

Annex E: Impacts on non-UK vessels

Although impacts outside of the UK are not formally assessed as part of UK policy impact assessments (and therefore the analysis in the main body of the IA), the implications for non-UK commercial fishing vessels are considered in deciding which sites to designate. This is because any management measures required for these sites have to be agreed at the EU level.

In order to gather evidence for analysis, in 2016, relevant member states were contacted by Defra and the MMO and asked to provide data on the revenues obtained by their vessels (both through bottom abrading gears and other gears) in the original 15 proposed sites. Belgium, Denmark, France, Ireland and the Netherlands provided data, however, Germany and Spain did not submit their data and at this stage this analysis assumes that only countries who responded to the call for evidence fish in these areas. This tranche 3 consultation will provide countries who have not responded and any other interested countries with an opportunity to comment on these figures. The same approach was adopted for previous first and second tranches when countries were invited to submit their data as part of the pre-consultation process.

For the two additional sites (South-West Approaches to Bristol Channel and East of Start point) information was not sought as part of this original request in 2016, as such some in-house analysis was undertaken to help inform decision making. However, the analysis for these two sites was not as robust as that for the preceding sites and therefore as part of this consultation we are seeking information from countries who fish in these areas to report to us their landings/revenue.

The following table provides an analysis of likely impacts on non-UK vessels at particular sites¹. The second column sets out the data received by other countries on the level of fishing by their vessels in the proposed area and the third column sets out a range and best estimate of how much revenues may be affected by the site designation². **These figures are not comparable to the impacts estimated for UK vessels, which are based on lost Gross Value Added.** These impacts are presented as a range – at the bottom end, the impact on non UK Vessels will be zero as it is assumed that all fishermen move their fishing elsewhere. At the top of the range the assumption is that fishermen may stop all fishing using bottom abrading gear that it would have undertaken in that area and so this reflects the total fishing values reports by countries. In order to estimate the likely impact (as some fishing is likely to be displaced) the same displacement effects were assumed for non-UK vessels as for UK vessels (see annex A for details of the methodology). Actual impacts on non-UK vessels will probably depend on the Gross Value Added rather than the revenue for each member state and their ability to fish elsewhere, which is likely to be greater for such vessels as they have a large range due to their transnational nature and size.

Note that all figures in the following table are expressed in 2015 prices and are rounded to 3 decimal places. Figures may not sum exactly due to rounding.

¹ Note: Non-UK fishing vessels are not permitted to fish within 6nm of the UK coast unless historic access rights exist (e.g. North of Lundy) and so most entirely inshore sites are excluded from this analysis

² The data is based on a formal request to countries to provide data on affected revenues. This data was used for all but two of the sites listed in the table under 'pers. comm. 2016/2017' with the exception of South West Approach Bristol Channel and East of Start Point. For these two sites data from countries was not available and some in house analysis was carried out but some uncertainties still apply for the non UK landing activities. Therefore further information will be collated during consultation. Not all countries responded to the formal request to provide data; any revenues from these countries are not included in the final estimates and therefore for the purpose of this analysis it's assumed that there are no impacts to them. However assumptions and derivations of the figures will be further tested during the consultation.

MCZ	Annual average Non-UK Revenues and Data Source(s) by country (£m/yr ³ 2009-2015 average unless otherwise stated)	Total Annual Revenues Potentially Affected by Management (£m/yr 2009-2015 average unless otherwise stated) ⁴
Cape Bank	<p>Belgium: 0.215 (Bottom Mobile Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>France: 0.190 (Mobile Gears⁵) Source: Les Pêcheurs de Bretagne and Cobrenord (pers. comms. 2017)⁶</p> <p>Ireland: 0.013 (Bottom Mobile Gears); < 0.001 (Mid-water gear) Source: Marine Institute Ireland (pers. comms. 2016)</p> <p>Netherlands: < 0.001 (Mid-water mobile gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)⁷</p> <p>Total Revenue Bottom-Abrading Gears: 0.417 Total Non-UK Revenue: 0.417</p>	<p>Best Estimate: 0.052 (0.000 - 0.417)</p>
South West Deeps (East)	<p>Denmark: 0.286 (Mid-Water Mobile Gear) Source: Ministry of Environment and Food of Denmark (pers. comms. 2016)</p> <p>France: 1.681 (Mobile Gear) Source: Les Pêcheurs de Bretagne and Cobrenord (pers. comms. 2017)</p> <p>Ireland: 0.114 (Bottom Mobile Gear); 0.288 (Mid Water Mobile Gear); < 0.001 (Static); Source: Marine Institute Ireland (pers. comms. 2016)</p> <p>Netherlands: 0.932 (Mid-Water Mobile Gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p>	<p>Best estimate: 0.224 (0.000 – 1.796)</p>

³ Where revenues were provided in Euros this has been converted to Pounds Sterling, using the average exchange rate corresponding to the price year of the revenue data used.

