Report on a Survey of Selected

"Major Marine Industries in the Gulf of Maine: Sustainability, Priorities, and the Council"

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For

Gulf of Maine Council on the Marine Environment

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1. Introduction:

1.1 Background

The Gulf of Maine Council on the Marine Environment was set up some 16 years ago to address perceived stresses on Gulf waters. Toward this end it adopted a mission of enhancing marine environmental quality through state/provincial cooperation. It was in the beginning and essentially still remains a government/environmental organization. However, in recent years the Council has come to the realization that the "health" of Gulf marine industries is an essential component of the overall health of the Gulf, and that their participation in Council activities is imperative if its mission is to be fully achieved.

The Council has therefore determined that the voice of marine industries needs to be adequately represented, heard and acted upon in its forums, and has set out a specific goal within its up-coming five-year Action Plan to address this limitation. The first step toward fulfilling this need was the hiring of a consultant to engage marine industries throughout the Gulf of Maine to assess both their sustainability perspectives and what role the Council might play in making them more economically viable within the broader context of the health of the full Gulf of Maine region.

1.2 Perspective

The essence of this project, "Sustainability, Priorities and the Council", is meant to reflect upon the subthemes of:

(a) whether marine industries of the Gulf of Maine are sustainable in light of existing environmental/economic conditions and trends, and

(b) whether the priorities of major marine industries are or could become such that they would participate within the Council toward greater stewardship of the Gulf of Maine and its/their improved sustainability.

1.3 Directions

The consultant was charged with the responsibility of conducting telephone interviews with as many marine industry contacts as possible within a limited time frame from lists supplied by each provincial/state jurisdiction on the Council. The survey lists were to include representatives of five industry sectors only, namely commercial fisheries, aquaculture, energy, seafood processing and shipping/ transportation. These sectors were not meant to be inclusive, but reflective of the interests of the major players in Gulf of Maine marine commercial activities. The consultant would then assess the responses, write a report on them and develop recommendations for consideration for the next action plan; all for submission to the Gulf of Maine Council's Working Group and its representatives.

2. Survey Methodology:

2.1 Process/Questions

As summarized in the following table, there were 67 contact names submitted in total from the five jurisdictions and covering the five industry sectors, with varying numbers per sector. All contacts were telephoned at least twice, with messages left. For all individuals contacted, the purpose of the call was explained and a time for the subsequent interview of approximately half an hour was requested. The interview itself consisted of three parts, the first being an explanation of the Council mission, make-up and activities, leading to the second relating to the resources used, sustainability and priorities of their industry sector, leading to the third in regard to what role if any that the Council might play in helping that sector and the Gulf generally become more sustainable. The last two parts were taped (with their prior permission).

Industry Contacts		**NB**	**NS**	**Me**	**NH**	**Ma**		**Totals**
Commercial Fisheries		7	7	12	5	2		**33**
Aquaculture		6	6	4	1	0		**17**
Energy		2	4	0	1	1		**8**
Seafood Processing		1	2	0	1	0		**4**
Shipping & Transportation		3	2	0	0	0		**5**
Totals		**19**	**21**	**16**	**8**	**3**		**67**

2.2 Confidentiality of Notes and Tapes

All respondents were assured that both the notes collected and taped conversations would be kept strictly confidential and for the consultants use only. For this reason, material in this report will typically be summarized, and no material will be presented or released which will compromise this assurance of confidentiality.

2.3 Base Data

Of the 67 contacts received, only 36 (54%) were interviewed as summarized in the following table. These interviews were all conducted during the 6-week period from January 9 to February 16, 2006. The remaining 31 were either not reachable due to incorrect telephone numbers or e-mail addresses, did not return my repeated calls or declined to be interviewed because they could not see the relevance to their companies.

Industry Interviews		**NB**	**NS**	**Me**	**NH**	**Ma**		**Totals**
Commercial Fisheries		6	5	3	2	2		**18**
Aquaculture		1	2	3	1	0		**7**
Energy		2	2	0	1	0		**5**
Seafood Processing		1	2	0	0	0		**3**
Shipping & Transportation		2	1	0	0	0		**3**
Totals		**12**	**12**	**6**	**4**	**2**		**36**

3. Jurisdictional Significance

At first glance of the interview spread among the various jurisdictions and industry sectors, there appears to be numerous data loopholes or weaknesses. However, as the interviews progressed, it became fairly obvious that there were few differences among the perspectives of any particular industry sector among the various jurisdictions. In consequence, it was decided to assure minimum numbers of respondents (three) per industry category than to strive unnecessarily for jurisdictional balance.

