

AN ANALYSIS OF THE TRAINING NEEDS OF THE NORTHERN IRELAND SEAFOOD INDUSTRY



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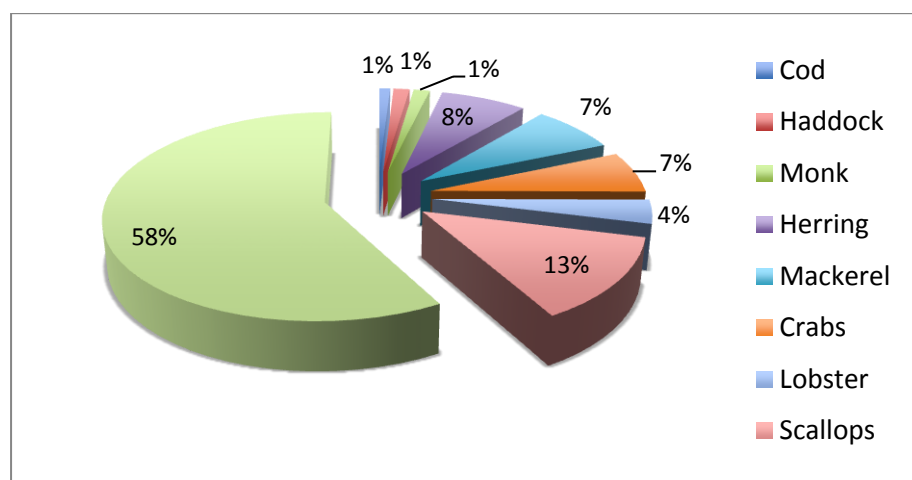
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1. Overview of the NI seafood industry

In 2013 the Northern Ireland registered sea fishing fleet consisted of 234 under 10m vessels and 145 over 10m vessels landing some 19,400 tonnes of fish and shellfish worth over £ 23.3 million (at first sale value¹) into Northern Irish ports.

Since the introduction of the EU Cod recovery programme in the Irish Sea (ICES VIIa) in 2000, whitefish landings have declined and the industry has become focused on the landing and processing of nephrops, which now accounts for just under 60% of the catch (by value) landed into Northern Irish ports.

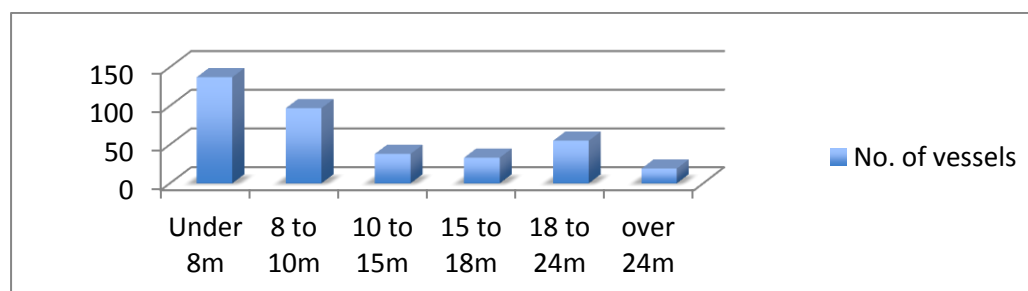
Chart showing breakdown of top nine species landed in Northern Ireland (by value) in 2013



The offshore (sea-going) sector provides employment (as share fishermen or self-employed status) to 815 fishermen (139 part-time and 679 full-time) the highest proportion of whom are based at the three main fishing harbours of Kilkeel, Ardglass and Portavogie with others based around the coast of Northern Ireland at around 34 other small landing sites, mainly servicing inshore potting vessels.

There are 79 vessels in the fleet of over 16.5m in length and which therefore require a master with a minimum of a Class II Certificate of Competency. There are 2 vessels with a registered main engine power > 750kw, requiring a minimum of a Class II Engineer onboard.

Chart showing breakdown of Northern Ireland fleet by length (m)



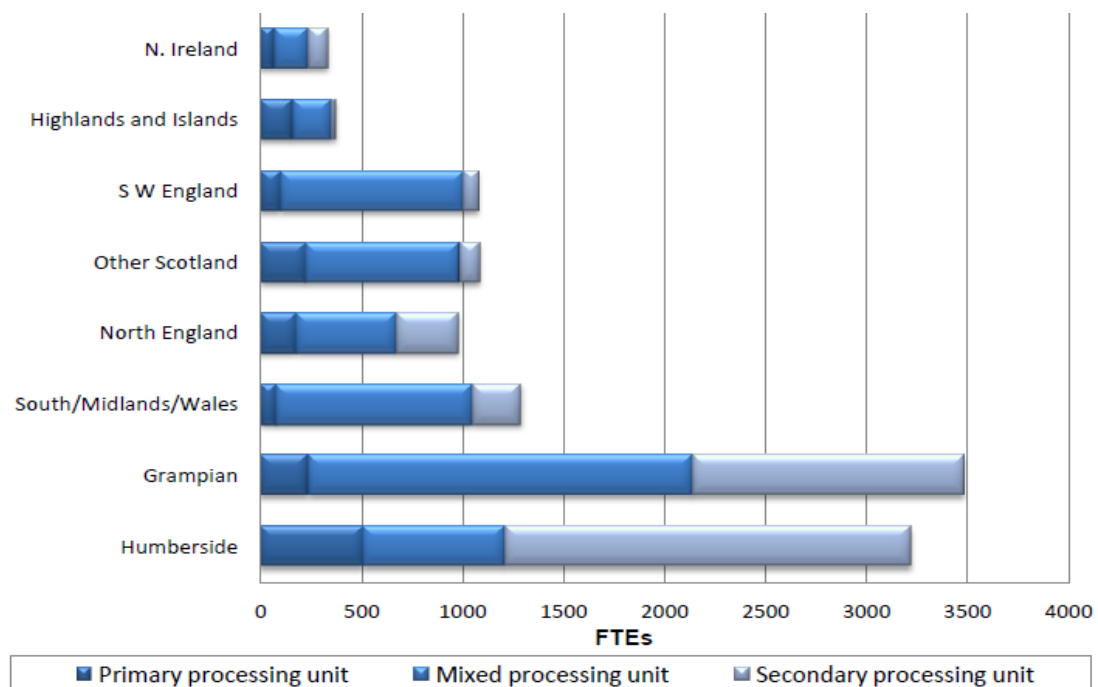
¹ UK Sea Fisheries Statistics, 2013

In recent years there has been a significant increase in the number of vessels and crews engaged in the delivery of guard ship service to the oil, gas and submarine cable industries. This has fuelled ambitious plans at Kilkeel to tap into the growing marine renewable energy sector, which has been identified as a growth sector opportunity. Parts of the catching sector are also well engaged in fisheries data collection through a fisheries science partnership approach with the Agri-Food and Biosciences Institute (AFBI).

