



A Fresh Start

The renewed Strategic Framework for Scottish Aquaculture



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MINISTERIAL FOREWORD

Aquaculture is a nationally important industry for Scotland, but particularly for our coastal and island communities, where it is often a mainstay of the local economy. Its output is estimated to have a farm gate value of about £350 million. Despite some annual fluctuations this is broadly in line with the value of catches from Scottish-based fishing vessels. The Scottish Government is committed to supporting sustainable economic growth in Scotland. Supporting aquaculture – production, processing and associated businesses – is a vital role for Marine Scotland, particularly during the economic downturn.

Scotland's coastal waters provide excellent conditions for further growth of finfish and shellfish farming. Some of this growth can come from existing authorised facilities which are not being used. Development must be sustainable – economically, socially, culturally and environmentally – minimising risks to biodiversity. The aquaculture industry must act as a good neighbour to those who share the aquatic environment.

Progress has been made. Reported fish farm escapes were significantly down last year on previous years, reflecting improved practice. Whilst welcomed, we are clear that improvement must continue – through the new inspection regime for containment and sea lice and the planned revision of the industry's Code of Good Practice. Control of sea lice continues to be a serious concern. The consultation indicated an urgent need for effective sea lice control measures to protect the health and welfare of both farmed and wild salmonids and is viewed as crucial for the long-term future of both sectors. Marine Scotland's ability to support the industry in this regard is hampered by the current lack of understanding of the nature and extent of the problem at the national level and we will set out a proposal to address this gap later this year.

Marine Scotland believes industry should operate to the highest standards in key areas. That means carefully-planned and properly-managed approaches to disease and parasite control, making use of synchronised production, fallowing and sea lice treatments that are coordinated at an appropriately sized area to ensure success.

This framework also sets out a more flexible approach for delivery through a smaller more focused Ministerial Group on Aquaculture, that will guide aquaculture policy and will be informed by a wider aquaculture stakeholders group. It gives us the platform we need to ensure a strong future for aquaculture in Scotland. The industry is here to stay and to grow, in balance with the environment.



ROSEANNA CUNNINGHAM MSP
Minister for Environment



VISION AND GUIDING PRINCIPLES



“ We want industry to operate in optimal locations, with access to good growing waters, providing jobs in local communities and acting responsibly, respectful of environmental considerations and the needs of other stakeholders ”

Our Shared Vision

Scotland should have sustainable, growing, diverse, market-led and profitable farmed fish and shellfish industries, which promote best practice and provide significant economic and social benefits for their people, while respecting the marine and freshwater environment. The industries will contribute to the overall vision for Scotland’s marine environment of “clean, healthy, safe, productive and biologically diverse seas managed to meet the long-term needs of nature and people”.

Sustainable Growth

The aquaculture industry is ambitious to grow but growth must be sustainable. Growth must be within the carrying capacity of the aquatic environment and balanced against the needs of others.

Economic principle: Farmed fish and shellfish industries should be able to fulfil their ambitions for growth, be market-led with a focus on quality leading to improved economic returns for the industry and greater market stability.

Environmental principle: Farmed fish and shellfish industries should act as a good neighbour by minimising risks to biodiversity and impact on the environment and other aquatic activities. Growth should be within the carrying capacity of the environment.

Social principle: Farmed fish and shellfish industries should underpin strong local communities and provide benefits to those communities.

The Ministerial Working Group on Aquaculture (MWGA)

The group was established in 2002 to develop and manage *A Strategic Framework for Scottish Aquaculture*, published in 2003. MWGA has been chaired by the Minister for Environment and comprises representatives of the aquaculture industry and its stakeholders. The role and membership of MWGA will be refocused with a smaller Management Group, chaired by the Minister, with an overarching role to review progress and reprioritise actions, with champions driving progress. This more focused group will be supported by a wider Aquaculture Forum, to meet annually and feed in the views of other interested parties.

Governance

Regulation should be proportionate and fit for purpose; be responsive to the needs of the farmed fish and shellfish industries without compromising the aquatic environment or interests of other stakeholders; and decision-making should be efficient, fair, transparent and inclusive. Good management, adherence to agreed codes of good practice and stakeholder engagement are important for the sustainability of the aquaculture industry.

Science

Policy development will be underpinned by robust and sound science; research which makes best use of the Marine Scotland science review process and the Scottish Aquaculture Research Forum (SARF).

Assimilative Carrying Capacity

Aquaculture development must be within the assimilative carrying capacity of the water body in which it is situated. It is important to demonstrate that water bodies are able to absorb the waste products associated with

aquaculture without harming the marine or freshwater ecosystem. This process underpins Marine Scotland's Locational Guidelines for Aquaculture as well as advances in water body scale modelling that are currently under development. Such an approach is also consistent with the Water Framework Directive and the ecosystem approach required by the Marine Strategy Framework Directive.

Strategic Environmental Assessment (SEA)

The draft renewed *Strategic Framework for Scottish Aquaculture* was subject to a preliminary screening process and as a result is not considered to be a plan or programme as defined by the *Environmental Assessment (Scotland) Act 2005*. However, it is likely that some of the outputs identified and actioned through the Framework will have environmental effects and will require Environmental Assessment under the Act.

