

2014

Sea Fisheries Section: Annual Report



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1 Summary

1.1 Background

All commercial fishermen must submit quarterly logsheet returns as a condition of their fishing vessel licence. Nil returns and small quantities of fish caught are still recorded and sent in, as these are important data that contribute to the overall picture of fishing effort in Bailiwick waters. Logsheet data from as far back as 2007 is stored on the Sea Fisheries electronic database, with paper records dating back further still. All local vessels over 12m in length now submit their logsheets directly to the Marine Management Organisation (MMO) via an electronic logbook (E-log). In these cases, the Section obtains the landings figures from the MMO database.

1.2 Executive Summary

It is now just over two years since a fishing vessel licensing scheme was introduced in the 0-12nm zone of Bailiwick waters. The Section's Sea Fisheries Officers (SFOs) continue to ensure that all vessels carrying out commercial fishing within the Bailiwick are licensed to do so by the Commerce and Employment Department, in an effort to clamp down on unlicensed fishing. Those who are identified as commercially fishing without a fishing vessel licence are dealt with in accordance with the *Sea Fish Licensing (Bailiwick of Guernsey) Law, 2012* and could face prosecution and a fine of up to £50,000 if found guilty.

The Section regulates commercial fishing using both the precautionary approach, whereby fisheries controls are implemented as a precaution where there is a lack of data, and the ecosystem approach which considers how commercial fishing impacts the marine environment. In 2014 the SFOs reviewed the initial technical controls which were introduced with the new licensing scheme on 1st February 2013. This included controls on pair and beam trawling, scallop dredging and wreck netting. A restriction on fishing for spider crab (*Maja squinado*) with spider nets was consulted on but ultimately not implemented, as French vessels fishing in the 6-12nm zone of Bailiwick waters would be able to continue to fish using this method in accordance with *The Fishing Boats (France) Designation Order, 1965*. This would have thus rendered the control discriminatory.

Significant resources have been put into reviewing *The Fishing Ordinance, 1997*, which regulates both fishing and shore gathering within the 0-3nm zone. In September 2014 the Section launched a Phase 1 consultation paper detailing the aspects of the law to be reviewed. The Section is extremely grateful to all those who took the time to respond, as all views expressed help to ensure that the Phase 2 consultation paper (due for release later in 2015) and the final redrafting of the law reflect, where possible, what the Bailiwick's public want to see implemented.

The Bailiwick's commercial fishermen continue to battle the adversities which come as part of operating a commercial fishing business. The winter of 2013-14 saw prolonged periods of adverse weather as depression after depression rolled in from the Atlantic, meaning many boats did not leave their moorings for weeks on end. Other factors having an impact on the profitability of a commercial fishing operation include the cost of vessel crew and fuel and largely static prices paid for fish and shellfish locally. Further factors impacting the Bailiwick fleet in particular include the logistics and cost of exporting catch off-island and fluctuating/ dropping Euro rates.

Bailiwick fisherman have continued to show resilience and in 2014 both Edible Crab and Lobster catches reached record levels, coupled with good prices for those who landed into France at the Cherbourg Auction Market. Catches for wetfish also increased in 2014 compared to 2013.

The future is bright for the Bailiwick fishing industry, with the fishing vessel licensing scheme playing a key role in ensuring that fishing businesses can continue to operate with protection from nomadic and unlicensed fishing.

Considerable resource and attention is now being given to working towards ensuring that stocks of fish and shellfish continue to be fished sustainably by the Bailiwick fleet. Key species will be benchmarked against scientific advice from both the International Council for the Exploration of the Sea (ICES) and the Centre for Environment, Fisheries and Aquaculture Science (Cefas). This benchmarking will continue to expand in 2015 to ensure that catches of fish and shellfish are within sustainable levels, with further licensing controls implemented to achieve this if it is considered necessary (subject to consultation with those holding a Bailiwick of Guernsey fishing vessel licence).



Chris Morris
Senior Sea Fisheries Officer



2 The Year in Brief

2.1 2014 in Pictures



Clockwise from Top Left: *Jenny D* GU78 returning to Creux Harbour after a successful day bass fishing; the Section alongside *Western Fisher* GU19 on an inshore patrol; *Puma* amongst the Sark moorings; film crew onboard *FPV Leopardess* filming *Our Portland Fisher* GU417 for the 2015 VisitGuernsey TV advert; a boarding in the Sark Box; guard boating the Battle of Britain exclusion zone gave an opportunity for some fantastic photos to be taken onboard *Leopardess*.

2.2 Onshore and Inshore

With the 2012 licensing law now firmly established, more time was dedicated to patrolling the inshore sector. This consisted of both shore-based patrols in the Section's Land Rover and inshore patrols using *FPV Puma*. Marinas and moorings were regularly checked for any unlicensed boats masquerading as GU-registered fishing vessels and unlicensed fishing activity was actively monitored. The result of this increased effort was the removal of more than 5 unlicensed vessels from the GU register.



Fig. 1 – an inshore patrol being carried out by *Puma* in Grande Havre.

The inshore patrols using *Puma* were undertaken from March to September to coincide with the fishing season of the smaller bay boats. As well as being a deterrent to unlicensed fishing activity these patrols are invaluable to the Section, as conversations with fishermen whilst *Puma* is alongside can often alert the Section to any potential issues or problems before they come to a head.