The onshore (fish processing) sector of the Northern Ireland Seafood Industry provides a little under 500 Full-Time Equivalent (FTE) jobs across twenty processing sites². The gross turnover of the processing sector was £70.6m in 2010³.

The sector is dependent on *Nephrops* and other species of shellfish (including scallops, mussels, crabs and lobsters). According to recent studies³ the processing sector faces a challenge in securing a good labour supply and strategically is looking towards added-value processing in the future as a means to increase exports and improve the return from finite supplies of fish, shellfish and aquaculture species.

Chart showing number of fish processing units in Northern Ireland in 2012 (Seafish)



Northern Ireland has a small number of independent fish mongers and a vibrant fish frying / fish and chip shop sector with one of the country's friers recently with some of Northern Ireland's top friers being recognized recently at the National Fish and Chip Awards, run by Seafish.

² Seafish Survey of UK Seafood Processing Industry, 2012

³ Opportunities for Growth in the Northern Ireland food & drink industry by 2010, Northern Ireland Food & Drink, 2010

2. Project aims

To analyse the training needs of both the onshore and offshore sectors of the Northern Ireland seafood industry, assess the infrastructure available for its delivery and make recommendations for action to improve provision.

In order to achieve this there was a need to understand the views of the Northern Irish Seafood supply-chain from 'net-to-plate' as well as stakeholders from public sector organisations involved in fishermen's safety and training. Consideration was also given to the funding opportunities provided by the new European Marine Fisheries Fund (EMFF) due to be launched in summer 2015.

Achievement of this aim required in-depth sector research, rigorous stakeholder consultation (mostly through one-to-one interviews) and detailed analysis of training needs and access to training. The study focused on the fisheries sector, but also included a consideration of training needs and delivery in those industries / sectors where common standards (or Certificates of Equivalence) apply to ensure the labour force is both flexible and able to take advantage of employment opportunities that may emerge in future.

This work was carried out within the context of, and guided by, the principle aims of Seafish and the food and drink sector in Northern Ireland⁴.

3. Background

Funded by statutory levy, payable by industry, Seafish was established by the 1981 Fisheries Act. Seafish is jointly sponsored by the four UK Fisheries Administrations as an executive Non Departmental Public Body (NDPB). As with other executive NDPBs, Seafish is led and directed by an independent Board but Ministers remain accountable to their respective Parliament or Assembly for Seafish's overall performance. The Seafish Board Chair, Deputy Chair and Members are appointed by the four Fisheries Ministers.

Seafish's mission is to support a responsible, sustainable and profitable seafood industry. It works across all parts of the seafood value chain from catching, through processing and manufacturing to retail and foodservice, giving due regard to the interests of consumers.

As part of this, Seafish aims to improve safety, knowledge and skills amongst fishermen, through the adoption of safer working practices and implementation of improved safety standards. Under a Memorandum of Understanding with the Maritime & Coastguard Agency, Seafish co-ordinates the delivery of training throughout the UK for commercial fishermen. Seafish has three main functions in this area:

- i. to approve instructors and training providers across the UK to ensure reasonable access to training
- ii. to ensure that training delivery is of the highest quality
- iii. to develop training courses, materials and online learning resources

⁴ Dept of Agriculture & Rural Development, Agri-Food Strategy for Growth, 2012

In the early 1980s Seafish established a network of fishing industry focused training providers across the UK known as Group Training Associations (GTAs). Each GTA employed at least one training co-ordinator who reported to a management committee consisting of members of the local fishing industry. Originally the GTAs received a direct grant from Seafish towards their running costs, but in 2006 this support changed to output-related funding. At that point many of the GTAs changed their legal status to become companies limited by guarantee (this also reduced the Directors exposure to personal or professional liabilities), but retained their “not for profit” ethos. The result is that delivery of fishermen’s training courses is now coordinated by a network of independent, Seafish-approved training providers (ATPs) and delivered by Seafish-approved instructors.

Fishermen’s training in Northern Ireland has been delivered by the Sea Fish Industry Training Association (NI) Ltd. (SFITA), formerly the Northern Ireland GTA, since 1999. Based in Portavogie, the organisation is the only training provider approved by Seafish to deliver the four one-day mandatory Basic Safety Courses in Northern Ireland. The Association employs one full-time and one part-time member of staff and has a Board of Directors drawing expertise from across Northern Ireland’s Seafood industry.

Since 1996 the UK fleet as a whole has reduced by 26%. Faced with the prospect of reduced income from fishermen’s training, many ATPs have diversified their offering to other maritime industries. In addition, Seafish has been able to secure substantial funding to support delivery of a number of voluntary training programmes, which has encouraged existing fishermen to attend more training. This funding has mainly come from European Structural Funds (such as EFF and ESF) and national Government, although these are often time limited interventions. Given the crucial role of SFITA as the sole provider of fishermen’s safety training in Northern Ireland, possible responses by the Association to this challenge are explored in detail later in the report.

4. Approach

The approach adopted involved a mixture of desk-top research and stakeholder consultation through one-to-one interviews. The work was broken down into five discrete phases:

- i) A desk-top review of relevant strategy documents, mandatory safety requirements, reports and data (produced by the MMO, Seafish, MCA, MAIB, DARD, Invest NI, RNLI and EC/Farnet) which provided background information to inform the stakeholder interview process;
- ii) The planning and co-ordination of stakeholder interviews;
- iii) Conducting a series of interviews with stakeholders (identified in phase ii)) which were conducted face-to-face where possible with supplementary interviews being conducted via telephone;
- iv) To fill gaps in breadth of coverage an internet survey of all seafood sectors in Northern Ireland using the ‘Survey Monkey’ tool was also carried out, but due to low uptake the results have not been included in this report;
- v) Collating, analysing and reviewing information and data gathered in phases i) and iii) to provide quantitative and qualitative results for reporting;
- vi) Draft findings from the study were presented to the Seafood Northern Ireland Advisory Committee (SNIAC);
- vii) A final report of key findings and actionable insight was provided.

Table 1: Stakeholder mapping to inform interviewing process:

Public	Processing	Catching sector	Training providers
<ul style="list-style-type: none"> • Dept. for Agriculture and Rural Development, • Maritime & Coastguard Agency, • Seafish (Training), • Seafish (Northern Ireland), • Invest Northern Ireland, Northern Ireland Food & Drink 	<p>Guided by Seafish staff in Northern Ireland a cross section of processors will be selected to provide sector coverage based on:</p> <ul style="list-style-type: none"> i. geographical location; ii. species processed (shellfish, whitefish); iii. nature of processing i.e. primary or secondary; and iv. target market (domestic or export; and, retail, wholesale or foodservice) 	<ul style="list-style-type: none"> • Anglo Northern Irish Fish Producers Organisation, • Northern Irish Fish Producers Organisation, • Small sample of fishermen selected to ensure coverage of the inshore (under 10m) sector, geographical coverage and gear types 	<ul style="list-style-type: none"> • Sea Fish Industry Training Association (NI) Ltd, • BIM, • local colleges, • other Seafish accredited training providers outside of Northern Ireland (Seafood Cornwall Training Ltd.)