Regulatory Impact Assessment (RIA)

As this is a strategic framework, a Regulatory Impact Assessment is not necessary. However, any significant Marine Scotland actions or policy changes resulting from the framework will require RIA.

Equality

Progressing equality is about creating a fairer society where everyone is able to participate and everyone has the opportunity to fulfil their potential. We believe that opportunities in aquaculture should not be denied to anyone because of their race or ethnicity, gender, marital or civil partnership status, disability, age, religion or belief or sexual orientation. An equality impact assessment has been conducted by the Scottish Government.

THE IMPORTANCE OF AQUACULTURE

Aquaculture is a nationally important industry for Scotland, in particular the west coast and the islands where many communities depend on the employment and revenue it provides. Scotland is the largest producer of farmed Atlantic salmon in the EU, producing about 130,000 tonnes annually,¹ with an estimated farm gate value of £324 million.⁴

Although farmed salmon dominates in Scotland, aquaculture is about much more. Scotland produces about 7,500 tonnes of rainbow trout – worth about £14 million.⁴ Brown trout, sea trout, halibut and Arctic charr are also farmed in Scotland.¹

Scotland has a successful shellfish farming sector, producing over 5,000 tonnes a year – mainly common mussels and Pacific oysters. Smaller amounts of native oysters as well as queen and king scallops are also farmed. This has a total first sale value of over £5 million.² There is an increasing appetite for Scottish shellfish and therefore real potential for this sector to grow to meet that demand.



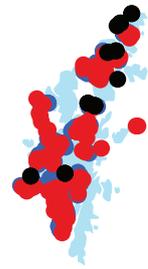
Farmed salmon supports 1195¹ direct jobs in salmon production and a significant number of jobs in salmon processing (3733³ full-time, part time and seasonal in 2008). Production of trout and other finfish supports an additional 247¹ jobs with another 292³ jobs in processing. Shellfish production supports 398² jobs.

¹ Scottish finfish production survey 2007.

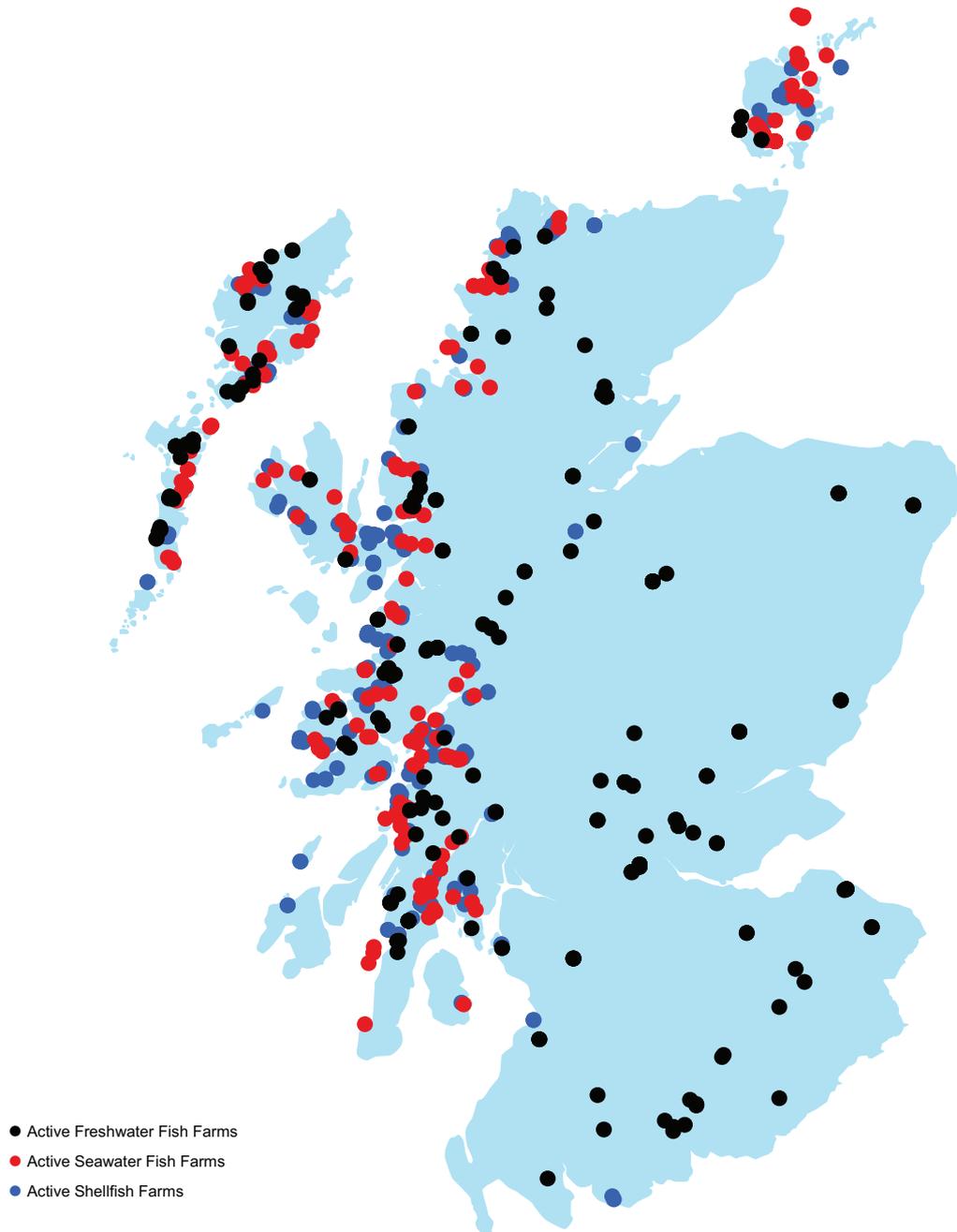
² Scottish shellfish production survey 2007.