4. Perspectives of Major Sectors:

4.1 <u>Commercial Fisheries</u>

This marine industry sector had by far the most respondents (half) at 18, just over half of who were supportive of participating in the Council. Perhaps this is not surprising given that their livelihoods are based upon living marine resources that are so dependent on environmental quality. Generally, larger companies, offshore and mobile gear operators were more in favour, and smaller companies, inshore and fixed gear operators were less in favour for obvious cost-benefit reasons. Most also questioned the Council's interest in and ability to really change to include industry in a meaningful way. Some particular challenges were suggested, namely the need for the Council to firstly prove its good intentions and secondly, that some financial support was likely needed for small-scale industry representatives to attend Council activities/meetings, a problem that government representatives do not have.

In terms of the major issues, most agreed that few fisheries stocks in the Gulf region seemed currently sustainable, although a few marine industries did appear to have good futures based upon what specific resources they utilized and how they conducted their businesses. The two most significant problem areas were communications and science. Many blamed poor communications and lack of trust among fishermen, regulators and other users, and miss-information from self-appointed guardian sources, as impacting negatively upon fisheries stocks. Many also suggested that scientific resources were inadequate for the very dynamic nature of the Gulf, and that the traditional knowledge of fishermen was given no credibility in the scientific/management process.

(Photo: Commercial herring weir fishery)

Lesser issues included the need for greater enforcement of existing regulations, conflicts among various fishing gear types and with other resource users, and poor water/landing quality due to sewage wastes and toxic runoffs.

Remedial suggestions highlighted the essential need for the collaboration of scientists and fishermen in addressing scientific directions and stock issues, where both would be equally respectful and learn from each other. It was similarly suggested that fishermen be more fully involved with fisheries management regulators and with integrated coastal zone managers both locally and regionally, and that socio-economic studies be required for all marine development proposals in the Gulf.

From a broader more general perspective, it was suggested that the Council take on a more open facilitation role for fisheries issues, such as might occur through a GOMC Fisheries Committee.

4.2 Aquaculture

Of the seven respondents in this industry sector, also based on living marine resources, most were in support of involvement in Council activities, but for different reasons. Typically, offshore/inshore, fish-based and larger companies saw a role for the Council; more localized/ embayment, shellfish-based and land-based operations saw little.

Of those that were supportive, there were some that thought the Council should just look at the big picture such as overall stewardship, regional water quality, standardization of regulations, promoting diversity and the development of cross-border agreements.

(Photo: Atlantic salmon aquaculture facilities)

Conversely, there were those that wanted more transitional/ diversification technical support, control on the movement of live fish and shellfish relative to diseases (biosecurity), viability studies on new species and a forum for interaction with other marine resource users, such as might have been addressed by the now-defunct Aquaculture Committee.

4.3 Energy

There were five respondents in this industry sector, and most could see a positive role for the Council. Although not based on living marine resources, they saw the potential for a strong oversight role that would bring all stakeholders together, particularly industry with regulators and researchers, to resolve issues and cut through red tape.

It was suggested that one focus could be toward a standardized energy resource management model that recognized regional differences while creating an equal playing field. It was specifically noted that all sides needed to listen as well as talk; recognizing a great communications gap among the players both within and between jurisdictions. Such communications might help to clarify misconceptions and head off miss-guided interventions.

(Photo: Tidal power generating plant)

There was also a general view among industry members that moving toward green energy was a good sustainability strategy, and that a multi-faceted sharing of ideas and information among jurisdictions as might be facilitated by the Council would be valuable in this regard.

4.4 Seafood Processing

Of the three respondents in this industry sector, two did not see any role for the Council within their activities at this time as current organizations were adequate to the tasks, but also decried the possibility of attending yet more meetings. However, the other made particular note as to the limited scientific information available to explain current fisheries declines or for the management of fish stocks in the Gulf, and suggested that the Council could take on the responsibility of facilitator for better stock management by promoting the need for more and better-integrated science.

Also, in support of this role, it was suggested that the Council could develop a status and trends report card on commercial and indicator species, and become more of a vocal conscience for marine resource sustainability.

