

Evaluation of the Rapid Response Grant Programme

Final Report
prepared for

The Fishmongers' Company and Seafarers UK

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Disclaimer

The views and propositions expressed herein are, unless otherwise stated, those of Risk & Policy Analysts and do not necessarily represent any official view of The Fishmongers' Company, Seafarers UK or any other organisation mentioned in this report.

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

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Executive Summary

The Rapid Response Grant Programme and evaluation

The Rapid Response Grant Programme (RRGP) was a £500,000 fund run by the Fishmongers' Company's Fisheries Charitable Trust (FCFCT) in partnership with Seafarers UK to assist fishing and seafood businesses and food charities in response to the Covid-19 outbreak. Applicants could apply if their project aimed to deliver diversification opportunities; promote and/or facilitate consumption or sale of local seafood; or provide community meals using seafood. The aims of this evaluation were to identify the measures taken by the fishing and seafood industry during the Covid-19 crisis and evaluate the impact of the RRGF on seafood businesses in the UK.

Methodology

The study team undertook a review of charitable and government Covid-19 grant programmes for the fishing and seafood trade sector. Furthermore, information was gathered from a survey (conducted by the FCFCT and Seafarers UK) which was the basis for assessing the impacts of the RRGF and the development of targeted interview questions to fill data gaps. In total, 19 interviews were held with a range of stakeholders including grant beneficiaries, unsuccessful applicants and the delivery team¹.

Comparison of Covid-19 grant programmes for the fishing and seafood trade sector

The RRGF was available to applicants across the UK. In addition, government grant schemes to support the seafood industry through Covid-19 were available in each country. These included the Fisheries Respond Fund (FRF) (England), the Scottish Seafood Business Resilience Scheme, Welsh Fisheries Grants and Northern Ireland Finance Scheme. These government schemes focused on funding fixed costs associated with, for example, running a fishing vessel or aquaculture business. The RRGF and one further government scheme, the Domestic Seafood Supply Scheme (DSSS) (England only), had broader aims related to diversification and increasing the sale, supply and consumption of local seafood, thus were relevant for a wider variety of applicants. The DSSS shared common themes with the RRGF across evaluation and prioritisation criteria. These included addressing gaps in existing support; focusing on cooperation and connection with consumers; and potential to attract match funding. The RRGF's provision of smaller grants on average meant that it was able to benefit more applicants (121 applicants awarded grants) than the 20 mostly larger projects funded by the DSSS.

The impact of the RRGF

Survey data indicated that beneficiaries were spread across the UK, with a high number in the South West of England (47% of grants in the <£4,000 tier were awarded to applicants in this area). Most beneficiaries (68% of the 72 survey respondents) were fishing businesses or fishmongers/merchants. Survey and interview data showed that grants have largely been used for capital expenditure and promotional activities such as e-commerce (an aspect that remains relevant due to the ongoing need for social distancing). Grants have enabled beneficiaries to diversify their businesses, for instance through direct selling, home delivery and exporting seafood. Interview data suggested that some impacts are likely to continue for the medium or long-term e.g. improved website/online presence for advertising. Business resilience has improved in many cases; the RRGF also enabled many beneficiaries to retain jobs. Around 79% of survey respondents stated that one to three jobs were directly supported or created by the grant. Where new jobs were created, 38% thought that these could be permanent positions. However, a few interviewees noted that difficulties remain due to uncertainty around further lockdowns, Covid-19 restrictions in the hospitality sector and the extent their services will be needed, and a lack of clarity about future policy (Brexit) and funding (including any replacement for the European Maritime and Fisheries Fund).

¹ Of the 19 interviews, 14 were undertaken by RPA and five by the Fishing Animateurs, who kindly assisted the study by carrying out the interviews with applicants from the South West of England.

Unsuccessful grant applicants

Unsuccessful applicants were located across the UK with the majority (12 of 31) in the South West of England, reflecting the higher number of applications received from this location. Oversubscription of the RRGF was highlighted as a key reason for unsuccessful applications. Some applicants failed to secure funding as they applied for ineligible expenditure. In a few cases, applicants were awarded less money than they requested and they declined the grant. Unsuccessful interviewees indicated that they did maintain business continuity, but they did not proceed with their projects or diversify.

Comparison of beneficiaries and unsuccessful applicants

For some beneficiaries, grants enabled the implementation of sustainable changes and grant recipients aim to continue the supported business element in the long-term. Such grant recipients are likely to have better future resilience than those who did not receive a grant. However, views on resilience varied amongst beneficiaries implying that there are likely to be variations across the sector dependent on an organisation's circumstances and its position in the supply chain. Beneficiaries also noted that positive business developments, such as newly created job positions and new projects, were due to a wide range of factors and could not always be directly attributed to the grant.

Future needs

Covid-19 has significantly affected exports and highlighted the need to promote local seafood in the UK in the longer term. It has also shown that greater collaboration within the seafood supply chain is needed to absorb or react to future shocks. Some beneficiaries felt that they would be able to further their ambitions themselves because they had diversified thanks to the grant. Others were more uncertain, expressing concerns that their future depended on government decisions on lockdown and restrictions (hospitality sector; direct sellers at the harbour) and that future funding would be required for business continuity. Types of support and initiatives suggested include training opportunities in the seafood industry, technical/marketing support and consumer education through advertising.

Lessons learnt

Industry made many positive comments related to diversification into direct selling and home delivery, observing a higher willingness to pay for seafood amongst consumers. The RRGF gave the opportunity to many beneficiaries to retain jobs and created new employment opportunities in some cases. Difficulties were encountered by single operators due to diversification into direct selling resulting in long working days and multiple demands on their time.

For the funders, collaboration with the Fishing Animateurs in the design and implementation phase helped to ensure ease of access. Having the Animateurs available to assist with applications was also beneficial. One interviewee highlighted this as "*invaluable*" because they see forms as off-putting. Projects were progressed quickly as the standard expenditure approval processes by the Fishmongers' Company were redesigned to ensure a faster turnaround. Recipients commented that the RRGF provided a "rapid response" as its name suggested, enabling beneficiaries to implement their plans quickly and easily. Due to the emergency nature of the fund, some elements of best practice were not followed. Small discrepancies in due diligence, for example in relation to receiving receipts, were accepted in such an emergency situation. This has been recognised by the delivery team as potentially unavoidable due to the exceptional circumstances in which the fund was operating. Process changes resulted in a lack of overall consistency in procedures, but they did facilitate the emergency response.

Conclusions

The RRGF supported 121 beneficiaries across the UK with a range of projects covering diversification, provision of seafood meals and increasing the sale of local seafood. Funding was well received, with appreciation expressed in survey responses and during interviews. Whilst there is ongoing uncertainty surrounding the Covid-19 situation, several beneficiaries commented that they have aspirations to continue with projects such as direct selling to consumers, or even grow new initiatives including home delivery. This suggests the RRGF has a longer-term impact beyond that of emergency support.

Evaluation of the Rapid Response Grant Programme

Report highlights

December 2020

82%

believe that the impact is sustainable and they aim to continue the supported element of business on a permanent basis

65%

said the grant supported direct employment of at least one individual

57%

said the grant allowed their business to continue operating or kept staff in employment instead of furlough

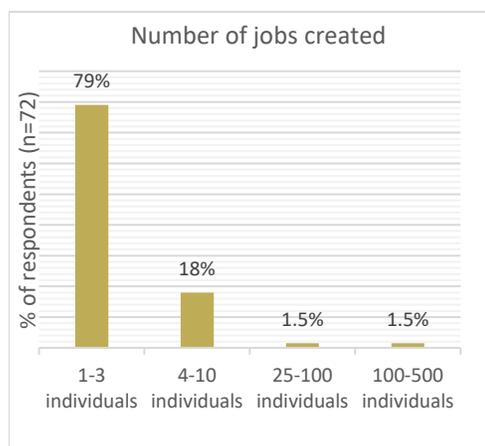
28%

stated that the grant prevented their business from closing

Number of grants awarded in the UK



JOB CREATION & RETENTION



Sources: % based on a survey of grant recipients. Other findings are from the database of grants, survey data and telephone interviews

EVALUATION FINDINGS

- Grants were awarded across the UK, with a large number in the south west of England. Beneficiaries included fishing businesses, fishmongers & merchants, hospitality, wholesalers, trade bodies and community projects
- Grants were mainly used for capital expenditure for projects such as direct selling and small-scale processing
- Grants have provided beneficiaries with an opportunity to diversify or develop new projects
- Grants improved resilience for beneficiaries as a group, but uncertainty remains in relation to easing of Government restrictions and retention of new business post-pandemic

IMPACTS

-  Retention of jobs
-  Creation of new employment
-  Increased profits
-  Support of start-up businesses
-  Heightened links with local communities
-  Increased awareness of locally caught seafood

Grants helped recipients to keep trading, supporting jobs along the supply chain

LESSONS LEARNT

- ✓ Simple application form and rapid pay out of funds were well received
- ✓ Help and support from Fishing Animateurs was valued
- ✓ The RRGP was well-designed and met the needs of the sector
- ✗ Asking people to partner with others, especially competitors, was difficult
- ✗ Uptake of in-kind support was poor, although marketing support was identified by beneficiaries as a future need
- ✗ Difficulties in partnership working during the pandemic meant fewer community initiatives were funded

FUTURE NEEDS

- Promotion of British seafood: customers are willing to pay a premium for locally caught products
- Support for existing distribution networks; and improvements to inland transportation
- Improved practical training opportunities to support apprenticeships
- Access to technical and marketing support for small businesses
- Improvements to waste management across the supply chain

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Glossary

CBILS	Coronavirus Business Interruption Loan Scheme
DAERA	Department of Agriculture, Environment and Rural Affairs
Defra	Department of Environment, Food and Rural Affairs
DSSS	Domestic Seafood Support Scheme
EMFF	European Maritime and Fisheries Fund
ERF	Economic Resilience Fund
FCFCT	Fishmongers' Company's Fisheries Charitable Trust
FHI	Fish Health Inspectorate
FRF	Fisheries Response Fund
FTE	Full-Time Equivalent
MCA	Maritime and Coastguard Agency
MFF	Maritime and Fisheries Fund
MMO	Marine Management Organisation
PO	Producer Organisation
RPW	Rural Payments Wales
RRGP	Rapid Response Grant Programme
SBGF	Small Business Grant Fund
SEISS	Self-Employment Income Support Scheme
SME	Small and medium-sized enterprises
STECF	Scientific, Technical and Economic Committee for Fisheries

1 Introduction

1.1 Overview

This report sets out the approach and findings of the evaluation of the Rapid Response Grant Programme (RRGP). The RRGF was a £500,000 fund run by The Fishmongers' Company's Fisheries Charitable Trust (FCFCT) in partnership with Seafarers UK to assist fishing and seafood businesses and food charities in response to the Covid-19 outbreak.

1.2 Background to the RRGF

1.2.1 The seafood sector and Covid-19

The seafood sector has been significantly impacted by the Covid-19 pandemic affecting businesses throughout its supply chain. For instance, during the first quarter of 2020, the tonnes of fish landed by UK fishing vessels in UK ports decreased by 1% compared to the same period in 2019. Even though landings only decreased by 1%, the overall value of landings declined by 17% to £147.15m with the average price of fish reducing by 15%². Figure 1-1 below shows the decline of UK fish exports in the first quarter of 2020 compared to previous months³. This further indicates the impact Covid-19 has had on the seafood supply chain, including exports.

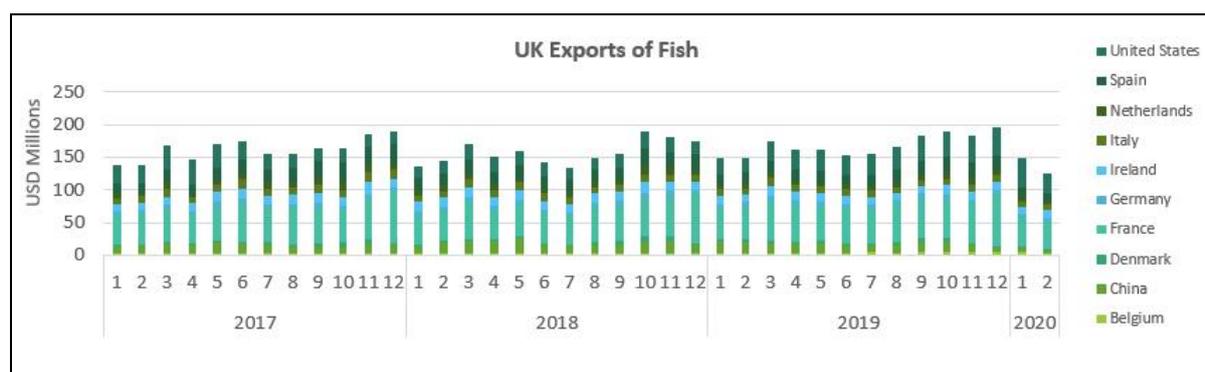


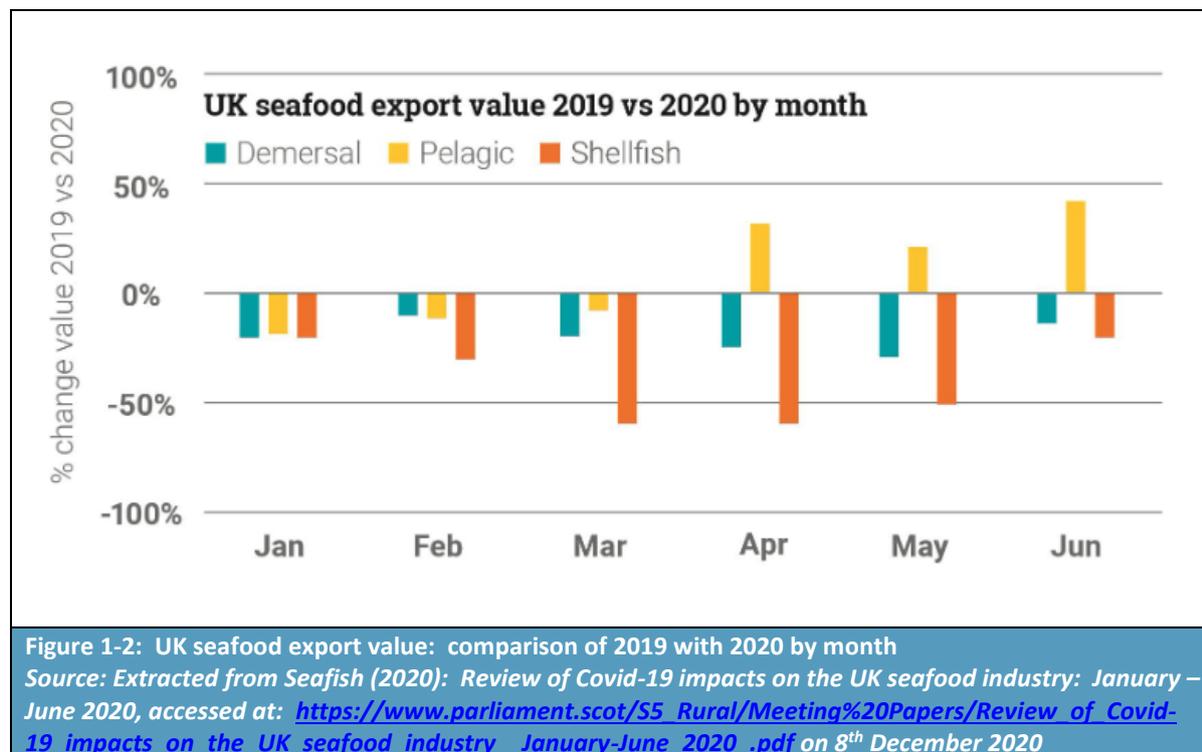
Figure 1-1: The impact of Covid-19 on the UK fishing industry: UK Exports of HS03 (Fish and Crustaceans, Molluscs and Other Invertebrates)

Source: Extracted from HIS Markit (2020): *The impact of Covid-19 on the UK fishing industry*, accessed at: <https://ihsmarkit.com/research-analysis/the-impact-of-covid19-on-the-uk-fishing-industry.html> on 8th December 2020

² MMO (2020): Monthly UK Sea Fisheries Statistics – Reported Landings – March 2020 Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/886652/Monthly_UK_Sea_Fisheries_Statistics_-_March_2020.pdf on 18th November 2020.

³ It should be noted that the first quarter of 2020 only included one week of UK national lockdown, which began on 23rd March 2020, however other countries entered lockdown earlier. Furthermore, the evaluation steering group has indicated that Quarter 1 was also affected by severe storms which stopped boats from fishing.

Figure 1-2 provides further information on the effect on exports during the spring and early summer of 2020. Seafish (2020)⁴ highlights that the value of seafood exports from the UK dropped by 28% for the second quarter (April to June) of 2020 when compared with the figures for 2019.



The fisheries sector includes marine fishing, aquaculture (fish farming) and processing, involving complex supply chains. In coastal communities, fishing facilitates employment and economic activity; in 2018 around 12,000 fishers were active in the UK and approximately 2,400 worked part-time⁵. Moreover, the UK is a leading aquaculture producer in Europe⁶ and aquaculture has been highlighted as one of the UK’s strategic food production sectors⁷. Initiatives are in place to grow the industry including, for example, a strategic plan (Aquaculture Growth to 2030) published by Scotland Food & Drink⁸ and events such as industry workshops (e.g. the Sustainable Aquaculture Industry workshop held in Edinburgh in 2015) and a Sustainable Aquatic Food Supply Knowledge Exchange Fellowship⁷.

The seafood processing sector employed 13,554 staff full-time in 2016 and contributed over £550 million in Gross Value Added to the UK economy in 2014. The Fish and Chip sector, for example,

⁴ Seafish (2020): Review of Covid-19 impacts on the UK seafood industry: January – June 2020, accessed at: https://www.parliament.scot/S5_Rural/Meeting%20Papers/Review_of_Covid-19_impacts_on_the_UK_seafood_industry_January-June_2020.pdf on 8th December 2020.

⁵ MMO (2019): UK Sea Fisheries Statistics 2018. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/863732/UK_sea_fisheries_statistics_2018.pdf on 15th July 2020.

⁶ Seafish (2016): Aquaculture in England, Wales and Northern Ireland: an analysis of the economic contribution and value of the major sub-sectors and the most important farmed species. Available at: http://www.seafish.org/media/publications/FINALISED_Aquaculture_in_EWNI_FINALISED_-_Sept_2016.pdf on 8th October 2019.

⁷ Newcastle University (nd): UK Aquaculture Knowledge Exchange, UK Aquaculture Initiative, available at: <https://research.ncl.ac.uk/ukaquaculture/about/ukaquacultureinitiative/> on 10th October 2019.

⁸ Scotland Food & Drink: Aquaculture growth to 2030, available at: <http://scottishsalmon.co.uk/wp-content/uploads/2016/10/aquaculture-growth-to-2030.pdf> on 10th October 2019.

supports the industry with about 10,500 takeaway fish and chip shops in the UK, jointly providing around 103 million servings of fish and chips annually⁹.

International trade, i.e. imports and exports, have been affected by the pandemic, affecting revenue in the seafood industry. The crisis has subsequently resulted in a decline in demand for seafood products, fishing activities and fish prices¹⁰. Impacts on the seafood industry include severe disruption to export markets; closure of high-end markets (hotels/restaurant trade) all over Europe resulting in the disappearance of normal demand for fresh products; increased cost and risk for suppliers due to interrupted input supply; staff illness/shortages/furlough; cash flow issues for SMEs; and delays in restocking^{11,12}. Seafood retail has been comparatively stable with an increased demand for seafood products with longer shelf life during lockdown⁴. There is, however, continual uncertainty as indicated by news coverage relating to the second lockdown¹³.

1.2.2 The RRGF

The RRGF was set up by The Fishmongers' Company's Fisheries Charitable Trust (FCFCT) and Seafarers UK. Seafarers UK provided £250,000 with match-funding from the FCFCT, creating a £500,000 fund designed to assist fishing and seafood businesses and food charities. In particular, the RRGF sought to¹⁴:

1. Diversify opportunities for seafood and fisheries businesses;
2. Promote consumption or sale of local seafood; and
3. Provide community meals using seafood.

The programme made a range of grants available, as follows:

- Up to £4,000 for applications where the main beneficiary was a single, registered company;
- Up to £10,000 for community-focused projects involving multiple companies or stakeholders; and
- Up to £25,000 for scalable projects and initiatives that supported multiple businesses, stakeholders and benefit communities (i.e. Fishing Associations, Auctions/Markets, Producer Organisations).

Research was commissioned to evaluate the RRGF to determine how the application process worked, who was awarded grants and what the impacts of the funding are. The research also looked at what unsuccessful applicants did in the absence of RRGF funding and what further support was/is desired. Finally, the identification of lessons learnt should assist grant providers and the industry going forwards.

⁹ Seafish (2018): Seafood industry factsheet. Available at: https://www.seafish.org/media/publications/SIF7_FS_March_2017.pdf on 15th July 2020.

¹⁰ Ibis World (2020): Marine Fishing in the UK - Market Research Report. Available at: <https://www.ibisworld.com/united-kingdom/market-research-reports/marine-fishing-industry/> on 15 July 2020

¹¹ FAO (2020): Covid-19 disrupts bivalve production and trade. Available at : <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1296657/> on 15th July 2020.

¹² FAO (2020): Summary of the Impacts of the Covid-19 Pandemic on the Fisheries and Aquaculture Sector. Available at: <http://www.fao.org/3/ca9349en/CA9349EN.pdf> 15th July 2020.

¹³ For example, see BBC News (2020): Covid lockdown: 'Feeling of dread' for fishing industry, available at: <https://www.bbc.co.uk/news/uk-england-cornwall-54793242> on 18th November 2020.

¹⁴ Fish on Friday (2020): Covid-19 grants for fishermen & seafood businesses. Available at: <http://fishonfriday.org.uk/covid-19-grants-fishermen-seafood-businesses/> on 10th August 2020.

1.3 Aims and objectives of the evaluation

The aims of the evaluation are to:

- Identify the measures taken by the fishing and seafood industry during the Covid-19 crisis; and
- Assess the impact of the RRGF on seafood businesses in the UK.

The objective, as outlined in the specifications, is to produce a report that intends to:

1. Provide an overview of private¹⁵ and government Covid-19 grant programmes for the fishing and seafood trade sector

- Grant Programmes: Rapid Response Grant Programme/Fisheries Response Fund/ Domestic Seafood Supply Scheme/Scottish Government's Seafood Resilience Fund/Welsh Fisheries Fund/Northern Ireland's Finance Scheme;
 - Objectives of the grant;
 - Funds available;
 - Grant procedures, restrictions, and timelines;
 - Grant eligibility and requirements;
 - Number of beneficiaries awarded/applied;
 - Average size of the grant;
 - Type of projects funded; and
 - An analysis of the grant application and the decision-making and evaluation process.

2. The impact of the RRGF on beneficiaries

- Use and impact of the grant, including the longevity of the measures taken during lockdown to diversify businesses (i.e. immediate impact only, medium, or long-term impact);
- Who the beneficiaries were (i.e. industry, size, location of business, type of business);
- Challenges and opportunities that were encountered due to diversifying;
- Case studies on what worked well, what failed, and why;
- The status and resilience of these businesses; and
- Future projections for these businesses.

3. An analysis of businesses who failed to secure private or public grants

- Identification of the reason as to why some businesses were not successful (i.e. oversubscribed fund, incomplete/poor application, not eligible)
- Who the businesses were (i.e. industry, size, location of business, type of business)
- Actions taken by these businesses during the crisis to survive/diversify
- Case studies on what worked well, what failed, and why
- The status and resilience of these businesses
- Future projections for these businesses

4. Market disruption and distortion

- Comparison of the resilience of grant beneficiaries and businesses that failed to secure public or private funds; and

¹⁵ Note that private in this instance is interpreted as charitable (rather than referring to grants provided by individuals).

- An analysis of the impact of Covid-19 grant programmes on pre-Covid-19 seafood supply chains in the short, medium, and long-term.

5. Future needs/recommendations

- Direction of travel for the industry;
- Projections for future funding needs;
- Additional support that could be taken by the charitable sector to assist the seafood industry in the future;
- Additional support that could be taken by the public sector to assist the seafood industry in the future; and
- A portfolio of initiatives/projects that could be nurtured to the benefit of the UK seafood sector.

6. Lessons learnt

1.4 Structure of this report

The remainder of the report is structured as follows:

- Section 2 provides information on the approach to the evaluation;
- Section 3 presents information on charitable and government Covid-19 programmes and draws comparisons;
- Section 4 considers the impacts of the RRGF on beneficiaries including who has benefited, how the funding has been used and what the impacts of the funding have been;
- Section 5 looks at wider impacts for the seafood industry including comparisons with businesses who failed to secure grants;
- Section 6 looks at future needs including support that could be provided to the seafood industry;
- Section 7 provides some overall conclusions;
- Section 8 presents lessons learnt. This section has been developed to function as a standalone document to enable lessons learnt to be shared;
- Annex 1 provides detailed information on the approach to the evaluation; and
- Annex 2 provides the interview questions.

2 Approach to the Evaluation

2.1 Overview

Section 2 provides a brief overview of the approach taken to the evaluation including the development of the evaluation framework, the data collection process and the methods for analysis. Detailed information on the approach is provided in Annex 1.

2.2 Evaluation framework

The evaluation framework can be found in Section A1-2. This starts from the study objectives and presents the evaluation questions, sub-questions and indicators. It also identifies the data sources for each indicator. The evaluation framework sets the scope for the study and has been used to guide the data collection and analysis.

2.3 Data collection

Several data sources were provided by The Fishmongers' Company's Fisheries Charitable Trust for use in the evaluation. These included application data, survey data and a transactions report. In addition to this, two separate data collection activities were carried out by the evaluation team:

- Internet research to collect information on other funding programmes; and
- Engagement through telephone interviews.

The interview questions were based on the evaluation framework, with the sub-questions and indicators guiding the topics that needed to be covered. A set of interview questions was developed for three stakeholder groups, namely the delivery team, successful grant applicants and unsuccessful grant applicants. The interview questions are provided in Annex 2.

For the applicant interviews, a sample was selected for interview. Due to the variety amongst stakeholder types we applied a purposive sampling method. This took account of a range of criteria such as location, grant size, etc. (further information is in Section A1.3.2). With the assistance of the Fishing Animateurs, a total of 19 interviews was held, which represents 39% of applicants contacted.

2.4 Analysis

The evaluation framework was used to provide a structure for the analysis and identify which of the various datasets available (i.e. application data, survey data, internet research or data from interviews) were relevant to each indicator or sub-question.

Quantitative data analysis was carried out in MS Excel to enable the calculation of averages, percentages, etc. Qualitative data were analysed by grouping together information for review to identify key points and commonalities or differences between the data sources. Some elements of the survey data, such as open-ended questions, were analysed thematically to highlight common themes. A deductive approach was used, drawing on the evaluation framework as a basis to identify the themes. More information on data analysis is provided in Section A1-4.

The conclusions were drawn through summarising the key aspects under each part of the evaluation framework. The lessons learnt were developed from information identified directly from applicants (e.g. through interviews), but also from the analysis where issues were apparent.

3 Charitable and Government Covid-19 Programmes

3.1 Overview

This section considers the various charitable and government Covid-19 grant programmes that were made available to the fishing and seafood trade sector.

3.2 Key details for Government programmes

The RRGP was originally designed to fill a gap in support for the fishing and seafood trade sector at a time when no government support had been announced. Subsequently, grant programmes were announced by HM Treasury, the Scottish Government, the Welsh Government and the Northern Ireland Government, resulting in a suite of grant funds for the UK fishing and seafood trade sector, as follows:

- Fisheries Response Fund;
- Domestic Seafood Supply Scheme;
- Scottish Seafood Business Resilience Fund;
- Welsh Fisheries Grant; and
- Northern Ireland finance scheme.

Additional amendments were also made to the European Maritime and Fisheries Fund (EMFF) to give further support to the fisheries and aquaculture sectors in response to Covid-19.

Key details of the programmes provided by the Devolved Administrations and UK Government (for England) are provided in Tables 3-1 to 3-5 below.