5. Stakeholder feedback

The key issues relevant to the training needs of the Northern Ireland Seafood Industry recorded during interviews with industry stakeholders, training providers and other relevant bodies are reported below by sector group.

5.1 Catching sector

As described at Section 1, the Northern Irish catching sector has seen a dramatic contraction of the whitefish fleet since the introduction of the cod recovery plan in 2000. As part of the cod recovery measures the size of the fleet (number of vessels) was reduced through multi-annual de-commissioning schemes. Many of the crewmen from these vessels are believed to have joined the construction industry which was booming at that time and despite a downturn in that industry (due to the recession) it was felt that many of these crew had now turned their backs on the fishing industry.

The trawling fleet now primarily targets *Nephrops*, which is known to be highly labour intensive activity. The exodus of crews into the construction industry and lack of new entrants over many years had resulted in a significant labour shortage in the trawling fleet and over time the industry had become increasingly dependent on migrant (non-UK national) labour. Until recently the majority of these crewmen were Filipino in origin but changes to legislation and increasing immigration from Eastern Europe (expanded EU membership) had resulted in a significant proportion of the crew being Eastern European or African in origin (e.g. Polish, Latvian, Lithuanian, Romanians and Ghanaians etc).

Precise details of the breakdown of crews by nationality was hard to establish, but best estimates of the level of non-UK national crewing of vessels was thought to be between 60-

70%, although largely confined to over 12m vessels. The migrant crew labour pool can be divided into Filipino nationals, Eastern European nationals and those of African origin.

The Filipino crews were reported to be generally well-qualified and competent seafarers with qualifications from their flag state; the only other course required by these fishermen was the one-day Safety Awareness course. In contrast, the Eastern European nationals often required all four of the basic one-day Safety Training Courses.

Catching sector representatives welcomed the local delivery of the higher-level Certificate of Competency course, thought to be the first run in Northern Ireland for over ten years. More typically though, it was reported that fishermen wishing to advance to these qualifications would attend college courses on mainland UK, or attend the BIM Irish National Fisheries College at Greencastle. If successful, the latter would provide the candidate with an Irish Certificate of Competency (fishing) and then an application could be made to the MCA for recognition (for use in the UK) via the route of a Certificate of Equivalence.

The catching sector reported little or no demand for the higher level Engineering Certificates of Competency as only two vessels in the NI fleet had declared engine power of >750kw and hence require a ticketed engineer. While there was recognition that the lack of new entrants entering the industry was a concern there was low demand for the generic maritime sector level 3 apprenticeship (vocational qualification). As an alternative, the three-week introduction to fishing course was seen as a more practical and viable way of getting new entrants involved into the fishing industry.

A small number of vessels were reported to be freezing *Nephrops* at sea, effectively taking on board activities beyond basic catch handling and into value-added processing. These vessels required some training / coaching in the principles of Hazard Analysis and Critical Control Points (HACCP) and freezing at sea as the practice is relatively new to Northern Ireland, although it was not clear who could provide such training.

With increased levels of offshore oil and gas work in the Irish Sea and limited fishing opportunities (as in other parts of the UK), fishing skippers and crews have diversified into the delivery of guardship duties. This has required vessel owners and operators to become more professional in their recording of crew qualifications. The use of the NFFO / Seafish developed Vessel Safety Folder to enable this was noted as being of significant benefit. To meet guardship industry standards there was strong demand for the International Convention on Standards of Training, Certification and Watchkeeping for Seafarers (STCW) Personal Safety and Social Responsibility (PSSR) course, but the lack of a suitably qualified local instructor meant trainees were having to travel to mainland UK or Republic of Ireland (RoI) to access training. Other vessel owners and organisations had invested significant time and energy in developing business with the offshore renewables sector and believed that, although in its infancy, it had significant potential for growth.

The catching sector recognised that although SFITA has improved access to courses by providing training courses at different venues, there was still a belief that courses should be able to be arranged at short notice, for example when the boats are in from sea due to weather.

There was no demand from the catching sector for investment in training infrastructure as this was not perceived as a barrier to training in the sector.

5.2 Processing sector

With the regulated decline in the Irish Sea whitefish fisheries for cod, hake and haddock, the number of processors in Northern Ireland has declined significantly, mirroring the reduction in the Northern Irish whitefish fleet. Portavogie's processing sector was hit particularly hard and the main fish-processing hub within the province was now felt to be in Kilkeel with other notable processors of pelagic fish being located in Ardglass. The processing of *Nephrops* was found to be the main activity with some pelagic and shellfish processing also taking place.

Again, as has been seen in the fleet, there has been considerable re-structuring and consolidation in the fish-processing sector. Businesses interviewed demonstrated a strong commitment to training across the workforce. Some companies had in-house personnel managers that had developed comprehensive training plans for each member of staff 'in house' while others had either engaged consultants or received assistance from a college to develop bespoke company training plans. The Seafood Training Network for Northern Ireland, recently established by Seafish, received significant praise for its role in facilitating dialogue between businesses and training providers.

The Seafood Training Network for Northern Ireland is a Seafish-led initiative (via the Seafood Training Academy) that brings together employers from the regional seafood industry and regional training providers. The aims of the Network are:

- i) To signpost training opportunities to the onshore fish and shellfish sectors in Northern Ireland
- ii) To encourage skills development and career progression
- iii) To seek funding to support training needs
- iv) To promote cooperation in the provision of fish and shellfish training across Northern Ireland
- v) To provide a voice to fish and shellfish employers in Northern Ireland over training issues.

Despite many of the job roles within the processing workforce being seen as relatively low-skilled there was a strong commitment to training at all levels with inclusive training plans for factory floor works, supervisors and managers along with those with specialist functions within each business.

In common with many parts of the UK processing sector many of the employees were of Eastern European origin although it was reported that many workers and their families had settled in the area. Notwithstanding this fact, the turnover of staff was seen as quite high and so training for new starters on the factory floor was commonly required.

Processors interviewed for this study had knowledge of SFITA but reported little contact with the Association in recent years. The main barriers to training were reported to be time, access to funding and trying to plan training around fluctuating landing patterns. The most common training courses required included: manual handling, basic food hygiene, fork-lift truck driving, health and safety in the workplace, English language and HACCP training. All of these courses were readily available either: a) through an independent / freelance trainer coming on-site to deliver training; b) as part of a suite of courses delivered by the Southern Regional College in Newry or c) via training co-ordinated by the Kilkeel Harbour Works Network co-ordinator. There was also some demand for shellfish (scallop) processing, which was not currently being met by existing training providers.

