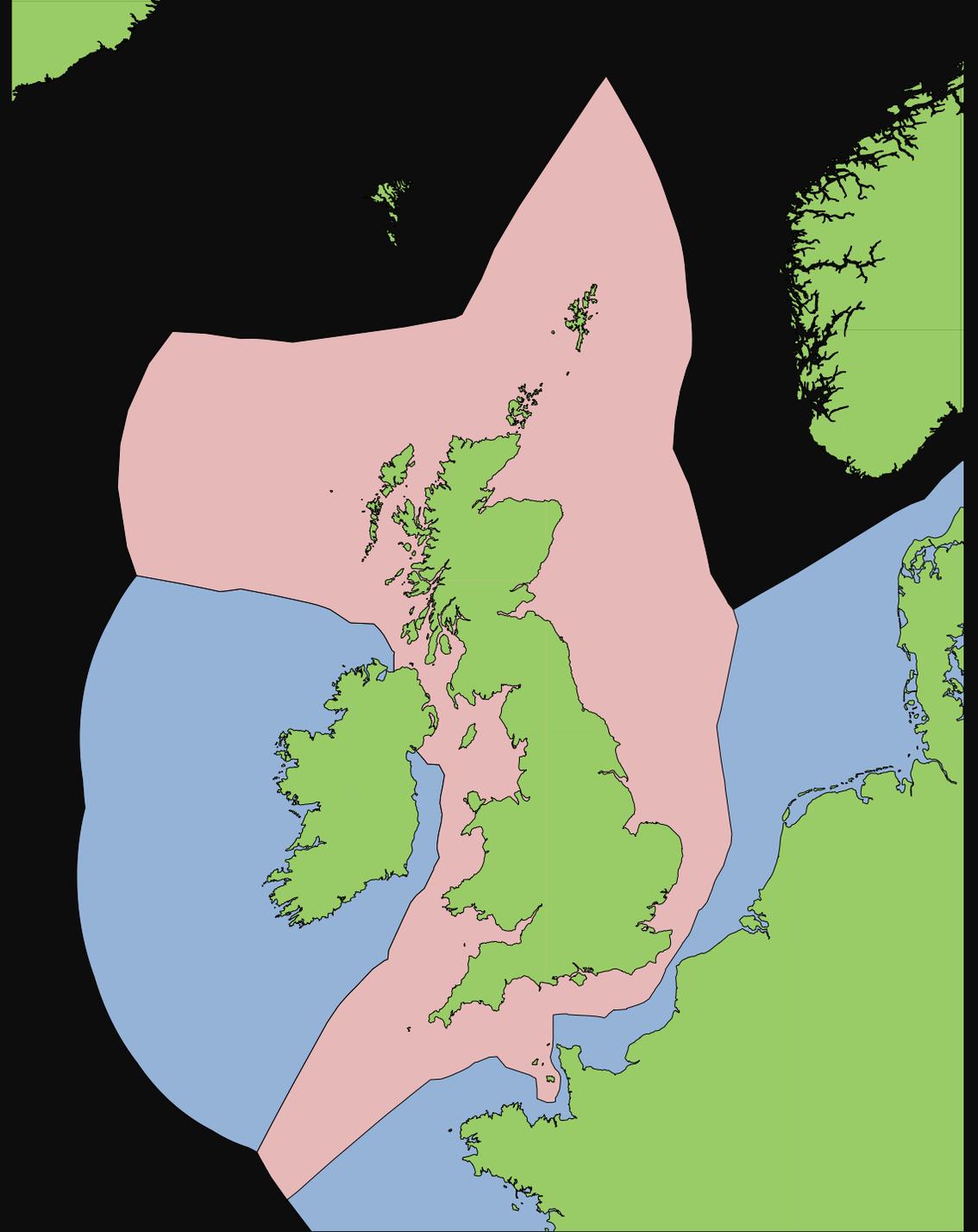
Raymond Hall

Renewables Policy Officer

SWFPA

The UK's EXCLUSIVE ECONOMIC ZONE

737077Km² of the most prolific and sustainable fishing grounds anywhere in the world.