Criteria	Details
Objectives of the grant	<p>Financial assistance for England's fishing and aquaculture businesses in response to Covid-19. Set up to help support fixed business costs of English fishing vessels and to provide immediate assistance with the ongoing production costs of aquaculture businesses, specifically shellfish and trout farms in England, producing food for direct human consumption.</p> <p>Directly contributed towards the fixed business costs of over 1000 catching and aquaculture businesses that have been adversely impacted by the downturn of export and domestic markets for fish and shellfish</p>
Funds available	£9 million fund announced by Defra and HM Treasury. Around £1 million of the FRF has been allocated to the aquaculture sector and around £8 million to the catch sector with grants of up to £10,000 per farm/vessel to assist with ongoing costs
Grant procedures, restrictions, and timelines	Announced on 17 April 2020. Administered by the MMO on behalf of Defra. Qualifying fishing vessel owners were contacted directly by email in stages by MMO from 20 April 2020, starting with the smaller vessels. Qualifying aquaculture businesses were contacted directly by MMO from 7 May 2020. The email contained an application form along with other documents, including a privacy notice and declaration. The application form needed to be completed then returned to MMO by email along with other required documents, including identification and banking information. Eligible vessel owners received fund payments for up to three months, with initial payments paid to cover 2 months (April and May 2020). Payments were

Table 3-1: Fisheries Response Fund (FRF)

Criteria	Details
	<p>made directly into nominated business bank accounts. Fund payments were extended to a third month, based on a review of industry and market conditions. MMO began emailing or calling eligible trout and shellfish aquaculture farms registered with the Fish Health Inspectorate from 7 May 2020. The email contained an application form to be completed, signed, and returned to MMO by email along with other required supporting documents, including identification and banking information, by 22 May 2020. Eligible businesses received one payment covering two months. Fund payments were extended to a third month, based upon a review of industry and market conditions. Eligible businesses received payment directly into their nominated business bank account. The MMO aimed to process payments within 24 hours of approval of the application form.</p> <p>The following aquaculture businesses were excluded:</p> <ul style="list-style-type: none"> • Farms that only produce trout or other fish to restock lakes; • Shellfish hatcheries, or businesses involved in the supply of juvenile fish or juvenile shellfish for aquaculture, or purifying shellfish prior to consumption (depuration); • Farms that supply ornamental fish, or research bodies; • Aquaculture businesses that had already benefitted from the Fund (to ensure they were not paid twice for the same business activity); and • Other aquaculture fish for human consumption such as tilapia, sturgeon or carp. <p>Eligible businesses could also apply for other government assistance. However, because the fishing industry is a sector that has benefitted from other state aid funding, this fund was subject to the temporary state aid framework, which may mean some projects and organisations were not applicable. This applied if the undertaking has received other forms of support provided under the temporary state aid framework including the: Fisheries Response Fund (FRF), the Domestic Seafood Support Scheme (DSSS), Small Business Grant Fund (SBGF), Coronavirus Business Interruption Loan Scheme (CBILs), or Bounce Back Loans, and the total amount of benefits received from all schemes has exceeded €120,000 (around £105,000). Note this includes the value of the fees and 12 months interest received from the CBILS or Bounce Back Loan, not the amount of the loan</p>
Grant eligibility and requirements	<p>Based on average fixed business costs, with fishing business vessel owners having to meet set criteria. Qualifying fishing business vessel owners must meet the following criteria:</p> <ul style="list-style-type: none"> • They must be the owner of an English registered fishing vessel under 24m (overall length); • The vessel must be currently registered with the Maritime and Coastguard Agency (MCA); • The vessel must be licenced to fish by MMO; and • The vessel must have sales of £10,000 or more as recorded on sales notes supplied to Registered Buyers and Sellers, during the period 1 March 2019 to 23 March 2020. <p>To qualify, eligible aquaculture businesses must:</p> <ul style="list-style-type: none"> • Be an active shellfish or trout farm in 2018; • Be located in England and produce shellfish or trout for direct human consumption; • Have a Fish Health Inspectorate authorisation number for the business; • Have a Fish Health Inspectorate authorisation number for the farm; and

Table 3-1: Fisheries Response Fund (FRF)	
Criteria	Details
	<ul style="list-style-type: none"> Businesses may apply for or already be in receipt of government support already announced, provided they do not exceed the temporary state aid framework limit. <p>Fishing vessel owners may continue to fish and may also qualify to receive payment in addition to other government assistance, including the business loan scheme, self-employed income support scheme and other benefits. Where businesses have farms that produce both trout for human consumption and restocking trout, the full-time equivalent employees (FTE) band will be calculated in proportion to the production of their direct table trout output, based on 2018 data. Businesses that opened or expanded their employee FTE number in 2019 will be required to provide verifiable evidence of production volumes and FTE employee numbers in 2019. Where a business runs more than one farm, the recorded total number of FTE employees was apportioned pro-rata across each farm</p>
Number of beneficiaries / applied	More than 1200 fishing and aquaculture businesses received payments from the Fund for April and May ¹⁶
Average size of grant	<p>As of June 2020, the average value of grants paid was:</p> <ul style="list-style-type: none"> Catch sector: £4,800 (based on 1163 payments totalling £5.6 million), the maximum available was £10,000 per vessel Aquaculture: £8,700 (based on 75 payments totalling £649,000), the maximum available was £10,000 per farm
Type of projects funded	The fund was focused on providing financial assistance to businesses that have been adversely impacted by the loss of export and domestic markets for fish and shellfish. In the aquaculture sector, the FRF particularly emphasised shellfish and trout farms in England for food production for direct human consumption
Grant decision-making and evaluation process	Funds payable under the FRF to fishing vessel owners for fixed business costs were calculated from the average fixed business costs for the size of vessels, as surveyed and published by the Sea Fish Industry Authority (Seafish), in their 2018 economic survey. Fund payment amounts vary according to the overall length of the vessel ¹⁷ . Aquaculture businesses will be categorised into funding bands, according to the number of FTEs, as recorded in 2018, from the latest validated records available from the Fish Health Inspectorate (FHI). These data were selected as the best available verifiable data for the sector, providing an indicator of scale and business performance. Fund payment amounts for aquaculture were based upon average ongoing production costs per number of FTE employees, published in the latest available data from the Scientific, Technical and Economic Committee for Fisheries (STECF) (2016) and increased to account for inflation
<p>Source: Guidance: Fisheries Response Fund - support for fishing and aquaculture businesses, available at: https://www.gov.uk/government/publications/fisheries-response-fund-support-for-fishing-and-aquaculture-businesses on 18th November 2020.</p>	

¹⁶ Update on Fisheries Response Fund: Further payment for eligible businesses, available at: <https://www.gov.uk/government/news/update-on-fisheries-response-fund-further-payment-for-eligible-businesses> on 18th November 2020.

¹⁷ UK Government: Guidance: Payments to the catching sector from the Fisheries Response Fund (FRF) available at: <https://www.gov.uk/government/publications/fisheries-response-fund-support-for-fishing-and-aquaculture-businesses/payments-to-the-catching-sector-from-the-fisheries-response-fund-frf> on 18th November 2020.

Table 3-2: Domestic Seafood Supply Scheme (DSSS)	
Criteria	Details
Objectives of the grant	Provided grant funding for seafood businesses in England to help fund projects that increase the sale and supply of local seafood to domestic markets and increase consumption of locally caught seafood. In the longer term, the aim of the fund is to assist local economies of coastal communities to further improve food security and help ensure the UK population has ready access to a healthy and nutritious food source. Specific objectives cover aspects such as facilitating new growth in markets
Funds available	£1 million grant scheme. Funded by HM Treasury and the Maritime and Fisheries Fund (MFF). Applications were considered for grants up to £100,000
Grant procedures, restrictions, and timelines	<p>Announced on 17 April and opened on 29 April. Administered by the MMO as a collaboration between Defra, MMO, Seafish and the fishing industry. DSSS application forms were available to download from 2pm Wednesday 29 April 2020. The deadline for applications ended on 11 May 2020.</p> <p>Projects were assessed by a panel including industry representatives. Successful applications were announced from Friday 15 May. Applicants could apply for all or part of the total cost of the project. To allow projects to progress at pace, applicants received 25% of the grant award in advance. Because the fishing industry is a sector that has benefitted from other state aid funding, this fund is subject to the temporary state aid framework, which may mean some projects and organisations may not be applicable. This applies if the undertaking has received other forms of support provided under the temporary state aid framework including the Fisheries Response Fund (FRF), Coronavirus Business Interruption Loan Scheme (CBILs) and Bounce Back Loan scheme, and the total amount of benefits you have received from all schemes has exceeded €120,000 (around £105,000). Note this includes the value of the fees and 12 months interest received from the CBILs and Bounce Back Loans, not the amount of the loan.</p> <p>DSSS did not fund:</p> <ul style="list-style-type: none"> • Projects where the sole aim was communications or marketing campaigns; • Consultancy/facilitation services (beyond 15% of the overall project value); or • Projects that had already been fully funded or were seeking full funding from other schemes
Grant eligibility and requirements	Applicants from fishing, aquaculture and seafood processing industries engaged in activities which support the seafood supply chain in England could bid for funding (with or without match funding, although match funding scored higher). The DSSS provided grant funding to projects that help to increase the supply of local seafood to domestic markets and help to increase consumption of locally caught seafood in the UK (whether live, fresh, landed and/or processed in England). Local seafood is defined as seafood landed in England and/or processed in England. This includes the use by English businesses of seafood landed into English ports by vessels or businesses that are not registered or owned in England. The DSSS was a competitive process, with grants being awarded for projects to a maximum of £100,000. Applicants could also apply for, or be in receipt of, a wide range of government schemes already announced to support businesses and individuals impacted by the Covid-19 pandemic
Number of beneficiaries / applied	As of 12 June, 20 projects have been approved with a total of £1,022,547 funding ¹⁸

¹⁸ MMO (2020): DSSS - List of approved projects. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/892089/DSSS_Approved_Projects_12.06.2020.csv/preview on 14th July 2020.

Table 3-2: Domestic Seafood Supply Scheme (DSSS)

Criteria	Details
Average size of grant	The average size of grant was approximately £51,000
Type of projects funded	<p>Projects were selected that could demonstrate they brought the greatest benefit to the industry as a whole, working across communities and regions, or with partners. The scheme funded measures that assisted the industry to set up local and regional distribution such as plant and equipment to help with local fish processing, or assets that could be shared at port such as storage and refrigerated vans.</p> <p>The awards panel placed priority on projects that:</p> <ul style="list-style-type: none"> • Had the potential to provide an economic return; • Were able to support multiple businesses; • Addressed the gaps in existing support; • Supported plant and equipment to help with local fish processing; • Supported resources that could be shared at port, such as storage or refrigerated vans; • Supported projects where private co-ordination/co-operation might not currently be viable, for example projects with a ‘regional’, ‘national’ or ‘sectoral’ focus; • Had the majority of budget on assets, rather than salaries; • Paid due regard to all legal, regulatory and health and safety issues, understood any risks involved and had mitigation in place; • Were achievable in the immediate to short term to deliver benefits at pace; • Supported the longevity of seafood post Covid-19; • Were able to provide an element of match funding, though this was not essential; and • Provided value for money.
Grant decision-making and evaluation process	<p>A competitive scheme with a panel including industry representatives assessing the applications. The panel assessed and scored projects against the criteria below:</p> <ul style="list-style-type: none"> • Facilitate new growth in markets through innovative regional distribution; • Support the development of infrastructure to sell seafood landed into English ports, or seafood processed in England to domestic consumers; • Help develop the infrastructure necessary for the catching and processing sectors to connect directly with consumers (e.g. either through online platforms or through facilitation on the ground); and • Have the potential to generate longer-term sustainable benefit to the seafood industry, creating supply chain resilience. <p>The panel was looking for projects that:</p> <ul style="list-style-type: none"> • Create physical infrastructure that support new routes to market, which may need funds for storage or transportation; • Create digital infrastructure that support new markets such as the development of an online platform; or • Aim to improve regional distribution through existing networks or connect previously unconnected regions in England.
<p>Source: Guidance: Domestic Seafood Supply Scheme (DSSS): how to apply for project funding: https://www.gov.uk/guidance/domestic-seafood-supply-scheme-dsss-how-to-apply-for-project-funding on 18th November 2020.</p>	

Table 3-3: Scottish Seafood Business Resilience Fund	
Criteria	Details
Objectives of the grant	Emergency support for seafood processors in Scotland during the coronavirus outbreak to address sudden shortages or unavailability of finance due to the pandemic. Launched to assist seafood processors impacted by the collapse of international markets and the shutdown of the UK's food service industry due to Covid-19. Funding made available to those businesses who were suffering severe hardship. The support went towards meeting the businesses' operational fixed costs
Funds available	£10 million fund which had paid out grants of £5.6 million by 3 June 2020, by which time applications had closed. The maximum level of grant varied depending on the business and the application, with the absolute maximum available being £100,000
Grant procedures, restrictions, and timelines	<p>Announced on 13 April 2020. Applications to the Scottish Seafood Business Resilience Fund are now closed. Applications were via an application form to be sent via email. Funds were intended to be administered as quickly as possible to enable owners to continue to operate or to remain closed but keep their business afloat until they are able to begin production. The maximum level of grant available for businesses with average annual earnings over a 3-year period <i>up to</i> £1.5 million did not exceed 4% of those earnings. The maximum level of grant for businesses with average annual earnings over a 3-year period <i>over</i> £1.5 million did not exceed 3% of those earnings, up to a maximum level of grant of £100k. The amount of grant provided was to cover the actual fixed costs encountered. The grant was paid as a lump sum by electronic bank transfer.</p> <p>Grant payments were made under and were subject to the rules and conditions of the Temporary Framework for State aid measures to support the economy in the current Covid-19 outbreak.</p> <p>The grant could only be used for the purposes of enabling the undertaking to continue to meet its fixed costs during the Covid-19 pandemic period and for no other purpose. In particular, the grant must not be used for any of the following purposes:</p> <ul style="list-style-type: none"> • Payment towards staff wages; • Payment to primary producers (if the grantee is active in processing and marketing of products); • Payment to offset debt from a business that has permanently ceased trading; • Transfer of ownership of a business; or • Winding up costs for a business which decides to permanently close. <p>Evidence of the fixed costs had to be provided with the application</p>
Grant eligibility and requirements	<p>Applicants had to provide:</p> <ul style="list-style-type: none"> • Evidence of fixed costs; • Evidence of earnings over the past 3 years; • Business bank details; • Evidence of identification; • Evidence of hardship/difficulty; and • State aid information
Number of beneficiaries / applied	Had supported 128 companies by 3 June 2020
Average size of grant	The average value of the grant was approximately £44,000
Type of projects funded	Shellfish and seafood processing businesses received immediate priority for consideration. The fund was targeted initially at all seafood processors and seafood

Table 3-3: Scottish Seafood Business Resilience Fund	
Criteria	Details
	businesses including those involved in exporting live seafood and shellfish and, in doing so, undertake associated husbandry
Grant decision-making and evaluation process	The amount granted to the Grantee was calculated on a case by case basis, based on the Grantee's fixed costs as evidenced, and subject to a cap based on a percentage of the Grantee's average annual earnings over the last 3 years. The Grantee's average earnings were calculated by reference to the Grantee's gross income (without deduction of costs)
<p>Sources: Scottish Government: Scottish Seafood Business Resilience Fund, available at: https://www.gov.scot/binaries/content/documents/qovscot/publications/form/2020/04/scottish-seafood-business-resilience-fund-application-form/documents/application-form-pdf/application-form-pdf/govscot%3Adocument/Food%2Band%2BDrink%2B-%2BResilience%2B-%2BCovid%2B19%2B-%2BSeafood%2B-%2BScottish%2BSeafood%2BBusiness%2BResilience%2BFund%2B-%2BApplication%2BForm.pdf on 18th November 2020</p> <p>Scottish Government (2020): Support for seafood industry, accessed at: https://www.gov.scot/news/support-for-seafood-industry/ on 19th November 2020</p>	

Table 3-4: Welsh Fisheries Grant	
Criteria	Details
Objectives of the grant	A grant to help vessel owning fishing businesses in order to support the viability of the Welsh seafood sector beyond the immediate effects of Covid-19. The grant scheme was developed to bridge the gap in the support provision for this sector, beyond other recently announced interventions, including the Economic Resilience Fund (ERF), Self-employment Income Support Scheme (SEISS), and Job Retention Scheme. The aim of the grant scheme was to help sustain fishing businesses in Wales through any short-term economic disruption, to ensure vessels continue fishing beyond the Covid-19 public health crisis. The new grant helped to cover fixed costs associated with owning a fishing vessel
Funds available	This support package provided a one-off grant payment. A payment was available for eligible fishers, equivalent to two months' average fixed costs, with a maximum limit of £10,000 for any one vessel. Vessels up to 10m received a one-off grant of £2,966, from 10.01m to 11.99m £8,700, and from 12m to 40m £10,000. The grant was open to all active seafood businesses with Welsh-licensed vessels and recorded sales of £10,000 or more in 2019
Grant procedures, restrictions, and timelines	<p>The online application window opened on 23 April 2020. Completed applications must have been submitted no later than 31 May 2020. Once received, completed applications were reviewed and, subject to all the necessary checks, the grant payment was made, with the expected payment process likely to take approximately 10 working days from receipt of a complete online application form. Support was available for those who require digital assistance, but payment through this method was expected to take longer.</p> <p>Applicants had to create a Government Gateway account in order to access and register with Rural Payments Wales (RPW Online). Recipients must not have been eligible for funding from other Covid-19 financial support (for example the Economic Resilience Fund), that overlaps/compensates for the same loss. This excluded the Self-employment Income Support Scheme (SEISS). If the vessel that was being claimed for had multiple owners, only one application per vessel was accepted. If multiple vessels were owned, a single application was required for all vessels. Funding had to be used solely for the purposes of enabling the undertaking to continue to operate vessel(s) during the Covid-19 pandemic period and for no other purpose whatsoever</p>

Table 3-4: Welsh Fisheries Grant	
Criteria	Details
Grant eligibility and requirements	<p>Eligibility:</p> <ul style="list-style-type: none"> Active fishing businesses with Welsh-licensed vessels up to 40 metres in length and recorded sales of £10,000 or more in 2019; and New entrants were considered on a case by case basis and will need to provide evidence. <p>Criteria:</p> <ul style="list-style-type: none"> All vessels applying for the scheme were required to be currently licensed by the Welsh Government; All vessels must have statutory sales data held by Welsh Government of £10,000 or more with a registered buyer in 2019; Recipients of the grant were asked to indicate their intention to continue to fish for a minimum period of six months, unless there were mitigating circumstances which would prevent this; Recipients must not have been in financial difficulty on 31st December 2019; and Recipients must not have been eligible for funding from other Covid-19 financial support (for example the Economic Resilience Fund), that overlaps/compensates for the same loss, excluding the SEISS
Number of beneficiaries / applied	<i>No data</i>
Average size of grant	<i>No data</i>
Type of projects funded	The grant was open to all active seafood businesses with Welsh-licensed vessels and recorded sales of £10,000 or more in 2019, and all eligible fishers were provided with a one-off payment
Grant decision-making and evaluation process	<p>This grant was calculated on the size of vessel and payable to all licensed vessel owners in Wales upon successful application to Welsh Government meeting all relevant eligibility criteria, with a maximum payment of £10,000.</p> <p>Based on the average fixed costs of Welsh vessel(s). Average fixed costs have been calculated over a defined period. The information on which the grant was based was provided by Seafish, a non-departmental public body (NDPB), who carry out an annual UK fleet survey to generate estimates of vessel accounts; with landings and capacity data for all active UK fishing vessels provided by the UK Marine Management Organisation (MMO)</p>
<p>Source: <i>Welsh Fisheries Grant: Application Guidance Notes</i>, available at: https://gov.wales/sites/default/files/publications/2020-04/welsh-fisheries-grant-using-rpw-online-to-apply.pdf on 18th November 2020.</p>	

Table 3-5: Northern Ireland finance scheme	
Criteria	Details
Objectives of the grant	A grant to help support the fishing industry during the Covid-19 pandemic. The grant was designed to help the fishing fleet to cover their fixed costs for three months, to ensure there was a profitable fishing industry to return to, once Covid-19 subsidies. A second emergency support package aimed to help aquaculture businesses that had experienced a significant drop in sales as a result of the Covid-19 pandemic, and help this sector to continue its work in growing, harvesting, shipping and delivering to customers all over the world and help the sector to be sustainable and profitable in the long term

Table 3-5: Northern Ireland finance scheme

Criteria	Details
Funds available	£1.5 million package for the fishing industry. The assistance was for three months with a maximum amount of total funding per undertaking capped at around £104,000, varying with vessel size. Vessel lengths of 0-10 metres received £1,050; 10.01-11.99 metres - £1,800; 12.00-14.99 metres - £3,550; 15 metres and over - £4,550. A second package for the aquaculture sector was worth £360,000
Grant procedures, restrictions, and timelines	Grant funds were delivered via monthly payments. The first payments were made early in May 2020. Vessels over 28 metres were not eligible for the support scheme. The aquaculture support fund of up to £360,000 was in the form of a grant payment, covering the three-month period from 1 March to 31 May 2020 and was based on the income lost from sales of aquaculture products due to Covid-19. Average monthly sales over the past three years for each business were used as the baseline. Payments were made directly to eligible shellfish growers and trout farmers
Grant eligibility and requirements	The following conditions applied to the fishing package: <ul style="list-style-type: none"> • The vessel must be a fishing vessel registered in Northern Ireland; • The vessel must normally be active during the period March to May; • The vessel must have had fish landings of at least £10,000 in 2019; • Vessels of overall length 28m and over were not eligible; and • The vessels must be available to fish if there is a market for their product (i.e. this is not a “tie-up” scheme)¹⁹
Number of beneficiaries / applied	<i>No data</i>
Average size of grant	<i>No data</i>
Type of projects funded	Grants for the catch sector were to cover fixed costs for three months. The aquaculture scheme aimed to assist producers of species like oysters and trout. This funding helped those businesses most at risk of financial ruin to survive
Grant decision-making and evaluation process	This grant was calculated on the size of vessel and payable to all licensed vessel owners in Northern Ireland upon successful application and meeting all relevant eligibility criteria. An initial support package for the fishing industry was followed by a further support package tailored to the aquaculture sector, replacing income lost from sales during the pandemic; average monthly sales over the past three years for each business were used as the baseline
<p><i>Sources: Department of Agriculture, Environment and Rural Affairs: Poots announces £1.5m support package for fishing industry, available at: https://www.daera-ni.gov.uk/news/poots-announces-ps15m-support-package-fishing-industry on 18th November 2020.</i></p> <p><i>Department of Agriculture, Environment and Rural Affairs: Poots announces £360k support for aquaculture sector, available at: https://www.daera-ni.gov.uk/news/poots-announces-ps360k-support-aquaculture-sector# on 18th November 2020.</i></p>	

¹⁹ A subsequent ‘tie-up’ scheme has been announced by DAERA, Northern Ireland covering two tie-up periods between mid-October and the end of November. There is a £1.7 million pot of funding for fishers to stop fishing for six weeks. The mobile gear scheme is funded through the European Maritime and Fisheries Fund (under the Temporary Cessation Measure), with the static gear scheme supported by national resources. All owners of registered trawlers and dredgers will be contacted directly by the Department. Source: Department of Agriculture, Environment and Rural Affairs: A further £1.7 million allocated to NI’s fishing fleet, 5th October 2020, available at: <https://www.daera-ni.gov.uk/news/further-ps17million-allocated-nis-fishing-fleet> on 20th November 2020.

3.3 Comparison of Government programmes with the RRGF

Overview

Of the five government grant programmes examined in this study, only one is also a competitive scheme: the Domestic Seafood Supply Scheme. The four other grants (Fisheries Response Fund, Scottish Seafood Business Resilience Fund, Welsh Fisheries Grant and the Northern Ireland finance scheme) are non-competitive and target fixed costs in order to provide emergency support to the catching, processing and aquaculture sectors. All programmes were set up to provide financial assistance to seafood sector businesses in response to Covid-19.

Table 3-6 compares the RRGF with the five government grant programmes. Reviewing the six programmes considered, only the RRGF spans the whole of the UK. Thus, an applicant located in any one of the four UK nations would have had access to their government’s scheme and the RRGF.

Criteria	Rapid Response Grant Programme	Fisheries Response Fund	Domestic Seafood Supply Scheme	Scottish Seafood Business Resilience Fund	Welsh Fisheries Grant	Northern Ireland finance scheme
Created/ funded by	The Fishmongers’ Company’s Fisheries Charitable Trust and Seafarers UK	Defra and HM Treasury	HM Treasury and Maritime and Fisheries Fund	Scottish Government	Welsh Government	Northern Ireland Government /EMFF
Administer -ed by	The Fishmongers’ Company	MMO	MMO	Scottish Government	Welsh Government	Northern Ireland Government
Beneficiaries	UK fishing and seafood industry	English catching and aquaculture businesses	English seafood businesses	Scottish seafood processors	Fishing and aquaculture businesses with Welsh licensed vessels	Northern Irish fishing and aquaculture businesses
Fund size	£500,000	£9 million: £8 million for fishing; £1 million for aquaculture	£1 million	£10 million. Had paid out grants of £5.6 million by application deadline of 3 June 2020	No data	£1.5 million for fishing sector; £360,000 for aquaculture sector (additional £1.7 million scheme for fishing sector announced October 2020)

Table 3-6: Comparison of grant programmes designed to mitigate the economic effects of Covid-19

Criteria	Rapid Response Grant Programme	Fisheries Response Fund	Domestic Seafood Supply Scheme	Scottish Seafood Business Resilience Fund	Welsh Fisheries Grant	Northern Ireland finance scheme
Number of beneficiaries	129 organisations	1,200+ businesses	20 projects, totalling £1,022,547 in funding	128	No data	No data
Maximum size of grant	£25,000	£10,000 per farm / vessel	£100,000	£100,000	£10,000 per vessel	£104,000 per undertaking
Average size of grant ¹	£4,000	£4,800 (catch sector) £8,700 (aquaculture)	£51,000	£44,000	-	-
Application period	7 April – 1 June	Qualifying businesses contacted directly by MMO	29 April – 11 May 2020	13 April - 3 June	23 April – 31 May	-
Period funding covers	April – June 2020	April – June 2020	-	-	-	March – May 2020
One-off payment	Y	N	Y	Y	Y	N
Competitive scheme	Y	N	Y	N	N	N
What is the fund directed towards?	Diversification opportunities for seafood and fisheries businesses; Promoting consumption or sale of local seafood; Providing community meals using seafood	Fixed business costs of fishing vessels; ongoing production costs of aquaculture businesses	Projects that increase the sale and supply of local seafood to domestic markets and increase consumption of locally caught seafood	Operational fixed costs	Fixed costs associated with owning a fishing vessel	Fixed costs

Notes: ¹ the mean size of grant for the RRGP is based on the information provided in the detailed transactions report (supplied 1st October 2020). This indicates that grants awarded by the RRGP ranged from just over £1,000 to £25,000 per organisation

Size of grants

Table 3-6 shows that size of grant varied by fund with a maximum of £104,000 per undertaking for the Northern Ireland finance scheme. The RRGP made a range of grant sizes available, as follows:

- Tier 1: up to £4,000 for applications where the main beneficiary was a single registered company;
- Tier 2: up to £10,000 for community-focused projects involving multiple companies or stakeholders; and
- Tier 3: up to £25,000 for scalable projects and initiatives that supported multiple businesses, stakeholders and benefit communities (i.e. Fishing Associations, Auctions/Markets, Producer Organisations).

An interviewee with the grant funding delivery team indicated the rationale behind the RRGP's design was that many small businesses were seeking funds and the RRGP was designed to respond to this within the confines of the overall grant programme budget. The cap of £4,000 for Tier 1 grants was selected as it was manageable within the programme budget whilst also allowing the beneficiary to purchase a sizeable piece of equipment or to receive a sizeable contribution to match funding. Tier 2 was designed to support a collection of businesses/fishers, although it was recognised that it was difficult to ask applicants to partner with competitors in order to qualify for funding. Tier 3 was designed as a means of supporting national projects and was targeted at established organisations.

Whilst the RRGP could have awarded a maximum grant of £25,000, the average grant tended to be around £4,000. Therefore, RRGP grants were typically smaller than those provided by the other funds (where data on averages are known). The Fisheries Response Fund did have an average grant size of £4,800 for the catch sector, but this increased to £8,700 for aquaculture businesses.