With an abnormally warm October and November, there was inevitably more conflict between netters and other beach users than there had been in previous years. Although the vast majority of fishermen continue to set their nets responsibly in accordance with the 1997 ordinance, it is the small minority who soon tarnish the rest of the sector.

2.3 Offshore

Until recently, the Section had no information regarding the whereabouts of overseas vessels fishing in the vicinity of Guernsey's waters. This meant that the *Leopardess* was often launched to subsequently find that no vessels were fishing in the 12nm limit, resulting in a waste of fuel and Officers' time. All fishing vessels over 12m in length must now have a Vessel Monitoring System (VMS) unit onboard. This unit operates like a plane's black box and reports the position of the fishing vessel randomly every two hours. The MMO are able to 'ping' any vessel to obtain its location at that exact moment in time. It is also a licence requirement that all fishing vessels over 15m must continually transmit their position using the Automatic Identification System (AIS) whilst in Bailiwick waters.



Fig 2 – the Section performing a routine boarding of local trawler *Amy Blue* GU116.

With position information available at Officers' fingertips, launching the *Leopardess* is now much more targeted – resulting in more efficient patrols and a greater number of boardings undertaken. The main target areas of offshore patrols are the Schole Bank and the Haricot to the east, the Sark Box to the south and the English Channel to the West. French boats are the primary concern in the Haricot and the Sark Box, with both UK and French vessels licensed to fish off the West coast.

2.4 Other Marine Work



Fig 3 – *Leopardess* guarding the cable repair ship *Ndurance* (photo taken from onboard *Ndurance*). Photo courtesy of Guernsey Electricity Ltd.

As part of its Memorandum of Understanding (MoU) with Guernsey Electricity, *Leopardess* is used to patrol the GJ1 cable route between Guernsey and Jersey. The purpose of these patrols is to identify static fishing gear and vessels fishing within the vicinity of the cable. Towed gears have the ability to snag and damage the cable, potentially severing this vital energy link. Two large-scale projects – a subsea cable running direct to France from Guernsey and a replacement of the ageing GJ1 cable – are currently in the pipeline and Sea Fisheries will continue to work closely with Guernsey Electricity to ensure the minimum amount of disruption to local fishermen and the safe execution of any subsea surveys.

Leopardess is also used by the police, for both personnel and equipment transfer to and from the neighbouring islands, either as a safety measure or when the weather conditions do not allow the use of scheduled flights and ferries. Training of the firearms team is carried out onboard *Leopardess*, with the team practising transfers and boardings at sea as well as staging landings on the island's beaches.

Sea Fisheries works with the States of Guernsey Environment Department to transport the local Seabird Monitoring Team (SMT) to important bird nesting sites throughout the Bailiwick, notably the Humps (north of Herm) and Les Autelets (Sark). It is only the trained SMT who are licensed to handle seabirds in accordance with Bailiwick animal welfare laws. Winter 2014 saw the worst seabird 'wreck' in living memory occurring in the North-east Atlantic, with the Channel Islands being one of the worst affected areas. The most severely affected



Fig 4 – the Seabird Monitoring Team ringing nesting seabirds.

species were auks, in particular Atlantic Puffin and Common Guillemot. With such a heavy mortality in the 2014 seabird wreck, it was good news to find that most of the Islands' seabird colonies remained vibrant. The Channel Islands' most important Guillemot colony on Les Autelets also seemed to escape the wreck relatively unscathed. Another positive observation was the return of breeding Common Terns to The Humps; however on the penultimate monitoring trip of the season it was found that the tern colony had failed virtually completely. Although puffins did return to their usual nesting areas they did so in smaller numbers than previous years and it would appear that many of them were not in an adequate physiological condition to breed. The other species to fare poorly was the European Shag. It is clear that once again many adults did not attempt to breed this year and, of those that did, many abandoned their breeding attempts either before eggs were laid or early in incubation.

2.5 Ormering

The start of the 2014 ormering season saw some appalling weather, although this did not deter people from flocking down to the hotspots in their hundreds. Some good catches were reported on the first set of tides despite the prevailing low pressure system meaning that the tide did not go down as far as the 1.2m predicted low. A feature of the 2014 season was the particularly poor tidal heights, with only three tides ducking under the 0.5m mark. The lowest tides of the 2014 season didn't appear until the beginning of March.

Catches appeared to be down compared to 2013, although it is thought that the strong winds during the first half of the ormering season drove the stock to take shelter below the low water mark. Despite the lower catches there were some encouraging reports of a high number of juvenile ormers, particularly on the southwest coast, ranging from the size of a thumbnail to just a millimetre or two below the 80mm retention size. This is a positive sign for future year's harvests.



Fig 5 – inspecting an ormer catch.

2.6 Inshore Fisheries Consultation: An Update



Fig 6 – the consultation paper.

The Stage 1 consultation paper 'Inshore Fisheries Management within Guernsey's Territorial Waters' was published on 1st September 2014 and the consultation period closed on 1st December 2014. The aim of the document was to provoke discussion and public feedback and over 350 people took this opportunity to have their views heard.

Since the closing date, the results from SurveyMonkey and the paper returns have been carefully combined and thorough analysis of the responses has been performed. The resulting summary paper was presented to the Board for approval in mid-2015 and a more focussed Stage 2 consultation paper, drawing on the feedback received from the Stage 1 paper, will be released sometime in the latter half of 2015 or in early 2016.