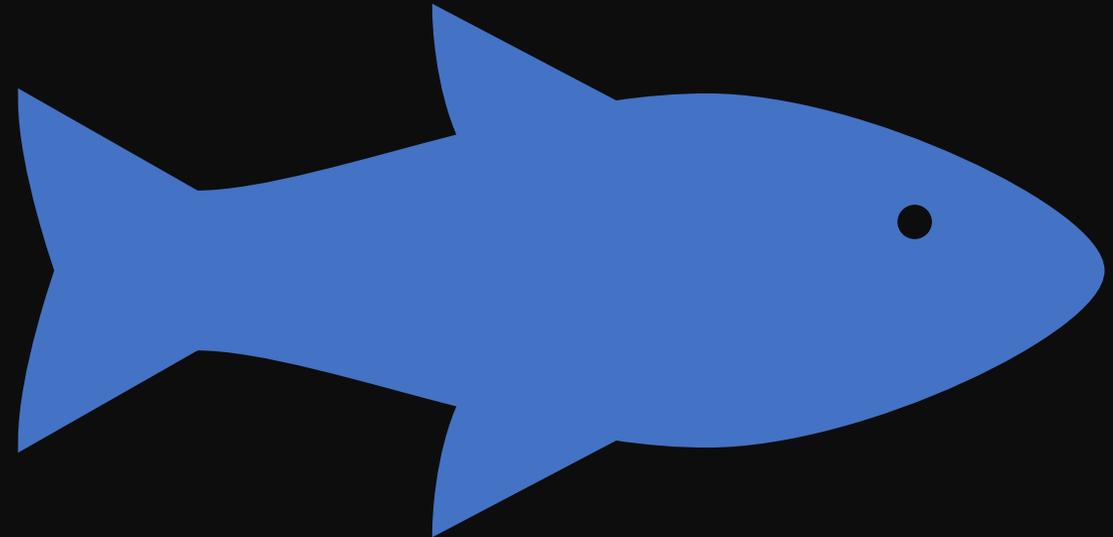
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- 63% of The UK EEZ is made up of the Scottish zone thanks in part to our many offshore islands and relative lack of near neighbors
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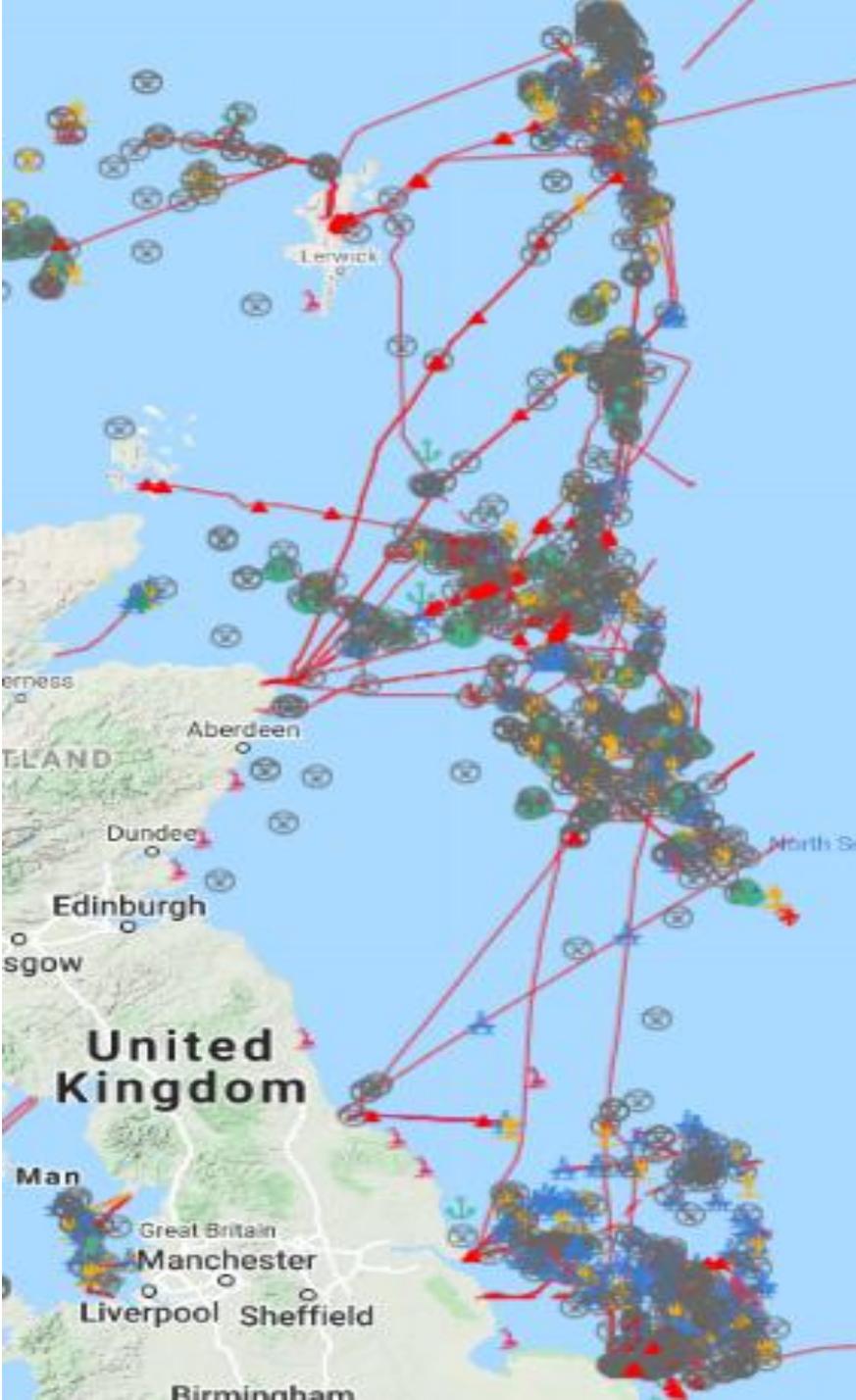


But we're not the only fish in the sea.....

- Oil and gas – exploration, production, decommissioning
 - Marine renewables
 - Subsea cables
 - Conservation sites – marine protected areas, HPMA
 - Aquaculture – fish, shellfish, *seaweed*
 - Marine tourism and recreation
 - Other maritime traffic
 - Dredging and mineral extraction