The preferred means of training delivery was through an on-site trainer, either from a college or local, freelance, independent, self-employed trainer. In some cases, training was delivered in-house with suitably qualified staff delivering training to staff at a lower level.

There was no demand from processors for investment in training infrastructure as this was not perceived as a barrier to training in the sector.

5.3 Fishmongers

The fishmongers interviewed tended to be micro-businesses, typically with a team of two to four staff. None of the fish mongers contacted thought there was a need for fish filleting courses to be run through formal training establishments. The stated preference was for staff to learn through in-house demonstration by one of the more experienced employees and the trainee then being given ample opportunity to hone their craft through practice.

There was however recognition of the demand within the sector for staff requiring basic food hygiene training, although being at a generic level it was felt that this need was best addressed either through open learning, or via courses delivered by local colleges for employees across the food and drink sector.

Few were members of any National Trade Association (such as the National Federation of Fishmongers) and most had not heard of SFITA. As both skills based and qualification driven training needs were being met.

5.4 Fish friers

The sample of the Northern Irish fish-frying sector interviewed were highly engaged in, and committed to, training as they believed it provided the workforce with essential skills to support the production of high quality products and profitable businesses.

All businesses had either attended or had knowledge of the courses delivered by the National Federation of Fish Friers (NFFF) at their base in Leeds; these were seen as the benchmark in fish frying training but the cost of travel and subsistence was seen as prohibitive in many cases.

Fish frying was seen as a specialist skill that did not readily lend itself to being taught at local catering colleges as the equipment used in colleges is different to the traditional range fryer common to most fish and chip shops. There was strong demand for customer services training for front of house, particularly for younger, part-time members of staff who were less confident or lacked social skills.

There was also a wider view that colleges should be challenged to do more to recognise fish frying as a valid career choice within the catering sector, as it was felt that the fish-frying sector was poorly represented within colleges and by careers advisers.

The main barrier to training was a venue where trainees could use a range fryer. There were some grounds for optimism though as companies were talking to the manufacturers of ranges and it was hoped an arrangement could be reached for a manufacturer to set-up a demo range facility in Northern Ireland for training and promotional purposes. There was

good knowledge of Seafish's activities within the sector– either through engagement with the Seafood Training Network Northern Ireland or with the National Fish and Chip Awards, but there was little knowledge of the role of SFITA in delivering training to the seafood sector in Northern Ireland.

5.5 Aquaculture & inland fisheries

Recent Seafish engagement with the inland fisheries operators had suggested that although there was no mandatory requirement for workers to undertake the basic one-day safety courses there was demand in the sector for this training. However, despite numerous attempts to follow-up with these employers, this interest could not be verified during this study. There was however demand from the aquaculture sector (growers and processors) for training in fish / shellfish health and bio-security. Currently, much of the training in these activities was being co-ordinated by BIM through the Cross Border Aquaculture Initiative.

5.6 Other agencies:

5.6.1 Department of Agriculture and Rural Development (DARD)

The Department of Agriculture and Rural Development has funded fourteen training projects totaling over £1m since 2006, mostly through Axes 3 and 4 of EFF (see Annex II). Despite this investment, the Department still did not feel that there was a true 'safety culture' within the industry as drills and practices were not seen to be as commonplace in the fishing industry as other offshore maritime sectors. It was also suggested that there should be greater emphasis and promotion of Refresher Training.

The Department was supportive of training across the onshore and offshore sectors of the Northern Ireland seafood industry. The challenge faced by industry to ensure these courses could be delivered locally by SFITA into the future was recognized and while the Department was supportive of SFITA's role it was stressed that there was no obligation for the Department to support the SFITA financially. Furthermore, it was stated that it is not possible for the Department to fund through any grant scheme the four basic statutory training courses. It was suggested that under strong leadership the Association should undertake a strategic review of its activities. Using estimates of future training demands such an exercise should consider staffing levels within the Association and review the need for a dedicated training centre ie the current facility in Portavogie (as opposed to hiring rooms as /when necessary).

There was a concern that the geographically diverse under 10m fleet was under-represented and that more could be done to raise awareness of training / funding available to smaller Associations and individual owners via the newly established Inshore Fisheries Partnership Group (IFPG) and other communication channels.

Under the forthcoming European Marine Fisheries Fund (EMFF) the Department's strategy would focus on upskilling workers and improving safety. The Department was not adverse to supporting funding applications for investment in training infrastructure and equipment provided any proposals were supported by a strong business case. Given the increasing role of the industry in science / data collection it was suggested that a 3-4 day course covering

the fundamentals of fish stock assessment might also be considered (under discussion by the Prince of Wales International Sustainability Unit (ISU)).

5.6.2 Maritime & Coastguard Agency (MCA)

It was felt that the UK sign-up to the International Convention on Standards of Training, Certification and Watchkeeping for Seafarers - Fishing (STCW-F) standard would have limited immediate impact on the Northern Irish fleet as in the first instance it would cover crews of vessels of over 24m (LOA) (of which there are only 2 in Northern Ireland) and even this was unclear as the UK's response on how it will meet the standard has yet to be published.

The issue of language was highlighted as a concern for all foreign crews. Filipino crew were thought to generally have a good maritime background but there was concern expressed over those of Eastern European origin, as often these fishermen arrived with little or no maritime-related qualifications. Furthermore, in many cases the validity of any existing qualifications held could not easily be verified.

It was suggested that as the majority of vessels do not require a qualified engineer (ie. One holding a Class I or Class II Certificate of Competency) onboard, better use could be made of the MCA 30hr Engine Watch-Keeping course to provide a basic understanding of safe operation and maintenance of vessel equipment.

The importance of access to fishermen's Basic Safety Training via courses provided by SFITA was underlined with concerns that if the Association was forced to close, the lack of access to training would have a significant impact on the operation of the Northern Irish fleet.

5.6.3 Northern Ireland Harbours Authority (NIHA)

The Authority reported concerns at the level of health and safety awareness shown by fishermen accessing or working on vessels when in harbour. It was suggested that consideration be given to the development of a bespoke course to address this need. Similarly, it was felt that many of the contractors undertaking vessel maintenance on or around the Authority's slips required more formal training in areas such as: working in confined spaces and working at height. The nature of the Authority's training needs for its own staff meant that training was delivered in-house or by specialist trainers.

5.6.4 Merchant Navy Training Board (MNTB)

The Merchant Navy Training Board was unaware of any trainees entering the Maritime Apprenticeship Framework Pathway via a Northern Ireland college and it was suggested that many trainees joining training courses in the maritime sector were entering via one of the UK's four major maritime training colleges (Tyneside, Glasgow, Warsash and Gravesend). Furthermore, there was felt to be insufficient demand to justify the investment in a combined maritime skills centre for Northern Ireland.