2.7 Community First Responder

In October, the entire Sea Fisheries Section undertook a week-long First Person on Scene (FPOS) course with St. John Ambulance and Rescue Service. Although this course was undertaken primarily to improve the marine capability of the *Leopardess* whilst she is at sea, either in her role as a fisheries protection vessel or as a valuable part of the Bailiwick's Search and Rescue (SAR) assets, it also means that the Sea Fisheries team are now part of the Community First Responder scheme. Volunteers are alerted to medical emergencies in order to provide patient care in the vital first few minutes before an ambulance arrives. All responders are equipped with a comprehensive First Response bag, including oxygen and a defibrillator.

2.8 Sea Temperature

Although 2014 started wet and windy with a period of prolonged winter storms, it turned out to be the warmest calendar year on record with a mean air temperature of 12.4°C. Unusually, however, not a single monthly or seasonal temperature record was broken as there were no 'stand out' hot spots - instead the year was consistently warm. This was reflected in the sea temperature, where we saw above-average temperatures for 51 out of the 52 weeks of the year. This peak was seen in week 30 (24th July) where the sea temperature was a record-breaking 2.2 degrees above the 30 year average, beating the previous record for that time of year by a substantial 0.7 degrees.

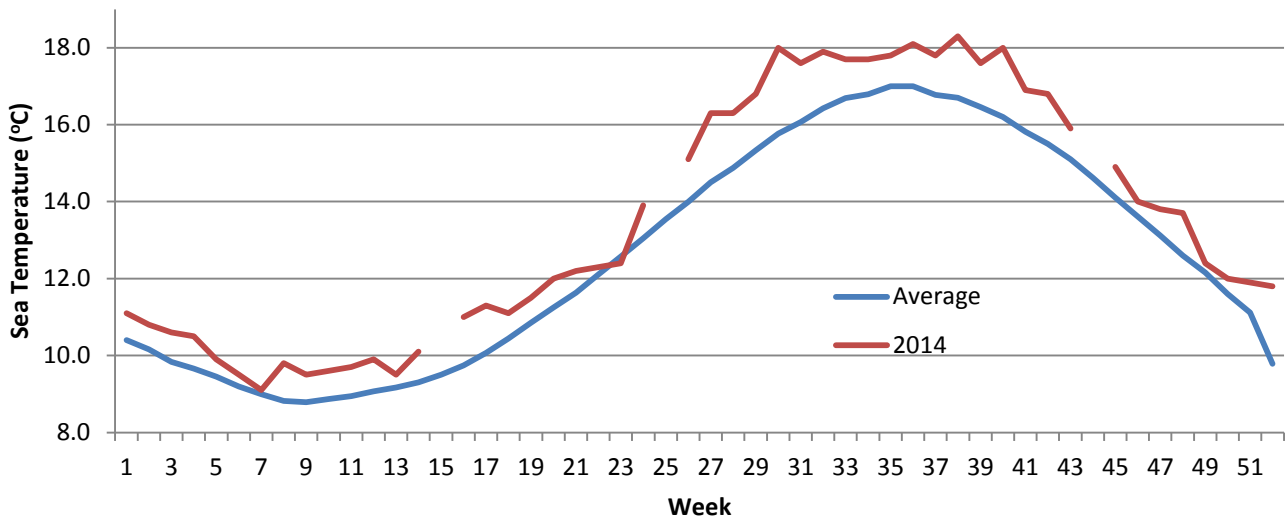


Fig 7 – comparison of 2014 sea temperature (red line) with the 30-year average (blue line)

According to Guernsey Meteorological Office data, June was the warmest since 2006 and the sunniest since 2010. It also had the lowest mean wind speed since 1949. July followed suit with the fourth highest mean temperature on record, again matched with significantly below-average wind speeds. The culmination of these two months of above-average temperatures and below-average wind speeds meant that a very pronounced and stable thermocline was developed, effectively splitting the water column into a warm, buoyant surface layer and a much cooler, denser bottom layer. Although a thermocline develops every summer in the English Channel, the calm winds meant that mixing between the warm surface layer and the cooler deep layer was significantly reduced. This resulted in a sea temperature of 18.3°C being recorded on the 18th September – the highest sea temperature on record, marginally beating the previous record high of 18.2 degrees reached in 1997. Not only was this the highest sea temperature on record but it occurred three weeks later than the highest average temperature, at a time when sea temperatures are normally starting their gradual decrease as the thermocline is beginning to be broken up.

3 The Fleet

Vessel Category	Number of vessels 2009	Number of vessels 2010	Number of vessels 2011	Number of vessels 2012	Number of vessels 2013	Number of vessels 2014
GU registered <10m	175	171	160	158	159	159
GU registered >10m	11	8	8	8	7	7

Table 1 – the Bailiwick of Guernsey licensed fleet 2009-2014

3.1 Local Under 10m



Fig 8 – OCA GU126 hauling gear off the west coast.

Although the figures in *Table 1* (above) suggest that the size of the under 10 fleet remained static between 2013 and 2014, there were in fact a significant number of changes of vessel ownership. This occurs both between owners locally and selling and buying vessels and licences from the UK. The under 10 fleet is unrestricted with regard to which methods can be used for fishing (subject to adherence to the 1997 Fishing Ordinance), with all vessels being permitted to undertake fishing by any method (the exception to this is potting, which is only permitted with a shellfish licence). The advantage to this lack of restrictions means that the Under 10 fleet can be dynamic and adjust

their fishing to whatever species and methods are most beneficial at that time of year. Boats commonly set both pots and nets, with some of the larger Under 10s also trawling at certain points in the year. Allowing the fishery to be flexible means that our local fishermen can always obtain the greatest commercial value from their fishing licence.