 - **The question is not can we co-exist? WE MUST co-exist.**
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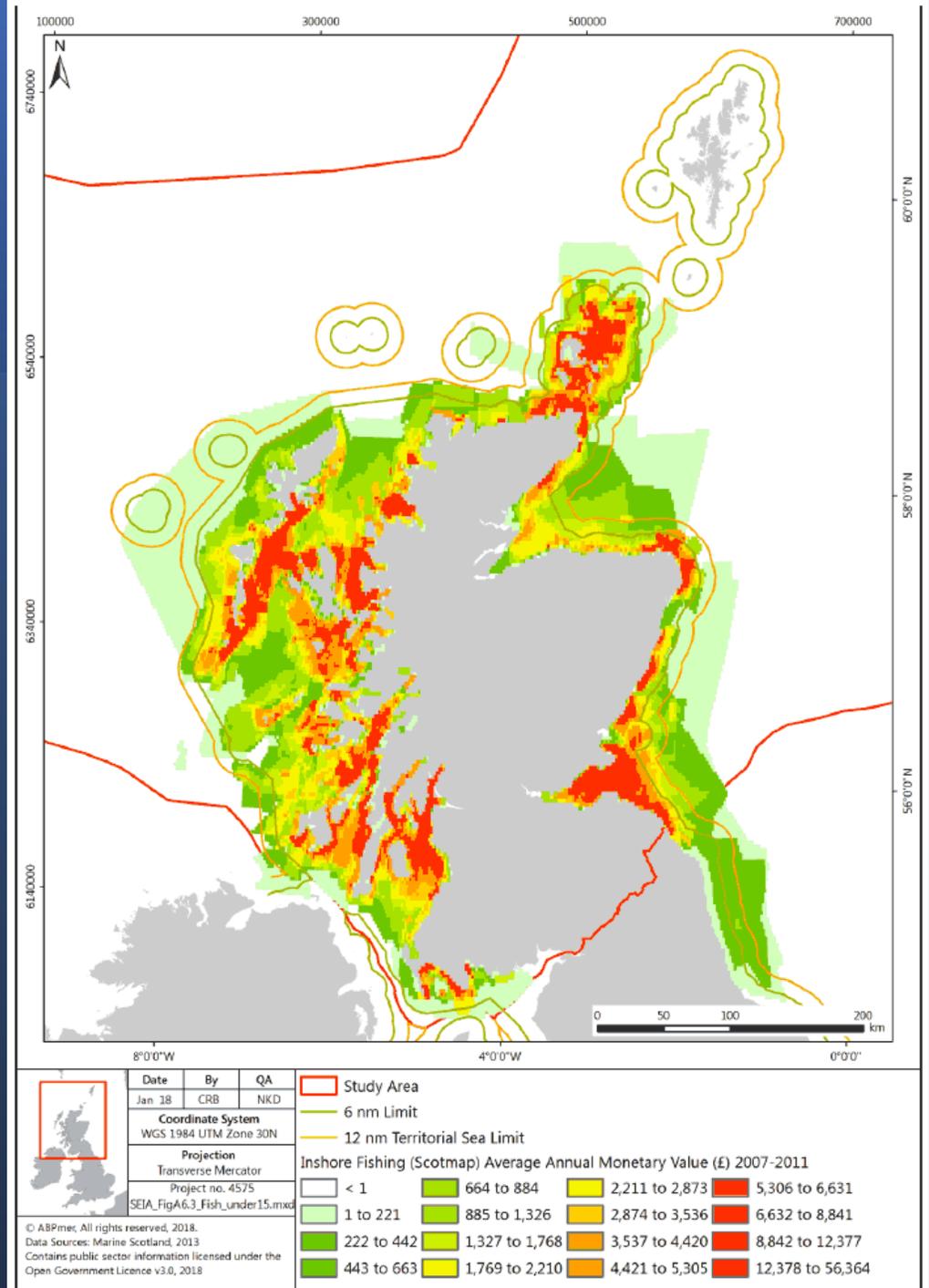