³ Sea Fish Industry Authority 2008.

⁴ Scottish Government Rural and Environmental Research and Analysis Directorate.



Active Fish and Shellfish Farms in Scotland – March 2009



There are 448 registered active finfish sites and 335 registered active shellfish sites in Scotland (Marine Scotland Science, April 2009).

THE BIGGER PICTURE

The Strategic Framework for Scottish Aquaculture is aligned to other policies and legislation.

Scottish Government's Economic Strategy

On 13 November 2007 the Scottish Government published *The Government Economic Strategy*. The Strategy's single Purpose is to focus the Scottish Government and public services on creating a more successful country, with opportunities for all of Scotland to flourish, through increasing economic growth on a socially and environmentally-sustainable basis. This growth, will be achieved through five Strategic Objectives which aim to make Scotland:

- **Wealthier and fairer** – enable businesses and people to increase their wealth and more people to share fairly in that wealth. In the context of aquaculture, this means a growing competitive and profitable aquaculture industry which is seen as a good neighbour;
- **Smarter** – expand opportunities for Scots to succeed from nurture through to life-long learning, ensuring higher and more widely shared achievements. This means maximising the best use of technology and training for aquaculture;
- **Healthier** – help people to sustain and improve their health, especially in disadvantaged communities, ensuring better, local and faster access to health care. This means the production and promotion of high-quality farmed fish and shellfish as part of a healthy nutritious diet;
- **Safer and stronger** – help local communities to flourish, becoming stronger, safer places to live, offering improved opportunities and a better quality of life. This means a sustainable and growing aquaculture industry, building and supporting communities; and
- **Greener** – improve Scotland's natural and built environment and the sustainable use and enjoyment of it. This means minimising the impact of aquaculture, ensuring it operates within the carrying capacity of the environment.

The *Strategic Framework for Scottish Aquaculture* will be guided by these overarching strategic objectives.

Scottish Government Economic Recovery Programme

In response to the economic downturn the Scottish Government is taking forward an extensive package of measures through our economic recovery programme. The Scottish Government is committed to doing everything within its power to protect short-term demand in the Scottish economy and to help those businesses and individuals worst affected by the downturn. Supporting profitable fishing, aquaculture and fish-processing businesses and the jobs and rural economies they underpin is a central part of the economic recovery programme.

The economic recovery programme is fully in line with the Government's *Economic Strategy* and its continuing commitment to achieving its Purpose of increasing sustainable economic growth for Scotland.

Marine Bill for Scotland and Marine Scotland

The Scottish Government is bringing forward dedicated legislation for Scotland's marine environment. The Scottish Marine Bill, introduced to the Scottish Parliament in Spring 2009, promotes a sustainable approach to marine management and will balance marine conservation with the growth of marine industries. Legislation will make provisions for marine planning, marine nature conservation and streamlined marine licensing.

A new delivery arm of the Scottish Government, Marine Scotland, came into effect on 1 April 2009 and is the lead marine management authority in Scotland. This development will, over time, clarify and simplify licensing of marine and freshwater aquaculture facilities.

Climate Change

The Scottish Government will play its part in rising to the global challenge of climate change and has introduced a Scottish Climate Change Bill. Scottish aquaculture must ensure that the potential impacts of a changing climate are incorporated into planning and development of the industry to reduce its vulnerability and to capitalise on potential opportunities offered by renewable energy.

European Fisheries Fund (EFF)

The EFF is a European programme of funding to support the sustainable development of fisheries, of which aquaculture is a significant sector. The EFF programme can support eligible projects from individual producers or industry/trade initiatives, in line with Marine Scotland priorities. The Scottish Government opened the EFF Programme to new applications on 15 September 2008, with the first round of awards announced in February 2009. It will run until 2013 with three to four rounds of awards expected each year.

Aquaculture and Fisheries (Scotland) Act 2007

This Act makes provision in relation to fish farms for sea lice control and containment of fish. It gives Marine Scotland inspectors powers to inspect fish farms to ensure that satisfactory measures are in place to control sea lice, to contain farmed fish, prevent escapes and recover escaped fish. There is provision for issuing of enforcement notices and failure to comply with the conditions of such a notice is an offence. Inspections and audits for compliance with the Act commenced in November 2008.

THE BIGGER PICTURE (Continued)

Industry Code of Good Practice

The *Code of Good Practice for Scottish Finfish Aquaculture* has been operational since 2006. It will be reviewed and updated in 2009, taking account of the best available evidence and of changes in legislation and policy. While the code is voluntary, companies which are signed up are audited for compliance by Food Certification Scotland Ltd.