Funding objectives

In terms of the aims of the funds, the RRGP's objectives appear relatively broad when compared with the majority of the government funds. For example, the Fisheries Response Fund covered fixed business costs for fishing vessels (and aquaculture businesses). The Welsh Fisheries Grant was also specifically for fixed costs relating to vessels. The RRGP therefore provided somewhat wider coverage of the seafood industry in that it was open to fishmongers, seafood restaurants, etc. The wider seafood industry was also targeted by the Domestic Seafood Supply Scheme. Whilst this had a larger pot of money available (£1 million compared with the £500,000 from the RRGP), most of the grants awarded were larger than those under the RRGP, thus only 20 projects were funded²⁰.

The RRGP was targeted at the small-scale inshore fleet who were known to be the least financially resilient. The lack of financial resilience and remote locations of small-scale coastal fishers makes them particularly vulnerable to the closure of markets and interruption of supply chains during the pandemic.

The RRGP was designed with existing knowledge of EU grants in mind, in which forward funding is required. Evidence from the Fishmongers' Company's Fisheries Charitable Trust and Seafarers UK's funding of the Animation programme demonstrated the difficulties encountered by grant applicants with phased payments and the ability to secure match funding. Therefore, the decision was made to provide successful applicants with the funds immediately, as forward funding was not appropriate in the context of the RRGP as an emergency response. The only other competitive Covid-19 grant programme for the sector, the Domestic Seafood Supply Scheme, provided beneficiaries with 25% of the grant award in advance in order to allow projects to proceed at pace.

²⁰ The list of approved DSSS projects can be found on the MMO's website, accessed at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/892089/DSSS_Approved_Projects_12.06.2020.csv/preview_on_14th_December_2020. Funds awarded ranged from £4,136 to £100,000.

A further point to note relates to quotes for equipment, goods, etc. For EU funds (e.g. EMFF) it is customary for three quotes to be requested at the application stage. This was not required by the RRGP, which was consistent with the emergency nature of the fund and the time and practicalities associated with obtaining quotes during lockdown conditions when grant support was needed quickly. Quotes were not required for the non-competitive funds (Fisheries Response Fund, Welsh Fisheries Grant, etc.) since grant amounts were related to fixed costs (and therefore pre-decided) rather than an application for support for a specific project or initiative.

In addition to financial support from the RRGP, in-kind support was offered by the grant body including in-house marketing expertise, although there was no uptake of this. A free e-commerce platform for seafood businesses was also established as part of the RRGP.

Eligibility criteria and the grant application process

The application process varied by fund. The DSSS (as a competitive fund) involved bidders submitting an application form. Projects were evaluated by an awards panel against a set of criteria. Projects were to be prioritised where they had certain characteristics, for example, if they aimed to support resources that could be shared at ports or were able to provide some match funding²¹.

For the Fisheries Response Fund, the MMO made direct contact with eligible vessel owners and trout and shellfish aquaculture farms by email (or in some cases telephone). Where emails were sent, these included the relevant applicant form.

The RRGP required an application form to be submitted, as did the Scottish Seafood Business Resilience Fund and Welsh Fisheries Grant. For the Northern Ireland finance scheme, set criteria had to be met with payments being made directly to eligible vessel owners and aquaculture businesses.

The key requirements for the four, non-competitive funds and the RRGP are summarised in Table 3-7. Eligibility criteria vary across the schemes and by sector (i.e. catch sector compared with aquaculture or marketing and processing). The table shows that eligibility by vessel size varies from up to 24m in England, to 28m in Northern Ireland and 40m in Wales. For the catch sector, a minimum income of £10,000 was required in England, Wales and Northern Ireland. In Scotland, it was necessary to show evidence of earning for the past three years. The RRGP did not require any such evidence, with administration information on the application form limited to company (or charity) registration number along with confirmation that the initiative requesting funding would meet legal and health and safety requirements.

²¹ Gov.UK (2020): Domestic Seafood Supply Scheme (DSSS): how to apply for project funding, accessed at: <https://www.gov.uk/guidance/domestic-seafood-supply-scheme-dsss-how-to-apply-for-project-funding#how-awards-will-be-decided> on 14th December 2020.

Table 3-7: Comparison of eligibility criteria across grant programmes

Criteria	RRGP	Fisheries Response Fund	Scottish Seafood Business Resilience Fund	Welsh Fisheries Grant	Northern Ireland finance scheme
Catch sector					
Ownership	Not specified	Must be owner of English registered vessel under 24m	Must provide evidence of identification	Must be Welsh-licensed vessel up to 40m length	Must be registered in Northern Ireland, and vessel under 28m; must be able to fish if there is a market for their product
Registration	Must provide registered company or charity name and number	Must be registered with MCA			
Licence	Not specified - scheme aims to fund projects initiated by food charities, fishing and seafood businesses and other community initiatives with a seafood focus	Must be licensed by MMO			
Required sales / income		Minimum £10,000 (1 Mar 2019 to 23 Mar 2020)	Must show evidence of earnings over past 3 years, fixed costs, and of hardship	Must have recorded sales of £10,000 or more in 2019 (new entrants considered on case-by-case basis)	Must be normally active between March and May, with fish landings of at least £10,000 in 2019
State Aid		Must not exceed temporary State Aid limit	Must not exceed temporary State Aid limit	Must not be eligible for other Covid-19 financial support	Not specified
Aquaculture					
Activity	Not specified	Must be active in 2018	Must provide evidence of identification, earnings over past 3 years, fixed costs, and of hardship	Must be active business with Welsh-licensed vessel	Must be active business in Northern Ireland
Location	UK	England			
Production	Not specified - scheme aims to fund projects initiated by food charities, fishing and seafood businesses and other community initiatives with a seafood focus	Shellfish or trout for direct human consumption		Must have recorded sales of £10,000 or more in 2019	Based on monthly sales for past 3 years; focused on species like oysters and trout
Authorisations		Must have FHI number for business and farm		None specified	None specified
State Aid		Must not exceed temporary State Aid limit	Must not exceed temporary State Aid limit	Must not be eligible for other Covid-19 financial support	Not specified

Table 3-7: Comparison of eligibility criteria across grant programmes					
Criteria	RRGP	Fisheries Response Fund	Scottish Seafood Business Resilience Fund	Welsh Fisheries Grant	Northern Ireland finance scheme
Marketing and processing sector					
Sector eligible for fund?	Yes	No	Yes - emergency support for seafood processors in Scotland during the coronavirus outbreak	No	No

Evaluation of applications

As competitive funds, both the RRGF and the Domestic Seafood Supply Scheme had selection criteria or defined characteristics for projects that would be considered for funding. The RRGF identified a series of desirable characteristics, where projects and initiatives with scalable and enduring solutions were given priority:

- Applications that recognised the need for cooperation among fish merchants, fishers and buyers, projects or initiatives that demonstrate collaborative working among stakeholders were given priority²²;
- Applications that leveraged existing capacity and expertise, or which re-deployed expertise from currently inactive parts of the seafood industry were given priority;
- Applications that attracted or had the potential to attract co-funding from other sources or contribution from businesses were considered favourably; and
- Applications that demonstrated how they would communicate their model, best practice and ‘lessons learnt’ to industry and the media.

Projects were appraised using a two-stage review process that included assessment by a member of the Fishmongers’ Company’s Fisheries Team, and review by an independent panel of cross-seafood industry representatives. It was anticipated that the review process would take a maximum of three weeks. Evidence from interviews with successful applicants indicated that applicants were very pleased with the quick turnaround of their applications.

The DSSS used a set of selection criteria with projects scored against each criterion by the awards panel. The deadline for applications was 11 May with successful applications announced from the 15 May. These criteria considered whether a project would:

- Facilitate new growth in markets through innovative regional distribution;
- Support the development of infrastructure to sell seafood landed into English ports, or seafood processed in England to domestic consumers;
- Help develop the infrastructure necessary for the catching and processing sectors to connect directly with consumers (e.g. either through online platforms or through facilitation on the ground); and
- Have the potential to generate longer-term sustainable benefit to the seafood industry, creating supply chain resilience.

²² Note that this is consistent with the DSSS, which aimed to prioritise projects that could support multiple businesses.

There are differences between the evaluation criteria and the principles upon which applications were prioritised, although there are also some commonalities. Common themes across the evaluation and prioritisation criteria of the RRGP and DSSS include:

- Co-operation and connection with consumers, including providing support to multiple businesses and sharing of plant, equipment and resources;
- Re-use of existing expertise and infrastructure, including addressing gaps in existing support;
- Potential to attract co-funding or matched funding;
- Communication and dissemination of outcomes and lessons learnt;
- Scalable and enduring benefits, including supply chain resilience and longevity beyond Covid-19; and
- DSSS prioritised projects that were achievable in the immediate to short-term to deliver benefits at pace. This is similar to RRGP requirement for leverage of existing but inactive parts of the seafood industry.

Differences in themes across the evaluation and prioritisation criteria of the RRGP and DSSS include:

- DSSS includes criteria on facilitating growth, with priority on projects that could provide an economic return and value for money. This is more implicit in the RRGP criteria;
- DSSS focused on projects where private co-ordination/co-operation might not currently be viable, for example projects with a 'regional', 'national' or 'sectoral' focus. Again, this is implicit in the RRGP criteria; and
- DSSS focused funding to where the majority of budget was for assets, rather than salaries.

4 Impact of the RRGP on Beneficiaries

4.1 Overview

This section draws on the survey and interview data to consider the impact of the RRGP on beneficiaries. The data analysed are based on three different sources: the applicant database, including application outcomes; the survey that had 72 responses from beneficiaries; and in-depth interviews with un/successful beneficiaries. It should be noted that the analysis may refer to the survey or the applicant database, and thus the quantitative analysis has a varying number (n) of responses.

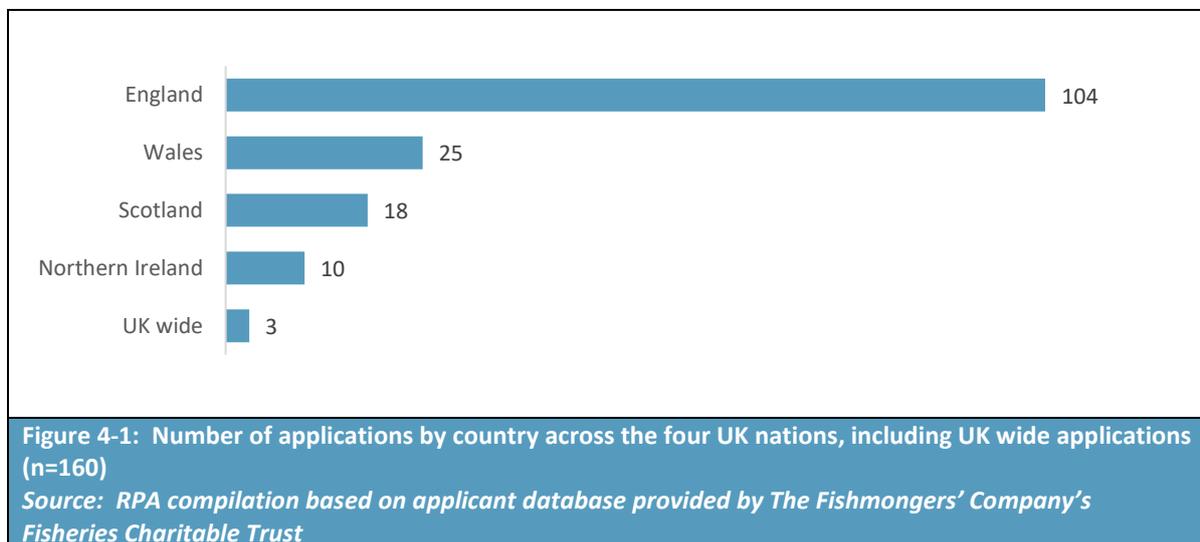
4.2 The beneficiaries of the RRGP

Overview of dataset

The analysis below presents an overview of the dataset provided by the Fishmongers' Company's Fisheries Charitable Trust and Seafarers UK. The cleaned data set amounts to 160 applications. The initial data set counted 161 applications with one duplicate. Duplicates and grants not being awarded are further discussed below.

Geographic scope

Figure 4-1 below presents the distribution of applicants across the UK. Most applications were received from England (104), followed by Wales (25), Scotland (18), Northern Ireland (10) and UK wide (3).



A further breakdown of the geographic spread of applicants is shown in Figure 4-2 overleaf.

Considering the English regions, most applicants (66) were located in the South West of England, in particular Cornwall. Seven applications were received from the East and five applications from the East Midlands. Fewer applications were received from the North West (3), North East (3), and Northern England (2).

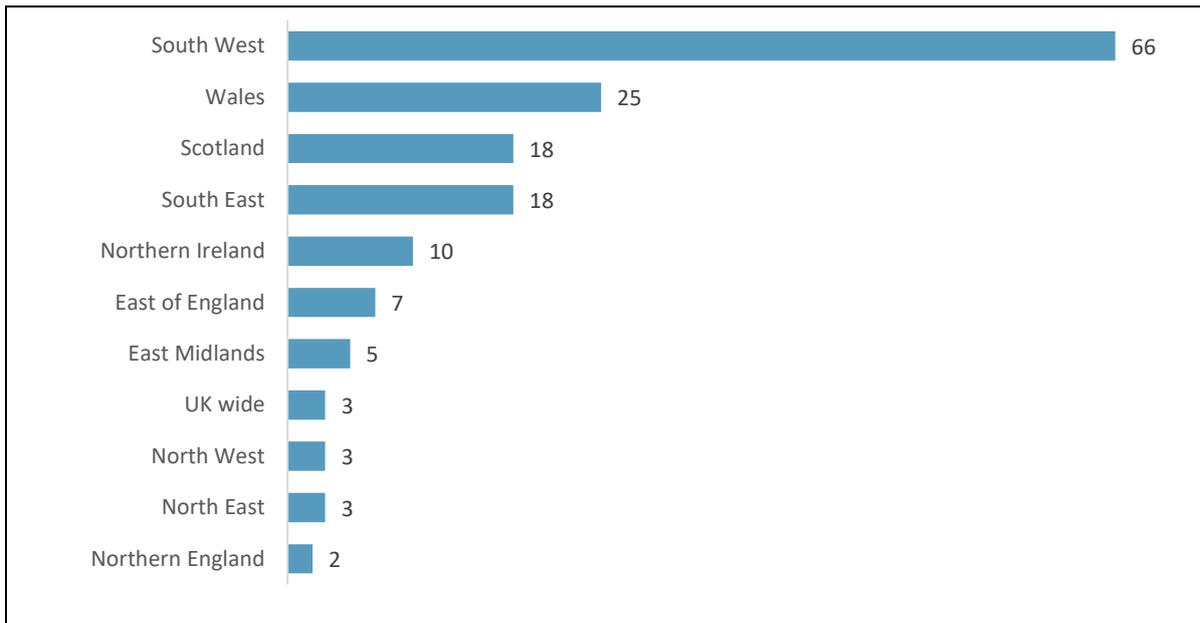


Figure 4-2: Number of applications by English region and Devolved Administration (n=160)
 Source: RPA compilation based on applicant database provided by The Fishmongers' Company's Fisheries Charitable Trust

Applications by category

Applicants were asked to meet one or more of the following objectives: seeking diversification opportunities for seafood and fisheries businesses; promoting the consumption or sale of local seafood; or providing community meals using seafood. Applicants outlined their project idea in the application and how this would help achieve one of the objectives.

Figure 4-3 illustrates that the largest number of applications aimed to promote the consumption or sale of local seafood (n=74 or 46%) followed by seeking diversification opportunities for seafood and fisheries businesses (n=68 or 43%). Seven applicants (4%) intended to provide community seafood meals. Six applicants (4%) aimed to deliver a combination of promoting the consumption or sale of local seafood and sought diversification opportunities for seafood and fisheries businesses. Three applications (2%) did not indicate a category for their applications. Finally, two applicants (1%) intended to achieve all three objectives: seeking diversification opportunities for seafood and fisheries businesses; promoting the consumption or sale of local seafood; and providing community meals using seafood.

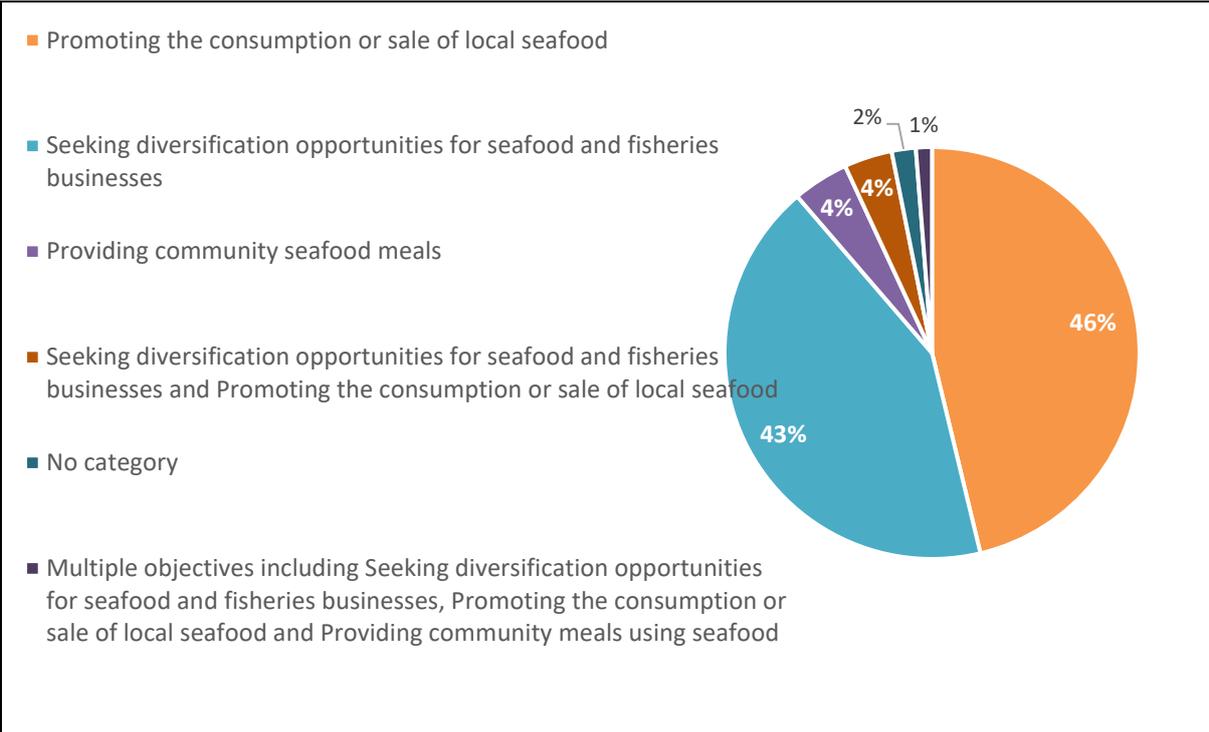


Figure 4-3: Applications by category (n=160)
 Source: RPA compilation based on applicant database provided by The Fishmongers' Company's Fisheries Charitable Trust

Applications by funding outcome

Out of 160 applications, 33 applications (21%) were unsuccessful, and 127 applications (79%) were successful but six of these were not awarded. For example, one interviewee noted this was due to the cut in funding. They explained that the grant awarded was significantly lower than they had applied for and thus they decided to renounce the money and not take the project forward. Figure 4-4 below shows the division between grant sizes, unawarded applications, unsuccessful applications and unsuccessful applications due to duplication. The figure indicates that most applicants received grants of up to £4,000.

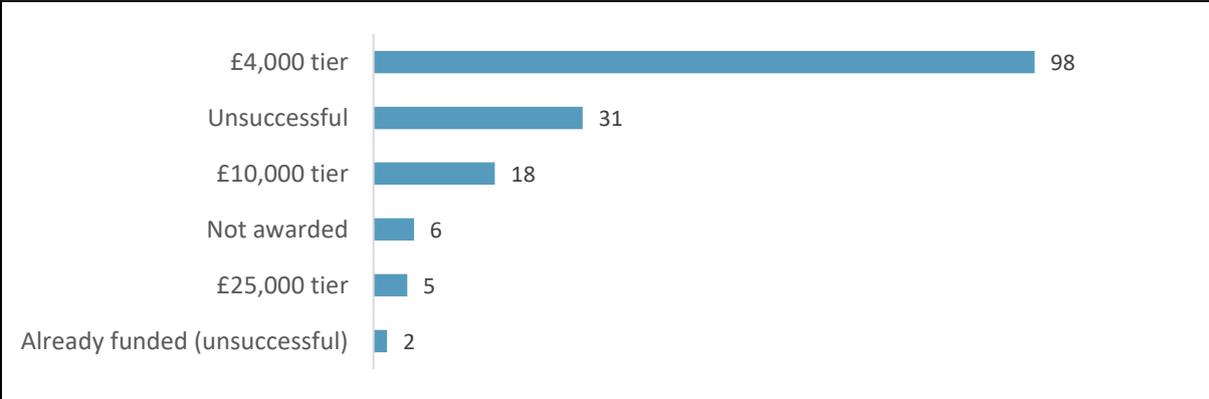


Figure 4-4: Applications by funding outcome
 Source: RPA compilation based on applicant database provided by The Fishmongers' Company's Fisheries Charitable Trust

The interview with the grant programme delivery team revealed that smaller, grassroots initiatives, and in particular community initiatives and collaboration, were prioritised by the panel in their selection. Tier 3 grants (up to £25,000) were the least often awarded grant, being difficult to justify in terms of the level of impact the project would have. The team indicated that, whilst they were happy with the diversity of projects funded, they would have liked to have seen more community initiatives represented. However, it was recognised that working with peers during the pandemic was particularly challenging.

Figure 4-5 below shows the funding outcome for grants up to £4,000 awarded by country. Applicants from England (66) received the majority of tier £4,000 grants. This is followed by Wales (16), Scotland (11) and Northern Ireland (5).

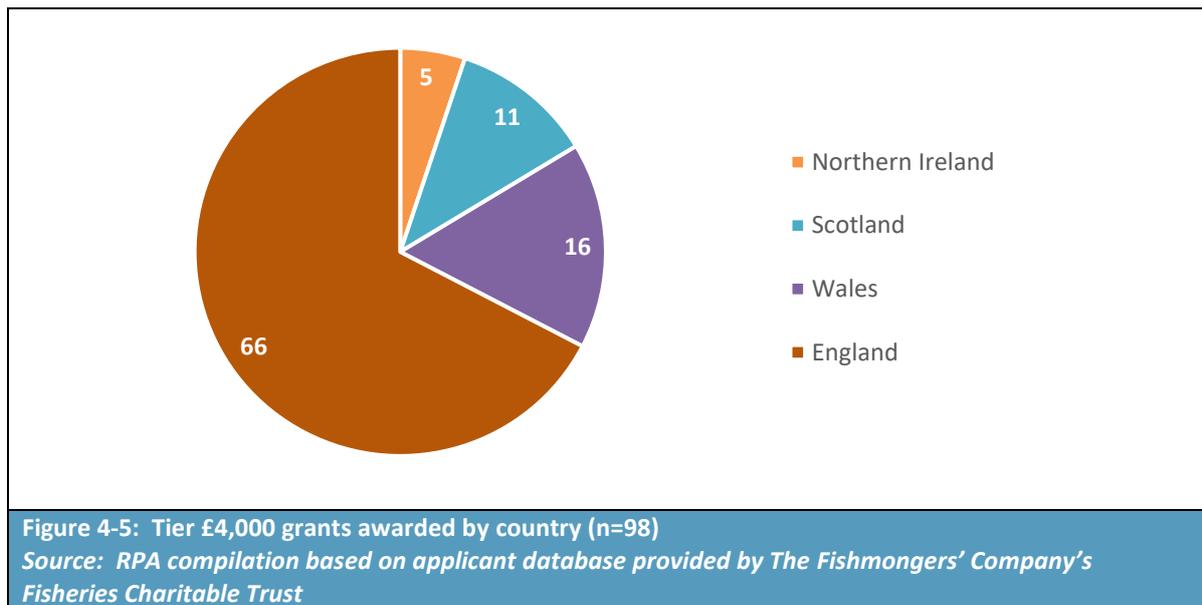


Figure 4-6 overleaf provides a further breakdown of the grants within the £4,000 tier by English region and Devolved Administration. The South West of England received most grants in this category (47%), followed by Wales (17%), the South East of England (12%) and Scotland (11%).

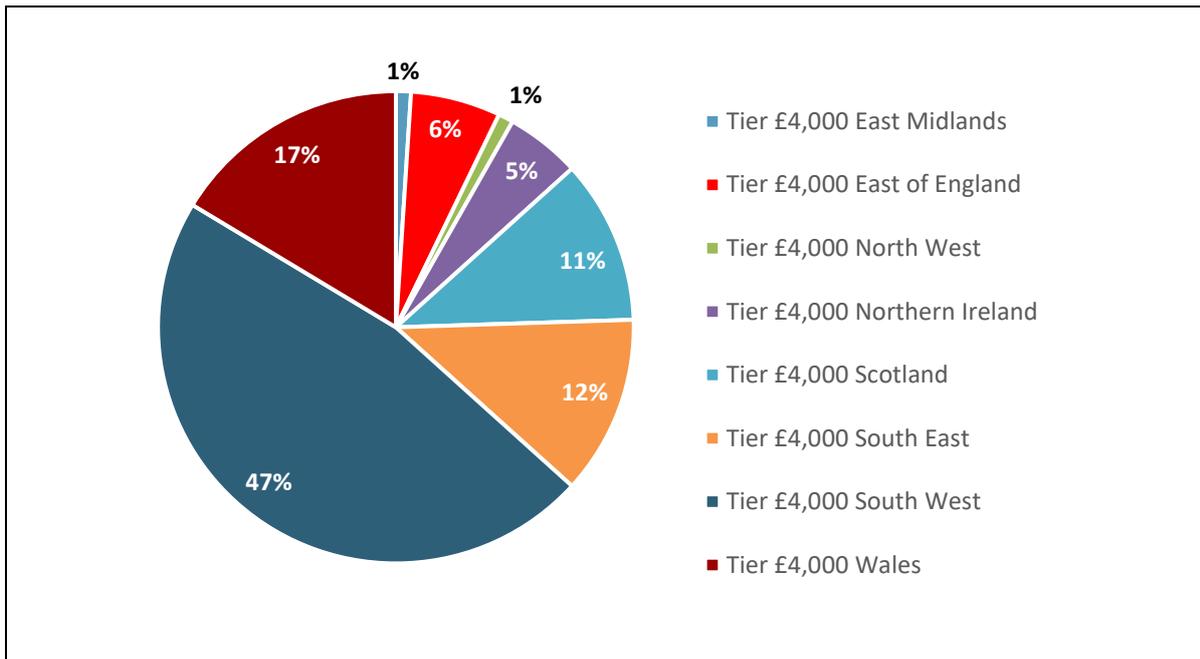


Figure 4-6: Geographical breakdown of tier £4,000 grants awarded (n=98)
 Source: RPA compilation based on applicant database provided by The Fishmongers' Company's Fisheries Charitable Trust

Figure 4-7 below shows the share of unsuccessful applications by country. Applications from England formed the majority of unsuccessful applications (19). Wales had significantly less unsuccessful applications (6) followed by Scotland and Northern Ireland (both 3). This reflects the number of applications by country.

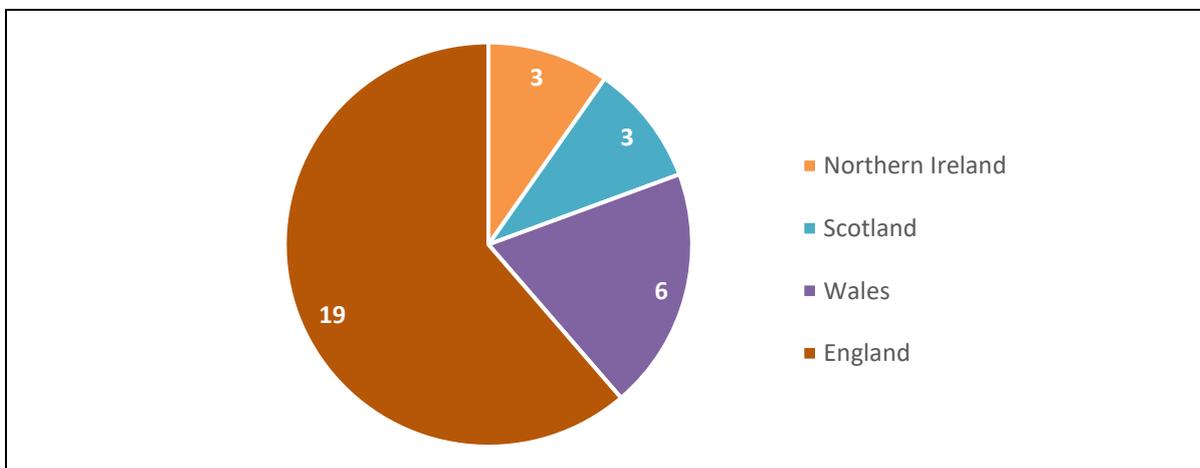


Figure 4-7: Unsuccessful applications by country (n=31)
 Source: RPA compilation based on applicant database provided by The Fishmongers' Company's Fisheries Charitable Trust

Figure 4-8 shows the data by Devolved Administration and English region. Most unsuccessful applications were in the South West of England (39%), Wales (19%), Scotland and Northern Ireland (both 10%). These percentages reflect the proportions of applications from each area considered in this analysis (i.e. most applications were from the South West of England, followed by Wales).