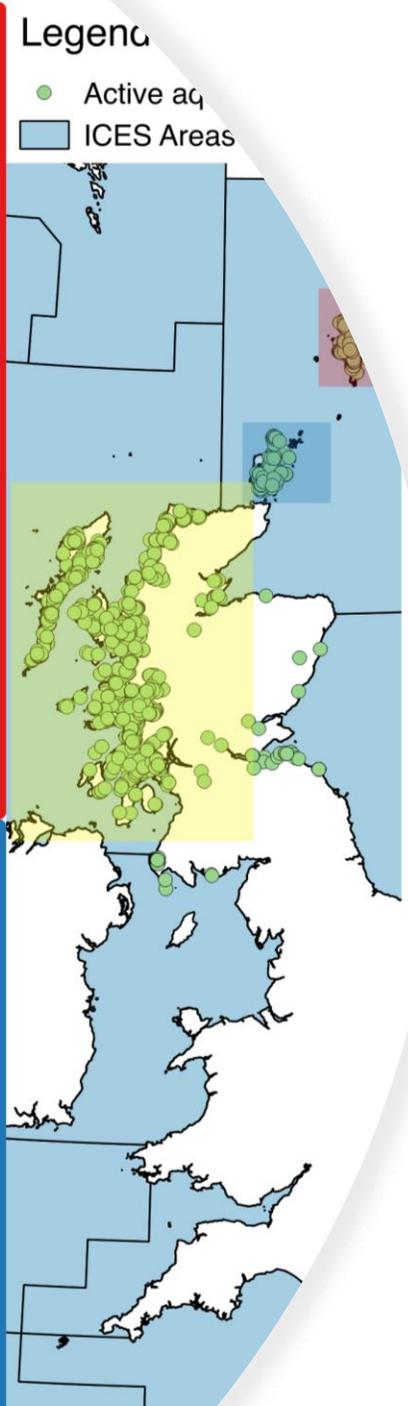
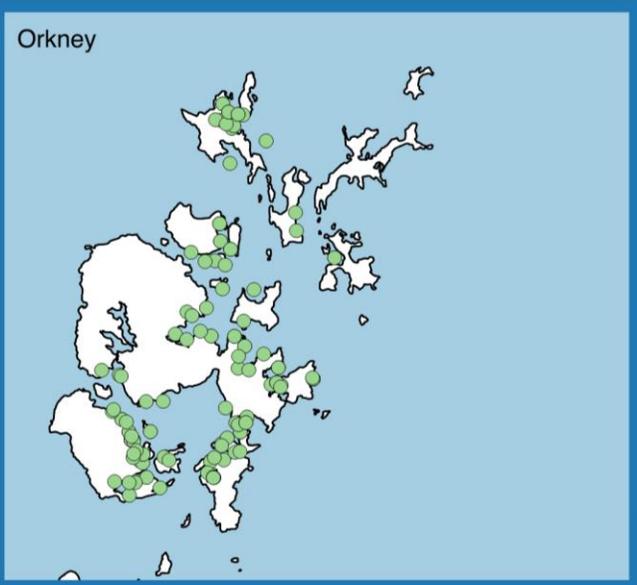
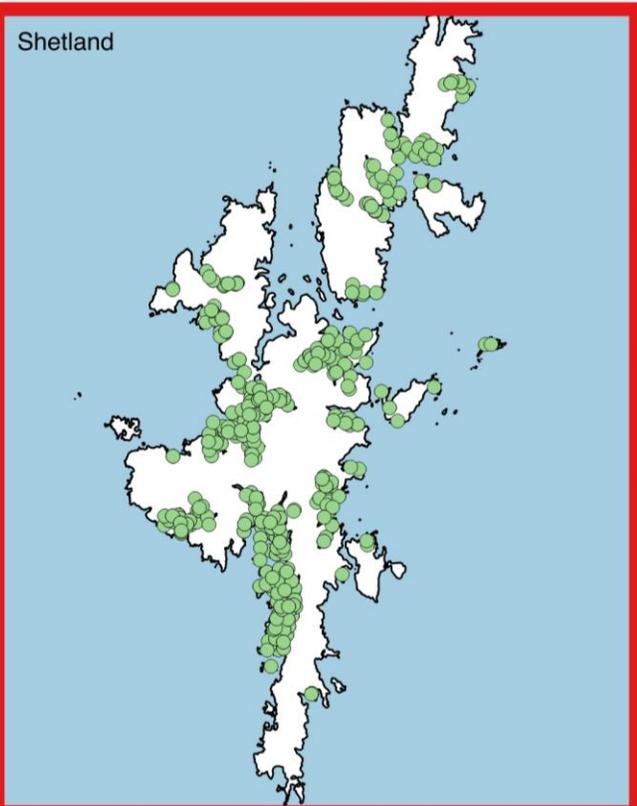
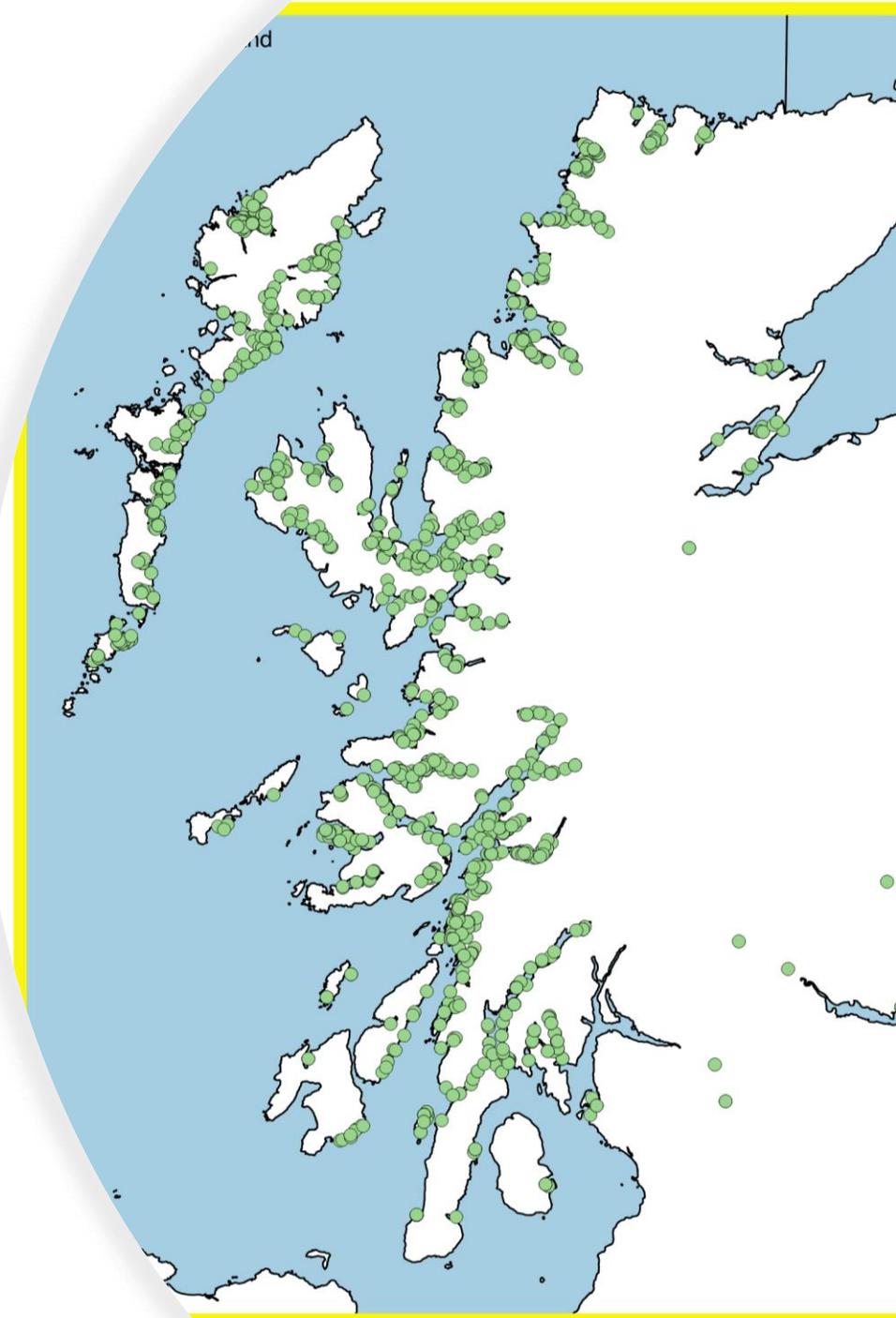
- **OIL AND GAS INFRASTRUCTURE**

- Pipelines (inc. other lines such as anchor lines): 30,355km
- SI Safety Zones (subsea zones): 499
- HSE Safety Zones (surface zones): 321
- Spans (outside SZs): 300
- Suspended Wells (outside SZs): 156
- Subsurface Structures (outside SZs): 1,765
- Surface Structures: 393

Heat map indicating vessels under 15m in length.