Aquatic Animal Health Directive

Application of this Directive will ensure that farms, transporters and processors operate to a high standard of bio-security in order to minimise the risk of outbreak and spread of disease.

Sea lice data

The Ministerial Group on Aquaculture will comment on proposals for a strengthened process for the collection of sea lice data to ensure the development of a national understanding of the nature and extent of this problem.

Tripartite Working Group

This group was set up to promote dialogue between the wild fish sector and finfish farmers for mutual benefit. It has been successful in brokering 18 Area Management Agreements on the west coast, within which the participants seek to protect and enhance the health of both wild and farmed salmonids.

The National Food and Drink Policy

At its core, aquaculture is about the production of high quality, healthy food.

Market demand for fish and shellfish is increasing, globally, within the UK and the EU. However, there is limited room for expansion in wild capture fisheries. Meeting this added demand can only realistically come from sustainable aquaculture. An increasing proportion of fish feed now originates from vegetable sources, helping to reduce the pressure on wild fish stocks. The health benefits of eating fish and shellfish are well documented and aquaculture can make a significant contribution by providing a sustainable source of fish protein. Scotland is well placed to deliver high quality, safe, nutritious and healthy farmed fish and shellfish.

Aquaculture has an important contribution to make in delivering a National Food and Drink Policy. This will promote Scotland's sustainable economic growth by ensuring the focus of all food and drink-related activity by Government offers quality, health, wellbeing and sustainability, whilst recognising the need for access to affordable food for all. Scotland Food and Drink, an industry-led body, has been established to bring everyone involved in the food and drink industry together working to a common agenda. The body aims to deliver greater success in global markets and to capitalise on Scotland's remarkable brand as the land of quality food and drink.

The *Strategic Framework* will provide a route for the aquaculture industry to contribute to the wider food agenda.

HOW WE GOT HERE

An inclusive, consultative and collaborative process

A *Fresh Start* has been developed through wide stakeholder involvement from the outset, including a wide-ranging pre-consultation exercise during which stakeholders were asked to identify the issues they felt should be addressed. This included a Ministerial letter to aquaculture stakeholders, bilateral meetings with stakeholder groups and public roadshows in Inverness, Oban, Scalloway and Stornoway.

It has also been informed by an aquaculture industry workshop in Inverary; a salmon industry fresh start summit in Edinburgh; a Scottish shellfish industry conference in Oban and incorporates a seven-point salmon industry action plan.

A draft renewed framework was also subject to a full 12-week public consultation which closed on 5 November 2008 and a Scottish Parliamentary debate on 20 November 2008. Non-confidential consultation responses along with an analysis of all responses are available on the Scottish Government website at www.scotland.gov.uk/Topics/Fisheries/Fish-Shellfish/

Stakeholder responses have informed this framework

Analysis of the consultation responses indicated general agreement with the five themes proposed and that many of the main issues had been identified in the consultation document. Additional issues and stakeholder comments raised through the consultation have been incorporated into this final document as far as is possible.



THE RENEWED STRATEGIC FRAMEWORK FOR SCOTTISH AQUACULTURE

The *Strategic Framework* is shown on pages 14-15. It has five key themes at its core and is set out to show how these themes relate to the Scottish Government's five strategic objectives, which are:

- **Wealthier and Fairer (WF);**
- **Smarter (S);**
- **Healthier (H);**
- **Safer and Stronger (SS); and**
- **Greener (G).**

The key themes reflect the main challenges facing the industry:

- **Healthier fish and shellfish (H);**
- **Improved systems for licensing aquaculture developments (L);**
- **Improved containment (C);**
- **Better marketing and improved image (M); and**
- **Improved access to finance (F).**

Each theme has an agreed overarching desired outcome. As this process moves forward, it is important that clear mechanisms are in place to ensure that progress against the outcomes is achieved and monitored.



“ A *Fresh Start* has five key themes: Healthier fish and shellfish; Improved systems for licensing aquaculture developments; Improved containment; Better marketing and improved image; and Improved access to finance ”

THE STRATEGIC FRAMEWORK FOR SCOTTISH AQUACULTURE

KEY THEMES	Scottish Government's Strategic Objectives		
	WEALTHIER & FAIRER	SMARTER	HEALTHIER
Healthier fish and shellfish (H)	Protecting valuable assets by high standards of husbandry and biosecurity to benefit all sectors	Continual development of control strategies and making best use of available medicines as well as research and development into emerging diseases	Producing healthy high quality, safe farmed fish and shellfish backed by a modern effective food safety regime
Improved systems for licensing aquaculture developments (L)	Develop plans to make optimal use of the space available to grow fish and shellfish through open and transparent processes	Develop and retain skilled, knowledgeable and trained decision-makers and workforce	Sites located to ensure optimum production of high quality, safe farmed fish and shellfish
Improved Containment (C)	Retaining stock within farm premises to increase profitability whilst preventing conflict with others' interests	Adopting best practice and technologies through continuous improvement to prevent fish farm escapes	Secure facilities producing high quality healthy fish
Better marketing and improved image (M)	Maximising profitability by promoting a positive image of the industry, making best use of the Scottish quality brand to secure markets home and abroad and retain and attract the best people and innovators	Ensure favourable conditions for both commodity and niche market production, better integration with transport and processing infrastructure and improved staff training and development	Promoting the health and nutritional benefits of farmed fish and shellfish
Improved access to Finance (F)	Develop a climate to improve investor confidence, supporting and underpinning the long-term future and competitiveness of the sector	Facilitate best use of technology and resources to make aquaculture attractive to investors	Producing high quality, safe, and nutritious farmed fish and shellfish