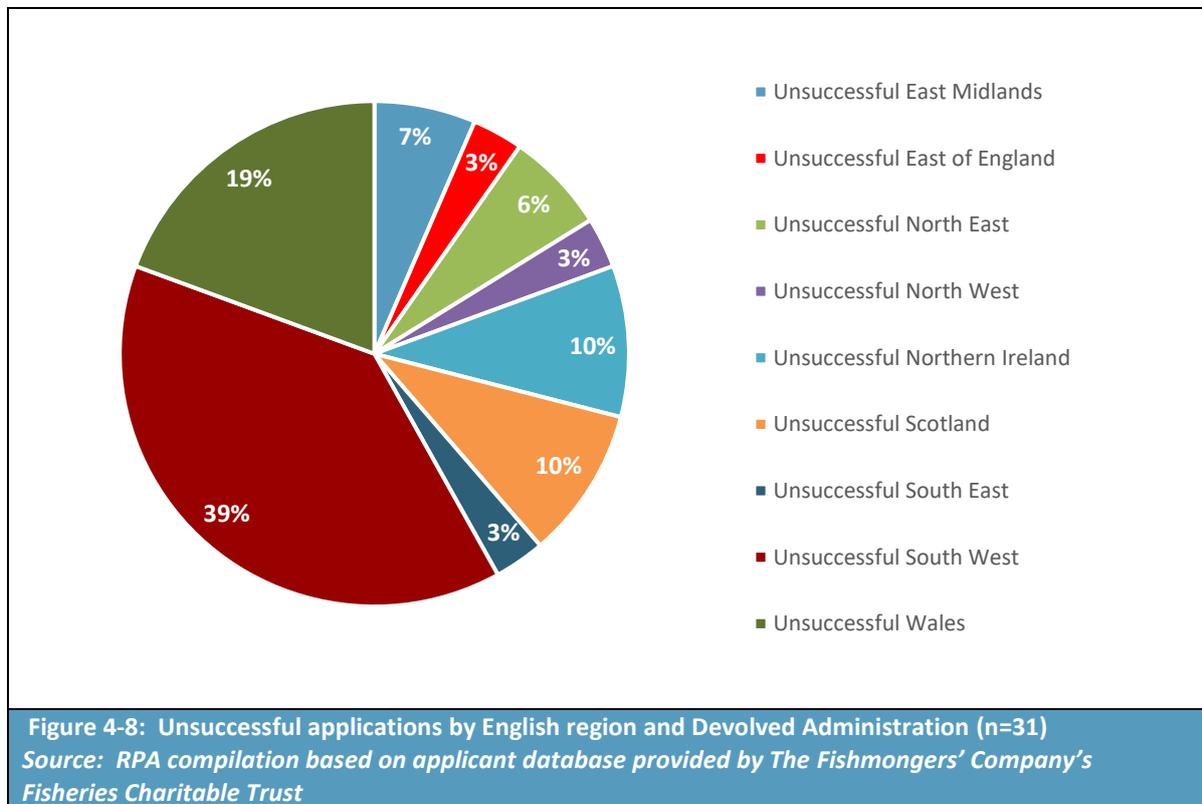


Figure 4-9 overleaf provides a more detailed breakdown of applications by location and grant size awarded. This illustrates that most grants were within the £4,000 tier.

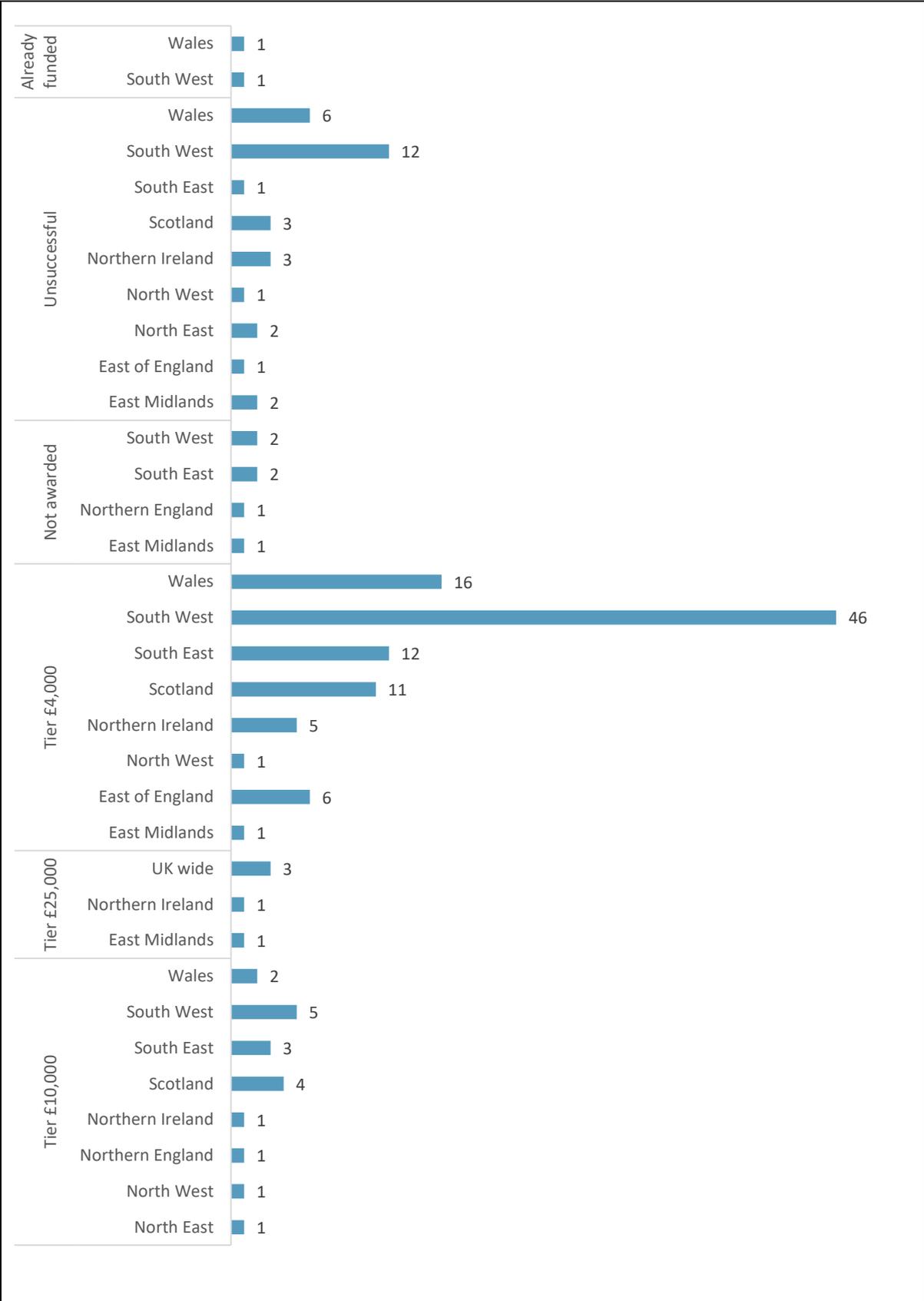


Figure 4-9: Funding outcome by Devolved Administration and English region (n=160)
 Source: RPA compilation based on applicant database provided by The Fishmongers' Company's Fisheries Charitable Trust

Duplications

Duplications were considered by business name. Where the contact details for two separate applications were identical, the applications were checked to ensure that they were not duplicates and the individual contact person was representing more than one business.

Six companies each applied twice to The Fishmongers' Company and Seafarers UK resulting in a total of 12 applications:

- One company from Northern Ireland received two grants as the project outlines for the applications differed. The grant applications both intended to 'promote the consumption or sale of local seafood'. The company's two grants had a cumulative total of less than £10,000;
- One company from the South West of England also received two grants as a result of two successful applications (the sum total of these two grants was below £4,000);
- Three companies made two applications with the duplicates being rejected but the initial applications awarded a grant in each case²³;
- A further candidate made two applications, however, both applications were rejected due to ineligibility for the grant. It should be noted that this duplicate is accounted for twice under *unsuccessful* applications.

Duplicates resulting in *unsuccessful* applications therefore misrepresent the actual rate of unsuccessful applications. Hence, the analysis distinguishes between unsuccessful applications and unsuccessful duplicates.

Beneficiaries by industry type

Figure 4-10 below shows that the fishing businesses (27 survey respondents, almost 38%) were the largest individual group of applicants. A further 22 respondents (31%) are fishmongers or merchants, seven survey respondents (10%) are wholesalers or distributors and five respondents (7%) work in the hospitality sector. Three respondents (4%) work in the trade sector and two respondents (3%) work on community projects within the fishing industry. Other respondents include a charity, fishing sector training company, local fish education community group, an agent and auction stakeholder, a stakeholder in the fishing, fish merchants and smokehouse sector and a care charity and community hub business (one respondent each).

²³ Of the three companies, the first company was funded to just below £4,000 (their two applications each requested the same amount of funding. Comments made by the funding assessors on the second application noted 'already applied for the exact same thing. Reject'); the second company was funded with £4,000 (their two applications had requested £4,000 and £5,000) and the third company was awarded £4,000 (for the company's second application, the funding assessors noted that the applicants had already been awarded money).

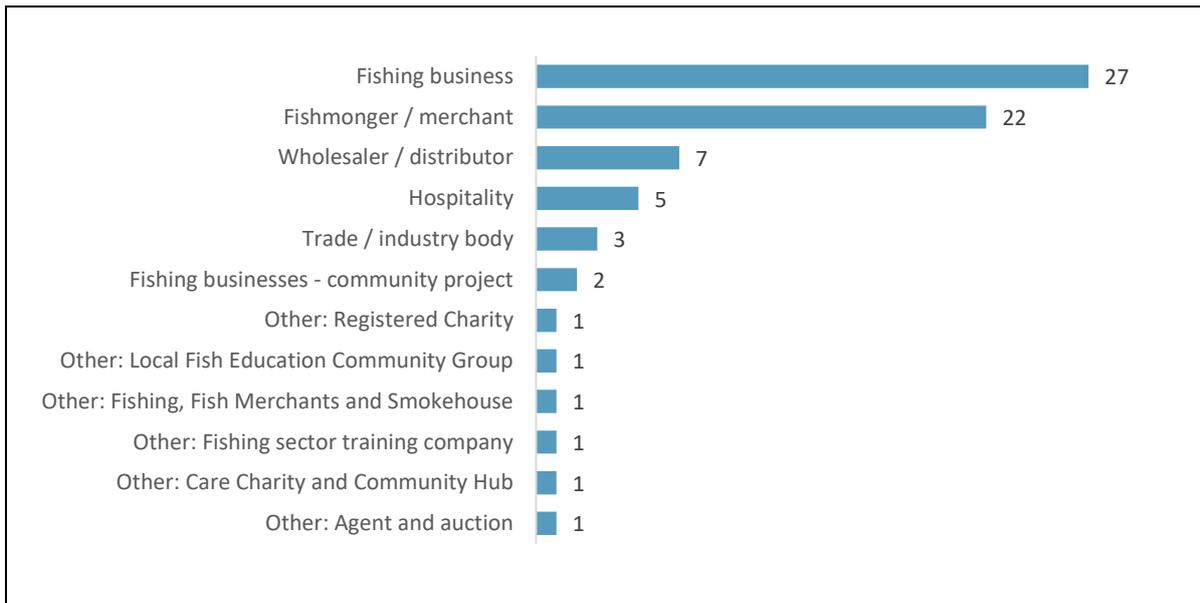


Figure 4-10: Beneficiaries by industry type (n=72)
 Source: RPA compilation based on survey responses

The grant programme delivery team indicated that no applications were received from large industrial organisations, as it was the intention of the programme to support the small-scale fleet.

Note that the industry type overview in Figure 4-10 is limited to survey responses and is not necessarily representative of all applicants. Furthermore, it should be noted that the survey respondents only include successful beneficiaries. Hence, the distribution by industry type among unsuccessful applicants is not provided.

The application process of the RRGP

Figure 4-11 demonstrates that most survey respondents did not face major difficulties during the application process. Many respondents (30, or 42%) found the process manageable and 17 (25%) respondents found it easy, very easy (17) or very easy to easy (1). Six respondents (8%) indicated that they required support during the application process and one beneficiary (1%) states that they could not complete the form by themselves.

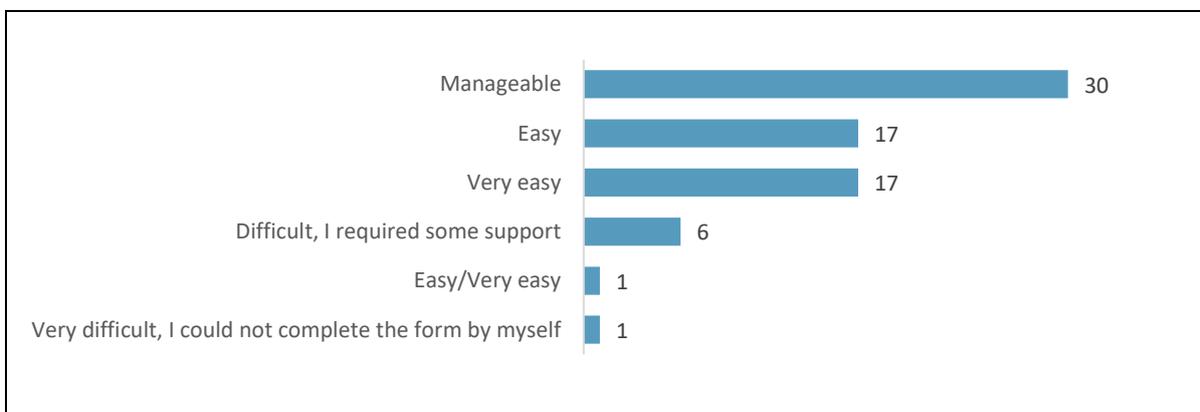


Figure 4-11: How did you find the application process for the Rapid Response Grant Programme? (n=72)
 Source: RPA compilation based on survey responses

The engagement data indicate that the application process was largely achievable for applicants. In total, 12 interviewees (of 15, or 80%) said that the application was straightforward enough for them to not need any assistance with their application. Where this was not the case, support was available via the Fishing Animateurs. Three interviewees (20%) received help in this way and engagement data indicate that the Animateurs were highly valued by those that used their services:

“The fishing animateur was invaluable for the application. The forms are off-putting²⁴ and I know of many others who have not bothered applying because of the paperwork involved, so having someone who can help with this is excellent.”

Four survey respondents²⁵ commented on the excellent assistance received from the Fishing Animateurs; three of these comments related to application preparation and one related to a project collaboration. However, there was some confusion amongst interviewees as to who they had received assistance from; several interviewees remarked that the grant body was extremely helpful in their dealings with them, although the delivery team confirmed that to maintain impartiality they did not discuss applications with businesses and instead referred applicants to the Fishing Animateurs or to the grant guidance. Incomplete applications received by the delivery team were referred to the Fishing Animateurs for assistance. This adaptable approach meant that individuals were not excluded from benefiting from the fund if their initial application to the fund was incomplete or sub-standard. Such flexibility was appreciated by applicants; one interviewee commented that they were pushed for time when they first submitted the application and so applied under the wrong tier. When they contacted the grant administration team, they were able to change this for them easily.

Application requirements were described by one interviewee as being *“ideal for the situation”*. They particularly liked that there was no need to provide three quotes (as is the case for other fisheries grants such as EMFF), as this would have been difficult to achieve during lockdown. This view was echoed by another interviewee who said that the application and decision process was straightforward. He commented that he was pleased to have such a quick turnaround time given the difficult situation many fishers were in: *“it is titled Rapid Response, and it was just that.”* This is in notable contrast to the other grants that the interviewee has been involved with (e.g. EMFF, MFF, DSSS). For example, he previously applied for safety equipment via another grant scheme administered by the MMO, and he ended up withdrawing his application and paying for the safety equipment himself since the process was far too long and drawn out. The interviewee was of the opinion that long application processes are off-putting for fishers who are time-poor, although he recognised the need to follow due process to ensure transparent allocation of funds.

One interviewee said that it was delightful to have something really easy to work with. She is very familiar with grant applications and this one was quick and easy to complete. The interviewee commented that the application form had enough depth to prove the logic and thought process behind a project, without being too onerous. This was especially useful as the deadline was short and she had to fill in the application relatively quickly.

Another interviewee said that what particularly appealed was that the grant was directly accessible, there was no middleman or consultant that he had to go through to complete the application; he was able to apply himself and liaise with the grant body directly which was a *“real bonus”*.

An unsuccessful respondent spoke about their experience with the RRGP: they were notified that the application had been unsuccessful but the FC thanked them for applying. The FC pointed out that they

²⁴ Note that in this comment the interviewee was referring to grant application forms in general, and not the RRGP application form specifically.

²⁵ This excludes interviewees from the South West of England.

had limited funding due to receiving a large number of applications. The respondent explained that they applied for the second round after just missing the first round. During the first round they were too busy to apply after lockdown was first announced.

Finding out about the RRGP

Interview data reveal where applicants found out about the RRGP, sources include:

- Word of mouth from another fisher (3);
- South West Producers' Organisation (1);
- Seafish (2);
- Social media (Twitter) (1);
- Fishing publication (1);
- Internet research (1);
- Fishing Animateurs (2);
- Communications with the Fishmongers' Company Fisheries Programme Manager (1); and
- Local authority (1).

4.3 How RRGP funding has been used

This section analyses how grant recipients have spent the funding and how project objectives have been achieved.

Grant expenditure and management

Figure 4-12 overleaf shows that most survey respondents (54, or 75%) indicated that they used the grant for capital expenditure, including equipment, vans, tools and office equipment. Nine respondents (13%) stated that they spent the grant on operation expenditure, i.e. employment, marketing and communications, website design, van hire, labour costs. Four survey respondents (6%) used the grant to provide community seafood meals. Other respondents indicate that they spent the grant on the renovation of a processing unit (1), some operation costs (1), packaging for home deliveries (1), rent for a fish hub (1) and a catering trailer to diversify the business (1).

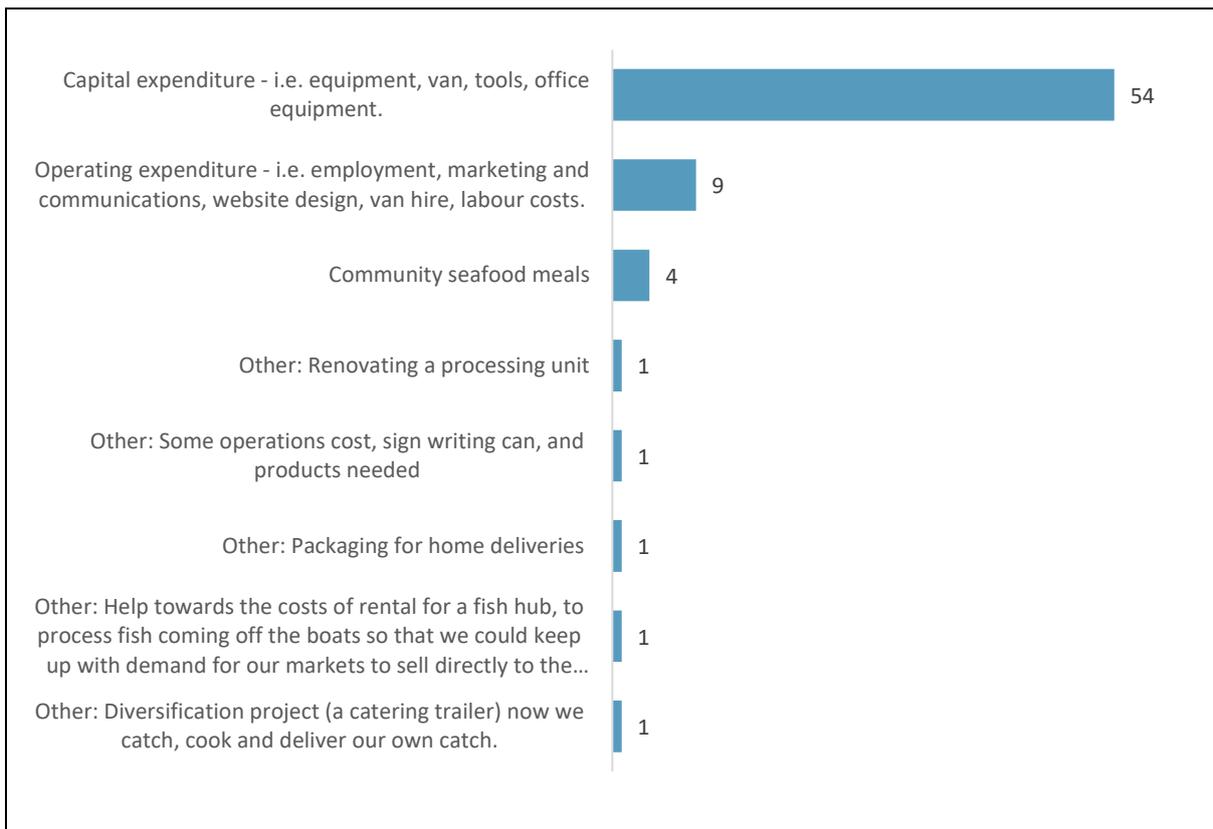


Figure 4-12: What was the grant primarily used for (i.e. more than 60% of the grant)? (n=72)
 Source: RPA compilation based on survey data

The comment boxes in the survey revealed further details of how grants were spent. In total, 50 survey respondents (69%) mentioned direct selling in response to the question of how the grant was used and what was achieved. A further 12 survey respondents (17%) mentioned small-scale processing in their use of the grant (e.g. through the purchase of a skinning machine or similar). Seven survey respondents (10%) commented that the grant had enabled them to help vulnerable people. Three survey respondents (4%) commented that the grant helped projects to get moving quickly, and nine respondents (13%) said that the grant was used for business survival at an uncertain time.

Many beneficiaries spent their grants on promotional activities such as the creation or improvement of websites or e-commerce sites. One interviewee used the grant to improve their existing website whilst the new one was being developed. They had a small e-commerce site that was not fit for purpose when they needed to increase sales via the fishmongers during lockdown. Another interviewee used the grant to increase awareness about their fishmonger operation. The grant contributed to a new website and to paying for a specialist social media person to increase their social media presence as well as advertising the fishmongers and information on how to cook seafood. The interviewee was of the opinion that people lack knowledge of how to cook seafood and are worried about doing so, and guidance around this is much needed. A further interviewee used the grant in part to create a trademark and a website that introduces local businesses involved in the seafood processing industry. This information also sought to promote the area internationally and create more exports in the long-term.

Examples of promotional expenditure by RRGP beneficiaries are provided below.



Capital expenditure includes the purchase of new equipment or upgrading of existing facilities or kit. With many beneficiaries moving from their traditional markets to direct selling, the purchase of equipment to enable safe and hygienic transportation of products was a popular use of grant funds. One interview respondent used the grant all at once for equipment, in particular to upgrade to a refrigerated van rather than just an insulated van. This has enabled them to expand their range, and go out for a longer period of time. Previously the respondent was limited in range because it was difficult to maintain the temperature of the fish without refrigeration. One interviewee mentioned that besides using the grant for their website, it also helped them to purchase an electric vehicle (although they had to contribute a significant amount themselves). The respondent highlighted that they deliver to the general public now which they did not do before. They were also trying to do something environmental by purchasing the van.

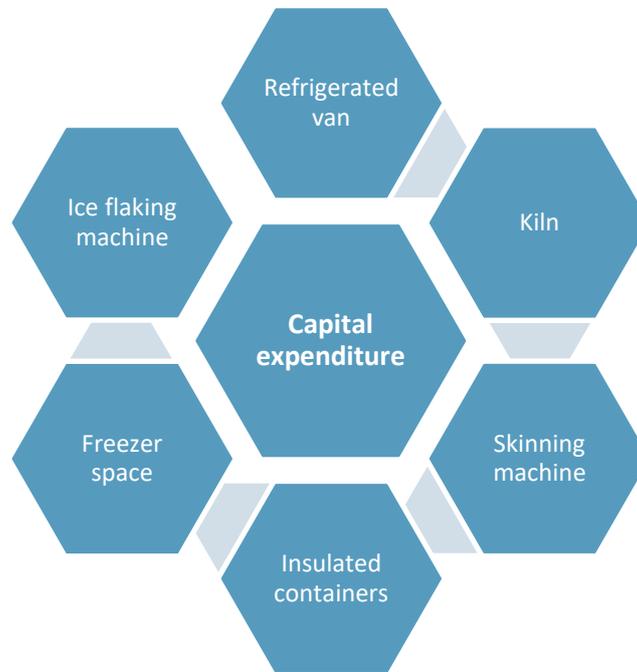
Another interviewee used the grant for capital expenditure which has allowed the business to hold more frozen stock from local boats and imported products.

A further interviewee said that the grant money has been used by a beneficiary to part purchase a new kiln for their smoking business. The grant for equipment was spent at once, as it was a part payment for the kiln. The rest of the money required was made up with their own money, as were the installation costs.

One interviewee commented that their grant was used to purchase 50% of a skate skinning machine. They match funded the other 50% of the machine. The machine was purchased via a system of staggered payments. The skinning machine was purchased as part of a wider development plan for the cooperative to generate new market opportunities. The cooperative often lands a lot of skate and they were having to send it to market 120 miles away, where it was sometimes not selling. They also sent winged skate to Lowestoft, where they got a better price for the fish, however the cost of getting the fish there was very high. Purchase of a skinning machine which wings the fish will enable the cooperative to generate another market: they can sell locally with a better-quality end-product, or they can send it to market. Unfortunately, due to Covid-19 the hospitality sector has reduced and

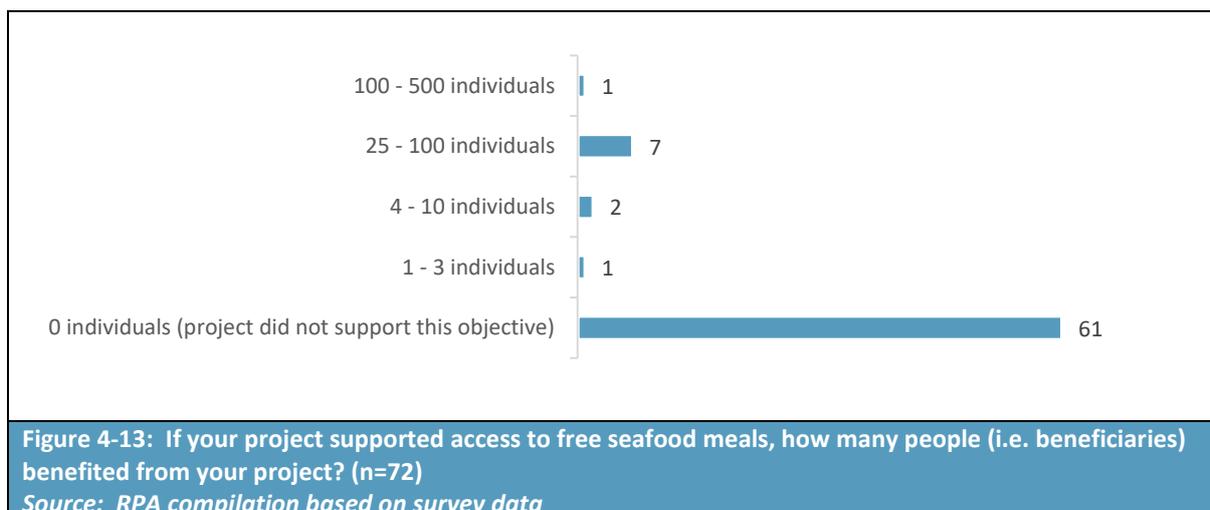
landings have been subdued, so they have not been able to capitalise fully due to Covid-19 market restrictions.