Chart indicates the value of landings from these areas and emphasizes their importance. (based on 2016 data)

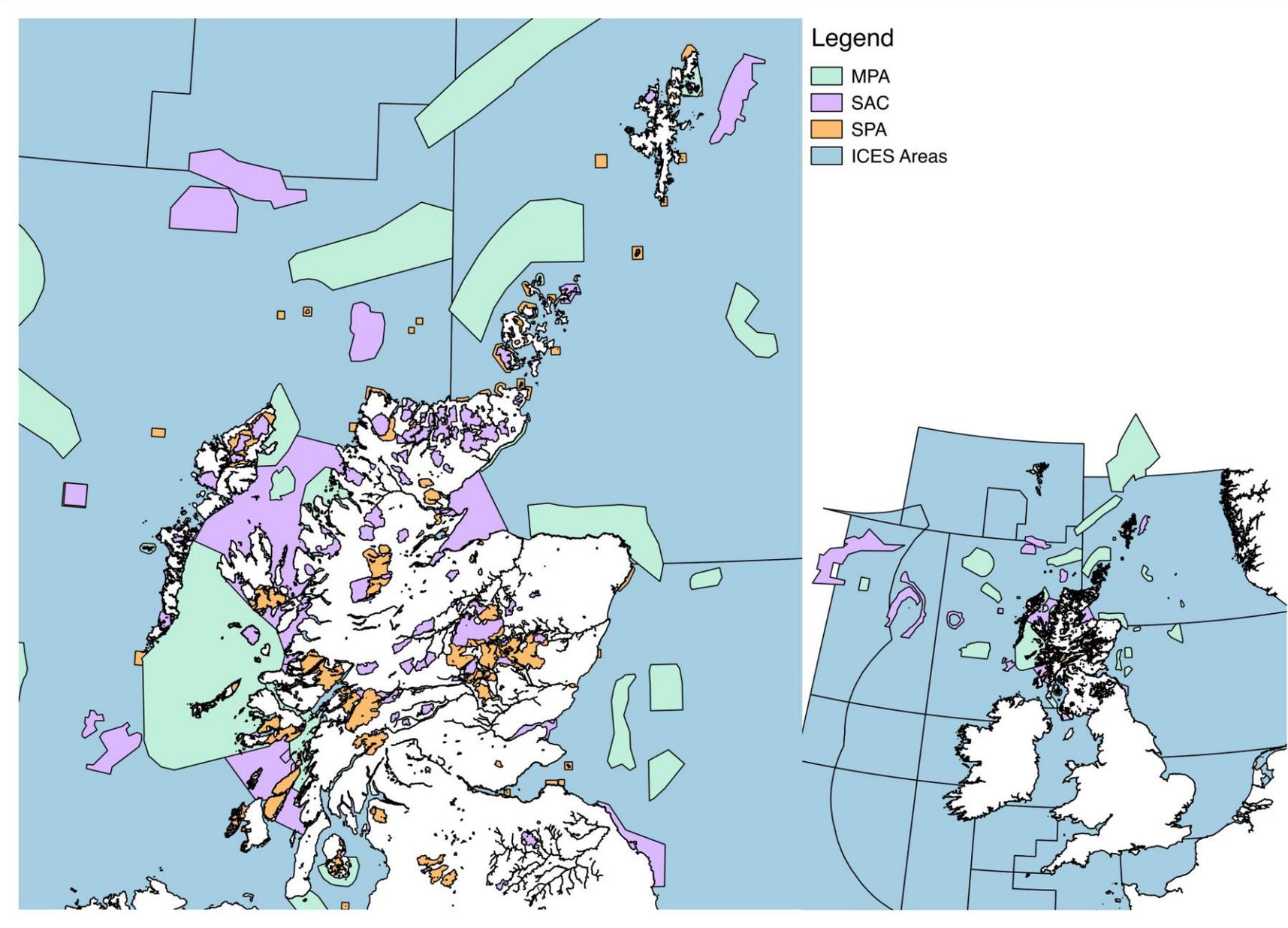




Map showing Marine Conservation Sites

Currently 37% of our total sea area.

N.B. MPAs are not by default areas where fishing is prohibited, however there may be fishing restrictions in some of them.