In many respects, the indirect interests of this marine industry sector are just an amalgam of the more direct interests of the commercial fisheries and aquaculture sectors, as might be expected.

(Photo: Seafood processing plant worker)

4.5 Shipping/Transportation

There were three respondents in this industry sector, and none saw any immediate need for involvement in the Council as they appeared to have little conflict or other problems in their marine affairs. In effect, this is not surprising in that the Council may appear to be little more than an additional hindrance to their activities until demonstrated otherwise.

(Photo: Inter-island ferry service)

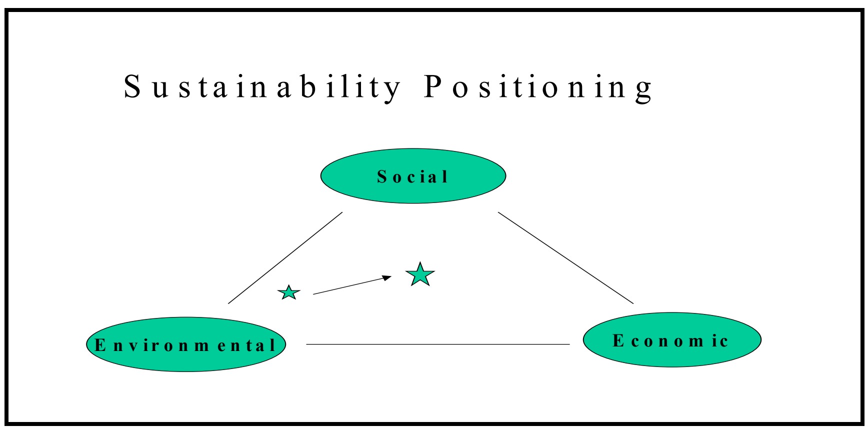
Of particular note, however, is that two of these did not have vessels, but contracted with shippers. In consequence, they did not have any direct responsibility over what those vessels did at sea relative to the environment. Obviously such ship owners/ operators would have to be involved in the broader equation of GOMC involvement.

Possibilities for action might include an inventory and the standardization of shipboard and dockside services throughout the Gulf to handle wastes and maximize the efficiency of operations.

5. Council Institutional Value:

5.1 Current Position and Focus

As mentioned at the outset of this report, the Gulf of Maine Council is seen essentially as an environmental organization. If this is its intention, then it has succeeded. However, if its intention is really sustainability in its broadest sense, then it has been only partially effective and is poorly positioned to meet that objective. In this latter circumstance it would have to move its focus further toward a more balanced integration of social, economic and environmental values as depicted below:



Such a shift would, of necessity and desirability, lead to the inclusion of players not currently at the table, notably marine industries, but would require significantly re-directed activities and communications to attract and accommodate the interests of such industries.

5.2 Industry Perceptions

About a third of those interviewed had never heard of the Council. Of the others, the following quotations were extracted essentially verbatim from the interviews to reflect the prevailing negative attitude expressed by many of the marine industry participants:

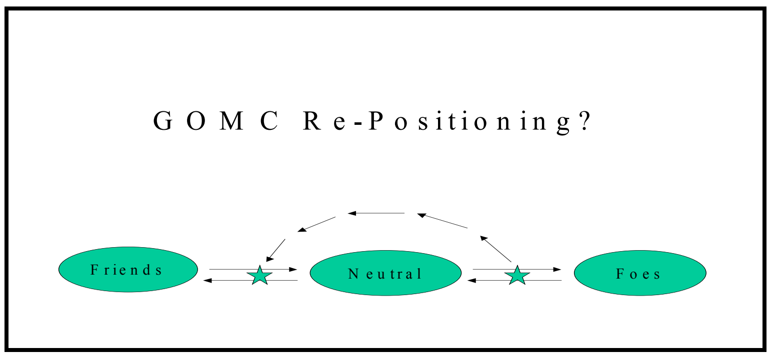
* Much talk, little action!
* No good for nothing as it is!
* No common sense; waste of time!

* Has no clout! No pull, no value!
* What is real interest: regulation or community welfare?
* Not industry friendly!
* More of a hindrance than help!
* There will be no line up at their door when it opens!
* May have outlived its usefulness!

With such perceptions of the Council by industry, it will be no easy task to bring them willingly to the table in the near future.