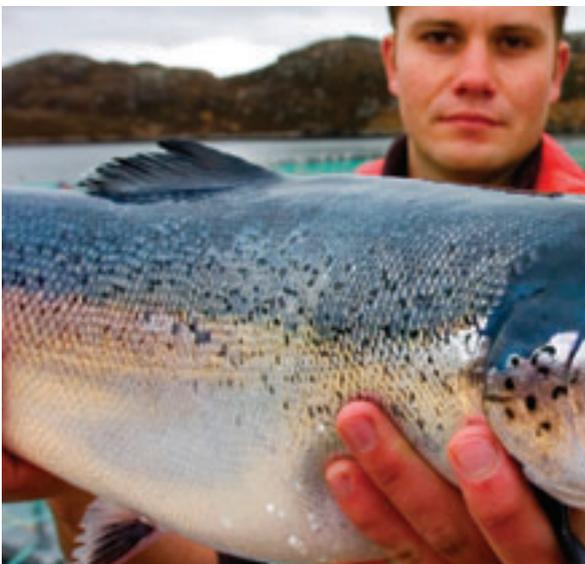
AQUACULTURE

Objectives		DESIRED OUTCOMES
SAFER & STRONGER	GREENER	
Controlling disease to help secure a sustainable, long-term future	Good strategies to help minimise discharge of medicine residues to the environment and the appropriate disposal of mortalities to limit disease spread	A secure long-term future for the industry by protecting the asset through adoption of disease and parasite-control strategies which also contribute to minimising impacts on the environment
Certainty and clarity going forward, underpinning downstream activities and benefits to local communities	The right sites in the right places permitted through a streamlined and proportionate regulatory framework to ensure reduced impacts on other species and users of the marine and freshwater environment	Development of the right sites in the right places through transparent, streamlined and proportionate regulation and processes to minimise adverse impacts on other users of the marine and freshwater environment
Reducing stock loss to improve the reputation and credibility of the industry to help secure its long-term future at the same time protecting wild fisheries and tourism	Potential detrimental effects on wild fish stocks reduced	Containment improved by adopting best-practice to reduce stock loss, improve profitability and secure the future and credibility of the industry whilst minimising adverse environmental impacts and preventing conflict with other interests
Strong industry with a strong brand through well-established markets and developing new markets for higher value and niche products	Enhancing the industry's reputation for respecting the environment through adoption of best practice and greener technologies and reducing the impact on wild fisheries by increasing use of alternative feed sources	Maximised profitability for commodity and niche market producers by promotion of a positive image of the industry and making best use of the Scottish quality brand to secure markets at home and abroad and provide sustainable employment opportunities
Securing finance to support the long-term stability and development of the industry	Invest in best practice and technologies to minimise impacts on the environment	An investment climate which supports and underpins the long-term future and competitiveness of the sector with investment in best practice and new technologies

THE KEY THEMES

What follows is a more detailed outline of each of the five key themes of the Strategic Framework. The issues, as identified by stakeholders, are highlighted within each theme as well as how they relate to other themes and the strategic objectives of the Scottish Government's Economic Strategy

HEALTHIER FISH AND SHELLFISH (H)



Desired outcome:
A secure long-term future for the industry by protecting the asset through adoption of disease and parasite-control strategies which also contribute to minimising impacts on the environment.

The consultation exercise indicated an urgent need for effective sea lice control measures to protect the health and welfare of both farmed and wild salmonids. This is viewed as crucial for the long-term future of both sectors.

The occurrence of Infectious Salmon Anaemia (ISA) in Shetland at the start of 2009 has highlighted the need to avoid complacency in regard to prevention and control of all diseases and the importance of operating to, as a minimum, the husbandry recommendations set out in the Code of Good Practice for Finfish Aquaculture, such as the establishment of management areas. It is important that such management areas are of appropriate scale for disease control.

Disease contingency planning involving industry and government is also important to ensure high health status of the Scottish industry and should be reviewed regularly. There is continued support for the Tripartite Working Group to deliver local solutions, supported by effective implementation of the Aquatic Animal Health Directive.