5.6.5 Maritime Skills Alliance (MSA)

The Maritime Skills Alliance (MSA) reported that the uptake of Level 3 Apprenticeships through the marine vocations pathway in Northern Ireland had been low and currently there were thought to be no candidates enrolled on this career path. This was seen as disappointing given that the idea of having common standards across a number of maritime professions was to facilitate delivery and provide greater flexibility and transferability for candidates. It was believed that currently, the existing maritime colleges were best placed to deliver these courses.

5.6.6 National Workboat Association (NWA)

The National Workboat Association (NWA) reported that Association members in Northern Ireland were mostly from the tug/work boat sector being engaged in activities in and around Belfast docks. Association members' staff that had attended one or more of the basic one-day fishermen's safety training courses run by SFITA, provided positive feedback on course administration and delivery.

5.7 Training providers

5.7.1 Seafish Industry Training Association (NI) Ltd. (SFITA)

Established in 1996, SFITA is the only training provider in Northern Ireland approved by Seafish to deliver the suite of four fishermen's basic safety training courses. A Board of Directors consisting of representatives from two Producer Organisations (POs) in Northern Ireland, fish processors and independent trainers oversee the management of the company. On a day-to-day basis the Association is staffed by a full-time manager and a part-time administrator. The Association operates in a similar fashion to many of the other catching sector-focused Seafish-approved ATPs, reacting to industry needs, setting up courses at suitable venues when required by industry.

The core of SFITA's business has been the delivery of the four one-day mandatory Basic Safety Training courses to fishermen. Given the high level of non-UK nationals crewing in the fleet, language has often been a barrier to training with interpreters being brought in to aid delivery of around 50-60% of courses over the past year. Delivery of these courses was supported through the Association receiving a grant from DARD towards the cost of replacing and / or servicing training equipment (e.g. liferaft etc). The relatively high numbers of trainees on these courses have provided SFITA with a competitive cost-base structure, which has attracted workboat operators from Belfast to send their staff on sea survival courses run by SFITA.

Demand for higher levels of Certificate of Competency has been relatively low, with approximately fifteen candidates studying for Class II over the last three years. For the college element of the course these candidates had studied at various locations including: Fraserburgh, Shetland and Greencastle. However, in 2014 the Association commenced delivery of the first Class II Certificate of Competency course to be run in Northern Ireland for over twenty years. However, a lack of approved facilities and trainers to deliver the 'add-

on' courses (advanced fire-fighting, Electric Navigation Systems (ENS) and Long Range Certificate / General Operators Certificate (GOC)) in Northern Ireland meant that candidates had to travel to mainland UK or to the RoI.

The Association reported very few new entrants to the industry although it had successfully delivered the three-week Introduction to Sea Fishing course. SFITA had not run the marine skills apprenticeship course as there had been no demand and, in addition, it did not believe that this approach would work in the context of most crews being "share fishermen" as opposed to employees.

The Association is RYA accredited to deliver the Offshore Yachtmaster theory course but to date the course had not been delivered due to poor demand and there being a number of other established RYA-Accredited training centres in Northern Ireland. SFITA had invested in "trainer training" to provide a greater geographical spread of trainers across a wider range of courses.

Over the past ten years the Association has trained significant numbers of fishermen, but more recently training numbers had dropped off markedly as crews had become less transient and this has had a serious impact on the Association's financial performance in more recent years. Cash flow had been further stretched by bankrolling EFF grants (ie paying upfront before claiming back grant aid through DARD) to cover the delivery of the Class II Certificate of Competency.

SFITA had delivered little onshore training to processors as it believed that colleges were best placed to secure the funding that would often be needed as an incentive for processors to train staff. The Association reported that demand for training from fishmongers was low as training was typically delivered 'in-house'. SFITA was not involved in the delivery of fish fryer training but was aware that Seafish staff, (through the Seafood Training Network) were working with the sector to help identify and meet training needs.

The drop-off in the Association's business was of concern to directors and staff and uncertainty around the availability of funding for courses in future had made planning for the future difficult. In addition, the training manager was due to retire later in 2015 and so the Association was looking for a strong steer from Directors and outside agencies on how best to position itself to meet the future demand of the Northern Ireland seafood industry.

5.7.2 Bord Iascaigh Mhara (BIM) National Fishermen's Training College – Greencastle

The BIM training college in Greencastle currently delivers the three day Safety Course in sea fishing which is mandatory in the Republic of Ireland (RoI). Although the syllabus and course requirements are currently slightly different to those required by MCA / Seafish the college indicated that it would be in a position to amend delivery of the three-day course in order to offer as a block of four one-day courses (to meet MCA requirements) should they be required in future.

The College offers taught courses for candidates seeking Irish Certificate of Competencies: referred to as: Skipper Full and Second hand full, which could then be granted certificate of equivalence (with the appropriate sea time, bolt-on courses etc) to MCA Class I and Class II (Deck) Fishing Certificates of Competency.

5.7.3 Southern regional college (SRC)

The SRC in Newry is working closely with the larger processors in South Down. The College is highly proactive and through collaboration with the Seafood training Network Northern Ireland is now working to deliver a suite of training courses to one of the largest processors in the area. The College is working with more than ten local processors and in each case had worked with employers to develop customized, flexible training plans. Through SRC facilitation, the companies signed up to courses through the College have been able to access grants from the Department of Employment and Learning (DEL) of up to 75% for standalone skills courses.

The College is planning a roadshow event to promote masterclasses in business planning and to offer support to companies aiming to achieve the British Retail Consortium (BRC) standard. The college is also working closely with a multi-site fish and chip business to deliver training courses for its ninety employees.

With its commitment to work with the fishing industry, wide range of training offered and location close to the main area of fish processing within Northern Ireland the Southern Regional College (SRC) at Newry is likely to be the preferred training provider for the larger fish / shellfish processors in the Kilkeel area. Outside of this area, the Belfast Metropolitan College is becoming increasingly involved in delivering a similar suite of courses to the food and drink sector and are also part of the Seafood training Network Northern Ireland.

5.7.4 Independent trainers

Although not interviewed during this study, a small number of self-employed, independent trainers were reported to be actively delivering Food Hygiene training (at Levels 2 and 3) to processing businesses.