Examples of capital expenditure by RRGP beneficiaries are provided below.



Achieving project objectives

Beneficiaries whose projects provided access to free seafood meals supported between 1 and 500 individuals (see Figure 4-13). It should be noted that all survey respondents answered the question, even though some survey respondents did not aim to support access to free seafood meals. The survey respondents whose projects had different aims therefore ticked the option to indicate that their project benefited '0 individuals' (in terms of supporting access to free seafood meals).



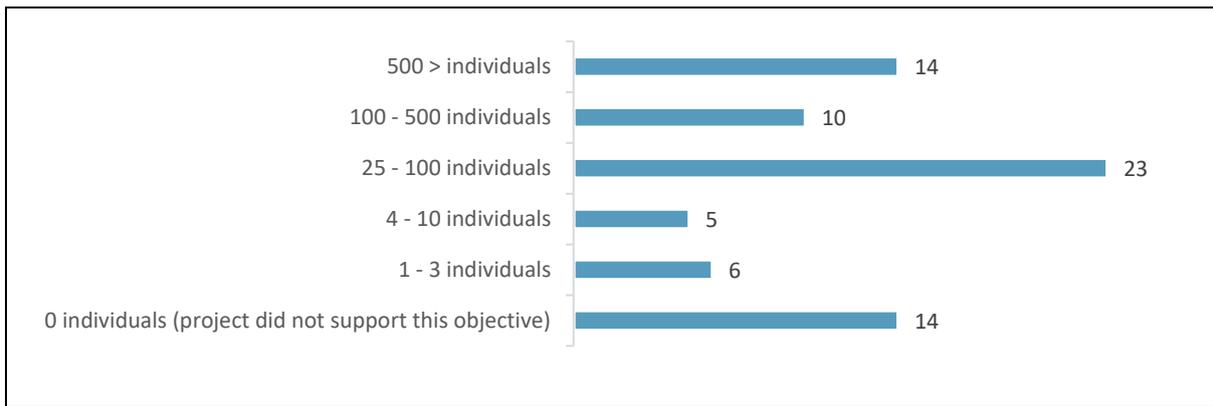


Figure 4-14: If your project supported access to local seafood, how many people (i.e. beneficiaries) benefited from your project? (n=72)

Source: RPA compilation based on survey data

Figure 4-15 shows the number of survey respondents that aimed to increase their sales and supporting another business. The number of people benefiting from the project was highly variable. In total, 20 respondents (28%) identified that between 4 and 10 individuals would benefit, while 17 (24%) said that 1 to 3 individuals benefited; the same number as said that no people could benefit, but it should be noted that this may have not been the aim of their project.

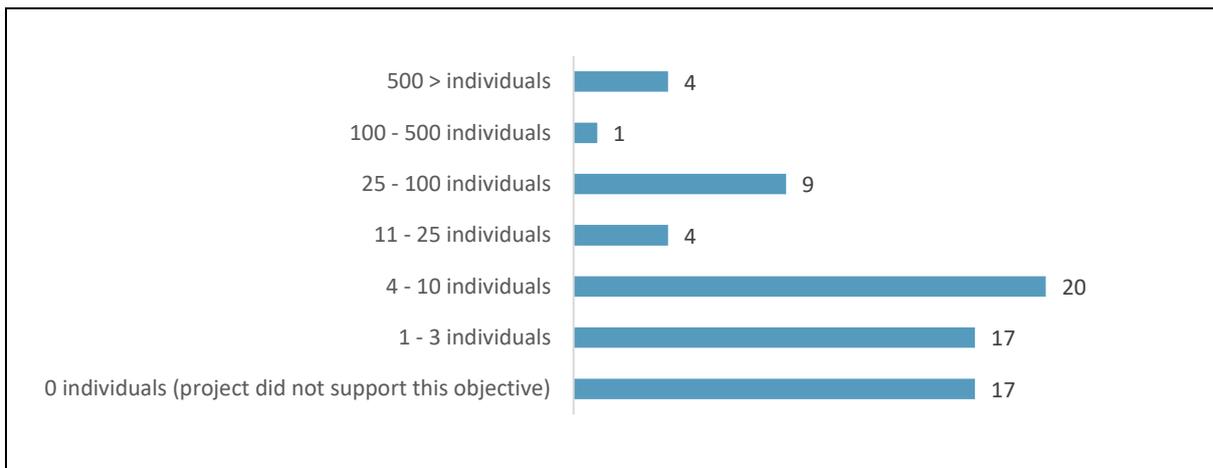


Figure 4-15: If your project supported an increase in sales, supporting another business, how many people (i.e. beneficiaries) benefited from your project? (n=72)

Source: RPA compilation based on survey data

Figure 4-16 indicates that one respondent (1%) supported access to processing facilities for 100-500 individuals, five respondents (7%) supported access for 25-100 individuals, three respondents (4%) supported access for 11-25 individuals, ten respondents (14%) supported access for 4-10 individuals and 18 respondents supported access to 1-3 individuals (25%).

Overall, 35 survey respondents (49%) stated that they did not support access to processing facilities. However, this may not have been their project objective.

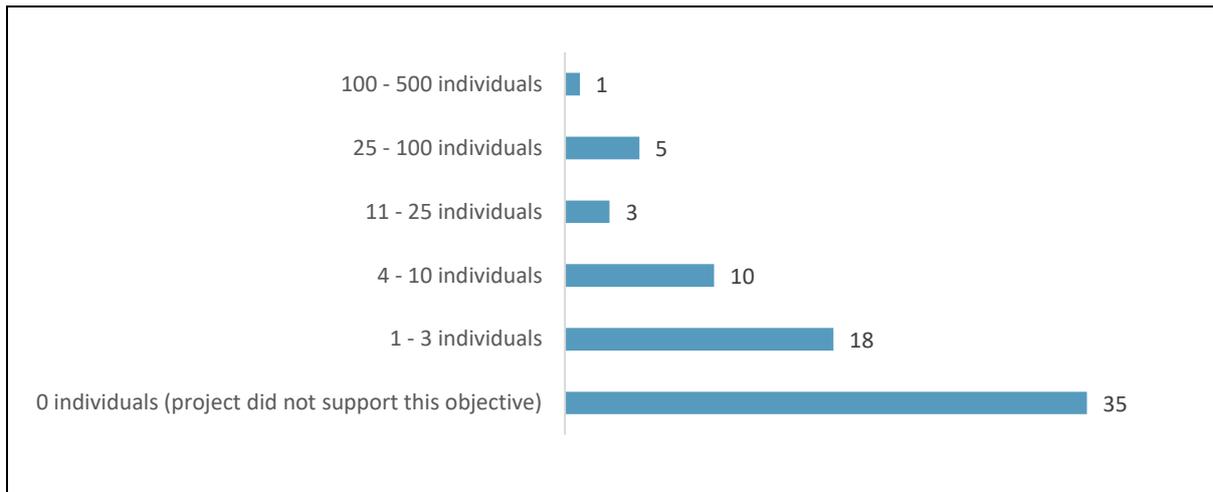


Figure 4-16: If your project supported access to processing facilities, how many people (i.e. beneficiaries) benefited from your project? (n=72)

Source: RPA compilation based on survey data

Has the grant linked recipients directly with consumers and have beneficiaries managed to maintain them?

Eight interviewees (44%) indicated that the grant had enabled them to connect directly with consumers. For many beneficiaries this was through direct selling; for example, selling products straight off the boat to the public. One interviewee commented that the grant has connected them directly with consumers during lockdown as they were asked to sell fish outside the local pub in a village with an elderly population and no shop. The demand for their smoked products has increased dramatically from this point. Another interviewee mentioned that the grant directly connected them with consumers via social media. They highlight that it is important to know how to use social media for this kind of direct selling.

The grants also enabled indirect connections with consumers. Through the marketing efforts supported by the grant, online and delivery businesses have experienced an increase in sales over the past months due to the pandemic.

Case study: Developing a direct consumer campaign in Scotland

The grant supported the delivery of the Seafood Supper Club series, bringing together a range of regional social media influencer guests to a ‘cook along’ under the tutelage of a well-known local chef from a restaurant closed due to Covid-19. The events were recorded and edited and shared by the beneficiary, partners and the influencer guests along with images and recipes to help drive consumers towards domestically landed seafood.

Designed to conclude during the strictest lockdown period, the campaign **reached well over 700,000 consumers**, working with over 30 influencers across 6 regions of Scotland, 6 Scottish chefs and 6 seafood supplier and raising approximately £4,000 for charities including The Fishermen's Mission. The final event was a consumer competition to win a supper club for themselves led by Glasgow chef Jak O'Donnell.

The grant also supported the development of a one-stop portal for seafood businesses to register for a range of online consumer listings hubs:

- Fish on Friday Sales Locations platform (now [Discover Seafood](#));
- [Scotland Food and Drink platform](#); and
- [Seafish platform](#).

Case study: Developing a direct consumer campaign in Scotland

A further 30 companies have registered across the three sites, with over 70 listings in total, gaining further free marketing to consumers in return.

The support was also used towards a consumer facing marketing campaign to highlight 'Local Legends' in a drive to support consumers source more local seafood. The total campaign **reached 70,000 people**, using radio adverts played 23,926 times, **reached 118,000 people through Facebook advertising** and worked with more than 50 influencers across the campaign.

Have beneficiaries managed to maintain these consumers?

One interviewee commented that the grant has enabled them to sell directly to the public when the shellfish buyers were not purchasing during lockdown. They started out selling locally during the lockdown, but have now started selling to local restaurants since the tourist industry has started up again. The stakeholder plans to expand on this side of the business as and when restaurants fully reopen.

Another respondent noted that the grant has enabled them to sell directly to consumers, including delivering to them. The use of logos on their van and t-shirts, and their Instagram account has also increased their presence in the local area. Overall, they have maintained relationships with around 70% of their customers, with which they reported as being happy.

A further interviewee said the grant was used to purchase ingredients and recycled takeaway boxes to supply free meals to people who were struggling to access hot meals during lockdown due to financial or social difficulties, or if they were shielding. The project ended once lockdown was eased as the local pub was no longer able to produce up to 40 free meals per night on top of their paying customers.

Have the grants helped beneficiaries to release additional funds?

Most survey respondents indicate that RRGP has not helped them to release additional funds (n=65 or 90%). Seven respondents (10%) state that the RRGP has helped them to release additional funds (see Figure 4-17). However, some respondents (3, or 4%) mentioned that additional funding may be a possibility in the future due to outputs of the RRGP. One respondent explained that they are currently discussing possibilities with another funder. Two survey respondents (3%) received a DSSS grant to purchase a new refrigerated vehicle and processing equipment. Another two respondents mention a grant in the form of match funding. One interviewee mentioned that they applied for other funding, but they did not think that the RRGP helped to release additional funding.

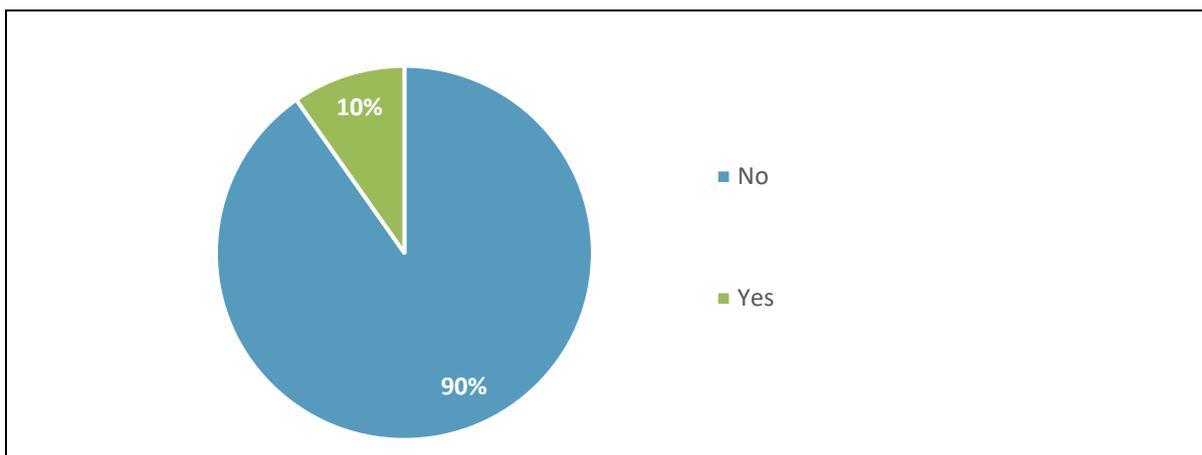


Figure 4-17: Did our grant help you to release additional funds from other grant funders? (n=72)
 Source: RPA compilation based on survey data

Additional finances for the project delivery

In total, 54 (75%) of survey respondents indicated that they put business or personal finances towards delivering the objectives of the grant (see Figure 4-18). The remaining 18 (25%) stated that they did not provide personal/business finances. Respondents were also asked to supply further details on the amount of additional finance they input to enable delivery of their project. The level of additional finance ranged from £1,500 to £37,000. However, this does not include additional in-kind support and respondents' own labour time. Some respondents also mentioned that they spent their savings in order for their business to survive and some took out loans, as the grant did not cover their costs.

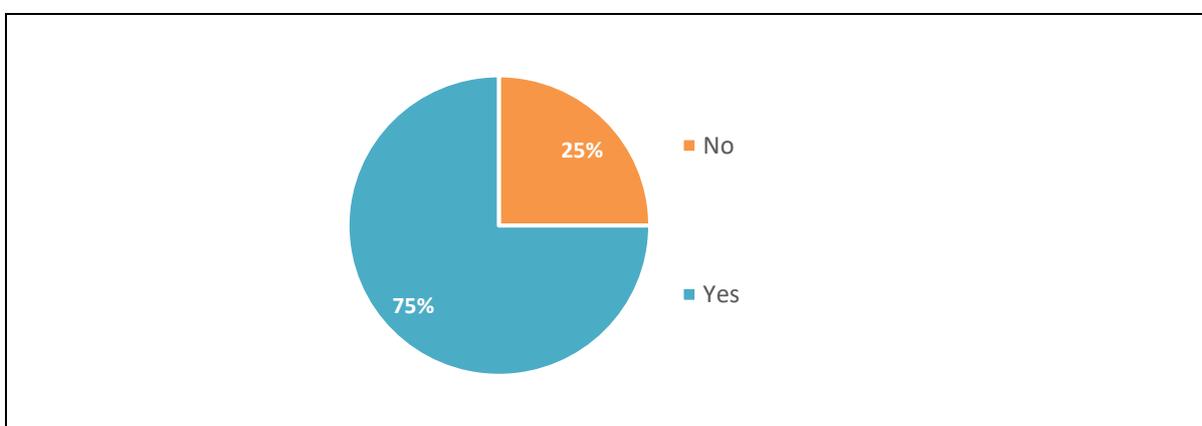


Figure 4-18: Did you put business or personal finances towards delivering the objectives of the grant? (n=72)
 Source: RPA compilation based on survey data

Additional finances went towards:

- **Equipment:** (refrigerated) vans, skinning machines, additional shellfish tank, stainless containers, ice flaker, packaging materials, ice bin, office equipment, sanitation products, food processing equipment;
- **New premises:** workplace/shed, gazebo, shop;
- **Construction:** building works;
- **Products:** additional frozen and chilled seafood;

- **Time:** staff time, input from others (e.g. Fishing Animateurs);
- **E-commerce:** additional website;
- **Transport costs;** and
- **Expanding/setting up a new business.**

Have the grants been awarded to new partnerships?

The interview with the grant programme delivery team indicated that the funders were pleased with the community initiatives which they had funded, although they would have liked to have seen more collaborative applications. Some respondents stated that the grant did not lead to the creation of new partnerships. However, several interviewees mentioned the opportunity to build new partnerships after receiving the grant; for example, one interviewee noted that the grant has helped improve their relationship with fishers. They have been able to hold more stock, hence the business has been able to buy in bulk rather than smaller amounts, and is therefore able to offer products to customers at lower prices. Another interviewee identified that the grant had enabled them to connect with and support small-scale fishers.

One interviewee said that they would have liked to have been able to apply for a grant under the community tier as well, but they were only able to apply under one tier, and decided to apply for their company alone. Numerous restaurants came forward to ask for support and fish during the first lockdown; the stakeholder would have been happy to do this at cost-price if they had been able to apply for another community grant to enable this. Despite not being able to apply for the community tier, the respondent mentioned that they have partnered with another company that approached them and asked them to supply them with small packets of fish as part of a mail order service.

Several respondents indicated their willingness to work with others if this had been a requirement of the grant funding. One beneficiary stated that if the grant was only available for groups of fishers, they would still have applied. However, there are already grants available for that sort of applicant, so what appealed to them about the RRGF was that it was available for a single-handed fisher like them to diversify their business. Another interviewee indicated that their grant was not awarded to a partnership, although they would have applied “*for the right reasons*” if working with others would have been a requirement. The beneficiary has commissioned/partnered with another business after receiving the grant to help them with achieving their objectives. One unsuccessful applicant stated that their application was on behalf of their organisation but it was mentioned in the application that they would cooperate with others in the region in the event that they were successful.

A further stakeholder also highlighted that they would have been more than happy to work with partners if that had been required. Although not directly linked to the grant, the business is currently working on a collective project that aims to generate a number of jobs and increase the attractiveness of the local area for its seafood.

One respondent stated that they would have worked with partners if the fund had required them to collaborate, as they have existing relationships with their suppliers. These include an oyster farmer who supplies them and someone who buys local fish for them. However, the interviewee highlighted that working with others to submit an application would have been difficult at the time because everyone was urged to cut down on contacts and avoid meeting people. The respondent also noted that they now work with a social media partner that they did not work with previously. The new partner is a sole trader providing social media expertise.

One final interviewee also stated they would have applied to the grant if it was a requirement to work with others. Indeed, their project involved collaboration with a local pub, whose staff were furloughed, to prepare and deliver hot meals four nights a week, using locally sourced fish.

On the other hand, some beneficiaries were less inclined to team up with others for a variety of reasons. For example, one beneficiary mentioned that he would not have worked with others as their company is a family run business which has been in the family for over 150 years. The business only consists of two people (father and son), thus they would not have been interested in getting anyone else involved. Another interview respondent stated that they did not collaborate, as their requirement was very specific, and it thus did not seem practical to team up in this instance. A further respondent also confirmed that they would not have applied if it were necessary to work with others to receive the money. They stated that they worked alone and are happy working alone. Another interviewee stated that they also would not have worked with 'strangers' as this causes too much politics. As such, they would want to know potential partners really well and would consider it if that was the case but it was not with this grant. However, while they are currently not working within any new partnerships, they are trying to collaborate more with local fisher in the future.

4.4 Impacts of the RRGF funding

This section examines what the impact of the grant has been, including longevity of the measures taken during lockdown to diversify businesses (i.e. immediate impact only, medium, or long-term impact). The section also discusses the current status of beneficiaries and their future projections. Also considered is how much additional business was generated as a direct result of the grant expenditure and what this has meant for the businesses.

Headline findings

Projects supported by RRGF funds were responsible for retaining employment in both the short and long-term. Grants helped people to continue working and prevented the need for furlough, but they also supported start-up businesses. Grants prevented unemployment, and potential liquidation or bankruptcy costs:

- 57% of respondents said the grant enabled their business to continue operating or kept staff in employment instead of furlough;
- 28% of respondents stated that the grant prevented their business from closing; and
- 65% of respondents indicated that the grant supported direct employment of at least one individual.

Grant impact on businesses

Figure 4-19 indicates that the grant had the biggest impact on business continuity and staff employment amongst survey respondents (41, or 57%). Twenty-five respondents (35%) noted that the grant has allowed their business to increase its profits and 20 respondents (28%) stated that the grant prevented their business from closing. Moreover, the grant has allowed 13 survey respondents (18%) to provide meals to the vulnerable while five respondents (7%) provided meals to key workers.

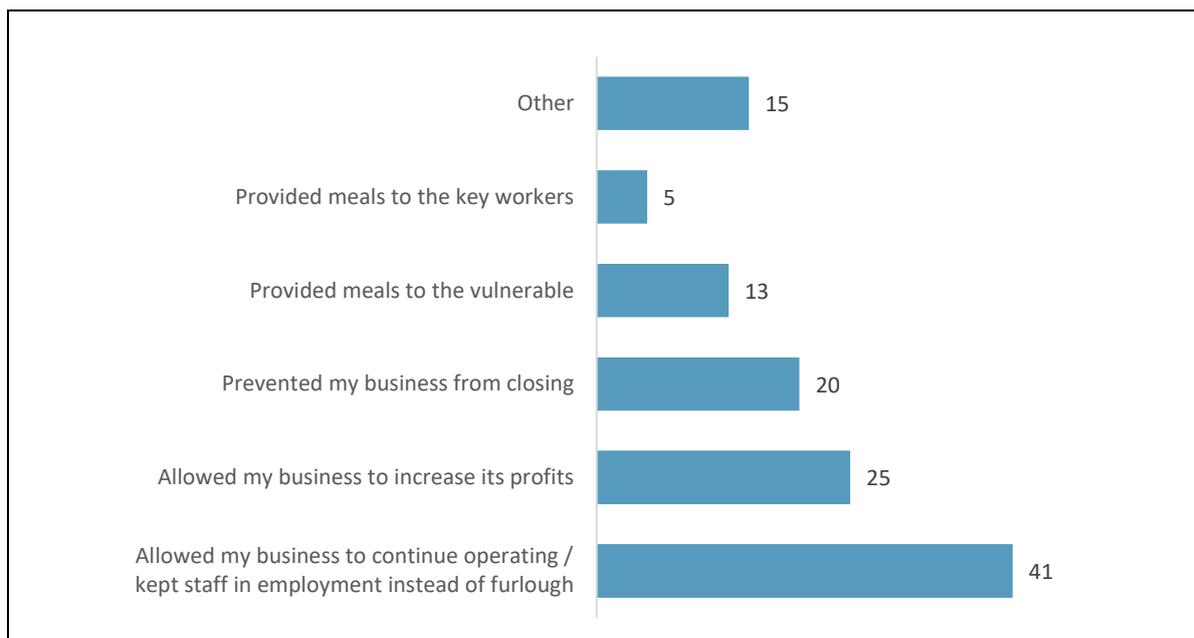


Figure 4-19: What impact did the grant have on your organisation/business? (n=72)
Source: RPA compilation based on survey data. Note that respondents could select multiple answers.

Other responses regarding the impact of the grant include:

- Continued support of fishers and fishing communities;
- Job retention for various areas of the supply chain and awareness of locally caught seafood to consumers across Scotland;
- Supported a new start up business;
- The grant and processing equipment will be of significant benefit due to better end products;
- Maintenance of a local fisheries promotion scheme and provision of dedicated support to the industry rather than ad-hoc volunteer time;
- A new fresh fish home delivery business pilot in North Devon;
- Sale transformation and business expansion ('with two boats on all fronts');
- Improved product quality and national delivery;
- Long-term business growth;
- Provision of a market for local fishers; and
- Diversification: retail selling, seafood supply to rural village and farm shops.

Challenges and opportunities that were encountered due to diversifying

Survey respondents were asked whether they encountered any challenges after the grant was issued (Figure 4-20). In total, 31 respondents (43%) highlighted that supply and demand issues have been challenging. Transport issues are noted by 17 respondents (24%) and product issues by seven survey respondents (10%). Food safety warnings (5, or 7%), limited access to machinery (3, or 4%) and poor customer feedback (2, or 3%) are suggested to have been a challenge for a few businesses.



Figure 4-20: Did you encounter any challenges to your business after the grant was issued? (n=72)
 Source: RPA compilation based on survey data. Note that respondents could select multiple answers.

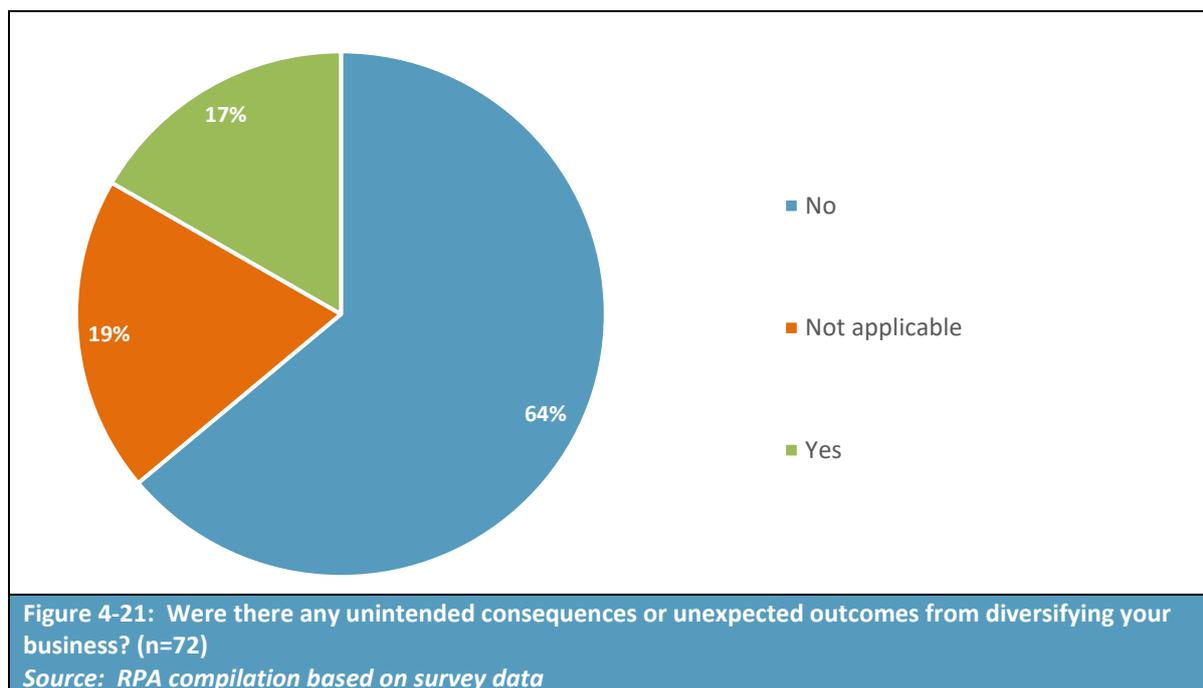
Whilst eight respondents (11%) stated that they have not faced any challenges, other respondents (26, or 36%) highlighted further issues.

Case study: challenges faced by beneficiaries

- Cost of delivery and finding suitable space to assemble orders: with a relatively small and dispersed North Devon population, cost of delivery (time and fuel) was a difficult issue;
- Some fishers started offering local supplies, but several soon ceased this once international export markets re-established and they refocused on full-time fishing; this change in offering occasionally caused confusion in some communities;
- Changing consumer demand throughout the Covid-19 pandemic as lockdowns are eased is a continuing challenge to work with;
- Delays in receiving project equipment due to manufacturing and supply chain disruptions;
- Increased administration with regards to orders, online payments, distribution;
- Limited space in shops due to social distancing restrictions has caused major operational issues;
- Volunteering chefs who created over 1,700 meals had to go back to work whilst the vulnerable were still in need; and
- Delays in supply of online web service: primarily, this was due to the service taking too long to set up with too much administration for the fishers.

Beneficiaries were asked whether they have noticed any unintended consequences or unexpected outcomes from diversifying their business (Figure 4-21). The majority of survey respondents (46, or 64%) stated that they have not experienced such consequences, while 12 respondents (17%) noted

that there were unintended consequences and 14 respondents (19%) indicated that this is not applicable to them.



Some respondents highlighted that they initially considered the project to be a temporary measure to maintain their business. However, a few survey respondents have found that they can sustain this business strand in case of further lockdowns and in some cases even continue with the diversified business model in the long-term. One respondent suggested that working hours have increased significantly due to diversifying their business. This is primarily because as well as undertaking his usual fishing activities, he is now also handling the logistics of direct selling and also responding to customer orders and queries. Similarly, another respondent highlighted the unexpected consequences as a result of this, since they now have to manage two jobs. The respondent explained that wholesale generates more revenue, but with the current circumstances retail is necessary for a more balanced approach.