ISSUES IDENTIFIED BY STAKEHOLDERS	LINK TO OTHER KEY THEMES	SG STRATEGIC OBJECTIVES					DESIRED OUTCOME
		WF	S	H	SS	G	
Integrated sea lice control strategies	L, M, F, C	✓	✓	✓	✓	✓	Strategy developed for effective control of sea lice supported by a transparent, robust and fair inspection regime to ensure satisfactory measures are in place and impact on the wider environment is minimised
Disease management areas	L, M, F, C	✓	✓	✓	✓	✓	Single year class stocking, synchronous treatment and fallowing of appropriate scale management areas
Tripartite Working Group (TWG)	M, L, C	✓			✓	✓	TWG refocused on local delivery of agreements between farmed and wild fisheries interests
Hatcheries/production of disease-free smolts, eggs and spat	F, M	✓	✓		✓	✓	Secure the retention of viable finfish and shellfish hatcheries in Scotland
Shellfish quality and public health	M, F	✓	✓	✓	✓	✓	Establishment of improved controls and testing mechanisms
Waste management	F, M	✓	✓	✓		✓	Robust and biosecure arrangements for the satisfactory disposal of waste and mortalities – both routine and for mass mortality events or emergency culling
Aquatic Animal Health Directive	F, C	✓		✓		✓	Directive transposed and fully implemented
Animal welfare	M	✓				✓	Best practice standards in place to ensure accepted welfare of farmed fish and appropriate control of predators through compliance with an industry code which is evolving to reflect current best practice
Fish and shellfish disease control including emerging diseases	L, M, F, C		✓		✓	✓	Effective control strategies for fish and shellfish diseases including efficient identification of emerging diseases and compliance with an industry code which is evolving to reflect current best practice

H = Healthier fish and shellfish L = Improved systems for licensing aquaculture developments C = Improved containment
M = Better marketing and improved image F = Improved access to Finance

IMPROVED SYSTEMS FOR LICENSING AQUACULTURE DEVELOPMENTS (L)



Desired outcome:
Development of the right sites in the right places through transparent, streamlined and proportionate regulation and processes to minimise adverse impacts on other users of the marine and freshwater environment.

There is a perceived lack of available sites for expansion of aquaculture in Scotland. A strategic approach to the siting of farms to facilitate sustainable expansion of the aquaculture industry is required. Any new approach will have to sit within the marine planning framework.

Stakeholders have indicated a desire for the relocation of sites away from important salmon rivers and migratory routes, particularly freshwater sites. The potential for possible impacts of aquaculture on wild fisheries, the wider environment and other marine and freshwater users must be considered appropriately through robust and transparent planning and licensing processes.

The draft River Basin Management Plan for Scotland identifies positive measures to address the challenge of how to support the continued expansion of the aquaculture industry while minimising impacts on the environment. Future arrangements for aquaculture planning and developments, and the issues set out under this theme, will be taken forward in light of progress on the Marine Bill and the establishment and development of Marine Scotland and improved marine management arrangements in Scotland.

ISSUES IDENTIFIED BY STAKEHOLDERS	LINK TO OTHER KEY THEMES	SG STRATEGIC OBJECTIVES					DESIRED OUTCOME
		WF	S	H	SS	G	
Improved availability of sites for expansion and rationalisation	M, F,	✓	✓	✓	✓	✓	Aquaculture plans, in the context of marine plans and river basin management plans, which provide a clear indication of where aquaculture development may take place for production of shellfish, finfish and other species
Large numbers of undeveloped leases	M, F	✓	✓		✓		Maximise use of available sites where appropriate, informed by an improved database and other information sources and develop an alternative to the current system of ad hoc “firebreaks” created by unused consents
Fitness for purpose of locational guidelines	C, H	✓	✓			✓	Clear guidance for environmental quality, disease control and landscape, taking into account the assimilative capacity of water bodies and resolving the issue of unused consents
Simplification of procedures and links with Marine Bill and Marine Scotland	C, M, F	✓	✓			✓	Clear indication of how freshwater and marine aquaculture will be dealt with including maximising opportunities for linkage to other marine industries
Impact of aquaculture on other users	C, M, F	✓	✓	✓	✓	✓	Impact of aquaculture on wild fisheries, biodiversity and wider environment minimised through robust and appropriate planning and licensing systems

H = Healthier fish and shellfish L = Improved systems for licensing aquaculture developments C = Improved containment
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THE KEY THEMES

IMPROVED CONTAINMENT



Fish farm escapes are clearly an important issue for the industry and its stakeholders and must continue to be reduced through best practice underpinned by the Marine Scotland inspection regime under the Aquaculture and Fisheries (Scotland) Act 2007 and revision of the industry Code of Good Practice.

Best practice should also consider welfare issues relating to the control of seals by fish farmers and the use of improved containment systems or facilities. By continuing to improve containment, the finfish industry will reduce potential impacts on the environment, be seen as a good neighbour and, by limiting stock loss, increase profitability.

Desired outcome:

Containment improved by adopting best-practice to reduce stock loss, improve profitability and secure the future and credibility of the industry whilst minimising adverse environmental impacts and preventing conflict with other interests.