3.2 Local Over 10m

The same seven vessels made up the Over 10m fleet in both 2013 and 2014. Of these seven, four vessels are engaged in potting (three based in Guernsey and one in Alderney) and three vessels are trawlers (both demersal and beam trawling). Unlike the under 10 fleet, the Over 10m vessels are restricted as to what methods they are permitted to use. Four of the seven Over 10m vessels (two trawlers and two potters) have now switched to the electronic logbook which reports directly to the MMO in the UK in accordance with EU law.



Fig 9 – Amy Blue GU116 is an Over 10m trawler.

3.3 Non-GU Vessels



Fig. 10 – scallop dredger *Betty G II* E316 is a UK-registered vessel with a Bailiwick fishing licence.

All non-Bailiwick vessels have to provide evidence of fishing in Bailiwick waters during a defined ‘track record’ period when applying for a Bailiwick reciprocal licence. Once the licence has been granted, it can be renewed without the need to re-supply the track record evidence. The methods permitted by the licence depend on what methods the owner was able to prove that his vessel previously used in Bailiwick waters during the track record period. A total of 32 non-GU vessels are licensed to fish in Bailiwick waters. This group consists of nine Under 10m vessels and 23 Over 10m vessels. The breakdown of the methods permitted by these vessels is provided in *Table 2*

below.

	Trawling	Dredging	Potting	Angling	Multi-Method	Total
Under 10	0	0	1	5	3	9
Over 10	3	8	7	1	4	23

Table 2 – breakdown of non-GU vessels by method and sector.



4 Landings

4.1 Landings Table

	Annual Landings (tonnes)							Average Value / kg (2014 prices)
	2014	2013	2012	2011	2010	2009	2008	
Anglerfish	0.9	1.9	1.3	1.1	1.1	1.1	3.3	£4.20
Bass	30.5	27.6	44.4	74.0	120.0	94.2	123.2	£12.34
Black Bream	21.3	13.7	12.7	13.9	34.0	91.5	55.0	£3.10
Brill	8.7	6.8	7.9	10.2	7.4	7.4	10.3	£7.17
Cod	3.0	1.7	3.0	3.4	2.7	0.9	2.2	£2.49
Conger	7.7	8.8	10.1	8.7	12.0	31.0	38.6	£1.10
Crayfish	0.2	0.6	0.2	0.3	0.4	0.5	0.7	£33.48
Cuttlefish	2.6	1.6	1.7	1.4	0.2	0.4	2.0	£2.80
Dogfish	12.5	16.2	15.3	18.0	9.0	23.5	16.0	£0.58
Edible Crab	878.2	784.2	785.6	692.7	759.0	622.0	802.0	£1.74
Grey Mullet	1.6	1.7	2.6	5.5	4.9	5.3	1.8	£0.81
John Dory	0.3	0.2	0.1	0.1	0.2	0.6	0.4	£8.40
Lobster	128.2	98.6	102.3	101.5	79.0	66.5	67.2	£14.51
(number)	168,645	139,654	146,429	147,204	105,532	58,881	(no data)	NA
Ling	0.9	2.0	2.0	2.6	1.8	1.8	1.6	£3.11
Mackerel	6.5	9.3	5.3	5.4	7.4	9.7	6.5	£1.65
Plaice	1.7	1.4	1.3	1.8	1.0	0.9	1.6	£2.13
Pollack	68.1	64.5	82.4	85.8	59.8	68.2	52.0	£4.19
Ray	153.3	110.2	136.5	158.8	112.0	105.8	149.8	£2.35
Red Mullet	5.0	4.7	6.0	4.8	5.2	4.3	8.3	£5.84
Sand Sole	0.7	0.7	0.4	1.1	0.9	1.4	1.5	£3.71
Sandeel	28.1	26.4	55.6	48.3	56.8	51.7	46.0	£2.45
King Scallop	101.2	102.6	95.7	108.2	118.0	89.6	102.0	£3.23
Smoothound	5.6	6.6	4.4	3.5	2.0	16.7	19.8	£1.35
Sole	5.1	4.0	2.3	4.0	3.1	3.2	6.0	£9.87
Spider Crab	34.2	34.9	40.7	40.1	69.0	77.8	86.3	£1.54
Squid	0.5	0.3	0.2	0.2	0.2	0.5	0.5	£4.77
Turbot	6.0	7.8	10.2	10.3	6.2	3.4	2.5	£11.60
Tope	3.3	5.7	3.2	4.8	8.9	14.0	16.2	£2.24
Wrasse	5.6	4.0	7.9	8.1	8.2	8.5	5.0	£0.92
Total (wetfish)	376.4	325.9	414.9	474.2	464.6	545.1	567.6	
Total (shellfish)	1145.3	1022.8	1026.4	944.4	1025.8	857.3	1060.7	
Total (all)	1521.7	1348.7	1441.3	1418.6	1490.4	1402.4	1628.3	
Estimated Value (£000's, 2014 prices)	5,225	4,477	4,933	5,258	5,483	4,887	5,617	

Table 3 – landings of key commercial species by Bailiwick vessels in 2014. This table contains landings made by GU-registered vessels only, it does not include landings or catches made by non-GU vessels when fishing in Bailiwick waters. To reflect the fact that more of the fleet are now landing into Diélette and Cherbourg, the 2014 price has been weighted between prices paid locally and French market prices. This was calculated using an average of the daily Cherbourg fish market prices, to which the average 2014 Euro exchange rate was applied.