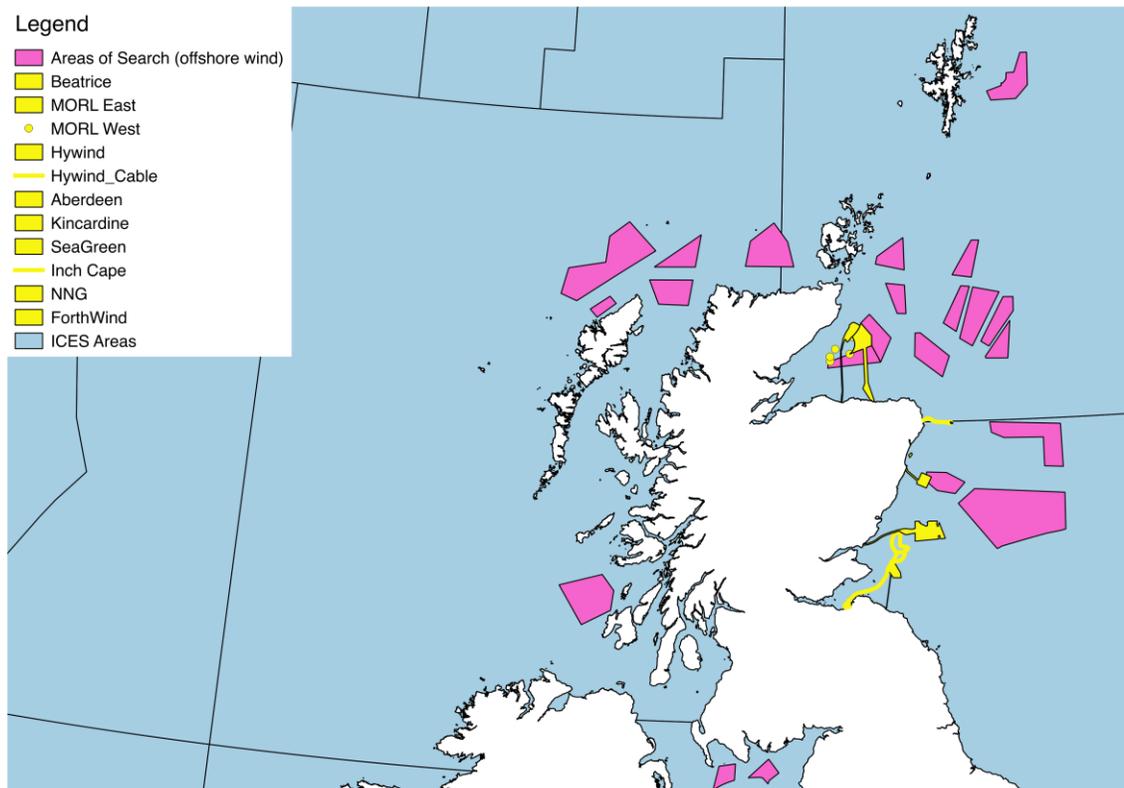


ScotWind Awarded Sites

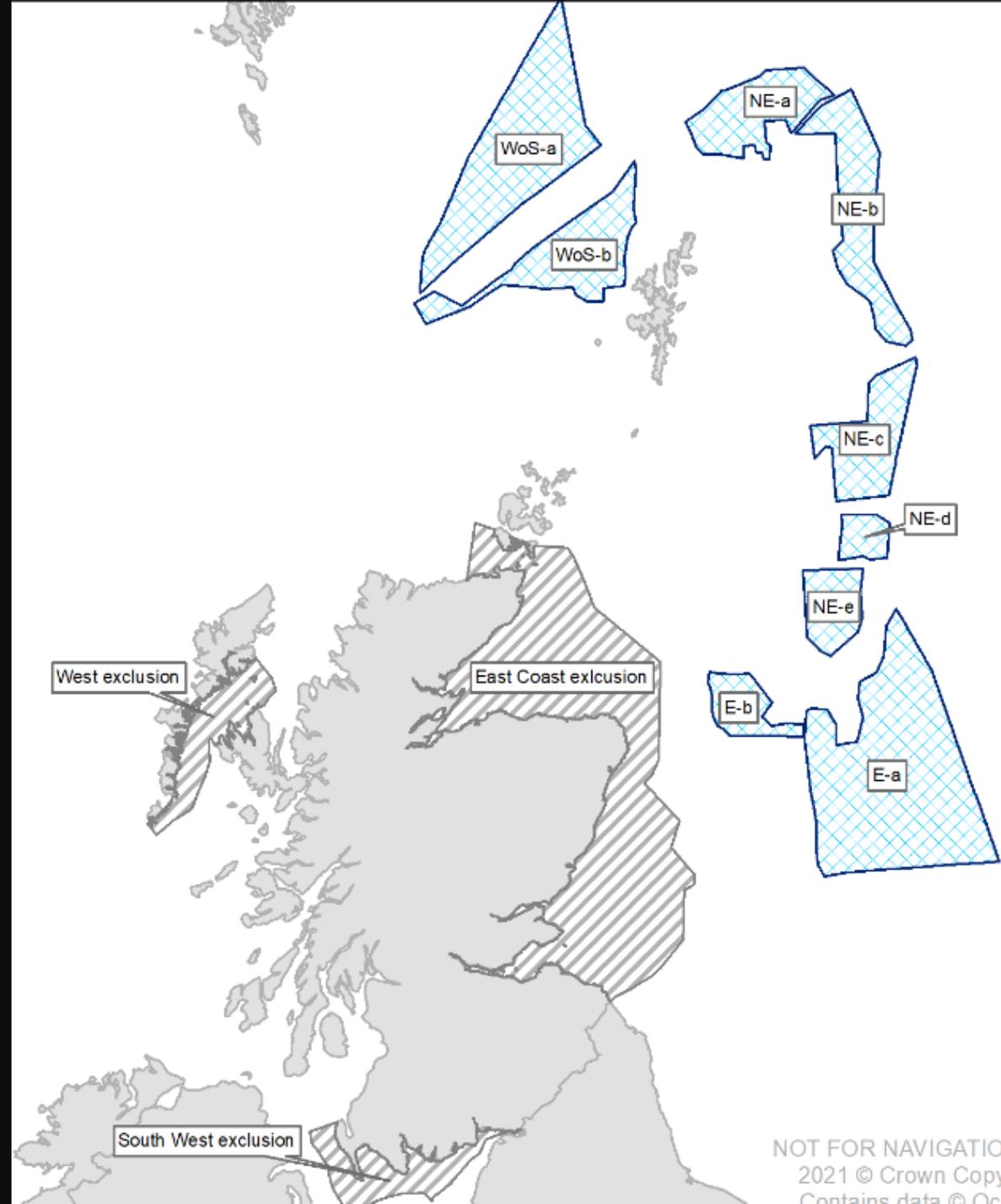


Legend

- Areas of Search (offshore wind)
- Beatrice
- MORL East
- MORL West
- Hywind
- Hywind_Cable
- Aberdeen
- Kincardine
- SeaGreen
- Inch Cape
- NNG
- ForthWind
- ICES Areas