⁴ Low and high estimates are calculated based on each sites respective lowest and highest management scenarios as outlined in annex A. The best estimate is calculated from the highest scenario, but with the following assumptions: only 50% of estimate value landed via mobile gear will be affected, only 25% of estimated value landed via static gear will be affected, 75% of commercial fishing activity will be displaced to other locations, the other 25% will be lost.

⁵ Data from this source does not differentiate bottom mobile gear and mid-water mobile gear. For this analysis, the value of landings from French vessels using mobile gear, has been included in the total revenue of bottom-abrading gears.

⁶ All revenue figures from this source is based on 2013 only

⁷ All revenue figures from this source are an average of 2010 – 2015

	<p>Total Revenue Bottom-Abrading Gears: 1.796</p> <p>Total Non-UK Revenue: 3.302</p>	
South of Celtic Deep	<p>Belgium: 0.061 (Bottom Mobile Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>Denmark: 0.002 (Mid-Water Mobile Gear) Source: Ministry of Environment and Food of Denmark (pers. comms. 2016)</p> <p>France: 0.097 (Mobile Gear) Source: Les Pêcheurs de Bretagne and Cobrenord (pers. comms. 2017)</p> <p>Ireland: 1.266 (Bottom Mobile Gear); 0.228 (Mid-Water Mobile Gear); 0.014 (Static) Source: Marine Institute Ireland (pers. comms. 2016)</p> <p>Netherlands: < 0.001 (Mid-Water Mobile Gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 1.424</p> <p>Total Non-UK Revenue: 1.667</p>	<p>Best estimate: 0.178</p> <p>(0.000 -1.424)</p>
South of Isles of Scilly	<p>France: 0.065 (Mobile Gear) Source: Les Pêcheurs de Bretagne and Cobrenord (pers. comms. 2017)</p> <p>Total Revenue Bottom-Abrading Gears: 0.065</p> <p>Total Non-UK Revenue: 0.065</p>	<p>Best estimate: 0.008</p> <p>(0.000 – 0.065)</p>
North East of Haig Fras	<p>Belgium: 0.040 (Bottom Mobile Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>France: 0.159 (Mobile Gear) Source: Les Pêcheurs de Bretagne and Cobrenord (pers. comms. 2017)</p> <p>Ireland: 0.213 (Bottom Mobile Gear); 0.001 (Mid-Water Mobile Gear); 0.003 (Static) Source: Marine Institute Ireland (pers. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 0.412</p> <p>Total Non-UK Revenue: 0.416</p>	<p>Best estimate: 0.051</p> <p>(0.000 – 0.412)</p>

<p>Goodwin Sands</p>	<p>Belgium: 0.141 (Bottom mobile gear); < 0.001 (Mid-water mobile gear); 0.003 (static gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>Denmark: 0.001 (Mid-Water Mobile Gear); < 0.001 (Static gear) Source: Ministry of Environment and Food of Denmark (pers. comms. 2016)</p> <p>France: < 0.001 (mobile gear) Source: Nord-Pas de Calais/Picardie Regional Fisheries Committee (pers. comms. 2016)</p> <p>Netherland: < 0.001 (bottom mobile gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 0.141 Total Non-UK Revenue: 0.145</p>	<p>Best Estimate: 0.018 (0.000 - 0.141)</p>
<p>Inner Bank</p>	<p>Belgium: 0.592 (Bottom Mobile Gear); <0.001 (Mid-Water Mobile Gear); < 0.001 (Static Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>Denmark: 0.003 (Mid-Water Mobile Gear) Source: Ministry of Environment and Food of Denmark (pers. comms. 2016)</p> <p>France: 0.274 (Mobile Gear) Source: Nord-Pas de Calais/Picardie Regional Fisheries Committee (pers. comms. 2016)</p> <p>Ireland: 0.002 (Bottom Mobile Gear); < 0.001 (Static Gear) Source: Marine Institute Ireland (pers. comms. 2016)</p> <p>Netherlands: 0.002 (Bottom Mobile Gear); 0.002 (Mid-Water Mobile Gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 0.870 Total Non-UK Revenue: 0.875</p>	<p>Best estimate: 0.109 (0.000 – 0.870)</p>
<p>Foreland</p>	<p>Belgium: 0.141 (Bottom Mobile Gear); < 0.001 (Mid-Water Mobile Gear); 0.003 (Static Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p>	<p>Best estimate: 0.174 (0.000 – 1.391)</p>