4.2 Analysis

4.2.1 Shellfish



Fig 11 – Dorado GU151 is an Under 10m potter.

Landings of edible crab increased by a substantial 94 tonnes (an increase of more than 13%) compared to 2013, with nearly 880 tonnes landed in 2014. This makes the landings of 2014 more than 115 tonnes higher than the seven year average. Lobster landings also saw a marked increase, with 2014's landings of 128.2 tonnes representing a 23% increase compared to 2013. Based on average 2014 prices, lobster alone accounted for over 35% of the total value of 2014's landings. As well as the

weight of the landings increasing, the figures suggest that the average weight of each landed lobster has also increased for the fourth consecutive year.

After six consecutive years of decline it was reassuring to see that spider crab landings appear to have stabilised, with just a 0.7 tonne difference between 2013 and 2014. The 34.2 tonnes landed in 2014 is still 60% lower than was landed in 2008, which is evidently a cause for concern. It remains to be seen whether landings will now remain stable for the coming years or if this species will show a comeback. Scallop landings were broadly on a par with 2013, reflecting the fact that the local scallop market is being fished for 'on demand' for local suppliers rather than catering to an export market.

4.2.2 Wetfish

After two years of decline, it was encouraging to see the wetfish landings experience a 50 tonne increase compared to 2013. A large part of this increase (15.5%) is due to the ray landings made in 2014, as this species was abundant in local waters. Landings of bass showed a slight increase for the first time since 2010, although 2013's landings were still less than 25% of those landed in 2008. Although only a small percentage of the total landings at 3 tonnes, cod also unexpectedly saw a large percentage increase compared to 2013 – this was surprising given the record sea water temperatures. Sandeel landings also appear to have stabilised at around the 28 tonne mark, partly due to the fact that there is now only one dedicated full-time sandeel trawler in the fleet. Despite several species showing encouraging increases compared to 2013, it is worth noting that the wetfish landings for 2014 remained 76 tonnes below the 7 year average. The reduction seen in mackerel landings in 2014 can be attributed to the late arrival of mackerel into our waters due to the high turbidity at the start of the year, which effectively shortened the mackerel season.



Fig 12 – sorting a typical mixed trawl of wetfish species

5 Effort

5.1 Potting

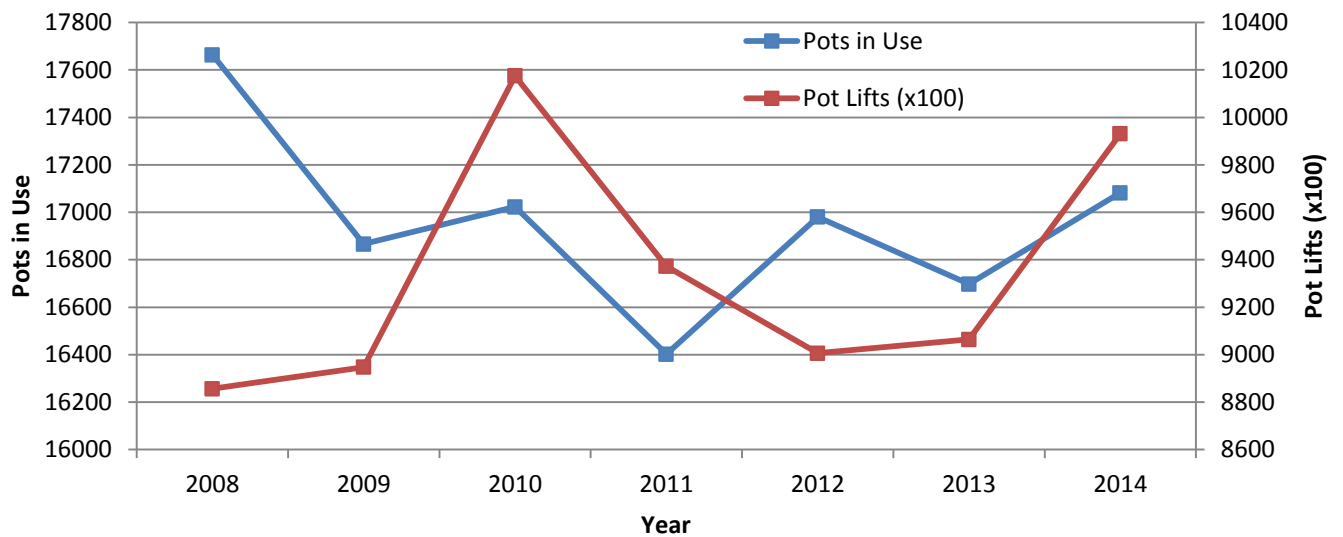


Chart 1 – number of pots in use and number of pot lifts 2008-2014

There was an increase in both the number of pots in use and the number of pot lifts in 2014, with the number of pot lifts approaching the 1 million mark for the first time since 2010. Despite this apparent marked increase, the number of pot lifts has actually remained relatively stable and fluctuated less than 10% during the past 7 years. The number of pots in use was the highest since 2008, with each pot being lifted an average of 58 times during the year.