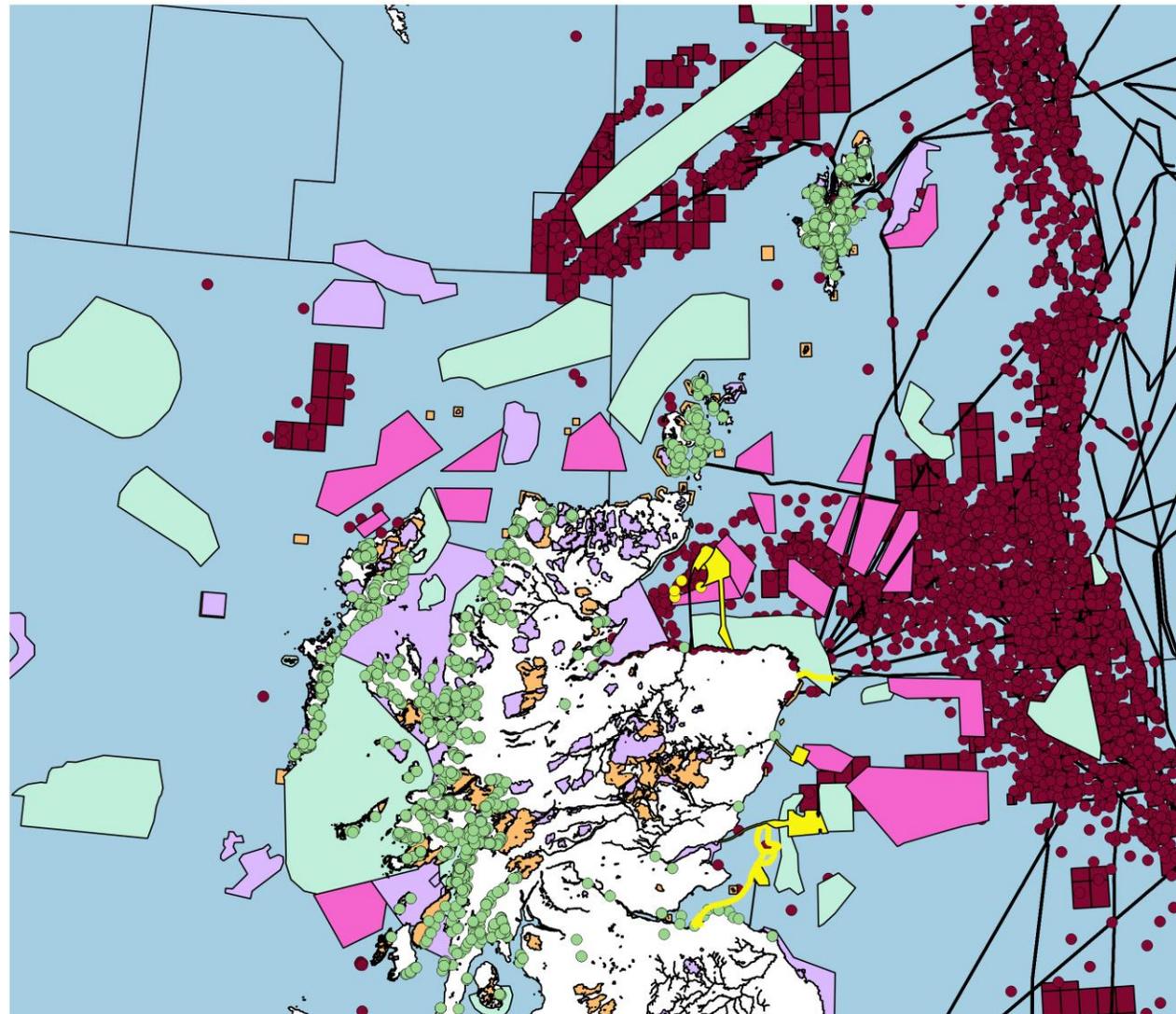


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- ScotWIND - INTOG
 - Sectoral Marine Plan for Offshore Wind for **Innovation and Targeted Oil and Gas Decarbonisation**.
 - Offshore wind areas to electrify of oil and gas infrastructure in Scottish waters (out to 200 NM).
 - Also examine potential options for smaller (<100 MW) innovation or test and demonstration projects.
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ALL MAPS
LAYERED APART
FROM INTOG
AND HPMAs

VESSEL
DISPLACEMENT
A HUGE
CONCERN FOR
THE CATCHING
SECTOR



- Legend**
- Licenced Windfarms**
- Beatrice
 - MORL East
 - MORL West
 - Hywind
 - Hywind_Cable
 - Aberdeen
 - Kincardine
 - SeaGreen
 - Inch Cape
 - NNG
 - ForthWind
 - Areas of Search (offshore wind)
- Active aquaculture farms**
- Active aquaculture farms
- MPA**
- MPA
- SAC**
- SAC
- SPA**
- SPA
- Oil and Gas**
- Wells
 - Surface
 - Subsurface
 - Pipelines
 - Current licenced areas
- ICES Areas**
- ICES Areas

DECARBONISING SCOTLAND

“By 2030, 50% of all Scotland’s energy needs will come from renewables”

Current offshore wind situation

- 915 MW built
- 4.1 GW consented
- 10 GW ScotWIND target goal (Actual 24GW)