	<p>Denmark: 0.001 (Mid Water Mobile Gear); < 0.001 (Static) Source: Ministry of Environment and Food of Denmark (pers. comms. 2016)</p> <p>France: 1.215 (Mobile Gear) Source: Nord-Pas de Calais/Picardie Regional Fisheries Committee (pers. comms. 2016)</p> <p>Netherlands: 0.033 (Bottom Mobile Gear); 0.046 (Mid-Water Mobile Gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 1.389 Total Non-UK Revenue: 1.438</p>	
Kentish Knock East	<p>Belgium: 0.185 (Bottom Mobile Gear); < 0.001 (Static gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>France: 0.007 (Mobile gear) Source: Nord-Pas de Calais/Picardie Regional Fisheries Committee (pers. comms. 2016)</p> <p>Netherlands: 0.133 (Bottom mobile gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 0.325 Total Non-UK Revenue: 0.325</p>	<p>Best estimate: 0.041 (0.000 – 0.325)</p>
Orford Inshore	<p>Belgium: 0.058 (Bottom Mobile Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>France: 0.003 (Mobile Gear) Source: Nord-Pas de Calais/Picardie Regional Fisheries Committee (pers. comms. 2016)</p> <p>Netherlands: < 0.001 (Bottom Mobile Gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 0.061 Total Non-UK Revenue: 0.061</p>	<p>Best estimate: 0.008 (0.000 – 0.061)</p>
Holderness Offshore	<p>Belgium: 0.010 (Bottom mobile gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>Denmark: < 0.001 (Bottom mobile gear); 0.003 (mid-water mobile gear); < 0.001 (static gear)</p>	<p>Best estimate: 0.015 (0.000 – 0.120)</p>

	<p>Source: Ministry of Environment and Food of Denmark (pers. comms. 2016)</p> <p>France: 0.099 (Mobile gear) Source: Nord-Pas de Calais/Picardie Regional Fisheries Committee (pers. comms. 2016)</p> <p>Netherlands: 0.012 (bottom mobile gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 0.120</p> <p>Total Non-UK Revenue: 0.120</p>	
Markham's Triangle	<p>Belgium: 0.151 (Bottom Mobile Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>Denmark: 0.040 (Bottom Mobile Gear); 0.053 (Mid-Water Mobile Gear); < 0.001 (Static Gear) Source: Ministry of Environment and Food of Denmark (pers. comms. 2016)</p> <p>France: 0.020 (Mobile Gear) Source: Nord-Pas de Calais/Picardie Regional Fisheries Committee (pers. comms. 2016)</p> <p>Netherlands: 0.230 (Bottom Mobile Gear) Source: VisNed (pers. comms. 2016)</p> <p>Sweden: 0.005 (Mobile Gear) Source: Swedish agency for marine and water management (pers. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 0.445</p> <p>Total Non-UK Revenue: 0.498</p>	<p>Best estimate: 0.056</p> <p>(0.000 – 0.445)</p>
South Rigg	<p>Belgium: 0.010 (Bottom Mobile Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>Ireland: 0.012 (Bottom Mobile Gear); 0.001 (Mid-Water Gear) Source: Marine Institute Ireland, pers. comms. 2016</p> <p>Netherlands: 0.002 (Bottom Mobile Gear); 0.002 (Mid-Water Mobile Gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 0.024</p> <p>Total Non-UK Revenue:</p>	<p>Best estimate: 0.003</p> <p>(0.000 – 0.024)</p>

	0.026	
Queenie Corner	<p>Belgium: 0.040 (Bottom Mobile Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>Ireland: 0.976 (Bottom Mobile Gear); 0.001 (Mid-water Mobile Gear); < 0.001 (Static Gear) Source: Marine Institute Ireland (pers. comms. 2016)</p> <p>Netherlands: 0.002 (Bottom Mobile Gear); 0.002 (Mid-Water Mobile Gear) Source: Dutch Ministry of Economic Affairs (per. comms. 2016)</p> <p>Total Revenue Bottom-Abrading Gears: 1.019 Total Non-UK Revenue: 1.021</p>	<p>Best estimate: 0.127 (0.000 – 1.019)</p>
South-West Approaches to Bristol Channel	<p>Formal request was not submitted to countries. N/A⁸:</p>	N/A
West of Copeland	<p>Belgium: 0.016 (Bottom Mobile Gear) Source: Belgium Institute for Agricultural and Fisheries Research (pers. comms. 2017)</p> <p>Total Revenue Bottom-Abrading Gears: 0.016 Total Non-UK Revenue: 0.016</p>	<p>Best estimate: 0.002 (0.000 – 0.016)</p>
East of Start point ⁹	<p>Formal request was not submitted to countries. N/A</p>	N/A
Total		<p>Best estimate: 1.282 (0.000-11.492)</p>

⁸ Data for this site could not be collected directly from member states. Some in-house analysis was carried out but due to some uncertainties on non-UK revenues more analysis is required and therefore figures are not included here. Further data and analysis will be carried out and tested during consultation.

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