Positive consequences of business diversification are noted as the following:

- Long-term business diversification beyond Covid-19;
- Increased availability of seafood;
- Good customer feedback;
- Networking: new communication and collaboration between community support organisations; and
- Strengthening ties with the local community.

Negative unintended consequences include:

- Lack of refrigerated vans to offer home delivery service;
- Business continuity: finding an effective way of continuing supply of fish to the customer base once the pilot is completed in October;
- Organisation: deliveries management increased working hours;
- Long delays due to Covid-19: Difficulty with getting tradesmen in to do the work; and

- High upfront costs to grow the business.

In total, 30 survey respondents (42%) have not noticed any changes since the grant was offered, whilst 42 survey respondents (58%) indicated that there have been significant changes. The lack of noticeable changes has been attributed to delays in using the grant. Where changes have been seen, one respondent associated these with Covid-19 and the 'new normal' and another highlights the increased working hours.

Other changes mentioned by survey respondents are particularly positive and include:

- Ability to open shop/processing unit;
- Bulk buying due to increased freezer capacity;
- Click and collect, deliveries and online ordering;
- Increased sales;
- Improved facilities;
- Increased customer base; and
- Increased retail prices and revenues which are distributed fairly.

Case study: Northumberland Seafood

The Seafood Centre is located in Amble, Northumberland. The business has its own standalone building that is surrounded by 15 retail pods. Within the Seafood Centre there are two main areas of operation: one is the fishmongers and the other is a lobster hatchery. Traditionally, these have a complementary relationship where visitors come to the hatchery and buy fish or vice versa, however this has not been possible this year due to social distancing measures.

The business aims to buy as much fish from local boats as possible, including shellfish, lobsters and crab, langoustines and bycatch of the langoustine boats. The local boats provide them with the majority of flat and round fish. Fish are supplemented by purchases from the fish market in North Shields (20 miles to the south). The business also works in collaboration with a number of fishmongers to get fish in that cannot be sourced locally to make sure they have a diverse offer on the counter, including salmon that is no longer available due to the restrictions on catching wild salmon.

The business has a seafood counter that is quite busy for most of the week. Furthermore, the Seafood Centre also operates a fish box scheme throughout the Northumberland area. Those boxes are issued on a Friday for collection from different hubs.

Over the last year, the business has increased their processing, where they pick their own crab and lobster and soak their own fish.

Funded project

The grant was spent on freezer space. The business modified part of the fridge to a freezer which has allowed it to hold more frozen stock. This includes stock for the counter (imported, e.g. prawns) that is an essential offer for customers to come in, and it also allows them to hold lobsters and crab from the local boats. As a result of the grant they now can buy pot bait (for lobster/crab pots) that is leftover at the market in an opportunistic way: the business purchases it if no one else is needing it. They can then store the product in the freezer and give it to the local boats if they require it to go out and fish. Previously there have been issues with not being able to get hold of stock because the boats did not have sufficient pot bait. The new equipment is particularly useful in a period of bad weather because the trawlers do not want to go out, which creates a lack of pot for the potting boats. The potting boats could only go out if they have either got a stock of it or have to wait until the trawlers have been out and got some bait to put in the pots. The freezer space helps smooth that lag period and offers more flexibility for the business and the supply chain as well as enhancing the business's resilience.

What worked well, and why?

Having the money was very helpful as the business is now more flexible and has enhanced its diversification.

Case study: Northumberland Seafood

Both the grant and pandemic were eye openers to realise the opportunity for collaboration within the fishing supply chain.

What worked less well, and why?

Trying to get people to supply in the lockdown period was difficult. This was an unavoidable consequence of the pandemic and restrictions, but it was challenging. It restricted the number of options that the business had available. Opportunities to collaborate were restricted because everybody seemed to be in a 'panic mode', and therefore having that headspace to think rationally and strategically about partnerships and how everybody could benefit was not available at the time. This reinforces the issues with the supply chain for fish and the lack of established strategies.

Lessons learnt

In the future there should be more planning on collaboration. If funding is available ideally the business would like to offer to collaborate. However, the relationship does not always exist within the fishing supply chain for different reasons. Collaboration is slowly improving, going through this period (pandemic) especially has made people reflect on the interdependence within the supply chain and the room for more collaboration. This has not been the case in the past.

Longevity of the grant's impact

Headline findings

Whilst RRGF funds enabled many short-term projects, some beneficiaries have found that they can sustain this business strand in case of further lockdowns and in some cases even continue with the diversified business model in the long-term:

- Out of the newly created jobs, 38 respondents (53%) believe that 100% of the jobs will be long-term positions; and
- 82% of respondents believe that the impact of the grant is sustainable, and they aim to continue the supported element of business on a permanent basis from now on.

Survey respondents were asked about the longevity of the grant's impact (see Figure 4-22). Most survey respondents (59, or 82%) believe that the impact is sustainable and they aim to continue the supported element of business on a permanent basis from now on. Eight respondents (11%) indicated that the impact will be medium-term and five respondents (7%) stated that the impact will be limited to the immediate term.

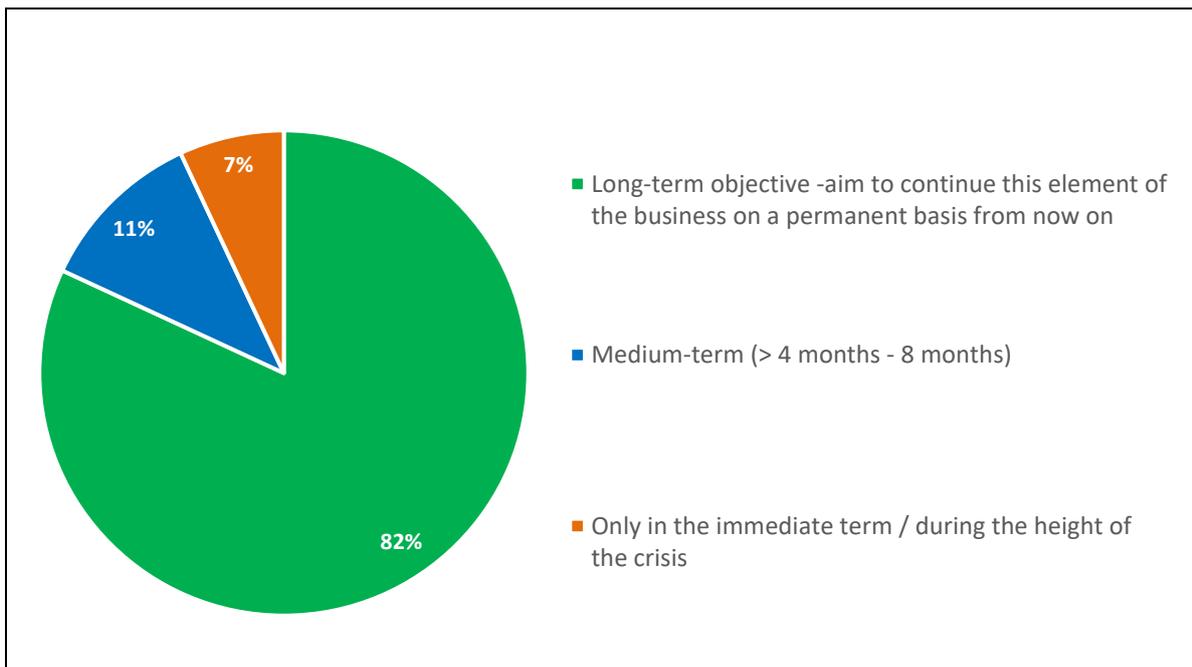


Figure 4-22: How would you describe the longevity of the grant’s impact? (n=72)

Source: RPA compilation based on survey data

Interview respondents were also invited to share their opinions on the longevity of the grant’s impact. Notably, some interviewees indicated that, while they are optimistic about the grant’s long-term impact, it is currently not possible to fully evaluate the impact of the grant. This will only manifest once the funding has been spent fully and its impacts become more evident, including when equipment can be used to its full capacity (when markets open up). However, others were keen to point out the positive impacts already occurring. Comments included:

- The funding has made a long-term change by increasing the scope for diversification;
- The additional financial stability they have achieved as a result of the grant will enable them to continue to diversify;
- The grant has enabled them to utilise more avenues to market, which include direct selling as well as selling to merchants. This has enabled them to make a long-term change and ensure that the business is stable by maintaining an income during lockdown; and
- The grant has enabled them to work with a different sector (the independent retail sector). Covid-19 has led to a step change whereby the independent retail sector was one of the only markets left (fish box, vans, etc.), when other usual markets closed.

Furloughed staff, future of business, insolvency, current/new projects

Supporting employment

Figure 4-23 overleaf shows that 47 survey respondents (65%) indicated that the grant supported direct employment of at least one individual. Most respondents state that the RRGP supported employment of one to three individuals (38, or 53%), six respondents (8%) note that the grant supported 11 to 25 jobs and two respondents (3%) indicated that between 25 and 100 jobs were supported by the grant. Twenty-five survey respondents (35%) suggested that the grant did not support direct employment. However, it should be noted that those beneficiaries might have focused on a different objective within their project, for instance providing community meals.

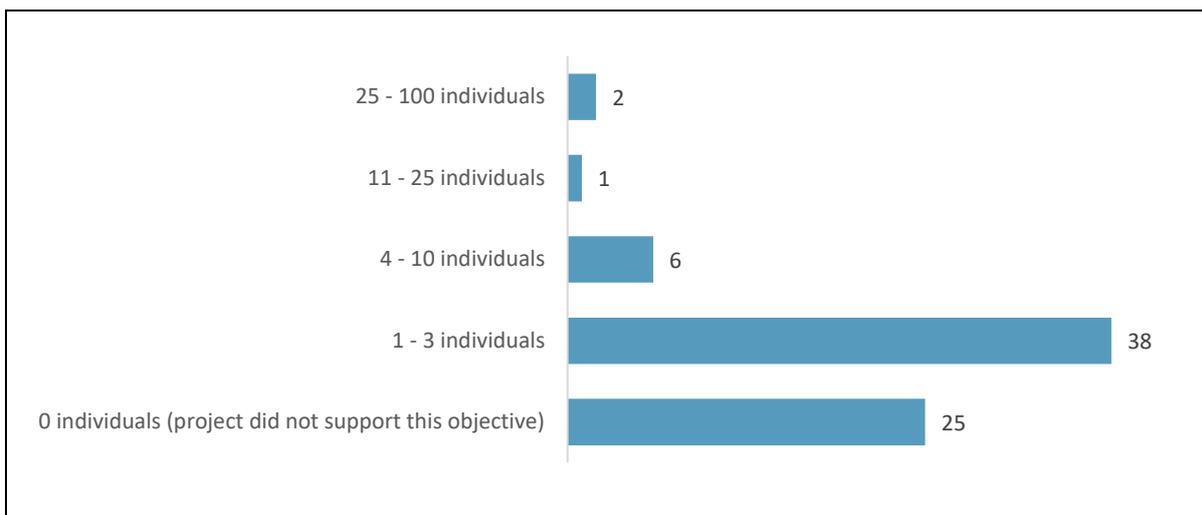
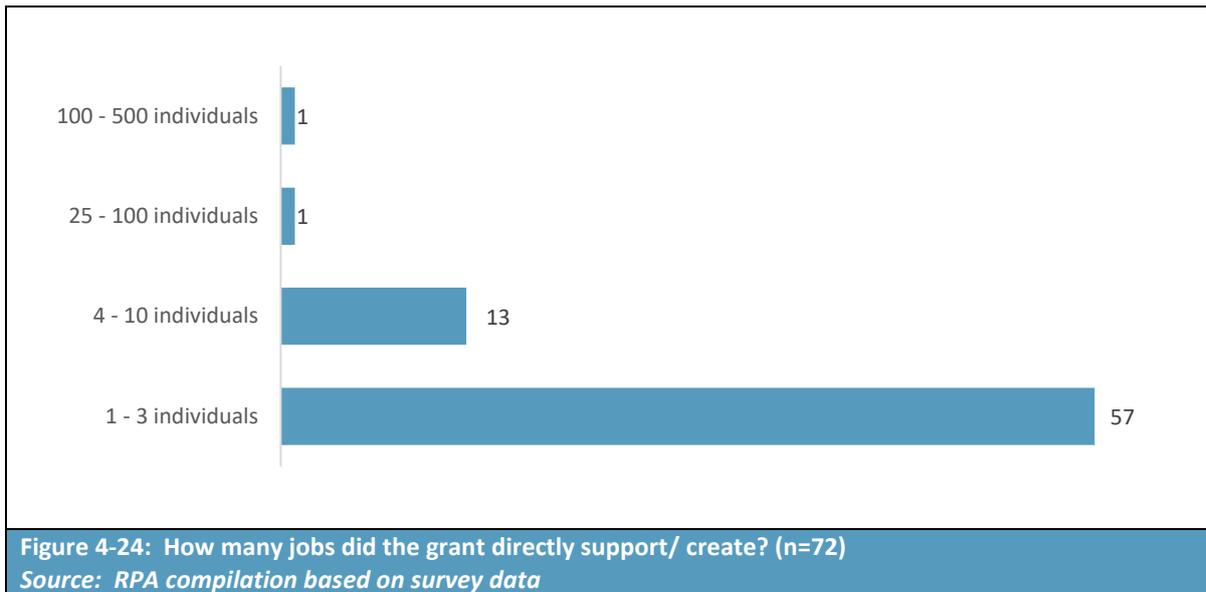


Figure 4-23: If your project supported direct employment, how many people (i.e. beneficiaries) benefited from your project? (n=72)
 Source: RPA compilation based on survey data

A couple of respondents (including a single-handed fisher) reported that the grant had allowed them to work throughout Covid-19. Several more noted that the grant had enabled the retention of employees. For example, two interviewees commented that existing jobs had been supported, with one of these highlighting that positions in partner organisations had also been maintained. One business that had to furlough staff because local boats were not fishing and the supply chain was disrupted, partially used the grant to help bring staff back from furlough. The business was concerned about whether there would be sufficient supply of products, but staff were brought back on a trial basis and it was discovered that they were quite busy. Another grant recipient was also able to bring seven staff back in or on partial furlough. They additionally noted knock-on benefits to their suppliers (e.g. an oyster farmer). Indirect impacts were highlighted by a further respondent, who felt that the grant had benefited the supply chain and awareness of locally caught seafood to consumers across Scotland. The grant enabled another recipient to bring members of staff off furlough more quickly; furthermore, they also furloughed fewer members of staff this lockdown (one instead of three). A further interviewee noted that their organisation had retained everyone to date, but this was due to previous diversification of activities. Similarly, another respondent indicated that the grant saved jobs after their business went from 100% business to 8% overnight due to lockdown.

Supporting and creating jobs

Fifty-seven survey respondents (79%) stated that one to three individuals were employed as a result of the grant (see Figure 4-24). Thirteen respondents (18%) indicated that 4 to 10 individuals were employed and two respondents (3%) noted that 25 to 100 or 100 to 500 individuals respectively were employed as a result of the grant.



Out of those newly-created jobs, 38 respondents (53%) believe that 100% of the jobs will be long-term positions (see Figure 4-25). Thirteen respondents (18%) do not think that any of the jobs supported by the grant will be permanent. Twelve (17%) and nine respondents (13%), suggest that 10% to 50% and 50% to 99% respectively will be likely to be permanent positions.

Comments from the interviewees were mixed. One interviewee stated that the grant had been a contributory factor to their employing an additional person. The new equipment capacity had helped with this. A further interviewee noted that the business had taken on one new person full-time to work in the fish merchants, and that this had freed up more time for an existing employee to work in the smokehouse.

In contrast, six said specifically that the grant had not yet led to the creation of new jobs. However, several of these had plans to develop or felt more secure as result of the grant:

- One aims to create a new position to maintain the momentum on the current progress, once the revenue is there to compensate for the position;
- One has been able to change their target species to brown crab. This meant that they were freed up to offer casual work to others on an ad hoc basis; and
- Existing jobs are more secure since the organisation is able to sell directly to consumers, door-to-door.

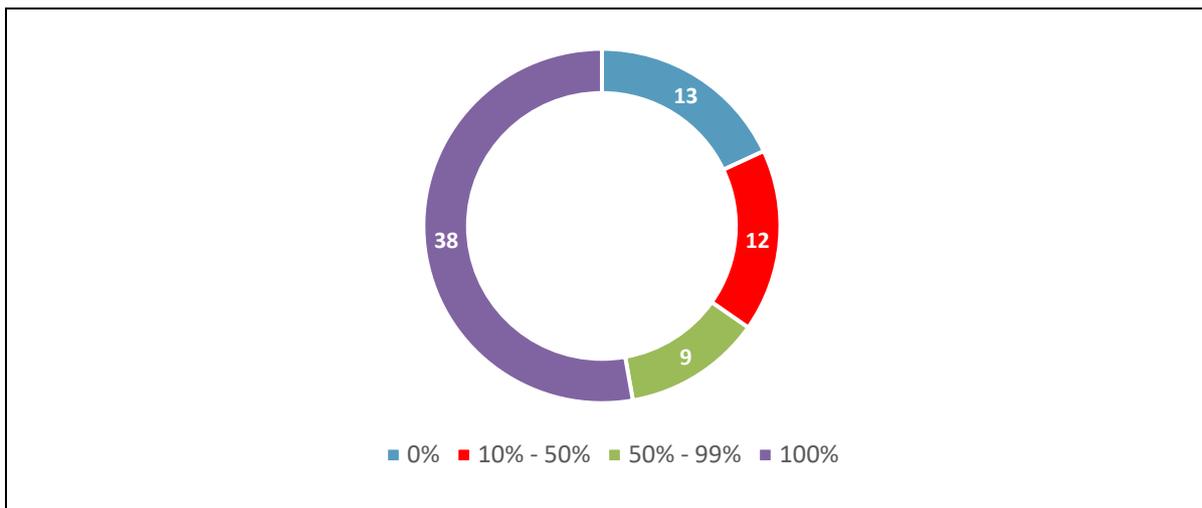


Figure 4-25: Of the new jobs created, how many could be permanent positions? (n=72)

Source: RPA compilation based on survey data

Whilst acknowledging the above impacts on jobs, it is also important to note the comments from a final interviewee. They highlighted that no new jobs were created as a result of the project to supply free meals during lockdown. However, the funding was considered to have helped vulnerable people who would otherwise not have been helped.

Financial stability

Varied comments were received from interviewees on the financial stability of their organisation. These are summarised in Table 4-1. They illustrate the complexity of the situation in which many organisations are operating.

Table 4-1: Interviewee comments on financial stability and how the grant has affected this		
Increased financial stability	No change/stable	Unsure/uncertain
<ul style="list-style-type: none"> Business is more financially stable due to the grant Financially stable and thriving - a direct result of receiving the grant More financially stable because the grant enabled the business to adapt to conditions and increase their customer base More financially stable. This was due to creating new markets for fish through direct selling as well as to merchants, and creation of a new income stream from direct selling of items such as oilskins and ice tubs Financial stability has "definitely" improved as a result of receiving the grant 	<ul style="list-style-type: none"> Stable financial state Grant has not directly affected their resilience. They were resilient anyway because Covid-19 has been beneficial for fishmongers No impact of the grant on resilience – although the grant enabled them to start something new, they still had to put a lot of their own money into the project No impact on resilience, but the grant did benefit vulnerable people and will have helped to increase their resilience during lockdown Due to the existing level of work that they carry out in the export market, the grant has not provided additional financial stability 	<ul style="list-style-type: none"> Uncertain about financial stability because they do not know when they will be able to re-open. Currently, they are waiting for the Government to ease restrictions. They may have to remain shut until March and will need Government support Previous diversification activity will enable them to hold their own until the summer. The grant has enabled them to diversify into a new market (however, this will depend on when restrictions are lifted) Resilience is expected to increase but they cannot comment yet

Table 4-1: Interviewee comments on financial stability and how the grant has affected this

Increased financial stability	No change/stable	Unsure/uncertain
<ul style="list-style-type: none"> Stable, not just because of the grant but due to a range of factors 		

Future business/resilience

Diversification is a means of enhancing future business resilience. Seventeen survey respondents (24%) identified diversification of product as being part of their project or initiative. This included activities such as purchasing a kiln for smoking products or changing their catch species. Thoughts from interviewees on future business resilience included:

- Selling new products and in new markets:**

 - One interviewee stated the fund has enabled them to sell a new product to different people. The business is now meeting the demand for skinned fish.
 - Another interviewee feels that they will be more resilient because they have an extra product to offer so can appeal to more customers. Additionally, they are better able to cope with uncertain times because they are not relying wholly on fresh fish products.
- Diversifying into new activities:**

 - One interview respondent indicated that they aim to diversify their organisation by exporting their seafood products.
 - One business is now actively pushing home delivery, especially for those who cannot get into the shop. The grant has encouraged them to make long-term changes to their business.
 - One organisation is hoping to continue to market their seafood via social media and selling it via the fishmongers next year. They felt that the grant could not have come at a better time for them.
 - A respondent thinks their business is now more resilient due to diversifying and that the change will be long-term.
 - A fisher was happy that the grant had enabled them to diversify and find new customers, and did not see any changes in future demand for their services.
 - A beneficiary commented that the grant has provided them with the option of being able to sell to other markets.
 - One business has made a long-term change as a result of the grant, with diversification from supplying restaurants to selling directly to consumers. This has resulted in direct connection with new consumers and new partnerships.
- Increased business:**

 - One respondent mentioned that they have been busier than ever before and this can be directly linked to the grant alongside other factors.

However, despite the above, two interviewees were cautious about future stability and resilience. One noted that there is a lot of uncertainty in relation to Brexit and the future of selling shellfish abroad. However, the stakeholder now has other options in cases of uncertainty related to both the pandemic and Brexit, in that they can fish, store and sell a product that is valuable locally. Another interviewee was concerned about their market being related to tourism and the extent to which this would be affected in the future. Concerns were also raised by a third interviewee as to whether the

service they had developed as a result of the grant (collecting fish from small-scale fishers to sell in online auctions) would be required in future lockdowns.

New projects/additional business

The awarded grants enabled the development of new projects and the creation of additional business including:

- **Working with the local food bank:** in one case, the grant supported the business in a new project partnering with the local food bank, with which they are offering a voucher scheme. The food bank puts a fish voucher in that consumers can redeem with the business. Due to an ad-hoc demand of this scheme, the business would not have been able to do the project without the added freezer space. The RRGF has allowed the business to hold larger amounts of stock which enables them to partake in programmes such as the voucher scheme.
- **Home deliveries:** in another instance, the grant has enabled home deliveries. Their new equipment makes home deliveries a lot easier and subsequently they now achieve a large number of deliveries. Although the stakeholder's shop is still open for some customers, the new improved business strand has allowed them to offer more home deliveries and therefore generated additional business. Another respondent's new electric vehicle enables new projects and diversification such as home deliveries which is also supported by their new website.
- **Supply of meals:** one grant was used to supply free meals to people who were struggling to access hot meals during lockdown. The project would not have been able to operate without the grant.
- **Diversification of product:** a respondent commented that their business is supplying fish to another company and the smoked seafood is now a thriving part of their business. Although the smokehouse was set up 10 months ago, it was only fitted with one kiln. The second kiln purchased with the grant allows them to fulfil a larger quantity of orders. Prior to having the new equipment, the beneficiary was only sending out smoked fish to their own customers. As capacity has increased, people have started approaching them for smoked products. They have also gained new fresh fish customers. Their sales over the summer were up by 20%. Another respondent commented that the purchase of a skinning machine, which he believes to be the only one of its type in the locality, will result in a new market for them. However, this will not be realised until the hospitality sector is fully operational again.
- **Seafood business portal and customer marketing campaign:** whilst the grant enabled the extension of the Supper Club (which was an existing project), it also enabled two different aspects of the project which would not have otherwise happened: namely supporting the development of a one-stop portal for seafood businesses to register for a range of online consumer listings, and the delivery of a consumer facing marketing campaign to highlight "Local Legends" in a drive to support consumers source more local seafood. The beneficiaries are now looking into further projects as a result of the grant. These are large-scale projects which may not have come about if it was not for the work that they have carried out as part of the grant.
- **Fish collection service:** one interviewee noted that the grant had helped them to purchase a van, which then enabled them to initiate a new project where they collected fish from boats in the south and south west of England to sell in their online auctions. This did not directly

lead to creation of any new jobs or have any impact in terms of existing jobs or on furloughing of staff within the company. However, it did enable them to support others during a difficult time.

- **Targeting new markets:** the grants have enabled a great many beneficiaries to target novel markets when the traditional markets closed. For example, one interviewee said the grant has enabled him to target specifically restaurants and the public rather than shellfish buyers and foreign markets. Another beneficiary indicated that the grant supported new projects and generated additional business by allowing the fishmongers to sell directly to consumers instead of via people coming into the restaurant. They had a significant increase in turnover per week when the restaurant was shut. This meant that they were buying more seafood per week from local ports. Turnover dropped significantly per week during the summer when the restaurants reopened, because people were eating out instead (through 'eat out to help out'). They have increased the fishmonger service once again since the second lockdown (Northern Ireland).

5 Wider Impacts for the Seafood Industry

5.1 Overview

This section looks beyond the grant recipients to consider wider issues stemming from the Covid-19 pandemic. It looks at the impacts for businesses who failed to secure public or charitable sector grants, prior to drawing comparisons between business types. It then considers the impact of Covid-19 grant programmes on existing (i.e. pre Covid-19) seafood supply chains over the short, medium and long term.

5.2 Businesses who failed to secure charitable or public grants

Minimal data have been obtained from those who failed to secure grants to date. One unsuccessful applicant reported that they did not take any specific action following receipt of the notification that they were not going to receive RRGP funding. This included not applying to any other funds. They noted that the goals of their business remained the same and their business plan was not adapted in response to not receiving the grant. A further unsuccessful applicant noted by email that they did not receive a grant, so had not progressed with their project. If this situation is replicated across all unsuccessful applicants, this indicates that of the 160 potential projects/initiatives represented by applications to the RRGP, 31 (around 19% of the total) were not taken forwards.

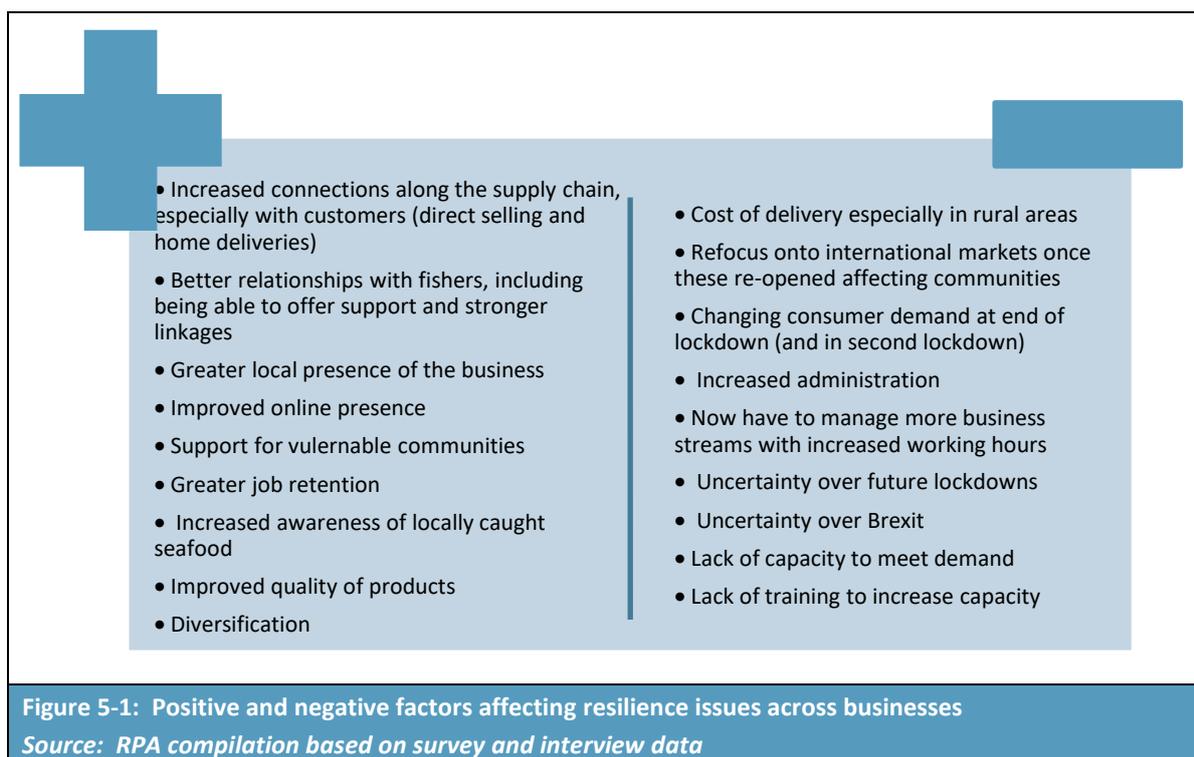
The unsuccessful interviewee stated that they did not have high expectations. They mentioned that they thought the FCFCT is more an English organisation prioritising English regions (and stated that the FCFCT would not like them saying that) hence why they did not have high expectations in the first place. However, they also acknowledged that the bias may be a misperception. The interviewee also applied for a small business grant that does not compare to the RRGP. The Scottish Government was running it in response to Covid-19. There was no uncertainty about whether they would get it as they qualified and knew they would receive funding. For the application they just submitted details and qualified immediately. They applied on a Tuesday and had the money on Friday. Besides that, the interviewee explained that they have a good financial base as 'people will always need to consume food'.