ISSUES IDENTIFIED BY STAKEHOLDERS	LINK TO OTHER KEY THEMES	SG STRATEGIC OBJECTIVES					DESIRED OUTCOME
		WF	S	H	SS	G	
Escapes of fish from farms	F, M, H, L,	✓	✓	✓	✓	✓	Minimise escapes caused by poor operational procedures, storm damage and predators
Full implementation of Aquaculture and Fisheries (Scotland) Act 2007	M, H	✓	✓		✓	✓	Transparent and fair inspection and audit regime in place ensuring correct operational procedures are in place
Utilisation of best practice and technology	F, M	✓	✓		✓	✓	Industry using the best practices and equipment available for containment reflected in an adhered to and evolving industry Code of Good Practice
Freshwater production	L, M, F	✓	✓		✓	✓	Industry using the most appropriate equipment or facilities for containment at fresh water sites to ensure adverse impacts on biodiversity and wider freshwater environment are minimised
Contingency planning for escapes	L	✓	✓		✓	✓	Robust plans are in place and adverse impacts are minimised
Source of escaped fish	M	✓	✓		✓	✓	Methods put in place to aid traceability of escaped fish

H = Healthier fish and shellfish L = Improved systems for licensing aquaculture developments C = Improved containment
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THE KEY THEMES

BETTER MARKETING AND IMPROVED IMAGE (M)



Desired outcome:
Maximised profitability for commodity and niche market producers by promotion of a positive image of the industry and making best use of the Scottish quality brand to secure markets at home and abroad and provide sustainable employment opportunities.

The Scottish aquaculture industry faces stiff competition from other countries. It must rise to this challenge and capitalise on its strengths by promoting the positive aspects of the Scottish quality brand to secure markets at home and abroad. The positive image of the aquaculture industry should be promoted by highlighting best practice, the robust regulatory regime in place, sustainability and the clear health benefits of eating fish and shellfish.

There is also a desire to develop the shellfish sector in particular and for diversification into new species and markets. Greater focus should be made on education and training including the promotion of aquaculture as a viable career in order to retain and attract talented and innovative people. This framework must also make best use of research and development, innovation and new technologies as well as an improved awareness of market trends.

ISSUES IDENTIFIED BY STAKEHOLDERS	LINK TO OTHER KEY THEMES	SG STRATEGIC OBJECTIVES					DESIRED OUTCOME
		WF	S	H	SS	G	
Image of the aquaculture industry	C, F, H	✓	✓		✓		Better public awareness, acceptance and understanding of aquaculture industry
Aquaculture as a viable career	F		✓		✓		Aquaculture recognised as a rewarding career which attracts, retains, educates and trains talented and innovative people
Structure of the industry and link to supply chains	F	✓	✓	✓	✓	✓	Planned access to processing and markets in UK and overseas
Securing the Scottish premium and developing niche markets	F	✓		✓	✓		Scottish aquaculture products recognised as top quality particularly those from specialist producers
Diversification in aquaculture, new species and new markets	L, F	✓	✓	✓	✓		Strategy in place to support diversification and innovation through development of new species production with good market prospects, informed by developments in technology
Feed sustainability	F		✓			✓	Feed derived from sustainable sources and understood as such
Health benefits of eating fish and shellfish	H		✓	✓	✓		Promotion of health benefits of fish and shellfish by clear linkage of aquaculture to Scottish Food and Drink Policy
Engagement with Europe and wider international stage	F	✓	✓				Scotland proactive and effectively engaged with other countries on aquaculture issues including implementation of the EU aquaculture strategy, sharing best practice and as a major contributor to international cooperation on research
Reduced waste and appropriate utilisation of by-products	H, F	✓	✓	✓		✓	Use of EFF grants to develop measures to minimise waste products and utilise by-products

H = Healthier fish and shellfish L = Improved systems for licensing aquaculture developments C = Improved containment
M = Better marketing and improved image F = Improved access to Finance

THE KEY THEMES

IMPROVED ACCESS TO FINANCE (F)



Aquaculture has faced difficulties in securing finance. This has been exacerbated by the global economic downturn. It is crucial that mechanisms are in place to facilitate access to financial support and potential investors must be encouraged to view the industry as a long-term viable business.

Securing access to finance is crucial particularly to small business and SMEs, as is effective roll-out of European Fisheries Fund (EFF) monies. Criteria for assessing EFF awards for aquaculture should be clearly linked to issues laid out in this Strategic Framework.

Desired outcome:

An investment climate which supports and underpins the long-term future and competitiveness of the sector with investment in best practice and new technologies.

ISSUES IDENTIFIED BY STAKEHOLDERS	LINK TO OTHER KEY THEMES	SG STRATEGIC OBJECTIVES					DESIRED OUTCOME
		WF	S	H	SS	G	
Competitiveness of Scottish aquaculture with aquaculture in other countries	M	✓			✓		Scottish aquaculture shown to be competitive within each market area
Long-term investor confidence	M	✓			✓		An industry that is recognised as a good investment opportunity
Development of robust data and information sources to highlight the value, importance and prospects of the industry in Scotland	M	✓	✓		✓	✓	Clear, robust and up-to-date information available to ensure industry is recognised as a good investment opportunity
Lack of private sector funding	M	✓			✓		More private sector funding available, encouraged by government and investor confidence
Lack of public sector funding	M	✓			✓		Best use of available public funding for the benefit of the whole industry including EFF and in compliance with state aids rules
Support for innovation and new technologies	M, C	✓	✓			✓	Partnerships between Government, academia and industry
More efficient use of facilities	H, M	✓	✓	✓	✓	✓	Support opportunities for shared facilities (depuration, processing, marketing, deliveries)

H = Healthier fish and shellfish L = Improved systems for licensing aquaculture developments C = Improved containment
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DELIVERY

A refreshed approach

Whilst widely acknowledged as having achieved a great deal, the original Strategic Framework, its Action Plan review process and the structure of the MWGA were subject to criticisms. Consultation responses clearly indicated that the MWGA should be refocused and take a leadership role in reviewing progress and reprioritising actions. Champions should drive progress on issues under each theme and report to the Minister.