5.2 Netting

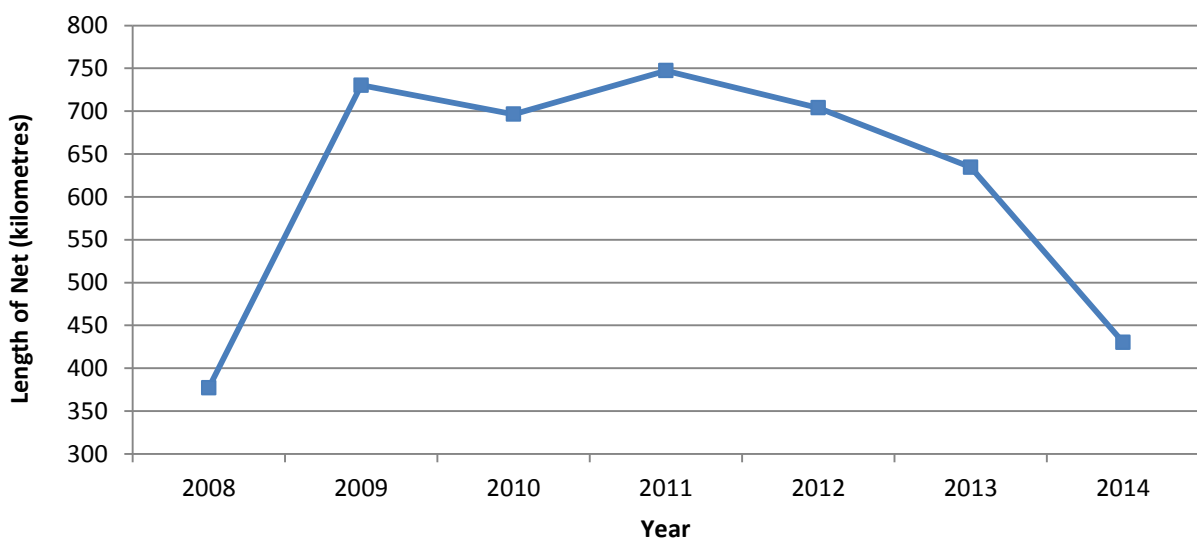


Chart 2 – length of nets set in Bailiwick waters 2008-2014. Includes tangle netting.

There has been a steady decrease in the length of nets set in Bailiwick waters since 2011, with a 32% reduction in effort since 2013. Given the increased potting effort for 2014, this reduction is to be expected as the fleet size has remained static compared to 2013. Therefore in a multi-method fleet, an increase in one method will result in a decrease in another. There has also been a shift in the public perception of shore netting and whether or not it has a place on the modern foreshore.

5.3 Trawling

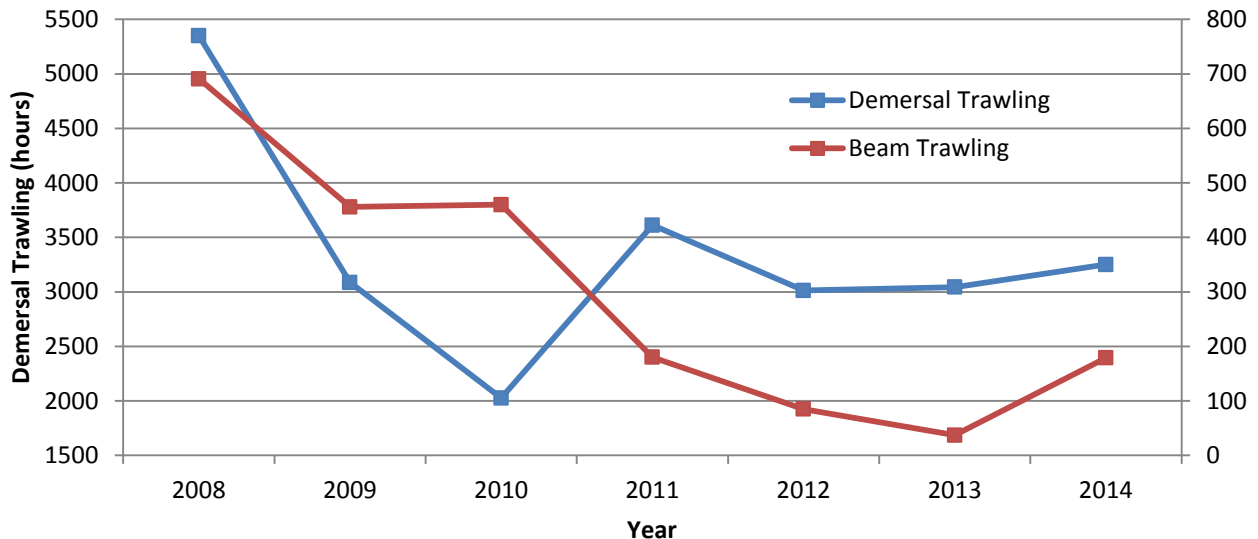


Chart 3 – demersal and beam trawling effort 2008-2014

Demersal trawling effort has remained broadly static since 2012, with a slight increase from 2013 to 2014 despite the fact that the composition of the trawling fleet has not changed since 2013. Only a select few vessels are licensed to fish with a beam trawl, hence why the effort is an order of magnitude lower than that of demersal trawling (please note the difference scales used for demersal and beam trawling). 2014 marked the first year of increasing beam trawling effort since 2008. Although this chart only shows effort for GU registered vessels, effort by non-GU vessels has decreased significantly since 2012 due to the new licensing laws coming into place.

