



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR MARITIME AFFAIRS AND FISHERIES

The Director-General

Brussels,
MARE.D.3/JR

Dear Mr Brouckaert, dear Mr López van der Veen, dear Ms Bermúdez, dear Mr O'Donoghue, dear Mr Marzoa Notlevsen, dear Mr López,

I would like to thank the North Western Waters, the Long Distance, the Market, the Pelagic, the Mediterranean and the South Western Waters Advisory Councils for their joint letter of 27 May 2024 relating to the foresight study “Fishers of the Future”.

[Fishers of the Future](#) is conceived as an iterative and participatory project: feedback is collected all along the way and helps us shape the outcome, using the informed opinions of our stakeholders. [Foresight in policymaking](#) is the disciplined analysis of alternative futures. Foresight aims to support policymakers in making better-informed decisions, having considered future eventualities, scenarios and outcomes. Foresight techniques help policy making to navigate the uncertainty of the future and explore alternatives in a structured way.

The focus groups in 22 coastal Member States, workshops, surveys and the event on 19 March 2024 have already allowed us to collect significant feedback. This will be further complemented by feedback received during dedicated meetings with advisory councils and social partners in September as well as another round of consultations with fishers in Member States. Much of this input will be reflected directly in the future scenarios and profiles; any other comments will be included in the final report. In both cases, the feedback has been carefully compiled by the contractor as an important source of information which we are also sharing internally with our colleagues.

This study is the first foresight exercise we do in DG MARE. As such, it is also a learning process, and we are duly noting all feedback received for future similar or related exercises, including that set out in your letter. We are also bound by the terms of our offer and contract, as well as by the available budget: rest assured that the margin of manoeuvre we have is being fully utilised to make adjustments were needed and possible, in full collaboration with our contractor.

I also wish to underline that this study was not conceived as an extended research study to gather quantitative data but rather a first attempt at identifying perceptions of fishers and stakeholders about what the future can hold (similar to what was done for [Farmers of the Future](#)). We are not seeking to *define* a future for fishers but want to stimulate thinking,

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discussion, and strategic planning around possible future conditions and challenges. Whichever the methodology, shortcomings can always be found. However, even though the methodology may have shortcomings, the study is indeed creating a lot of thinking and debate about the future, which we are listening to closely and which is essential to building our reflections and policy direction for the coming years.

Evidently, there is space for further and more extended research studies to be conducted over a couple of years fully representative of the fishing sector across 22 coastal countries. However, the cost and time associated with such work would mean that we miss many critical policy milestones along the way and are not able to respond swiftly enough to the needs and challenges the sector is facing. We do hope though that our first foresight study will help as a steppingstone for researchers to continue, build on it and deepen the reflections in the years to come.

Profiles of fishers in 2024 (today)

Regarding the [profiles of today's fishers](#), the idea was to discuss with fishers directly and come up with a characterisation of their situation today, in its diversity, in order to steer discussions on the future profiles, which are the main deliverable of the study and will be developed over the coming 3 months.

We understand that some of them may have been perceived as simplistic but wanted to stay true to the words used by the selected fishers during individual interviews or group discussions. Such interviews and discussions took place in 22 coastal Member States, with locations chosen by the contractor based on its country experts. Limitations of cost and time have also meant that choice was made to use different working languages during the focus groups and interviews with fishers in the Member States, so that they could voice their concerns in full confidence; the rest of the project is conducted in English.

Initially, these “2024 profiles” were just going to be an internal basis for the rest of the study. However, following interactions with advisory councils and social partners, we decided to gather additional feedback from the fishing sector as well. This was done through the event in March and the 1st online survey: significant input was gathered on these occasions and the contractor took it onboard, making modifications to the initial profiles.

Trends, future scenarios and profiles of future fishers (2050)

The 2nd phase of the project focused on the identification of trends and the development of future scenarios. Initial work used recognised international mega-trends defined by the Joint Research Centre and IPSOS, which were tailored to the fishing world through feedback collected during the first phase of the study as well as an EU survey (180 respondents) and 4 stakeholder workshops from March to June, to which all advisory councils were invited. We are very grateful to all advisory council members who took the time to participate in these workshops.

Feedback on the initial workshop format and organisation were used to adapt the process, by providing longer periods of time for discussion and opening them to a greater number of participants. Additionally, the final draft scenarios were shared with all workshop participants for final comments on 28 June.

We have also made adjustments to the engagement sequence of the last phase of the project that will develop the future profile of fishers to ensure that advisory councils and social

partners are fully involved in their preparation, alongside fishers in the 22 coastal Member States.

Finally, I would like to bring one additional element to your attention. The debates and reflections on the future of fishers will not end with the project's final report in December 2024. Our aim is to keep discussions going during the start of the next Commission mandate and we are already reflecting on the set up of future stakeholder consultations to discuss the final outputs of the project.

Beyond this study, the current challenges and the future of fishers and fisheries is at the core of the work of DG MARE. This is underlined by the launch of the CFP evaluation. The outputs of the Fishers of the Future study and any follow-up consultations and engagement with stakeholders will also contribute to these reflections and help us shape the way ahead.

I look forward to our continued fruitful cooperation on these very important issues. Should you have any further questions on this reply, please contact Ms Julia Rubeck, our Advisory Councils coordinator, via the functional mailbox MARE-AC@ec.europa.eu.

Yours sincerely,

Kestutis SADAUSKAS

On behalf of Charlina VITCHEVA

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