5.3 Council Potential

It does not serve either the Council's or the marine environment's interests to have a poor relationship between the GOMC and one of its major, but non-participating partners, namely marine industries. Alternatively, it would greatly serve such interests for the Council to re-position itself relative to such industries as suggested below:



If representatives of Gulf marine industries can be attracted back into the Council fold in a meaningful way, and Council processes can change to deal effectively with industry input, then the Council may be able to look forward to even greater achievements in sustainability in the Gulf. The Council has the potential to change, but does it have the will?

5.4 Suggested Roles

A synthesis of feedback from industry participants in this survey suggested the following possible general directions for Council relative to marine industry interests:

* Overall stewardship of Gulf sustainability
* Coordination of forums for stakeholder interaction
* Facilitation of communications with the public
* Development of standardized processes
* Promotion of greater scientific resources
* Ensuring status and trends reporting
* Promotion of sustainable activities and products

These generalities are predicated upon the inclusion of marine industries in the process of their development by the Council, and are broken down into specific activities in the next section.

6. Recommendations:

6.1 Year I

* Place all survey contacts indicated by "T" on the GOM Times mailing list
* Send a copy of this report to all industries surveyed, with a cover letter from the Council Chair
* Develop a Strategic Marketing Plan to attract and involve marine industries in GOMC activities
* Enhance focus of GOM Times to include industry activities as an additional major element
* Develop article for GOM Times on industry stewardship importance and GOMC involvement initiative

6.2 Year II

* Hire a Marine Industries Coordinator for implementation of the Strategic Marketing Plan
* Expand criteria and promotion of grants program to include marine industry interests and sustainability objectives
* Set up and maintain a database of GOM marine industries, and contact re GOM Times mailing list
* Regular articles on industry stewardship in GOM Times
* Create special annual award for industry GOM stewardship
* Hold marine industry health forum with Council meeting
* Develop criteria for promotion of Best Management Practices among GOM marine industries
* Develop criteria to establish baseline data studies for subsequent marine industry sustainability progress

6.3 Subsequent Years

* Coordination of Strategic Marketing Plan implementation and subsequent activities
* Establish marine industry positions on Council
* Establish marine industry positions on Working Group
* Rejuvenate Industry Advisory Committee at Council level
* Marine Industries Coordinator to serve as secretariat to Industry Advisory Committee
* Rejuvenate Aquaculture Committee at technical support level
* Set up Fisheries Committee at technical support level
* Regular articles on industry stewardship in GOM Times
* Promotion of grants program among marine industries
* Seek nominations for and present annual GOM Industry Stewardship Award

* Implement program to establish and promote Best Management Practices in each industry sector
* Implement baseline data studies program on marine industry sector sustainability
* Maintain and update database of GOM marine industries
* Develop traveling display and brochures for GOM marine industry sustainability
* Promote “green” branding of GOM products to consumers
* Promote regulatory efficiency through reduction of red tape/ and one stop shopping
* Conduct a survey among marine industries to determine how their business sector could be conducted in a more sustainable manner
* Inventory current vessel dockside facilities and services available throughout the Gulf

7. Conclusions

Within the context of whether marine industries of the Gulf of Maine are sustainable in light of existing environmental conditions and trends, it appears that those industry sectors which rely upon the health of fisheries stocks (namely commercial fisheries, aquaculture and seafood processing) have some doubt as to the sustainability of these specific marine industries, particularly for offshore and nearshore operations. For those marine industries that do not rely upon living resources (namely energy and shipping/ transportation), sustainability is not much of an issue except perhaps economically, as in the context of possible over-regulation and limited avenues to address concerns directly with regulators.

As to whether the priorities of major marine industries are such that they would participate with the Council in greater stewardship of the Gulf of Maine toward its/their improved sustainability, of the 36 respondents 56% thought that their participation on the Council might be worthwhile, but 44% held the negative view. However, many really intimated that it was up to the Council to “prove its value to them”, so that industries could see what they would receive for the investment of time and money. As one respondent summarized it, his company “would only participate if it was both useful and cost effective relative to issues of consequence to their specific industry sector.”