5.4 Hand Diving

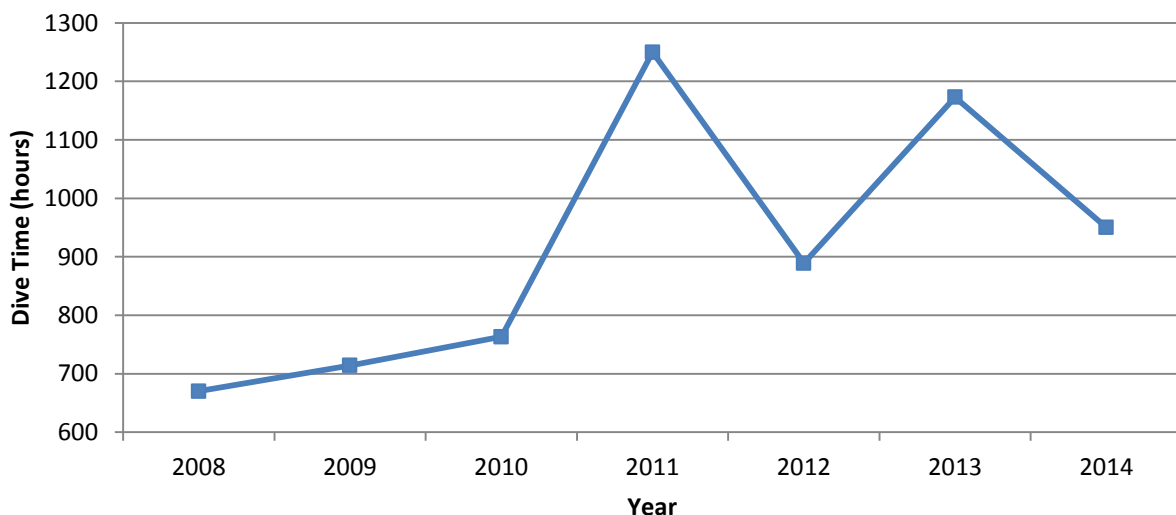


Chart 4 – hand diving effort 2008-2014

The closure of St. John's hyperbaric chamber has meant that commercial divers are restricted by health and safety considerations to a dive depth of 10m. These restrictions are the likely cause of the decrease in effort seen between 2013 and 2014 as, in practice, the closure has resulted in divers reducing their diving effort rather than sourcing an alternative chamber. Although hand diving saw a decrease in effort compared to 2013, the overall trend is an increase since 2008.

5.5 Long Lining

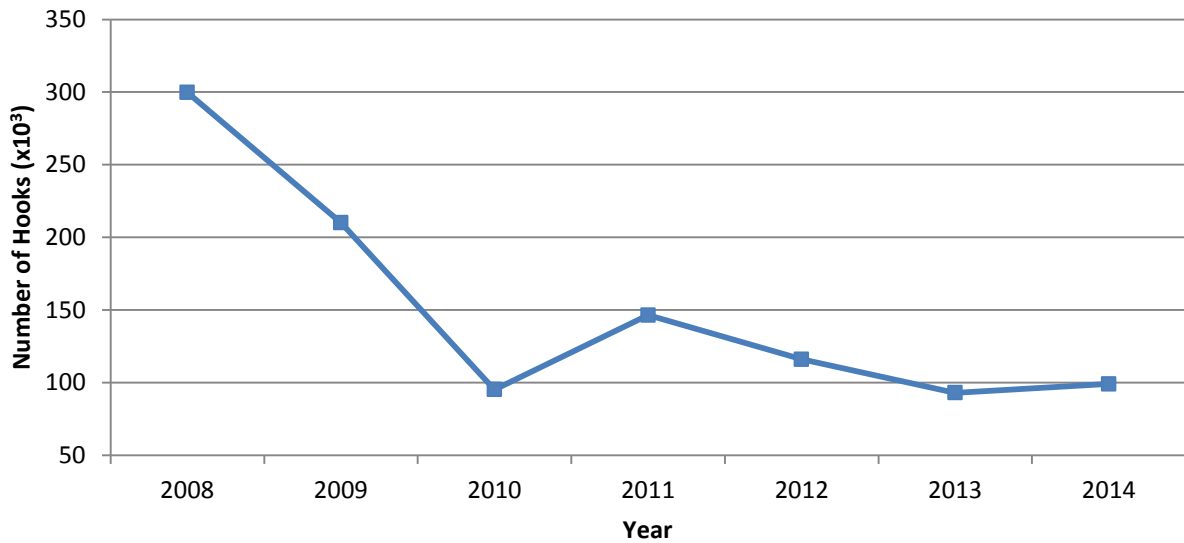


Chart 5 – long lining effort 2008-2014

Despite a small increase in effort compared to 2013, the number of hooks set in 2014 still represents a 66% reduction compared to 2008 effort. Long lining is a very labour intensive fishing method, with lines of up to 300 individual hooks needing to be prepared, which could partly explain its recent decrease in popularity. Out of the 166 licensed vessels, just 14 recorded long lining as a fishing method in 2014 (by contrast, 77 vessels recorded potting as a fishing method).

