

## 2<sup>nd</sup> meeting of the Seaweed Review Steering Group

### Paper 4 - Scenario Mapping

A research proposal based on the initial review of industry in other countries done by Marine Analytical Unit has been drafted and expected to be out to tender by late September. The aim of the commissioned research project will be to consider the current and future growth opportunities for the seaweed sector to help inform the SRSG the environmental and socio-economic implications of seaweed harvesting and cultivation.

### **Aim and Objectives of the Research**

This research will focus on understanding the potential scale for seaweed-based industries in Scotland founded on locally sourced or produced raw material, and associated wider socioeconomic impacts. The research aims to identify the potential scope and scale of sustainably harvested seaweed-based industries in Scotland or industries dependent on production of seaweed from Scotland's marine environment based on consumer and other market requirements. This includes understanding the resource that could be made available to industries developing in Scotland, their market opportunities and potential, their requirements, and their probable economic and social impacts in Scotland. This evidence is required to increase understanding of the potential for seaweed-based industries, with particular respect to:

- To assess the potential economic and social impacts of the industry if it was to establish and grow;
- Ensuring that benefits of increased prosperity are environmentally sustainable and can be enjoyed by future generations;
- Ensuring that benefits of further economic growth are shared widely across Scotland.

The specific objectives of the research are to:

- i. Determine the potential scope, requirements and scale of seaweed industries in Scotland, and where it may establish.
- ii. Identify how supply chain in Scotland may develop and the size of associated indirect economic impacts – upstream and downstream- for industries that may develop locally based on seaweed sourced (harvested or grown) from Scotland's seas.
- iii. Assess the wider socioeconomic impacts that may arise from both the direct and indirect impacts from local seaweed-based industries using raw material sourced from Scotland's seas. This would include identifying the communities in Scotland that may be affected by development of seaweed industries and the nature of impacts on these communities.

### **Contract Duration and other Timelines**

- The contract will commence on 8<sup>th</sup> January, 2020 and will run until its conclusion on 25<sup>th</sup> June, 2020.
- An inception report setting out the approach for the project that will be agreed with the project steering group, due by 20<sup>th</sup> January, 2020.
- An interim report setting out a detailed methodology including preliminary estimates of the socio economic impacts, due by 24<sup>th</sup> February, 2020.
- A final report presenting the final estimates of Scottish seaweed industry's potential market growth and associated socio-economic impact, due by 27<sup>th</sup> May, 2020.
- Presentation of results to Scottish Government officials, seaweed review steering group (SRSRG) and to other stakeholders as requested.

(See Annex A)

### **Project Management**

The contract will be managed by Marine Scotland.