If the Council truly wants to get away from its government/ environmental image in order to address its mission more effectively, marine industries must be at the table and directly involved in guiding the Council’s decisions and charting its future. There must no longer be any hesitation in addressing fisheries or aquaculture issues, or any other sector issues, as in the past. Jurisdictional issues must become secondary to sustainability issues! Working together in this manner would certainly ensure a more healthy environment, more healthy food products and more healthy marine industries; as are the explicit goals of the GOMC Action Plan for 2006-2011.

Alternatively, not involving such industries in any meaningful way would guarantee no more than the status quo, and possibly expose the Council to the looming probability of losing representation from economic development agencies, further weakening the attainment of its sustainability goals. It is suggested that the status quo is not a viable option in the long-term, and it is highly recommended that the Council opt for the pro-active opportunity to truly take on the full role of "Marine Ecosystem Champion" to the Gulf of Maine. From the perspective of the marine industries surveyed, the ball is in the Council's court, but nobody is lined up to play the game!

Appendix: List of Major Marine Industries Surveyed

Commercial Fisheries:

No.	Name (Jurisdiction)	Organization	Telephone Number	Mailing Address	E-Mail Address /T**
1	Klaus Sonnenberg *(NB)	Grand Manan Fishermen's Assoc.	506-662-8481	X	gmfa@nb.aibn.com
2	Bob Cochrane (NB)	Fundy Weir Fishermen's Assoc.	506-755-6644	35 L'etete Rd., Unit 1, St. George, NB, Canada E5C 3H3	fndyweir@nbnet.nb.ca
3	Greg Thompson (NB)	Fundy North Fishermen's Assoc.	506-659-2885	30 Longbeach Lane, Dipper Haarbour, NB, Canada E5J 1X6	gregt_fn@hotmail.com T
4	Paul Green (NB)	Grand Manan Lobsters	506-662-8090	114 Ingalls Head Rd., Grand Manan, NB, Canada E5G 3G4	beamarc@hotmail.com
5	Martin Collins (NB)	Independent Fisherman	506-887-2200	X	X (no reports)
6	Rex Hunter (NB)	Acadia Seaplants	506-466-1567	188 Upper Tower Hill Rd., Tower Hill, NB, Canada E5A 2S5	rhunter@acadia.ca T
7	Clare Grindall (Me)	Downeast Lobster Fishermen's Assoc.	207-359-8025	138 Caterpiller Hill Rd., Sargentville, Me., USA 04673	dela@hypernet.com T
8	Mary Beth Tooley (Me)	East Coast Pelagics	207-763-4176	415 Turnpike Dr., Camden, Me., USA 04843	ecpa@adelphia.net T
9	Herb Hodgkins (Me)	Maine Lobster Pound Assoc.	207-422-6238	64 Tidal Falls Rd., Hancock, Me., USA 04640	lobprod@prexar.com

10	Claude d'Entremont (NS)	Atlantic Canadian Mobile Gear Assoc.	902-762-2522	P.O. Box 198, Middle West Pubnico, Yarmouth County, NS, Canada B0W 3M0	claude@inshore.ca
11	Chris Hudson (NS)	Bay of Fundy Inshore Fishermen's Assoc.	902-532-7118	RR#2, Granville Ferry, Annapolis County, NS, Canada B0S 1K0	fundyviper@nb.sympatico.ca T
12	Martin Kaye (NS)	Fundy Fixed Gear Council	902-638-3044	P.O.Box 273, Cornwallis Park, Cornwallis, NS, Canada B0S 1H0	martink@bfmrc.ns.ca
13	Ashton Spinney (NS)	LFA Dist. #34 Lobster Committee	902-643-2490	RR#1, Glenwood, Yarmouth County, NS, Canada B0W 1W0	ashton@ns.sympatico.ca T
14	Glanville Travis (NS)	Upper Bay of Fundy Fishermen	902-582-7395	Box 112, Canning, NS, Canada B0P 1H0	gtravis@ns.sympatico.ca
15	Peter Tilton (NH)	Defiant Lobster	603-926-3910	125 Landing Rd., Hampton, NH, USA 03842	ptiltonjr@verizon.net
16	Bonnie Spinazzola (NH)	Atlantic Offshore Lobstermen's Assoc.	603-498-3032	54 Chatham Dr., Bedford, NH, USA 03110	bonnie@offshorelobster.org T
17	Dave Casoni (Ma)	Massachusetts Lobstermen's Assoc.	508-224-3038	8 Otis Place, Situate, Mass., USA 02066-1323	dave@lobstermen.com
18	David Bergeron (Ma)	Massachusetts Fishermen's Partnership	978-282-4847	2 Blackburn Center, Glouchester, Mass., USA 01930	dbergeron@mass-fish.org T