5.3 Comparison between businesses

A comparison is drawn between businesses based on the identified benefits of the RRGP and on-going uncertainties surrounding future business resilience. The key findings are summarised in Figure 5-1, which shows positive and negative trends and perceptions around business resilience linked to the benefits of the grant programme.

There are variations between types of businesses. Many fishmongers commented that they had experienced increased financial stability due to Covid-19. Many fishers, however, were affected by loss of markets, especially export markets and restaurants. For them, grants that have enabled direct selling have meant that they can continue to sell their fish, which may not have otherwise been possible. Stronger linkages between fishers and fishmongers are also highlighted as helping improve business resilience. A general comment was that consumers appeared to be willing to pay higher prices for quality food during the lockdown as they were unable to spend money on other things. Some interviewees highlighted a potential issue in the second lockdown, where demand for direct sales has been much lower (perhaps due to second homeowners returning to their usual place of residence). Some businesses still recognised, however, that their future resilience is linked to recovery of the hospitality sector.

An unsuccessful applicant from the Shetland Islands explained that the absence of the RRGP was not too problematic for their business, as they work in a sector that is producing food which is not as threatened by the pandemic. Seafood is the primary activity in Shetland. They mentioned that the situation has not been without its difficulties during the Covid-19 crisis but they have done a lot better than other economic sectors, in particular the tourism industry. The stakeholder reiterates that seafood has done relatively well. In terms of diversification they noted that there is not a great scope for diversifying as they are mainly a provider of raw material. Hence, they cannot add a lot of value to products due to costs and location. Because they are primary producer it is difficult to offer a continuity of service to the mainland, e.g. weather conditions may prohibit ferries to deliver products which would have detrimental knock-on effects for buyers, for example supermarkets. Despite these limitations and an unsuccessful application, the stakeholder highlighted that their business continuity is not threatened.



5.4 Impact of Covid-19 grant programmes on pre-Covid-19 seafood supply chains

Seafish has undertaken an assessment of the impact of Covid-19 on the seafood industry. An initial Seafish report (2020)²⁶ was produced in September 2020. A further report to assess the impacts from July to September is expected to be published in December 2020. The main findings of the report are presented below and compared against the findings of the RRGP evaluation:

- UK seafood businesses started to be significantly affected from February 2020, as Covid cases increased in China and began to spread in Europe, due to the effects of lockdowns and trading restrictions. The value of UK exports fell by 19% in January to March and 28% in April to June,

²⁶ Seafish (2020): Review of Covid-19 impacts on the UK seafood industry: January-June 2020, available at: <https://www.seafish.org/insight-and-research/covid-19-impact-on-seafood-industry/> on 20th November 2020.

compared with 2019. Even though seafood production and provision were identified as an essential sector, the impacts on UK seafood markets increased when the UK entered lockdown in March 2020, with already reduced export markets further constrained by reduced transport and logistics. Many borders were closed, and logistics companies reduced the frequency of their services in the face of uncertainty over markets and disruptions. Ports and harbours reliant on fishing and tourism also saw significantly reduced income, although vessel maintenance services saw some additional trade due to a reduction in normal vessel operations. Aquaculture businesses faced challenges associated with minimum crewing required for basic stock management. This presented significant financial challenges due to fixed minimum crewing costs.

- Comparison with the findings from the RRG evaluation: Exports have been affected by Covid-19, which highlights the need to promote British and local seafood in the UK in the longer term. This requires better connected infrastructure beyond the South West of England and improved processing facilities in the UK. RRG funds supported innovating projects which helped businesses target new markets, for example collecting fish from small-scale fishers to sell in online auctions. However, concerns were raised as to whether the services that have been developed as a result of the grant would be required in the future.
- With lockdown, the foodservice market collapsed. Many hotels, restaurants and pubs closed completely; others offered a reduced service through takeaway and delivery, usually to a limited capacity. Businesses reliant on tourism saw a reduction of around 72% in visits in March and April. Suppliers and processors were affected by bad debt, with invoices sometimes being outstanding as far back as December 2019. At the same time, retail sales of seafood products increased due to stockpiling, with pre-packed, tinned and frozen products proving especially popular. Over time this levelled off, although in June 2020 demand was still around 15% higher compared with 2019.
 - Comparison with the findings from the RRG evaluation: Short-term and long-term job retention and creation of jobs has been supported by the RRG and other Covid-19 grant programmes within the seafood supply chain as businesses diversified which they could not have achieved without financial assistance. Some organisation types (e.g. fishmongers) are busy and doing well with the Covid-19 situation having benefited them, as people shop more locally and the grant has enabled them to expand their services (e.g. home delivery). However, others such as those in the hospitality sector and fishers who supply them, are awaiting Government decisions on the easing of restrictions.
- The closure or reduced operations of fish auctions, increased volatility of prices and failing markets created considerable challenges for both the wild catch and aquaculture sectors. The supply of wild caught fish was significantly reduced in terms of both landings and value, compared with 2019. Pelagic landings were largely unaffected as their fishing season had already finished. Shellfish was hardest hit, with fishing activities often stopping overnight. Despite reductions in landings, there was still an oversupply which meant prices reduced to unsustainable levels. Industries organised tie-up schemes and there were efforts at the local level to coordinate and stagger landings to even out supply and keep market prices buoyant. Some businesses looked to diversify into retail, online sales, takeaway and delivery options. This enabled some vessel owners to create or grow direct sales or delivery. The overall impact was a move to small-scale markets with direct selling to consumers. Fish and chip shops did better by mid-May, but many were still running at reduced capacity.

- Comparison with the findings from the RRGP evaluation: closure of markets and auctions led to a shortage of refrigeration space for landings. Grants from the RRGP enabled many fishing businesses to move towards direct selling and home delivery, although supply and demand issues were common, compounded by a need for better consumer education. Targeting of new stock (e.g. brown crab) helped some businesses to meet customer demand. Consumers are willing to pay a premium for locally caught seafood, although provenance messaging is an integral part of this and many upskilling is needed to help individuals succeed in new customer-facing roles.
- Many seafood processing, wholesale and smaller retail businesses closed or reduced their operations due to uncertainty over when export and UK foodservice markets would return. An estimated 75% to 80% of processing business focusing mainly on seafood were forced to reduce their activities or close during lockdown. Those supplying live or fresh export markets and producing fresh whitefish to the foodservice sector were hardest hit. The other 20% to 25% of processors were able to continue production at normal or higher than normal levels. These were typically those with smaller workforces meaning social distancing measures were easier to implement. Some were able to upscale production to meet increased demand from online retail and home deliveries. There were supply issues for some businesses, especially around cardboard for packaging. The easing of restrictions in May and June enabled businesses to slowly begin to reopen. Export markets were slow to return and were still below normal levels at the end of June. Longer term challenges remain.
 - Comparison with the findings from the RRGP evaluation: More collaboration within the seafood supply chain is needed to prevent or react to future shocks. The RRGP supported many small-scale processing projects which enabled businesses to diversify their product and sell directly to consumers; for example, through the purchase of a smoker to produce smoked produce, or a skinning machine to meet consumer demand for processed fish.

6 Future Needs

6.1 Overview

Drawing on the data gathered from RRGP beneficiaries and other interviewees, this section discusses future needs including the direction of travel for the industry and projections for future funding requirements. It also considers additional support that could be taken by the charitable and public sectors to assist the seafood industry. It concludes by providing an indication of the initiatives and projects that could be nurtured to the benefit of the UK seafood sector.

6.2 Direction of travel for the industry

Table 6-1 gives an overview of the aims of industry stakeholders and what their anticipated direction of travel entails. It should be noted that this overview only includes responses from successful applicants.

Table 6-1: Direction of travel for the industry	
Theme	Interview responses
Brexit	One interviewee noted that the direction of travel is dependent on what happens with the markets abroad after Brexit. Pre-pandemic this was the stakeholder's main market for shellfish. If this changes the beneficiary now has the option of selling in the UK if required
	With Brexit looming there may well be knock on effects for local seafood suppliers. Usually produce is landed on the quay and loaded into lorries for the export market. With supply chain disruption this may not be possible. There is already a demand for local seafood and this could be tapped into ²⁷
Covid-19	One stakeholder hopes the demand for fish from fishmongers will continue to grow. They believe that Covid-19 has pushed the supermarkets back to providing services they used to specialise in, i.e. providing tins on a shelf rather than fish counters. Many people emphasise value and supermarkets promote their value in different forms (tins, toilet rolls, etc.); however, they have no expertise in fish counters
	One beneficiary noted that everything is 'up in the air' until there is a vaccine for Covid-19. They are very reliant on income from tourism given they are in Belfast. The stakeholder does not believe that things will be normalised until next spring
	It is a case of waiting and seeing how the November 2020 lockdown will affect the demand for the stakeholder's product. However, now that they have diversified from the restaurant sector, they are optimistic that demand from consumers locally will continue
Collaboration	Improvement of collaboration within the seafood supply chain should be a key direction of travel for the industry. The independent retail sector in particular is very fragmented and there are lots of people working on their own; direct marketing support would therefore be valuable for the sector. Grassroots, local events where the local community can meet local fishers, would also help rebuild supply chains
	One respondent would like to collaborate with local suppliers to provide 100 or 200 portions of fish and educate local people as to where they can go and purchase the product from. The respondent receives many enquiries from customers as to where the café gets the seafood from, but they often do not have a chance to reply to them. They would like to produce a postcard or POS (point of sale) similar with the details of suppliers so they can spread the word

²⁷ The evaluation steering group noted that this finding was relevant to the Fishmongers' Company's local fishing campaign and highlighted its timeliness.

Table 6-1: Direction of travel for the industry	
Theme	Interview responses
	Another interviewee is anticipating that they will be flooded with demand next year. They need to get the consumer product offering right first, and then they hope to be able to benefit the industry, and in particular the independent retail sector, much more going forward. The Fishmongers' Company has a very strong reputation in the industry, and they would like to partner and exchange knowledge and contacts with them outside of the grant programme. There is plenty of crossover and potential to work together going forward
	An organisation's new skinning machine is part of a wider development plan aspiration, including the development of a cooperative fish market on the quay with a dual approach: what they do not sell at the quay, they can send down the road to the fish market. They would also like to continue to help not only the cooperative members, but the other boats landing at Whitehaven (e.g. whelk boats), and continue to help the charities which support fishers and seafarers
Diversification	Supplying to the hospitality sector: One beneficiary plans to sell their product to more restaurants in the UK. However, as tourism on the Isle of Skye is seasonable, the feasibility is still unclear. As lockdown eases, the stakeholder hopes that this will become a bigger target market for them
	Home delivery: Another interviewee considers doing home deliveries later, although there is currently enough work to keep them occupied. They would also like to create a Facebook page or similar to create a following for their customers. One stakeholder mentioned that they would like to deliver nationwide and focus more on retail
	Ready meals and online dissemination: One beneficiary wishes to get their artisan products into deli-shops and supermarkets in the long-term. They have got foil bags into which they put the seafood. The customer can then put the bag straight in the oven. They are offering whole meals to customers this way. The stakeholder also uses YouTube to post videos explaining how to cook the meal. Subsequently, this aims to take the 'fear factor' away from the customer and increases customer confidence to cook fish

6.3 Projections for future funding needs

Interview respondents indicated that they might require funding based on the direction of travel for the industry as outlined in Section 6.2. The key themes identified during stakeholder engagement are presented in Table 6-2 below.

Table 6-2: Projections for future funding needs	
Key funding requirements	Further details
<i>Industry-wide initiatives</i>	
Education to promote local and British seafood	Three interviewees suggested funding needs to help educate and ultimately change consumer behaviour to promote British seafood
Reviving the MMO marketing strand	One interviewee explains that they were disappointed that the MMO stopped accepting applications for their marketing strand. The respondent believes that this should be revived as soon as possible

Table 6-2: Projections for future funding needs	
Key funding requirements	Further details
Funding needs post-Brexit	An unsuccessful interviewee from Shetland noted that it would be interesting to see the outcome of the Brexit negotiations. They know about the Shared Austerity Fund but think that there needs to be an alternative along the lines of European structural funding programmes now that the UK is leaving the EU, whether it is Westminster or Local Authorities that provide funding. Shetland has an Islands deal, similar to the city deals, which will generate some funding. The interviewee believed it was £100 million over ten years between Shetland and the Western Isles for a number of projects
<i>Individual business initiatives</i>	
A replacement for the EMFF	Promotion of replacement funding schemes to improve awareness of support that exists for the sector
Investments in existing equipment for repair and renewal	Repair and renewal are the new focus for a company, in particular there are some worn out freezers and a fridge which need motor repairs, so some investment in existing equipment needs to be made

6.4 Support that could be provided to the seafood industry

Beneficiaries suggested a large variety of support measures that the charitable and public sector could offer the seafood industry. Ideas are presented below.

- **Promoting British seafood**

One stakeholder suggested that in the UK there is poor appreciation of the types of fish around the UK coast and how to prepare it. The UK should celebrate local seafood. However, currently the vast majority of shellfish are exported. Most people do not realise the value of some of the fish that are caught locally. A lot of the local products are valued more abroad than they are locally which the interviewee would like to change. They further explained that there is an inconsistency in that people are prepared to eat international cuisines but show no interest in British seafood, which the respondent considers a key challenge that needs to be overcome. An unsuccessful candidate from Shetland was not sure about the scope of highlighting regional seafood produce or if the focus should be on British seafood as opposed to bringing out different areas within the UK. They mentioned that Shetland had the same abundance in seafood as Cornwall and therefore regional promotion of seafood should be supportive.

- **Improved distribution of seafood**

It was mentioned that distribution of seafood, in particular inland transportation, needs to be improved to deliver fresh fish.

- **Management of the supply chain in dealing with waste**

There is a significant amount of waste from the seafood supply chain, in particular the rest of carcasses. The interviewee recommends creating a system that derives more value from waste. The stakeholder explained that there is work being undertaken in Australia that facilitates investment in the development of a market for fish that has gone off or not for human consumption.

- **Lack of training opportunities**

One respondent explained that when they are seeking new members of staff, the access to training for fishmongers is limited. The business is based in the northeast of England and when they were looking for an apprenticeship, the nearest supplier was in Blackpool (north west of England). The practical nature of the fishmonger profession means it is not well-suited to distance learning. The stakeholder notes that they are fortunate that they can train people onshore locally, but not everyone is in that position. The respondent warns that there is a significant risk if there is an increase in demand for fish because there is a lack of people that are trained. An aging workforce also creates problems related to this.
- **Community events**

Grassroots, local events where the local community can meet local fishers would help rebuild supply chains.
- **Technical support**

One interviewee highlights that monetary support was ‘fantastic’. They suggest having more support on the technical side, for instance, access to measures that promote business might be helpful. Assistance with websites would also be supportive, for example, the free e-commerce site which was paid for by the RRGP and provided website support. The stakeholder knows of fishmongers who took this service up, although they did not.
- **Political barriers**

According to one stakeholder, there is no other type of support needed. They mention that ‘cancelling Brexit’ would be good, as they expect fish shortages. A lot of fish in Northern Ireland comes from Scotland, but Brexit will create barriers to trading fish which will be a major challenge. Another beneficiary mentioned Brexit as a problem as it creates too many unknowns. They are also concerned about the French in terms of the Brexit negotiations.
- **Promoting the Fishing Animateurs**

One interviewee discovered the Fishing Animateurs by chance and was not aware that they existed previously, so perhaps spreading the word about their role would help others. Another interviewee remarked at how pleased they were with the collaboration with the Fishing Animateurs.
- **Collaboration within the supply chain**

One stakeholder reiterated that working with other organisations is important, hence closer collaborations would be helpful. According to another respondent, the independent retail sector is very fragmented and there are lots of people working on their own. This is certainly an area of support for the sector going forwards. Another stakeholder believes that Seafish is too geared towards multi-retail outlets rather than independents.
- **Direct marketing**

Direct marketing support would be valuable for the independent sector.
- **Continued support for the domestic supply chain**

One interviewee is aware that this sector is the focus of several grant funds at the moment (e.g. also DSSS) but highlighted that continued support will be needed.

6.4.1 Initiatives and projects

A summary of potential initiatives as mentioned by interviewees is presented overleaf. Respondents would particularly like to see more promotion of British and local seafood in the UK and anticipate greater collaboration through improved seafood supply chains.

Promotion of local seafood and consumer education

- An interview respondent highlighted that they want to promote seafood products made in their local area, also by working with partners. Having an extra resource that can take these projects forward and give it more attention would be helpful.
- An interview respondent mentioned that consumer education is an important initiative to promote. They explain that many television and other programmes refer to fish imported into the UK. For instance, they mention tuna and prawns whereas they could be talking about plaice or langoustines. A greater concentration on locally-produced fish would be important, including trying to make some of the fish that the UK has an abundance of more exciting. The respondent also indicates that there is an opportunity to make higher profits on very low volume fish by selling them at a higher price. Increasing the perception of fish that the UK offers and develop on the market is a great opportunity.
- One beneficiary suggests an advertising campaign (alongside Brexit negotiations) to promote British seafood.

A sustainable supply chain

- Another challenge that an interviewee highlighted is environmental pollution through polystyrene. The supply chain relies on and generates polystyrene, which has negative impacts on the environment on which the fishing industry fundamentally relies on. Having a better cooling chain not including polystyrene or better ways of recycling it would be a good market for the industry. The stakeholder notes that this requires strong leadership. The respondent's business would be interested in supporting such an initiative but it needs an organisation to establish it.

Collaboration

- One interviewee would like to see increased collaboration between organisations, in particular the Fishmongers' Company and the National Federation of Fishmongers. They also suggest to support more independent fishmongers and improved supply chains through initiatives. An issue with markets drying up and a lack of movement from coastal to inland markets was highlighted.

Direct sales

- The closure of restaurants and other facilities resulted in the loss of an essential part of business for those who focus on foodservice. Therefore, many had been selling directly to food service. Projects supporting this would be beneficial for the UK seafood sector.
- One interviewee is keen to start up a 1-2 day fish market on the quayside at Whitehaven. They have had discussions with the Animateurs about the potential for this and is looking for funding. However the public are often looking to purchase something which is not caught locally at Whitehaven, so it would imply that they need to buy a little bit of fish in to give the required variety. They believe that a similar market has been set up in West Mersea and they have asked the Animateurs to forward some images of the stalls and hygiene equipment in use there, so they have an example of the sort of thing which has been funded elsewhere.
- A shellfish sales business identified that they would like to install a commercial kitchen so they are able to cook lobsters and crabs for direct selling. They believe customers would prefer to buy cooked shellfish, so this would help them to continue to diversify.

Support of existing distribution networks and supply chains

- One interviewee, although unsuccessful with their application, highlighted that they would like to see support for existing distribution networks and supply chains. They also wanted to see long-term investment that does not undermine existing businesses, and encouragement of domestic consumption of domestically landed fish.
- One beneficiary suggests to support coasts and promote jobs in coastal communities in the UK.

Community initiatives

- One respondent is seeking information on funding for a communal fish fridge for Lowestoft. During the March lockdown BFP, the fish auctioneer at Lowestoft furloughed their staff and closed. Lots of fishers at Lowestoft land their fish at BFP and they could no longer do this as there are no chilling facilities at Lowestoft. The respondent's company made agreements with some of the fishers to take the fish that they landed. However, this often entails very long days as they have to be at the quay when the fishers land. They would like funding for a refrigerated box or similar which the fishers have keys for so that they can land their fish at tide, ready for the stakeholder to sort/weigh at a later point.

Lack of overview of different funds

- There seems to be plenty of grant initiatives out at the moment. One respondent stated that they lose track of the different grants. They are now undertaking an application for the Coastal Communities Fund in Wales.

7 Conclusions

7.1 Overview

This section brings together the findings to provide some overall conclusions from the evaluation. It sets out the main messages from each aspect of the evaluation framework.

7.2 Overall findings

Table 7-1 provides a summary of the findings against the evaluation framework.

Table 7-1: Summary of the findings against the evaluation framework		
Theme	Evaluation questions	Key findings
Overview of charitable and government Covid-19 grant programmes for the fishing and seafood trade sector		
Overview of grant programme	How do Covid-19 grant programmes compare across the fishing and seafood trade sector? (Rapid Response Grant Programme; Fisheries Response Fund; Domestic Seafood Supply Scheme; Scottish Government's Seafood Resilience Fund; Welsh Fisheries Fund; Northern Ireland's Finance Scheme)	Aside from the RRGF, the other funding programmes mentioned are run by the public sector. Maximum grant size varied from £10,000 per farm/vessel for the FRF (England) and Welsh Fisheries Grant to £100,000 for the Scottish Seafood Business Resilience Fund. Most schemes made one-off payments (excepting the FRF and Northern Ireland Business scheme). Fund objectives varied slightly with the FRF, Scottish Seafood Business Resilience Scheme, Welsh Fisheries Grants and Northern Ireland Finance Scheme focusing on fixed costs. The RRGF and DSSS had broader aims related to diversification and increasing the sale, supply and consumptions of local seafood
The impact of the RRGF on beneficiaries		
Grants awarded	Who were the beneficiaries?	Beneficiaries were spread across the UK, with a considerable number based in the south west (47% of grants in the <£4,000 tier were awarded in the southwest). Based on survey responses (n=72), most beneficiaries were fishing businesses (27 responses, 39%) or fishmonger/merchants (22 responses, 31%)
	What has the use and impact of the grant been, including longevity of the measures taken during lockdown to diversify businesses (i.e. immediate impact only, medium, or long-term impact)?	Survey data indicate that grants have mainly been used for capital expenditure. Common themes raised were direct selling and small-scale processing. Interview data suggest that some impacts are likely to be medium or long-term, e.g. improved website/online presence for advertising, refrigerated van for home deliveries
Impact	What is the current status of beneficiaries?	Of the 72 survey respondents, 9 (around 13%) indicated that the grant was used for business survival at an uncertain time. Interview data show variability in the current status of beneficiaries. Fishmonger businesses report being busy; other organisations such as restaurants continue to be affected by Covid-19 restrictions

Table 7-1: Summary of the findings against the evaluation framework

Theme	Evaluation questions	Key findings
	<p>How much additional business was generated as a direct result of the grant expenditure and what has this meant for the businesses?</p>	<p>Additional business has been generated by the grant in some instances. Interview data indicate that the grants have supported new projects, for example:</p> <ul style="list-style-type: none"> • Voucher schemes with the local foodbank • Home deliveries • Direct selling to consumers instead of via food service • Selling a new product to different people <p>Knock-on impacts were also reported. Grants enabled recipients to keep trading, thus supporting jobs down the supply chain. This has allowed individual pride among beneficiaries, sustainable economic development and reduced Government spending</p>
	<p>What are the future projections for beneficiaries?</p>	<p>Interview data indicate varying levels of confidence in the future. Positive comments from beneficiaries included:</p> <ul style="list-style-type: none"> • Feeling that their new project will improve their resilience • Aiming to diversify by exporting seafood products • Improved resilience through marketing by social media • Thinking that the grant had stimulated a long-term change and movement into home delivery for the business <p>However, others had concerns about whether the new services they had developed would be needed in subsequent lockdowns, and uncertainty over when/to what extent the hospitality industry might be allowed to open. These issues were made both by those in the hospitality sector and organisations who supply it</p>
<p>Lesson learning</p>	<p>What challenges and opportunities did beneficiaries encounter due to diversifying?</p>	<p>Many lessons learnt were identified with variations by type of organisation.</p> <p>On the grant application process, the opportunity to apply quickly for emergency funding without the typical three quotes required by some grant applications was really welcomed. The role of the delivery body as an assessor of grant applications meant that the provision of in-depth support with applications was passed to the Animateurs to avoid bias. Help and support from the Animateurs were appreciated and highlighted by several interviewees.</p> <p>Following grant receipt, fishing businesses encountered challenges with workloads and tracking payments/administration when trying to fish and sell directly to consumers. Hospitality businesses raised the importance of good IT support, whilst fishmongers joined fishing businesses in highlighting consumer education as a challenge. Opportunities for collaboration and strengthening ties with the local community were highlighted several times</p>

Table 7-1: Summary of the findings against the evaluation framework

Theme	Evaluation questions	Key findings
Analysis of businesses who failed to secure charitable or public grants		
Project procurement/design	Which businesses were unsuccessful in securing grants?	Unsuccessful applicants were located across the UK, with the highest number (12) being in the south west, reflecting the relatively higher number of applications received from this region. In a few cases, applicants were awarded less money than they requested (some expenditure was deemed ineligible) and they declined the grant
	Why did businesses fail to secure funding?	Oversubscription of the RRGP was highlighted as an issue that led to failed applications. A few applications were not successful because they duplicated earlier applications where businesses had already received money. Others applied for things that were not classed as eligible expenditure under the RRGP
Impact	What are the future projections for businesses who did not manage to secure grants?	One business that failed to secure a grant indicated that they did not proceed with their project, but retained the existing goal for their business
Lesson learning	What challenges and opportunities did businesses without a grant encounter in attempting to diversify or develop business without grant support?	An email response from one business and an interview with another both noted that they did not proceed with their projects, so did not diversify or develop additional business
Market disruption and distortion/supply chains		
Impact	How does grant beneficiaries' current resilience compare to those businesses that failed to secure public or charitable funds?	Grants have provided beneficiaries with an opportunity to diversify or develop a new project; this has not been available to unsuccessful applicants. However, interview data from beneficiaries indicate that many are still in an uncertain situation due to the renewed lockdown. Some organisation types (e.g. fishmongers) are busy and doing well with the Covid-19 situation having benefited them as people shop more locally and the grant has enabled them to expand their services (e.g. home delivery). However, others such as those in the hospitality sector and fishers who supply them, are awaiting Government decisions on the easing of restrictions
	How does grant beneficiaries' future resilience compare to those businesses that failed to secure public or charitable funds?	Interview data showed many positive thoughts from beneficiaries regarding their future resilience. For example, many beneficiaries noted that the grant has allowed their business to increase its profits prevented their business from closing as well as preventing unemployment and furloughing staff. Some beneficiaries managed to create job positions or are looking to create positions in the future as a result of diversifying their businesses. For some, grants have enabled the implementation of long-term sustainable changes and they aim to continue the supported element of business on a permanent basis from now on which is not expected to have been possible for unsuccessful applicants. Such grant recipients are likely to have better future resilience than those who did not receive a grant. However, views on resilience varied amongst beneficiaries so whilst grants are assumed to have improved resilience for beneficiaries as a group, there are likely to be variations across the sector dependent on the individual organisation's circumstances

Table 7-1: Summary of the findings against the evaluation framework

Theme	Evaluation questions	Key findings
Coherence	How have Covid-19 grant programmes had an impact on particular parts of the supply chain?	Exports have been affected by Covid-19, which highlighted the need to promote British and local seafood in the UK in the longer term. This requires better connected infrastructure beyond the South West of England and processing facilities in the UK which was also supported by the RRGp. Covid-19 has had a significant impact on the hospitality sector; restaurants, schools, etc. had to close and businesses were forced to diversify by direct selling, e.g. offering home delivery and click and collect. Some successful examples implied that businesses have managed to diversify and increase their resilience in the long term with the help of the RRGp. Where applications for Covid-19 grant programmes in the seafood sector were unsuccessful, project ideas were not taken forward and/or stakeholders received other funds (e.g. small business grant that are not specific to the industry). Short- and long-term job retention and creation of jobs has been supported by the RRGp within the seafood supply chain and business diversified which they could not have achieved without financial assistance. Covid-19 (and grant programmes such as the RRGp) highlighted that more collaboration within the seafood supply chain is needed to prevent or react to future shocks
Future needs/recommendations		
Strategic added value and coherence	What aspirations do beneficiaries have for their businesses and do they require funding to fulfil this ambition?	Beneficiaries' aspirations ranged from being able to continue with their new business projects (such as direct selling to consumers) to growing initiatives further (e.g. home delivery). Some felt that they would be able to continue to further their ambitions themselves because they had already diversified thanks to the grant. Others were more uncertain, expressing concerns that their future depended on Government decisions regarding lockdown and restrictions (hospitality sector; direct sellers at the harbour) and that future funding would be required to keep going
	Other than further funding, what additional support could be taken by the charitable sector to assist the seafood industry in the future? What additional support could be taken by the public sector to assist the seafood industry in the future?	Interviewees did not tend to distinguish between the providers of support. Requests for areas to support included: <ul style="list-style-type: none"> • Dealing with the challenge of encouraging people in the UK to eat locally caught seafood • Support for existing distribution networks • Improved training opportunities e.g. for fishmongers • Improving the management of the supply chain in dealing with waste • Access to technical/marketing support that could be used to help promote the business

Table 7-1: Summary of the findings against the evaluation framework

Theme	Evaluation questions	Key findings
	<p>Are there specific initiatives/projects that should be developed to benefit the wider seafood industry in the UK?</p>	<p>Various initiatives were suggested by interviewees with ideas including:</p> <ul style="list-style-type: none"> • Setting up a new fish market in the North West, similar to the example provided by West Mersea • Having communal fish fridges to enable catches to be landed and temporarily stored by fishers, enabling the next organisation in the chain to retrieve the fish at a time that is convenient to them (avoiding the need to be there when the boats land) • A consumer education programme to improve the perception of UK caught fish • Dealing with the use of polystyrene in the industry – having a cooling chain that does not need polystyrene or finding better ways of recycling it

8 Lessons Learnt

8.1 Overview

This section brings together the lessons learnt from the evaluation of the Rapid Response Grant Programme (RRGP).