6. SWOT analysis of principle training provider

SWOT analysis of SFITA (NI) Ltd.:

Strengths	Weaknesses
<ul style="list-style-type: none">- No competitors in main market of the delivery of the four one-day fishermen's safety training courses.- Established trainers- Cheap office costs	<ul style="list-style-type: none">- Low level of training for onshore sectors- Dependence on demand-driven training- Lack of clear multi-year business strategy- Lack of clear leadership- Weak company balance sheet- Course delivery could be more flexible- Dependence on a small number of trainers
Opportunities	Threats
<ul style="list-style-type: none">- To promote and develop the Association's training courses to other maritime sectors.- To diversify training activities to support the needs of businesses in the fish vessel support services sector.- To work with appropriate Agencies and Government Departments to actively promote fishing as a career to help attract new entrants.- To actively bid for different funding pots to enable delivery of apprenticeship schemes - or the 3-wk introduction to fishing course.- To work more closely with the Seafood Training Network NI.- Increase flexibility of course delivery by using the wider bank of qualified trainers available	<ul style="list-style-type: none">- Un-certainty of future funding provision for industry trainees from Seafish.- Reduced EU funding available for training- Retirement of key staff- Industry apathy- Reduced training numbers leading to reduced turnover and diminishing profits

7. Risk assessment

A risk assessment based on the threat of lack of trained / skilled workforce impacting on the operation of a business was carried out using the recognized approach of risk being calculated as a function of consequence multiplied by probability of occurrence.

Using this method, the most significant potential risk was to the catching sector. Based on recent performance the probability of SFITA not being able to deliver courses in future due to insolvency appears high. The impact on fishing businesses of not having access to the basic one-day safety training courses in Northern Ireland would be high, as direct and indirect costs of training would increase, at least in the short term.

The threat to fish friers was seen as moderate as there was both high demand and high dependency from fish and chip shop owners for skilled fish friers and formal training was currently unavailable in Northern Ireland; however, there was no legal requirement for this so the demand is driven by business need rather than to meet a regulatory obligation.

Also of moderate risk was the fishing vessel ancillary support sector as there were legal training requirements; here though the demand for training was being met through industry initiatives but the number of alternative training providers available was unclear.

At the lowest level of risk was the processing sector. Here the identified training needs can either be met by other training providers, are not legal requirements, or can be tasks undertaken by other qualified personnel within a business.

Given the high level of perceived risk surrounding the delivery of basic safety training to fishermen and the continued operation of SFITA NI Ltd the rest of this report focuses on possible actions the Association could take to reduce the risk of collapse.

8. Alternative delivery models:

The challenges faced by the Seafish Industry Training Association (Northern Ireland) Ltd are similar to those of other training providers in the UK and therefore three examples of alternative responses are highlighted below as they all provide examples of best practice in business adaptation.

8.1 Whitby & District Seafood Industry Training School

Established in 2002, with funding via the Skills Funding Agency and Seafish, the Whitby & District Seafood Industry training School is housed within the Mission to Seafarers' Centre adjacent to the fish quay in Whitby. It was set-up in response to local industry calls for a dedicated Seafood School to attract new entrants to the fishing industry.

Today, the School offers training for new entrants to the fishing industry, experienced fishermen, leisure boaters and commercial seafarers. The School specialises in the delivery of the Level 2 Apprenticeship which includes a vocational certificate, and two functional skills (maths and English). The School also offers a high level of one-to-one support for apprentices (many of whom are not from the local area) and is seen as the leader of best practice in delivery of the apprenticeship in the fishing sector.

Apprentice placements are advertised by local fishing companies, offering experience of working with skippers and crews on vessels on the east coast of England. The skippers and crews support the apprentices with their knowledge and experience, keeping them safe at sea and regularly liaising with the School to ensure good progress.

Trainees use computers with broadband internet access, interactive computer programmes with simulations, VHF and GMDSS radio, GPS and chart plotters. The library is stocked with industry related publications, manuals, videos and DVDs that are constantly updated. The company has won several awards for its training delivery and success, and holds current awards for quality systems in both management and training.

8.2 Western Training Association

The Western Training Association (WTA) is a not-for-profit training company with over 20 years' experience working for the benefit of all maritime sectors. It was one of the original GTAs established by Seafish but as demand for fishermen's training reduced the organisation took the bold step of investing in infrastructure to enable diversification into wider maritime training at all levels (e.g. GMDSS training suite).

Whilst maintaining strong links with fishing industry it now delivers a broad portfolio of courses leading to GMDSS qualifications and higher levels certificate of competency. It is run by two full-time executive directors that manage and guide the expansion of the training offering to meet the needs of the regional commercial maritime sector.

8.3 Seafood Cornwall Training Ltd

Seafood Cornwall Training Ltd is based in Newlyn, at the heart of Cornwall's Fishing Industry. The not-for-profit, fish industry training school and industry support body was established by the Cornish FPO and opened its doors to fishermen and onshore workers from across the county and the Isles of Scilly in January 2009.

Prior to the Company being established, the distance required to travel for some Basic Safety Training courses (such as Sea Survival) was recognised by an industry taskforce as being a significant barrier to training. A business model for a Newlyn-based fishermen's training centre was developed but this concluded that there was insufficient demand to run a full-time centre purely on income derived from training courses. The scope of activities covered by the business plan was broadened to: i) include charge out secretarial services to other fishing business and small associations; and, ii) to deliver projects to promote seafood consumption and fishing as a career.

The Company works with a wide range of funders and organisations to meet its aims of supplying affordable training as and where needed; providing cost-effective support services to other local fishermen's associations and actively promoting fish and fishing to local schools, businesses and colleges. While providing benefits to the wider fishing community, these courses also generate a small profit margin or which cover a small percentage of staff time.

The self-financing organisation employs two full-time staff, one administrator to manage the day-to-day administration of training courses and another member of staff to act as manager / project / business development officer. The company is a Seafish-approved training provider with many of its trainers being drawn from the local fishing industry.

9. Summary of Northern Ireland Seafood Industry Training needs:

Sector	Mandatory / non-mandatory	Course name	Estimated demand	Availability of training course (location / training body)	Barriers to delivery
Catching sector	Mandatory >16.5m	Class I & II Cert of Competency (deck)	Low (c. 5 pa)	Portavogie 2014/15, but typically BIM college in ROI or college based mainland UK	Cost of delivery / lack of facilities for ENS, 4-day fire fighting etc / low demand
	Mandatory >750kw	Class I & II Cert of Competency (engineering)	V. low (c. 1-2pa)	BIM college in ROI or college based mainland UK	Cost of delivery / lack of facilities / low demand
	Non-mandatory	Seafish u16.5m certificate: Bridge Watchkeeping (5- & 2-day) Engineroom Watchkeeping (2-day) Stability Awareness (1-day) GMDSS SRC (2-day)	Medium (10-100 pa)	SFITA Portavogie, Kilkeel and other locations as needed	None
	Non-mandatory	Refresher training for basic safety	High (>100 pa)	SFITA Portavogie, Kilkeel and other locations as needed	None
	Mandatory	Basic Safety Training courses: Sea Survival First Aid Fire Fighting	High	SFITA Portavogie, Kilkeel and other locations as needed	None; language interpretation can be an issue when training foreign crews