Aquaculture:

No.	Name (Jurisdiction)	Organization	Telephone Number	Mailing Address	E-Mail Address /T
1	Shirley Roach Albert (NB)	Marine Harvest	506-754-5200	7 Anchorage Ave., Saint John, NB, Canada E2K 5R3	shirleyroachalbert@gmail.com
2	Sebastian Belle (Me)	Maine Aquaculture Assoc.	207-622-0136	Box 148, Hallowell, Me., USA 04347	futureseas@aol.com
3	Dick Clime (Me)	Dodge Cove Marine Farm Inc.	207-563-8168	P.O. Box 211, Newcastle, Me., USA 04553	clime@midcoast.com T
4	Chris Davis (Me)	Pemaquid Oyster Co.	207-832-6067	P.O. Box 302, Waldoboro, Me., USA 04572	cdavis@midcoast.com T
5	Brian Blanchard (NS)	Scotian Halibut Ltd.	902-471-1113	25 Kenny St., Clarke's Harbour, NS, Canada B0W 1P0	brianblanchard@klis.com T
6	George Nardi (NH)	Great Bay Aquaculture	603-430-8057	153 Godine Rd., Portsmouth, NH, USA 03801	gnardi@greatbayaquaculture.com
7	Doug Bertram (NS)	Innovative Fisheries Products Inc.	902-769-3300	P.O. Box 125, Belliveau Cove, NS, Canada B0W 1J0	jdbert1@netscape.net T

Energy:

No.	Name (Jurisdiction)	Organization	Telephone Number	Mailing Address	E-Mail Address /T
1	Glen Wilson (NB)	New Brunswick Power Corp.	506-458-3630	P.O. Box 2010, Fredericton, NB, Canada E3B 5G4	gwilson@nbpower.com
2	Bill Borland (NB)	JD Irving Ltd.	506-632-7777	X	borland.william@jdirving.com

3	Dana Atwell (NS)	Nova Scotia Power Corp.	902-428-6533	1894 Barrington St., Barrington Twr., Halifax, NS, Canada B3J 2A8	dana.atwell@emera.com T
4	Scott Travers (NS)	Minas Basin Pulp & Power	902-684-1343	Print St., Hantsport, NS Canada B0P1P0	stravis@minas.ns.ca T
5	Richard Dumore (NH)	Public Service Co. of New Hampshire	603-679-1602	265 Calef Hwy., Epping, NH, USA 03042	dumorrf@nu.com T

Seafood Processing:

No.	Name (Jurisdiction)	Organization	Telephone Number	Mailing Address	E-Mail Address /T
1	David Giddens (NB)	New Brunswick Seafood Producers Assoc.	506-456-3391	669 Main St., Black's Harbour, NB, Canada E5H 1K1	dave.giddens@connors.ca
2	Denny Morrow (NS)	Nova Scotia Fish Packers Assoc.	902-742-6168	38B John St., Yarmouth, NS, Canada E5A 3H2	fishpackers@klis.com T
3	Roger Sterling (NS)	Seafood Producers Assoc. of Nova Scotia	902-463-7790	X	spans@ns.sympatico.ca

Shipping/Transportation:

No.	Name (Jurisdiction)	Organization	Telephone Number	Mailing Address	E-Mail Address /T
1	Dave Seman (NB)	Bayside Marine Terminal	506-529-3503	108 Champlain Dr., Bayside, NB, Canada E3B 2Y2	baysideport@nb.aibn.com T
2	Murray Ryder (NB)	Coastal Transport	506-642-0520	P.O. Box 7235, Saint John, NB, Canada E2L 4S6	mryder@nbnet.nb.ca T
3	Matt Holleman (NS)	Fundy Gypsum Co.	902-798-8079	P.O. Box 400, Windsor, NS, Canada B0N 2T0	mholleman@usg.com T

* Jurisdictions: New Brunswick (NB), Maine (Me), Nova Scotia (NS), New Hampshire (NH), Massachusetts (Ma).
** T: Would like to be put on the Gulf of Maine Times mailing list.