8.2 Lessons learnt for the catch and seafood industry

Grant beneficiaries were asked about lessons learnt in both the survey and telephone interviews.

Many comments received in the survey related to diversification into direct selling and the lessons learnt as part of adapting to this new market. There were several observations relating to the price paid for produce when selling directly to customers, with respondents finding that customers are willing to pay a premium for locally caught seafood when compared with wholesale buyers. Home delivery was welcomed by many customers and some businesses that diversified into direct selling found this enhanced links with the local community. The RRGP gave the opportunity to many beneficiaries to retain jobs and created new employment opportunities in some cases.

Some difficulties were encountered in relation to food safety and environmental health regulations. However, engagement with wider stakeholders (e.g. Local Authority) at an early stage was raised as an important lesson. In the case of some single operators, diversification into direct selling resulted in long workdays and multiple demands on their time as they were overstretched to undertake both the fishing and the customer interactions. The importance of providing direct marketing support for the fragmented independent retail sector was also suggested; with lots of people working on their own, equipping those doing the selling with skills in provenance messaging to successfully market their goods in the sector is central to long-term success.

A summary of lessons learnt by sector is provided in the following figure.

Fishing business	<ul style="list-style-type: none"> • Awareness of food safety and environmental health regulations • Importance of stakeholder engagement • Consumer education on alternative species to help supply/demand issues • Ask for help and advice from industry bodies and do not be put off by application forms • Ensuring customer satisfaction and repeat customers through fresh, quality produce • Investment in a system to track cash payments (e.g. Quickbooks app.) • Restrict home delivery radius to avoid conflict with competitors and keep workload manageable • Single operators will benefit from help from someone ashore to take orders when out fishing • Generation of new direct-selling business through the use of social media (Instagram)
Hospitality	<ul style="list-style-type: none"> • Importance of good IT support
Fishmonger or merchant	<ul style="list-style-type: none"> • Consumer education key to meeting consumer expectations • Provenance messaging is an important part of direct selling • Building customer confidence through direct engagement • Importance of local partnerships and reciprocal arrangements to cope with supply chain disturbances • Investing in Covid-19 secure shop measures has resulted in customer confidence • Time management has been challenging: lockdown restrictions and furloughing have impacted project delivery
Trade or industry body	<ul style="list-style-type: none"> • Organising co-operative or shared delivery systems to lessen carbon footprint • Importance of long-term consumer strategy • Correct crafting of messages so they are suitable for a direct consumer audience
Wholesaler or distributor	<ul style="list-style-type: none"> • Marketing measures (e.g. van sign writing) has helped build a direct selling customer base • Direct selling has strengthened relationships in the local community
Community project or community group	<ul style="list-style-type: none"> • Collaboration and communication between community support organisation, Fishing Animateurs and businesses • Partnering with an established regional food co-operative to enhance the long-term viability of home delivery across a relatively small and dispersed rural population

8.3 Lessons learnt for funders

Information on lesson learning for funders has been brought together from survey data, interviews with beneficiaries and the interview with the programme delivery team. Data indicate that the RRGP has been extremely well received by the industry. The funders' familiarity with existing grant schemes and knowledge of the sector have resulted in a well-designed programme which has met the needs of fishing and seafood businesses and food charities during the initial stages of the Covid-19 pandemic. Collaboration with the Fishing Animateurs in the design phase also helped to ensure ease of access. The roll-out of the fund was swift, enabling projects to progress quickly. Normal expenditure approval processes by the Fishmongers' Company were re-designed to ensure a faster turnaround. Due to the emergency nature of the fund, some elements of best practice were not followed. However, this has been recognised by the delivery team as potentially unavoidable due to the exceptional circumstances in which the fund was operating. Small discrepancies in due diligence, for example in relation to receiving receipts, were accepted in such an emergency situation. Processes were altered and improved where possible during the course of the funding rounds to enhance project procurement. For example, the online survey which was designed for the panel to detail their decision was identified as too time consuming and was replaced with a streamlined spreadsheet. Such changes resulted in a lack of overall consistency in procedures, although they facilitated the emergency response.

Some comments received from beneficiaries during the interviews are provided below:

"It was delightful to have something really easy to work with."

"Of all the grant programmes I have had experience of this is the most straightforward."

"It couldn't have been better."

"I'm really surprised how easy the whole process has been; I cannot think of anything which I would have done differently or that hasn't worked well."

"Talking to real people about the eligibility and requirements of the grants was very helpful, rather than pages and pages of guidance. The fund was flexible enough to cater for us and our project, which might not have been the case with other grant programmes. The payment schedule was excellent, and it was easy to claim. The feedback and evaluation aspects were very good, in particular the KPIs and metrics which we had to report against. Overall, the RRGP fitted our project well."

The programme's intention was to support a high percentage of the small-scale fleet. This resulted in some repetition in application types as businesses looked to diversify into direct selling as their usual markets closed. An initial influx of applications for direct selling projects resulted in more stringent requirements for vans being introduced after the first round of funding. Stricter requirements were also introduced relating to maximum spend on graphic design and web development. There were concerns that a concentration of direct selling projects in the south west of the UK might lead to oversaturation of the market. This geographical spread was evened out to some extent in later rounds and by the close of the programme, applications from businesses in Northern Ireland and Wales were received - both areas in which the funders had not had a huge reach prior to the creation of the RRGP.

A summary of lessons learnt for funders is provided in the figure overleaf.

Project design	<ul style="list-style-type: none"> • The simple application form was received well by the sector, having enough depth to allow demonstration of the logic behind a project, without being too onerous • The addition of a PDF application form to complement the online application form improved ease of access for applicants • Using an adaptable approach when receiving incomplete application forms and referring to Animateurs where help was needed, meant the process was inclusive
Project procurement	<ul style="list-style-type: none"> • There was a lack of consistency of approach, although processes became more standardised as the rounds progressed. Ideally the framework would have been set up at the start • Business knowledge was initially lacking due to the variety of previously unknown organisations applying for funding; determining the validity of businesses was a learning curve • Declaration of interest by a panel member resulted in their vote becoming invalid in order to retain impartiality in funding decisions
Quality of delivery	<ul style="list-style-type: none"> • The manual sifting and uploading of applications could have been more technologically sophisticated to avoid the risk of human error during busy times • During later rounds when funding availability was reduced, there was confusion among fishers around partial funding awards and how to use them
Efficiency	<ul style="list-style-type: none"> • The quick turnaround of funds was appropriate for an emergency response • Having no requirement to procure three quotes for proposed outputs was appreciated by applicants
Effectiveness	<ul style="list-style-type: none"> • There were no applications received from large commercial vessels, which was the intention of the fund • It did not necessarily matter if projects did not demonstrate long-term impact, as long as the funding supported fishing and seafood businesses during their time of need
Management and monitoring	<ul style="list-style-type: none"> • Fishmongers' Company retained their impartiality by not assisting with the application process, instead referring enquiries back to the guidance or Fishing Animateurs for clarification • There remain gaps in receiving receipts for some grants. The rapid response nature of the grant programme meant that best practice was not always followed
Target groups	<ul style="list-style-type: none"> • Funding more community initiatives would have been favourable. However, it became clear that asking people to partner with others during a pandemic is difficult, especially if they are competitors • An initial saturation of projects in the South West was balanced in later rounds
Strategic added value	<ul style="list-style-type: none"> • To supplement the fund, in-kind support was offered (e.g. in-house marketing support), although the uptake of this was poor

Annex 1 Approach to Evaluation

A1.1 Overview

Section 2 provides information on the approach taken to the evaluation including the development of the evaluation framework, the data collection process and the methods for analysis.

A1.2 Evaluation framework

Table A1-1 overleaf provides the evaluation framework. This starts from the study objectives and presents the evaluation questions, sub-questions and indicators. It also identifies the data sources for each indicator.

The evaluation framework sets the scope for the study and has been used to guide the data collection and analysis.

A1.3 Data collection

A1.3.1 Data provided by The Fishmongers' Company's Fisheries Charitable Trust

Several data sources were provided by The Fishmongers' Company's Fisheries Charitable Trust for use in the evaluation. These included:

- Three spreadsheets detailing grant applications and amounts awarded:
 - Summary of the applications and the commenting/scoring process (version supplied 1st October 2020);
 - Detailed transaction report (version supplied 1st October 2020); and
 - Database of all applications (version supplied 6th October 2020).
- The results of the online survey completed by grant recipients (version supplied 2nd October). The survey was set up and operated by The Fishmongers' Company's Fisheries Charitable Trust prior to the contract for this evaluation being let.

For the analysis, the spreadsheet providing the summary of the applications has been used as the main source, since this provides detailed information on applicant location, grant outcome, grant requested, grant size, etc. Cross checks were made with the other spreadsheets where clarification on specific grants was required. It should be noted that triangulation of data did identify a few discrepancies between the three spreadsheets. However, these are expected to have minimal impact on the analysis in Section 4 due to the overall number of grant applications²⁸.

²⁸ In total, 160 discrete grant applications (which had been provided with an application number) were analysed. Application 056Da was treated as a sub-application to 056D and thus counted as one.

Table A1-1: Evaluation framework			
Theme	Evaluation questions	Sub-questions/indicators	Source of information/ approach
Overview of charitable and government Covid-19 grant programmes for the fishing and seafood trade sector			
Overview of grant programme	How do Covid-19 grant programmes compare across the fishing and seafood trade sector? (Rapid Response Grant Programme; Fisheries Response Fund; Domestic Seafood Supply Scheme; Scottish Government's Seafood Resilience Fund; Welsh Fisheries Fund; Northern Ireland's Finance Scheme)	Grant programme objectives Total funds and size of grants available Eligibility criteria, procedures, restrictions and timelines Application, decision making and evaluation process Number and types of projects funded	Internet research Interview with delivery team
The impact of the RRGP on beneficiaries			
Grants awarded	Who were the beneficiaries?	Industry, size, location of business, type of business	Application data Survey Interviews with grant beneficiaries Interviews with delivery team
	What has the use and impact of the grant been, including longevity of the measures taken during lockdown to diversify businesses (i.e. immediate impact only, medium, or long-term impact)?	What have the grants been used for? Whether grants have linked recipients directly with consumers Whether beneficiaries have managed to maintain these consumers Whether the grants helped beneficiaries to release additional funds Whether grants have been awarded to partnerships/those working together	Application data Survey Interviews with grant beneficiaries
Impact	What is the current status of beneficiaries?	Narrative on how funding has been managed Has this investment made a long-term change? If so, how?	Survey Interviews with grant beneficiaries
	How much additional business was generated as a direct result of the grant expenditure and what has this meant for the businesses?	Furloughed staff, future of business, insolvency, current/new projects	Survey
	What are the future projections for beneficiaries?	Narrative on future business plans, financial security and changes in demand of beneficiaries' services	Interviews with grant beneficiaries

Table A1-1: Evaluation framework			
Theme	Evaluation questions	Sub-questions/indicators	Source of information/ approach
Lesson learning	What challenges and opportunities did beneficiaries encounter due to diversifying?	Narrative on approaches used, what worked well/less well and in which contexts (case studies)	Survey Interviews with grant beneficiaries
Analysis of businesses who failed to secure private or public grants			
Project procurement/design	Which businesses were unsuccessful in securing grants?	Industry, size, location, type of business What barriers are there that prevented successful applications?	Survey Interviews with organisations that failed to secure funding
	Why did businesses fail to secure funding?	Number of applicants compared with number of grants (amount of money) available Comparison of eligibility criteria for different grants Comparison of application process for different grants Applicant opinions on the application process and eligibility criteria Were there any barriers that prevented businesses from applying? What were the reasons for businesses failing to be awarded a grant?	Interviews with organisations that failed to secure funding Interviews with delivery team Feedback on grant applications from the delivery team
Impact	What are the future projections for businesses who did not manage to secure grants?	Narrative on future business plans, financial security and changes in demand of businesses' services	Interviews with those who failed to secure RRGF funding
Lesson learning	What challenges and opportunities did businesses without a grant encounter in attempting to diversify or develop business without grant support?	Narrative on approaches used, what worked well/less well and in which contexts (case studies)	Interviews with organisations that failed to secure RRGF funding

Table A1-1: Evaluation framework			
Theme	Evaluation questions	Sub-questions/indicators	Source of information/ approach
Market disruption and distortion/supply chains			
Impact	How does grant beneficiaries' current resilience compare to those businesses that failed to secure public or private funds?	Comparison of impact on grant beneficiaries and unsuccessful grant applicants	Interviews with beneficiaries Interviews with organisations that failed to secure funding
	How does grant beneficiaries' future resilience compare to those businesses that failed to secure public or private funds?	Comparison of impact on grant beneficiaries and unsuccessful grant applicants	Interviews with beneficiaries Interviews with organisations that failed to secure funding
Coherence	How have Covid-19 grant programmes had an impact on particular parts of the supply chain?	Survey responses indicating if particular parts of the supply chain received more grants compared to others Eligibility criteria and grant statistics	Survey Interviews with delivery team
Future needs/recommendations			
Strategic added value and coherence	What aspirations do beneficiaries have for their businesses and do they require funding to fulfil this ambition?	Narrative on future business plans, financial security, changes in demand of businesses' services, staff management	Interviews with beneficiaries
	Other than further funding, what additional support could be taken by the charitable sector to assist the seafood industry in the future?	Experience of delivery team, beneficiaries and unsuccessful grant applicants	Interviews with beneficiaries Interviews with organisations that failed to secure funding Interviews with delivery team
	What additional support could be taken by the public sector to assist the seafood industry in the future?	Experience of delivery team, beneficiaries and unsuccessful grant applicants	Interviews with beneficiaries Interviews with organisations that failed to secure funding Interviews with delivery team
	Are there specific initiatives/projects that should be developed to benefit the wider seafood industry in the UK?	Narrative on successful projects, future business plans and project ideas	Interviews with beneficiaries Interviews with organisations that failed to secure funding

A1.3.2 Data collected by the evaluation team

Two separate data collection activities were carried out by the evaluation team.

- Internet research to collect information on other funding programmes; and
- Engagement through telephone interviews.

Internet research

Internet research was undertaken on grants available to the fishing and seafood trade sector to help organisations and individuals deal with the impacts of the Covid-19 pandemic and disruption to normal business activity. Grants from across the UK (England, Scotland, Wales and Northern Ireland) were investigated with similar information collected for each grant to enable comparisons to be made.

Engagement

A set of interview questions was developed for three stakeholder groups, namely:

- The delivery team (focusing on The Fishmongers' Company's Fisheries Charitable Trust);
- Successful grant applicants; and
- Unsuccessful grant applicants.

The interview questions were based on the evaluation framework, with the sub-questions and indicators guiding the topics that needed to be covered. Questions suggested by the Fishing Animateurs and the study's steering group (The Fishmongers' Company's Fisheries Charitable Trust and Seafarers UK) were also included. The interview questions are provided as Annex 2.

One interview was arranged and held with the delivery team.

For the applicant interviews, a sample was selected for interview. Due to the variety amongst stakeholder types we applied a purposive sampling method. This took account of a range of criteria including:

- Region;
- Grant purpose, i.e. whether the applicant was seeking diversification opportunities for seafood and fisheries businesses, promoting and/or facilitating the consumption or sale of local seafood, or providing community meals using seafood²⁹;
- Whether the grant was successful and funding was awarded; and
- Grant size: for grant size, the applications were divided into the three categories used during the grant assessment process, namely:
 - <£4,000;
 - Between £4,001 and £10,000; and
 - Between £10,001 and £25,000.

Based on the above criteria, 14 applicants were initially selected for interview³⁰. Applicants were invited to interview by email, with interviews subsequently taking place by telephone. For some applicants, specific interview times were arranged; others replied directly with their telephone

²⁹ Note that several applicants were aiming to meet two or more of these outcomes.

³⁰ The number of interviews was constrained by the budget and resources allocated to the study.

number and asked the researchers to try ringing them. Applicants in the South West were kindly contacted and interviewed (if willing) by the Fishing Animateurs.

Of the initial sample of 14, a few emails were undeliverable and there were several non-respondents. Follow-up emails were sent to the non-respondents. Additional applicants were then selected from the dataset (based on the characteristics of the non-respondents) and further emails sent. In total, attempts were made to contact 49 applicants. The breakdown of the full sample contacted is provided in Table A1-2 whilst Table A1-3 provides an indication of the response rates. It should be noted that regions are presented by nation as well as by region in England. Since the majority of applicants were from England, the breakdown informs about the geographical scope within England to avoid a bias towards the South West of England. Moreover, the table below indicates that stakeholders in Wales were contacted proportionally more than those in NI and Scotland. More attempts to contact stakeholders in Wales were due to a low response rate from the country as well as a higher amount of applications received from Wales compared to Scotland and NI. Therefore, the higher numbers of stakeholders contacted in Wales was an attempt to have a diverse response rate across all four nations proportional to applications received.

Table A1-2: Breakdown of 40 applicants contacted	
Criteria	Characteristics of sample
Nation	<ul style="list-style-type: none"> • 1 of 49 (2% of the sample) was UK wide • 5 of 49 (10% of the sample) were from Northern Ireland • 10 of 49 (20% of the sample) were from Wales • 6 of 49 (12% of the sample) were from Scotland • 27 of 49 (55% of the sample) were from England
Region for England/ Nation for devolved administrations	<p>Of the 49 applicants contacted:</p> <ul style="list-style-type: none"> • 1 of 49 (2% of the sample) was UK wide • 2 of 49 (4% of the sample) were from the East Midlands • 5 of 49 (10% of the sample) were from the East of England • 3 of 49 (6% of the sample) were from the North East • 2 of 49 (4% of the sample) were from the North West • 8 of 49 (16% of the sample) were from the South East • 7 of 49 (14% of the sample) were from the South West • 5 of 49 (10% of the sample) were from Northern Ireland • 6 of 49 (12% of the sample) were from Scotland • 10 of 49 (20% of the sample) were from Wales
Grant purpose	<p>Of the 49 applicants contacted:</p> <ul style="list-style-type: none"> • 24 of 49 (49% of the sample) contacted aimed at promoting the consumption or sale of local seafood • 3 of 49 (6% of the sample) contacted aimed at providing community meals using seafood • 21 of 49 (43% of the sample) contacted aimed at seeking diversification opportunities for seafood and fisheries businesses • 1 of 49 (2% of the sample) contacted aimed at achieving multiple objectives
Whether the application was successful and a grant was allocated	<p>Of the 49 applicants contacted:</p> <ul style="list-style-type: none"> • 40 of 49 (around 82% of the sample) contacted were successful with their applications • 9 of 49 (around 18% of the sample) contacted were unsuccessful

Table A1-2: Breakdown of 40 applicants contacted	
Criteria	Characteristics of sample
Grant size	Of the 40 grants awarded: <ul style="list-style-type: none"> • 30 grants (75% of the sample) were <£4,000 • 7 grants (around 18% of the sample) were between £4,001 and £10,000 • 3 grants (around 8% of the sample) were between £10,001 and £25,000
Notes: percentages may not sum to 100% due to rounding	

Table A1-3 provides a summary of the interviews held with applicants. Following each interview, a set of notes was written up and taken forwards for use in the analysis.

Table A1-3: Summary of responses (based on contact with 49 applicants)		
Response	Number of applicants	Percentage of applicants contacted
Interview arranged/other arrangements to talk made	20	41%
Interviews held	18 (13 by the RPA team; 5 by the Fishing Animateurs)	37%
'No shows' (interviews set up/arrangements made to call and applicant did not pick up the phone)	2	4%
Notes: this table combines engagement with applicants that was carried out by RPA and the Fishing Animateurs (who contacted applicants in the South West of England). Percentages are rounded to the nearest whole number		

A1.4 Analysis

The evaluation framework (see Section A1-2) was used to provide a structure for the analysis and identify which of the various datasets available (i.e. application data, survey data, internet research or data from interviews) was relevant to each indicator or sub-question.

Analysis of quantitative data was carried out in MS Excel to enable the calculation of averages, percentages, etc. Graphs and charts were developed to produce more visual responses to some of the evaluation questions.

Qualitative data was analysed by grouping together information that related to similar parts of the evaluation framework, for example, data from the interview notes on the impacts of the grants. The data was then reviewed to identify key points, whether there were commonalities or differences between the data sources (e.g. between stakeholder types) and if there were specific comments that could be related to context.

Some elements of the survey data, such as open-ended questions, were analysed thematically to highlight common themes. A deductive approach was used, drawing on the evaluation framework as a basis to identify the themes. This approach entailed familiarisation with the dataset prior to the researcher identifying a set of themes that encapsulated the key points raised by respondents. Each response was reviewed, and a record was made of the main theme it was raising. Once an initial set of themes had been identified, the responses were reviewed for a second time to pick up responses that raised more than one theme. As an example, Table A1-4 provides the themes identified from the

survey responses to the open question: ‘Please use the space to provide any other information about how the grant has supported your business, how the grant was used, and what you have achieved’. It indicates that the theme of “direct selling” was raised by many of the 72 survey respondents.

Table A1-4: Thematic analysis of survey data	
Theme	Number of respondents
Direct selling	50
Diversification of product	17
Small scale processing	12
Strengthening ties with the local community	11
Business survival during uncertain times	9
Helping vulnerable people	7
Getting projects moving quickly	3
Help received from Fishing Animateur	4

Following the analysis, the findings were written up. The conclusions were drawn through summarising the key aspects under each part of the evaluation framework. The lessons learnt were developed from information identified directly from applicants (e.g. through interviews), but also from the analysis where issues were apparent.

Annex 2 Interview Questions

A2.1 Interview Questions for Successful Beneficiaries

A2.1.1 Introduction

Could you give me a brief overview of your business?

What is the size of your business? (Number of people, locations covered)

Where are you located?

What type of business do you work for/in?

A2.1.2 Your RRGP application

How did you find out about the RRGP?

What did you think of the application process? E.g. how did you find the guidance?

Did you receive any help with your application?

Did you receive any feedback on your RRGP application?

If so, what did this say?

If the money was only on offer if you were working with others, would you have applied?

A2.1.3 Your RRGP grant

What have you used the grant for?

How did you manage the grant – did you spend it all in one go, or bit by bit?

Has the grant connected you directly with consumers? If so, have you managed to maintain these consumers?

Has the grant helped you or your organisation to release additional funds?

Have you used the grant to work within a new partnership or with another company for the first time?

A2.1.4 Impacts of the RRGP grant on your business

Has the grant supported new projects?

Has the grant led to the creation of any new jobs?

How many existing jobs have been maintained / supported by the grant? What impact did the grant have on furloughing of staff?

Have you generated additional business as a direct result of the grant expenditure?

Do you think the grant has affected the resilience of your business?

Has the funding made a long-term change? If so, how (for example, through enabling diversification)?

How would you assess the current financial stability of your business?

Do you think your business is more financially stable as a result of receiving the grant?

A2.1.5 Lessons learnt

Since being awarded the grant and spending it:

What has worked well, and why?

What has worked less well, and why?

A2.1.6 Future business plans

Do you foresee any changes in demand for your organisation's services?

Do you think your business will be more resilient in the future as a direct result of the grant? If so, why?

What aspirations or goals do you have for your business?

Other than further funding, what additional support (from the charitable or public sectors) would help your business?

Are there any specific initiatives or projects that you would like to see developed that would benefit your business? E.g. do you think more should be done to promote British seafood?

A2.2 Interview Questions – Unsuccessful Applicants

A2.2.1 Introduction

Could you give me a brief overview of your business?

Where are you located?

What is the size of your business? (Number of people, locations covered)

A2.2.2 Your RRGF application

How did you find out about the RRGF?

What did you think of the application process? E.g. how did you find the guidance?

Did you receive any help with your application?

Did you receive any feedback on your RRGF application?

If so, what did this say?

Did you take any specific actions following the notification that you would not be receiving RRGP funding?

If the money was only on offer if you were working with others, would you have applied?

A2.2.3 Other grant applications

Did you apply to any other funds in addition to the RRGP?

If so, did you receive any funding from these?

Did you receive any feedback on your application(s)?

A2.2.4 Future business plans

Have you adapted your business plans in the absence of a grant from the RRGP?

If so, what have you done? For example, have you diversified to other activities? Changed the timetable for the implementation of planned activities?

What difficulties have you faced?

What aspirations or goals do you have for your business?

Other than further funding, what additional support (from the charitable or public sectors) would help your business?

Are there any specific initiatives or projects that you would like to see developed that would benefit your business? E.g. do you think more should be done to promote British seafood?

A2.3 Interview Questions for the Delivery Team

A2.3.1 Overview of charitable and government Covid-19 grant programmes for the fishing and seafood trade sector

Can you provide more details about the design, application, decision making and evaluation process, specifically:

Was the RRGP aiming to fill particular gaps in the provision of support to seafood industry?

What was the rationale for the selection of the three categories for projects/initiatives to apply under?

Did you make any changes to the application or evaluation process during the operation of the RRGP? If so, what were these and why?

Could you provide a bit more information on the trial round (Round A) and what was learnt from this?

Could you provide an indication of the number of pre-application enquiries you had? (This has been mentioned by interviewees)?

What are your opinions on the diversity of the projects funded in terms of objectives (grant outcomes) size, type, etc.?

In your opinion, how successful was the partnership between the Fishmongers' Company, Seafarers UK and other organisations involved in the RRG?P?

Did you face any barriers and how did you overcome them? (Lesson learning)

What worked well and why? (Best practice)

A2.3.2 Analysis of businesses who failed to secure charitable or public grants

Were you made aware of any barriers that prevented businesses from applying to the fund? For example, IT literacy, issues with understanding the application form?

What barriers did you identify as preventing successful applications? For example, oversubscription, incomplete application form?

Where businesses completed an application form and funding was available, what were the main reasons for businesses failing to be awarded a grant?

A2.3.3 Market disruption and distortion/supply chains

In your opinion, have particular parts of the seafood supply chain received more COVID-19 related grants/support than others?

A2.3.4 Future needs/recommendations

Other than further funding, what additional support do you think could be provided by the charitable sector to assist the seafood industry in the future?

And what additional support do you think could be provided by the public sector?

Based on your experience, what additional support could assist the seafood industry more generally in the future?



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