		Health & Safety Safety Awareness			
	Non-mandatory	Apprenticeship in Maritime Occupations (Sea Fishing pathway)	Low	None in NI	Low demand / no delivery structures in place
	Non-mandatory	Introduction to Commercial Fishing (3-week)	Low	SFITA Portavogie, Kilkeel and other locations as needed	Low demand and trainer availability / cost can be limiting
	Non-mandatory	MCA Approved Engine Course (30-hour)	Low	None in NI	Engines/facilities needed
	Non-mandatory	Personal Safety & Social Responsibility	Medium	Currently mainland UK Maritime, but SFITA identifying trainer to deliver locally	Trainer limited, but being addressed
Processing sector	Mandatory	Basic food hygiene	High	Local colleges / independent trainers; co-ordination provided by the Seafish Training network NI	None
	Non-mandatory	Manual handling / lifting	High	Local colleges / independent trainers; co-ordination provided by the Seafish Training network NI	None
	Mandatory	Fork-lift truck driving	Med	Local colleges / independent trainers; co-ordination provided by the Seafish Training network NI	None
	Mandatory	Basic first aid	High	Local colleges / independent trainers; co-ordination provided by the Seafish Training network NI	None
	Non-mandatory	Fish / shellfish processing skills	High	Local colleges / independent trainers; co-ordination provided by the Seafish Training network NI	None
	Non-mandatory	COSSH / H & S in the workplace	Med	Local colleges / independent trainers; co-ordination provided by	None

				the Seafish Training network NI	
	Non-mandatory	Supervisor training	Med	Local colleges / independent trainers; co-ordination provided by the Seafish Training network NI	None
	Non-mandatory	Management training	Low	Local colleges / independent trainers; co-ordination provided by the Seafish Training network NI	None
Aquaculture / Mariculture	Non-mandatory	Biosecurity	Med	Co-ordinated via the BIM Cross border aquaculture initiative	None
	Non-mandatory	Environmental management	Med	Co-ordinated via the BIM Cross border aquaculture initiative	None
	Non-mandatory	Fish / shellfish health	Med	Co-ordinated via the BIM Cross border aquaculture initiative	None
Onshore support / services sector	Non-mandatory (but required for insurance)	Working at height / telescopic platforms etc	Med	Sea-Source co-ordinated and delivered through independent trainers	None
	Non-mandatory (but required for insurance)	Working in confined spaces	Med	Sea-Source co-ordinated and delivered through independent trainers	None
	As above	Basic first aid and fire fighting	Med	Sea-Source co-ordinated and delivered through independent trainers	None
Fish frying sector	Non-mandatory	Basic food hygiene	High	Various local colleges, online courses, independent trainers	None
	Non-	Fish frying	Med	NFFF training centre in Leeds	Lack of suitable premises /

	mandatory				equipment
	Non-mandatory	Customer service skills	Med	None identified	None identified
Fishmongers/ independent retail sector	Non-mandatory	Fish-filleting	Low	Entirely delivered 'in-house'	No demand for externally run courses
	Non-mandatory	Basic food hygiene	High	Various local colleges, online courses, independent trainers	None
Inland fisheries	Non-mandatory	4 x 1d basic sea safety courses	High (un-confirmed)	SFITA Portavogie, Kilkeel and other locations as needed	None

10. Conclusions (and options)

10.1 Sector needs

After a turbulent period, the Northern Irish catching sector is economically viable and is providing significant employment along the County Down coast. *Nephrops* trawlers and scallop dredgers are currently the most significant parts of the fleet. These vessels largely depend on migrant workers for crew and this could present a potential risk in the longer term if the labour market changes or workers return to their home countries. The industry recognises this and agrees that more work should be done at a National level to undertake co-ordinated actions that attract trainees into the industry.

The main demand from industry is for the four one-day mandatory Safety Training Courses to be delivered at times and locations to suit industry with a view to these being delivered at shorter notice during times of bad weather. Although there is clearly a limit to the notice needed due to the need for rooms to be booked etc there should be some discussion between training providers and industry leaders to see how this need could be better met.

The training of foreign crews also presents challenges to training providers as the trainees command of the English language varies considerably and could impact on the ability to learn vital information. This problem is not unique to Northern Ireland and as a strategic issue could be an area for Seafish to become actively involved.

The inshore shellfish fleet is increasing in scale and therefore provides potential to further promote the Seafish under 16.5m skipper certificate. However, the content of that certificate is basic and Seafish is keen to encourage those who have already achieved it to continue their learning and undertake higher level courses. There is still a gulf of knowledge between the Under 16.5m certificate and a Certificate of Competency. With the exception of the current course in Portavogie, candidates wishing to achieve the higher level of Certificates of Competency (Class I and II) are required to travel out of the country to take the component courses (such as GMDSS, advanced fire fighting, ENS etc). Given the relatively low numbers of candidates each year (estimated to be typically between two and ten) the situation is un-likely to change unless candidates from other maritime activities can be found to help build a stronger demand. Following discussions with MNTB and the National Workboats Association the prospect of this looks equally unlikely. However, the industry did not see this as a key issue as it believed that training of a high standard was readily available from the BIM College at Greencastle in the Republic of Ireland.

There was strong demand for local delivery of the 1-day STCW Personal Safety and Social Responsibility (PSSR) course in order for fishing crews to deliver effective guardship services. With an appropriately qualified trainer this course could be run locally (where needed) and this opportunity should be capitalised on, through the identification of the appropriate person to undertake trainer training.

There was demand from the vessel support services sector for a wide range of training courses including: fork-lift truck driving, working at heights, working in confined spaces etc. Currently this demand is being met through Sea Source in conjunction with Kilkeel Harbour Works – a local business partnership, ensuring training is cost-effective and flexible around the needs of businesses.

Growing interest in diversification into other maritime pathways such as the offshore windfarm sector can be achieved either directly through achievement of a commercially endorsed RYA Yachtmaster Offshore qualification, or use of this qualification as a pathway towards the Master 200 qualification. The numbers of candidates for these qualifications are again likely to be low and even if combined with training to other maritime sectors in Northern Ireland it is unlikely to warrant the establishment of a maritime college in Northern Ireland.

The main provider of training to the catching sector is SFITA (NI) Ltd. The Association is at something of a crossroads as it has become financially stressed by a downturn in its core business (delivery of the four one-day Basic Sea Safety courses) and impending retirement of the Association's manager. It is therefore suggested that the Association's directors advance dialogue over the future structure and purpose of the Association.

The larger scale processors are generally well-organised and have plugged-in to local Colleges of Further Education or developed bespoke in-house training plans to cover training needs across their businesses. The one area of processing identified as lacking coverage was shellfish aquaculture, specifically around bio-security. The fledgling Seafood Training Network for Northern Ireland has played a key role in this area and should be encouraged to continue its work.

Smaller processors appear to require a greater degree of external assistance in identifying training needs. This support could be provided by local College staff or through further expansion of the training network's activities. Training is typically delivered in-house by an independent trainer and currently no skills gaps were identified.