This renewed Strategic Framework will therefore adopt an approach in which the Ministerial Group on Aquaculture drives progress on the priorities and outcomes contained in this document, rather than simply being a body which reviews and tracks progress. It will also generate a flexible list of priority actions that remain current, are regularly reviewed and reprioritised as appropriate. Work-streams will flow through the five identified key themes and be directed by the Group.

The Group will be guided by this overarching framework document and will identify the immediate priorities and agree actions within each theme. Each theme will have a “champion” who sits on the main group and will have responsibility for ensuring that agreed actions within their theme are being progressed. These will include sub-groups, and possibly the use of task-specific workshops which co-opt specialists/experts and stakeholders with relevant interests. Existing stakeholder groups such as the Aquaculture Health Joint Working Group will be drawn into this new structure. A new shellfish group will advise on specific issues not addressed by these sub-groups.

A refocused Ministerial Group on Aquaculture (MGA)

The refocused group will be established in summer 2009 following the launch of this renewed Strategic Framework. At the meeting, new terms of reference, champions and the first 6-month action plans will be agreed. The group will have the following characteristics and function:

- A Purpose of driving forward Sustainable Economic Growth of Scottish Aquaculture.
- A group which is smaller and more focused than previously to make better use of expertise, skills and time.
- A champion for each theme with responsibility to manage and facilitate the key actions identified under that theme and to deliver and report back to the core Group.
- All key stakeholder interests will be involved, as appropriate, either on the Ministerial group or through focused subgroups and workstreams or the National Aquaculture Forum.
- The refocused Group would meet biannually to review, revise and agree action plans.
- There will be scope to review, add and change membership as appropriate.
- Marine Scotland will be responsible to ensure this links into wider policy themes, e.g. food & drink, Scottish Marine Bill, climate change and EU aquaculture strategy.

Reporting Progress and Review

- Champions will report back to the new management Group on progress at every meeting. This may include specialist/ expert feed back to the group on a specific issue as necessary.
- Following progress reporting, the Group will consider current and emerging issues before agreeing an updated plan of actions within each theme.
- Action plans will be reviewed against this document to ensure they are delivering the desired outcomes agreed and re-evaluated and refocused as and when necessary.
- An update on progress and any newly agreed priorities will also be published on the Scottish Government website after each meeting and issued to stakeholders.

A National Aquaculture Forum

The consultation suggested “a wider *Aquaculture Forum*”. The Forum will have the following features:

- Wide-ranging membership.
- Chaired by Marine Scotland.
- It will feed into framework theme action plans and receive feedback on progress from the new Ministerial Group.
- It will be tasked with specific pieces of work to inform themes or specific issues. Members/Forum representatives could be co-opted onto task specific groups as appropriate.
- It will act as a sounding board for new policy initiatives and provide opportunities to inform policy and respond to wider, relevant Scottish Government consultations.
- It will generate key questions for the MGA to be dealt with through the relevant sub-group.
- It will allow for stakeholder input to ensure that the actions remain relevant and accommodate new issues of concern which may arise or when there is a lack of progress.



APPENDIX

LINKS TO USEFUL WEB ADDRESSES

A Strategic Framework for Scottish Aquaculture

<http://www.scotland.gov.uk/Topics/Fisheries/Fish-Shellfish/>

Aquaculture & Fisheries (Scotland) Act 2007

http://www.opsi.gov.uk/legislation/scotland/acts2007/pdf/asp_20070012_en.pdf

Code of Good Practice for Scottish Finfish Aquaculture

<http://www.scottishsalmon.co.uk/aboutus/codes.asp>

EU Aquaculture Strategy

<http://ec.europa.eu/fisheries/>

EU Aquatic Animal Health Directive

http://ec.europa.eu/food/animal/liveanimals/aquaculture/index_en.htm

European Fisheries Fund (EFF)

<http://www.scotland.gov.uk/Topics/Fisheries/grants-subsidies>

Marine Scotland

http://www.scotland.gov.uk/about/Directorates/wealthier_and_fairier/marine-scotland

Marine Scotland Science

<http://www.marlab.ac.uk/>

Scottish Finfish and Shellfish Annual Production Surveys

<http://www.frs-scotland.gov.uk/Delivery/standaloneCM.aspx?contentid=770>

Scottish Government's Economic Strategy

<http://www.scotland.gov.uk/Publications/2007/11/12115041/0>

Scottish Government National Food and Drink Policy

<http://www.scotland.gov.uk/Topics/Business-Industry/Food-Industry>

Scottish Marine Bill

<http://www.scotland.gov.uk/marinebill>

Scottish Planning Policy – SPP 22

<http://www.scotland.gov.uk/Publications/2007/03/29102058/0>

Tripartite Working Group (TWG)

<http://www.tripartiteworkinggroup.com/>

Water Framework Directive (WFD) in Scotland

<http://www.scotland.gov.uk/Topics/Environment/Water/15561/14925>

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