5.6 Angling

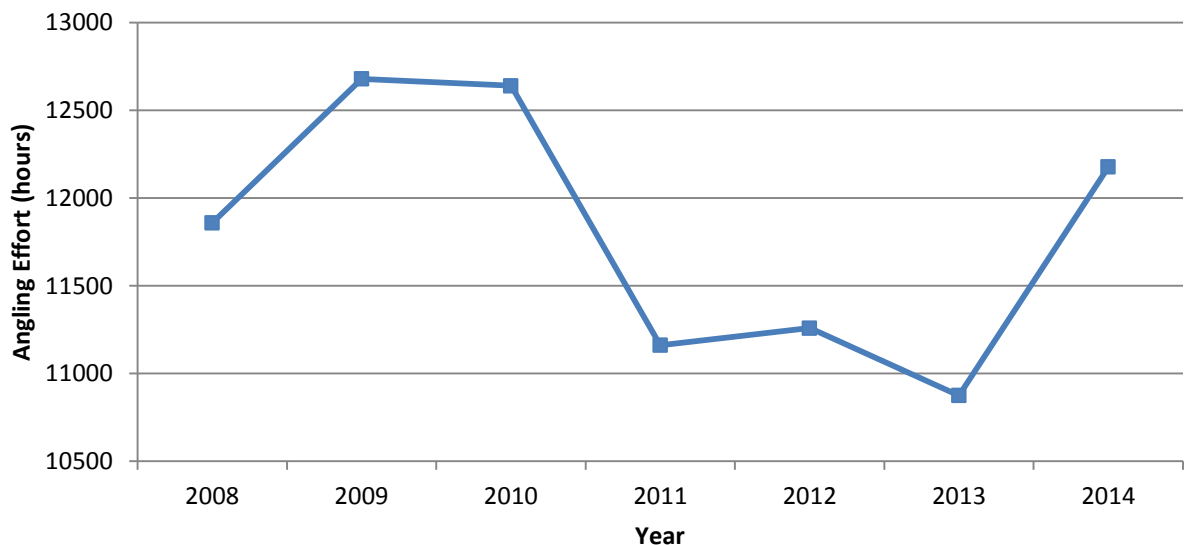


Chart 6 – angling effort 2008-2014

Angling effort includes fishing by rod and line, handlines, jigging machines and trolling. In terms of the number of vessels, angling is by far the most popular fishing method as almost every fishing vessel has the capability to allow a rod and line to be used. The significant increase from 2013 to 2014 can be attributed to the long summer with below-average wind speeds, meaning that the smaller vessels had more opportunities to fish than in 2013. The strong winds of January to March would have had less of an impact on the angling sector than other methods due to the fact that the smaller vessels which use angling as a method tend to spend the winter laid up ashore.

5.7 Scallop Dredging

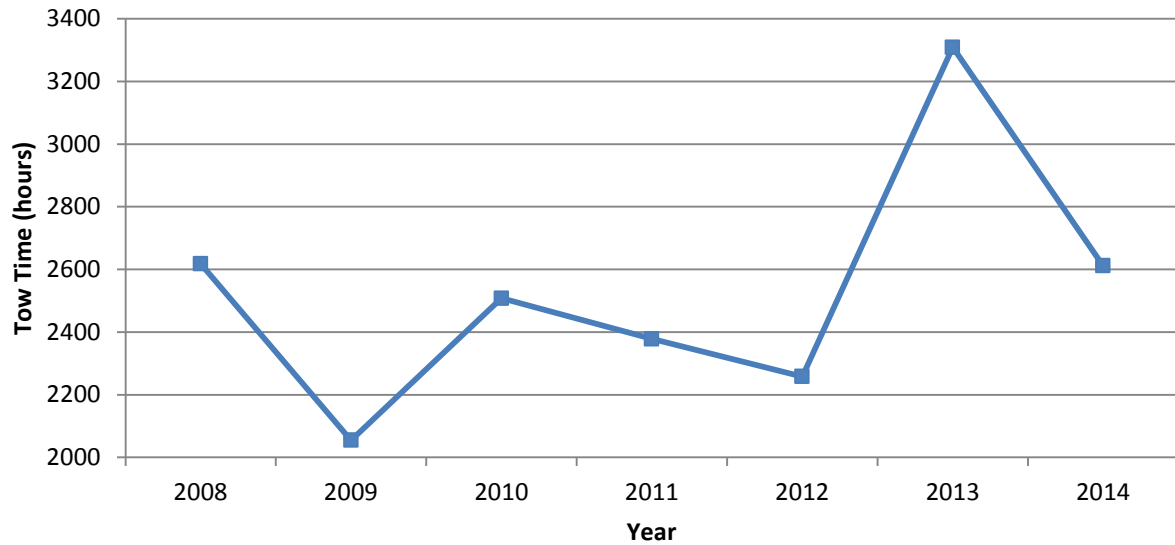


Chart 7 – scallop dredging effort 2008-2014

Scallop dredging effort saw a marked decrease in 2014 compared to 2013, but the total tow time of 2,600 hours was still 100 hours above the 6 year average. Despite this sharp decrease in effort, scallop landings were only one tonne lower than 2013 (see *Table 3* on page 11). *Chart 7* only shows the effort of GU-registered vessels, thus the reduction in effort by foreign vessels due to the new licensing laws is not taken into account. This reduction, although not quantifiable, is considered to be substantial. Non-Bailiwick vessels were previously allowed to fish up to the 3nm limit with any size of vessel and without the current technical controls, which resulted in a large number of vessels exploiting the area of sea between the 3-12nm limit.