The fish frying sector is proactive and vibrant and has identified fish fryer training as a clear training need for the sector that was not currently being met by any training provider in Northern Ireland. The sector is working closely with the Seafish Seafood Training Network Northern Ireland and the National Federation of Fish Friers (NFFF) to address this issue and therefore no further intervention is suggested at this stage.

The retail / fish monger sector is small and geographically diverse. Due to the owner / operator nature of many of these businesses and the specialized skills they require it is hard to envisage although there could be a role for the Seafood Training Network.

Inland fisheries are known to employ large numbers of workers in Northern Ireland and although exempt from MCA certification requirements could provide a significant area of business for SFITA if funding could be secured to incentivise uptake of training.

10.2 Delivery

The Sea Fish Industry Training Association (NI) Ltd (SFITA) fulfils a vital role in the Northern Irish catching sector being the only Seafish provider of the fishermen's one-day Safety Courses in Northern Ireland. Due to its location and long-standing fishing industry experience the organisation has consistently delivered high numbers of the four one-day fishermen's Sea Safety Courses. It therefore enjoys a unique and un-challenged position in the marketplace for delivering safety training to fishermen.

However, in the coming years the Association faces significant challenges as trainee numbers are falling and funding for future courses is less certain. In addition, key staff will be retiring so proactive intervention from the Board of Directors will be required to ensure the Association remains on an even keel through this period of transition. Without this high-level intervention there is a clear risk that the Association could cease trading – a risk recognised by both MCA and Seafish (and others) that would have serious consequences for the Northern Irish fleet.

The work of the local Colleges compliments the work of SFITA and with little or no overlap between courses offered there could be an opportunity for greater collaboration and networking. The Colleges and some leading employers have welcomed the Seafood Training Network set up by Seafish in Northern Ireland and further development and promotion of its activities should be encouraged.

11. Recommendations

1. SFITA should consider appointing a business development manager to act as an interim manager (possibly explore EMFF funding for role). This person could be appointed over a 6 to 12 months term to undertake a number of key tasks leading to the development of a robust, sustainable and deliverable business plan for the organisation. Such a business plan should cover the minimum the following areas:
 - a) a marketing and communications plan (including digital & social media);
 - b) outreach to other maritime sectors to identify opportunities and provide a critical mass for courses with commonality;
 - c) developing closer links with inland fisheries & aquaculture as an opportunity for business growth;
 - d) explore business models adopted by other catching sector Seafish ATPs;
 - e) review the costs of delivery and administration and consider all avenues for reducing costs
2. Review staffing arrangements and work with the Board of Directors to consider the appointment of a new staff member when the current manager retires; this should involve consideration of:
 - a) staffing levels required;
 - b) job roles and responsibilities required and in particular whether the manager should be a trained trainer;
 - c) consider the need for a fixed office vs mobile / home based office;
 - d) review trainer coverage to permit increased short notice delivery of courses
3. Work closely with Seafish and MSA, Department of Employment and Learning (DEL) to attract funding for an apprenticeship scheme.
4. The Seafish Seafood Training Network Northern Ireland should continue its role in bringing together businesses and training providers, with consideration being given to possible greater integration with the catching sector.

Annexes:

Annex I - List of consultees

Sector	Organisation	Method of contact
Catching	Anglo-North Irish Fish Producers Organisation / Sea Source (ANIFPO)	Face-to-face
	Northern Irish Fish Producers Organisation (NIFPO)	Face-to-face
	McMullan shellfish	Telephone
Processing	Rooney fish	Face-to-face
	Kilkeel seafoods	Face-to-face
	Sea-source	Face-to-face
	C & O Milligan	Telephone
Retail	Sean MCKeown, Bangor	Telephone
	Ewings Seafood	Telephone
	Mourne Seafood bar	Telephone
	George Cully & Sons	Telephone
Friers	Pitstop (Kilkeel)	Telephone
	John Dorys	Telephone
	Fish City	Telephone
	The Dolphin	Telephone
Training delivery	Sea Fish Industry Training, Northern Ireland (SFITA)	Face-to-face
	Newry College	Face-to-face
	BIM, National Fisheries College (Ireland)	Telephone
Regulators	Department for Agriculture Northern Ireland (DARD)	Face-to-face
	Northern Ireland Harbours Authority	Telephone
	Maritime & Coastguard Agency (MCA)	Telephone
Other maritime sectors	Workboat association	Telephone
	Maritime Skills Alliance	Telephone
	Merchant Navy Training Board (MNTB)	Telephone
	Seafish	Face-to-face

Annex II - DARD supported fisheries sector training from 2006 to 2014

Date	Programme	Project description	Promoter	Cost £
Apr-06	South Down Taskforce	Enhanced Fishermen's safety training	SFITA	26,205
Apr-06 to Mar-09	South Down Taskforce	Processor training	SFITA	32,000
Apr-06 to Mar-08	South Down Taskforce	Provision of safety training bursaries	SFITA	86,536
Apr-06	South Down Taskforce	Industry Skills Audit	SFITA	2,000
Apr-06	South Down Taskforce	Migrant workers scheme	SFITA	15,000
Apr-06	South Down Taskforce	Training and education material	SFITA	8,825
Apr-06 to Nov-08	South Down Taskforce	Safety and Diversification scheme	SFITA	382,386
Dec-06	FIFG	Fishermen's safety training	SEAFISH UK	179,055
Jun-10 to Mar-12	EFF - Axis 3	Fishermen's safety training	SEAFISH UK	29,838
April 2011 - March 2013	EFF - Axis 3	Fishing industry training programme - Assistance for Engineering courses	SFITA	18,971
Oct 2012 - March 2013	EFF - Axis 3	New entrant fishermen training	SFITA	7,955
Feb14 - Sept 15	EFF - Axis 3	Trawl gear technology training	SEAFISH UK	106,720
April 14 - April 15	EFF - Axis 4	Fishermen's development training	SFITA	75,747
April 14 - April 15	EFF - Axis 4	New horizon's start up business training	Down Business Centre	70,300
Total		14 projects		1,041,543

Annex III - Reading list

Dept of Agriculture & Rural Development

<http://www.dardni.gov.uk/going-for-growth.pdf>

Marine Management Organisation (MMO), annual report of fisheries statistics

<https://www.gov.uk/government/statistical-data-sets/uk-sea-fisheries-annual-statistics-report-2013>

Northern Ireland Food & Drink

<http://www.nifda.co.uk/fs/doc/publications/ap-for-growth-programme-for-web.pdf>

Seafish

http://www.seafish.org/media/Publications/2012_Survey_of_the_UK_Seafood_Processing_Industry.pdf

Seafood Cornwall Training Ltd.

www.seafoodcornwalltraining.co.uk

Western Maritime Training

<https://www.swta.co.uk>

Whitby & District Fishing Industry Training School

<http://www.whitbyfishingschool.co.uk>

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