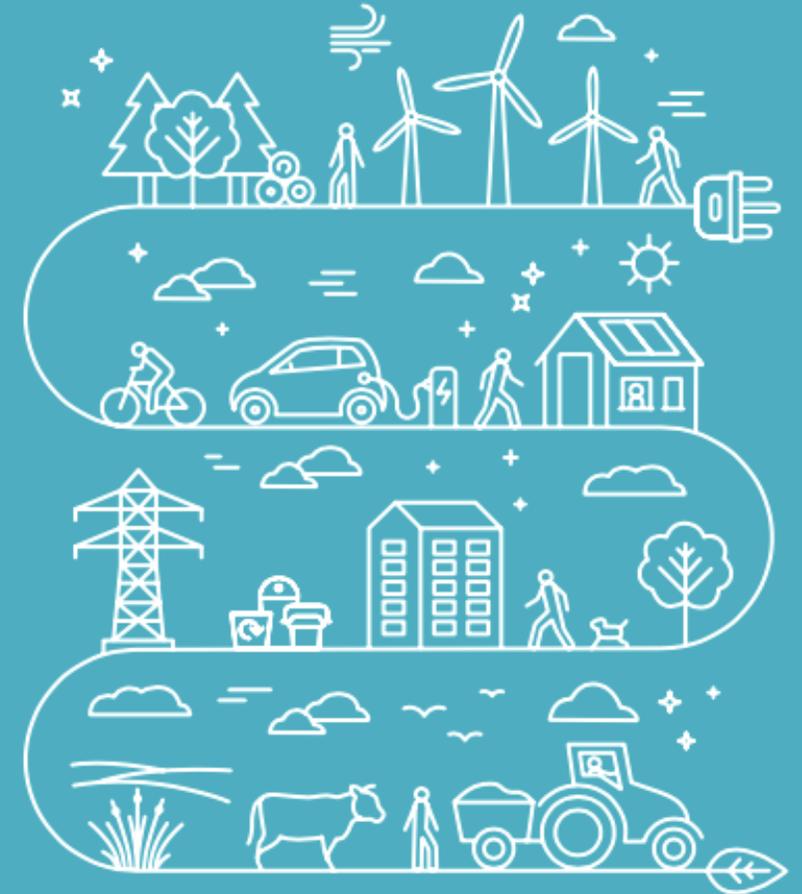
UK target goal: 75 GW

- Of which probably >75% in Scottish waters (≈55 GW)

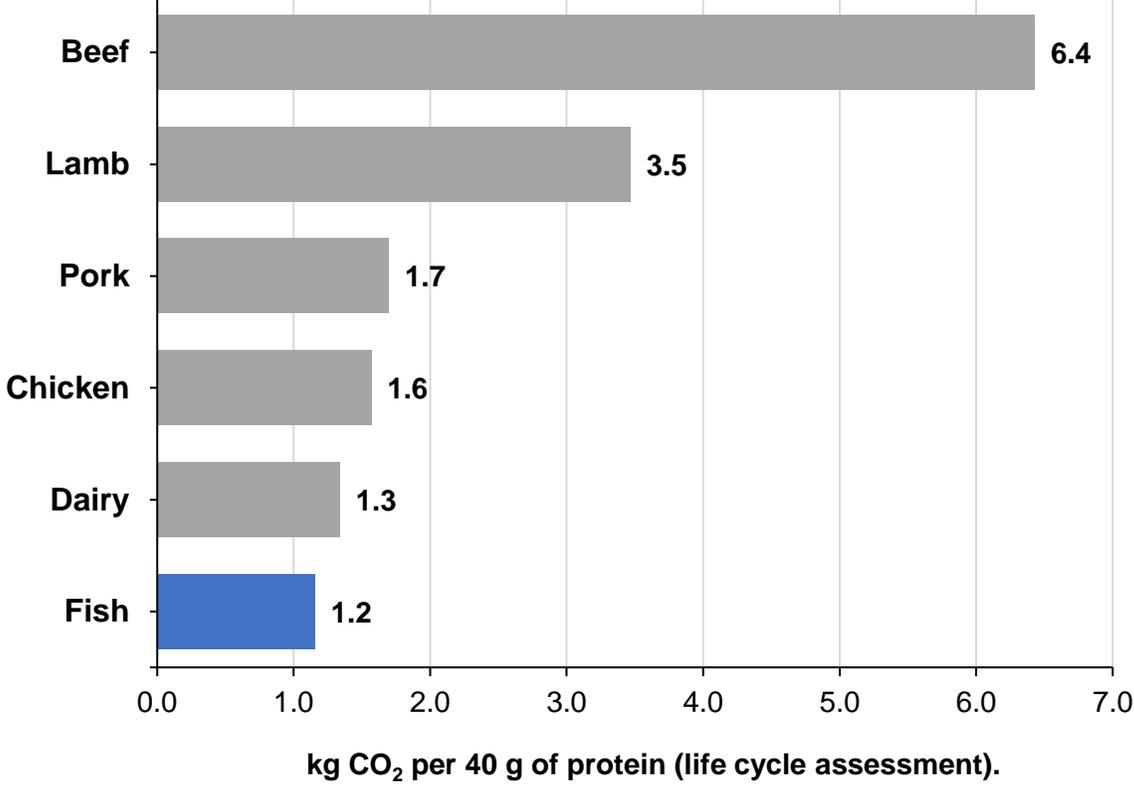
Marine renewables necessary for net-zero – but presents real spatial challenges for fishing

CLIMATE CHANGE PLAN

Third Report on Proposals and Policies 2018-2032
Summary Document



Fishing – also part of reaching net zero



Scottish Fishing Industry Facts

- Number of people working on Scottish fishing vessels: **4,737**
 - For every job at sea, there are **5 jobs ashore**
- Number of active Scottish registered fishing vessels (2020): **2,088**
 - Under 10 (1556) vs over 10 (532)
- **399,000 tonnes** of fish/shellfish landed by Scottish vessels (2020)
 - Gross value of **£488 million**
 - By value, mackerel the most valuable, then *Nephrops*, haddock 3rd
- Biggest ports in the UK for...
 - Shellfish: Fraserburgh
 - Whitefish: Peterhead
 - Pelagic: Peterhead, Lerwick

The Catching Sector comes in all shapes and sizes....



4 METRES



80+ METRES

... and there are many various methods



- Static gear
- Seine netting
- Single trawlers
- Pair trawlers
- Twin trawlers
- Dredgers
- Pelagic

- The spatial squeeze is already happening – and is going to get much tighter
- No one sector has any more ‘right’ to Scotland’s marine space than another
- But we do need *fair and equitable* marine planning for co-existence
- Co-existence must allow sectors to remain viable – ‘fishing on a postage stamp’ is not viable
- Fishing produces low carbon, high protein healthy food – we are also part of the routemap to net zero!



ACCEPT THE THINGS WE CANNOT CHANGE



CHANGE THE THINGS WE CAN



HAVE THE WISDOM TO KNOW THE
DIFFERENCE