

## CONCLUSIONS INTELLECTUAL OUTPUT 1 E-FISHNET CURRENT SITUATION

Main conclusions regarding different parts of the first Intellectual Output of e-FishNet Project are as follows:

### 1. European Fishmonger Professional Profile (Marco Curriculum)

- The universe of respondents of the survey addressed to fishmongers is **265 people**, being **mostly men (74%)** with an average age of **45 years**; One half are **owners** and the other half are **employees**, having started their activity mainly for an **heritage family business or own interest**.
- The number of respondents covers all levels of education, from primary education to university education. However, only **11%** of the respondents have **university education**.
- A high percentage of fishmongers is working in a **traditional fish shop (91%)** compared to the small number of operators working in the **Large retail chain (only 9%)**.
- There is some **discrepancy related with the number of years** that they work in the fishery sector. We have a **large percentage with many years of experience (> 15 years)**. In general, it can be said that it is a sector where a **higher age group dominates**, with a **lot of experience** and **poor or no training in the area**.
- At the training level, the needs focus on topics such as "**Food Quality and Safety**", "**Product Handling and Presentation**", "**Costumer service**" and in a lesser extent "Business management" and "Labeling and traceability".
- The lack of specific training for the individuals to become a fishmonger is also pointed by the respondents as something that could harm the sector, but with low impact.
- Most of respondents are familiar with new communication tools and technologies. However, the use of online learning platforms are minimally used by them (only 2%).
- Most of the interviewees would be available to start training in online platforms (63%). The main reasons pointed out by those who say they would not use them

# INTELLECTUAL OUTPUT 1

## STATE OF ART STUDY AND FISHMONGERS MARCO CURRICULUM

are the preference for face-to-face training and the lack of knowledge about the use of these platforms.

- In general, fishmongers think that society don't value the profession. The most of them think that training could improve this vision. So, there is space for growth in this type of training, however it may be more targeted to younger people with poor knowledge and experience.
- Regarding interview videos we have an universe of 25 people and these information reflects all the conclusions that were collected in the surveys.

## 2. Employability and official training in the area of education and employment

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- If we take into account the basis of the Educational system, in order to enable a specific training in a specific profession the main feature is that this profession should be defined and collected in a document similar to "National Catalogue of Qualification". If we find in this point, this profession is not even defined or included in this document; it will be very difficult to find an available specific training for this profession, so we have identified the inclusion of this training/ qualification in the basis of the system as a critical requirement.
- We have identified several features that enable the development of an specific training. They are as follows:
  - ✓ Centralized Educational System (or at least very centralized): Division of jurisdiction between public bodies, for example between the Ministry of Education and the Ministry of Labor, does not promote the development of specific training. This is the case of Spain. On the other hand, a centralized system (or very centralized) enables the development of specific training. This is the case of England and Portugal.
  - ✓ Specific Body related to the fishery value chain: When we have a specific Body which is in charge, amongst other issues, of training of different groups of stakeholders of the fishery value chain, training offer improves. This body is aware of needs and demands of stakeholders. This is the case of Portugal and England.
- In Portugal the system is working well. We can find available specific training for fishmongers and its contents are reasonably complete. It's also available for young people or for other people with different backgrounds. It's a flexible training and has equivalence with the official system of qualifications.

## INTELLECTUAL OUTPUT 1

### STATE OF ART STUDY AND FISHMONGERS MARCO CURRICULUM

- In England there's no longer available a Level 3 Certificate focused on fishmongers. Nevertheless in England we can find plenty of training courses that together can replace a specific training. Something to improve would be the collection of these courses in one training path and its equivalence with the official qualification system.
- In Iceland and Turkey is not even defined fishmonger's training/ qualification in the Qualification system. In Iceland is understandable, because we only have 30 professional fishmongers in the Island, but not in Turkey where we can find a larger collective of fishmongers.
- In Spain, even though "fishmonger profession" is included in the National Catalogue of Qualifications, jurisdiction is divided between two Ministries (Education and Labor). Also legal requirements, especially the ones related to facilities are really hard to meet, thus official training for fishmongers can't be defined as "available". Also contents are very related to fishery industry branch of the value chain, so these contents do not suit real needs of this sector. We can say in Spain fishmongers, or people interested in becoming a fishmonger can't get to an official specific training, with contents focused on real needs of the sector.

### 3. Current Situation in relation to e-learning models

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- E-learning as a tool for fishmonger's training differs amongst the partner countries. Except UK, the partner countries have no public or private organization providing e-learning for fishmongers.
- -In Turkey, there is no access to training courses specifically for fishmongers. However, in HE, some courses are offered in the Faculties of Fisheries and Aquaculture, Food Engineering and some colleges specific to Fisheries. As well as that the courses for Fish Processing Operator offer similar education with fishmonger.
- In the United Kingdom, there is reasonable access to training courses specifically for fishmongers in some area. Almost all the training courses are ranging from a few hours to several days, or in the case of Apprenticeships, many months or even years. There is no training currently offered to fishmongers, either traditional or via e-learning, for the peripheral but necessary areas of business and financial planning, customer relationship skills, advertising and marketing, waste management or record keeping.
- In Portugal, currently there is no public or private organization that offers this type of online training certified and directed to fishmongers.

# INTELLECTUAL OUTPUT 1

## STATE OF ART STUDY AND FISHMONGERS MARCO CURRICULUM

- In Spain, there is no specific official e-learning courses focused on fishmongers. But many entities and enterprises offer general training courses for example about “Food Handling” or “Occupational Hazard Prevention (HACCP)”.
- Mainly there is no e-learning platform for fishmongers. Only in the UK there is some training available to fishmongers by e-learning, but the majority require physical presence (f2f) even at centres throughout the UK. The food sector courses by e-learning seems suitable for a part of fishmonger training.
- In Turkey, approximately half of the fishmongers are positive to e-learning. In the other countries, as a figure of the survey addressed to fishmongers, the 63% of fishmongers would be interested in e-learning tools.

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### 4. Current Consumer Needs and Demands

- Compulsory and specific training for fishmongers is perceived as a positive step by consumers. Consumers believe that it should include at least the following:
  - ✓ Customer service
  - ✓ Product presentation
  - ✓ Knowledge of nutritional issues of concern to customers
  - ✓ Fish preparation.
- The number one requirement from customers in every country surveyed is **CUSTOMER SERVICE**. Customers perceive this as encompassing in the following order of importance:
  - ✓ Recipes
  - ✓ Special offers
  - ✓ Tastings
  - ✓ Nutritional advice
  - ✓ Product advice
  - ✓ Customers would be 75% more likely to buy from a fishmonger offering these services

# INTELLECTUAL OUTPUT 1

## STATE OF ART STUDY AND FISHMONGERS MARCO CURRICULUM

- Consumers who buy fish mainly from supermarkets do so because it is quick and convenient and the customers can buy other products at the same time.
- Consumers who buy fish from fishmongers do so because they have confidence in the person serving them and value the personal service they receive.
- Fishmongers are generally seen in a positive light and are held in high esteem in most countries.
- Compulsory and specific training for fishmongers is perceived as a positive step and should include customer service, product presentation, knowledge of nutritional issues of concern to customers and fish preparation.
- Customers would be more likely to buy from traditional fishmongers if they were offered recipes, special offers, tastings, nutritional advice and product advice – all of which could be regarded as customer service – the number 1 thing which customers want.

