

Strategic Plan for Aquaculture.

Croatian multiannual plan for aquaculture.

Workshop ZADAR 20-21 January 2014

Croatian Ministry of Agriculture
Directorate of Fisheries



MINISTARSTVO POLJOPRIVREDE
UPRAVA RIBARSTVA



Experts mission.

AGR IND/EXP 54211.

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1. Introduction - EU Vision & Policy Context

2. What is a Strategic Plan ?

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1. Introduction

EU Vision & Policy
Context for
Aquaculture

Europe's vision of Aquaculture and Fisheries

Excellent quality.

EU Market Supply

EU Aquaculture production.

1.26 mT
3.1 B€

10%

25%

65%

13.2 mT
Consumption
3 - 4 .000
employment

Political wiliness.

H2020

Blue
Growth

FAO

Strategic Sector



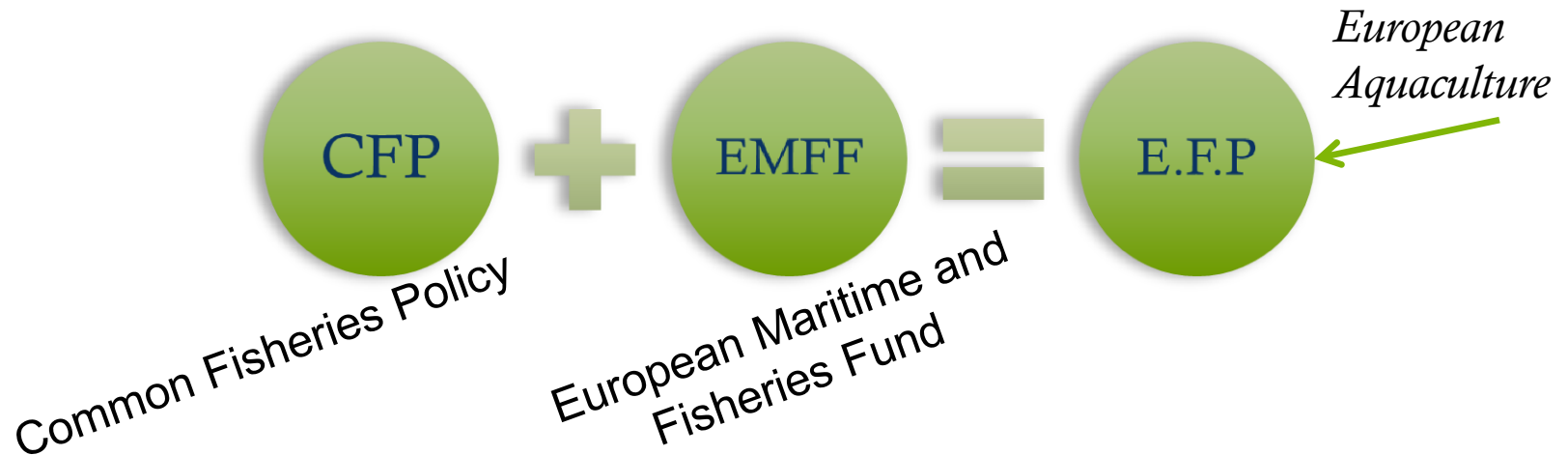
EUROPEAN
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COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

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European Fisheries Policy (EFP)

Actually in reform process

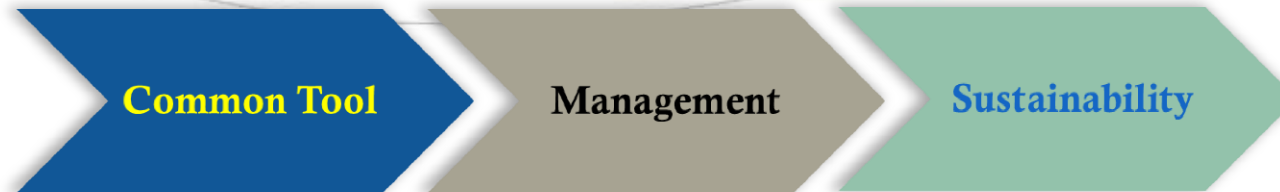


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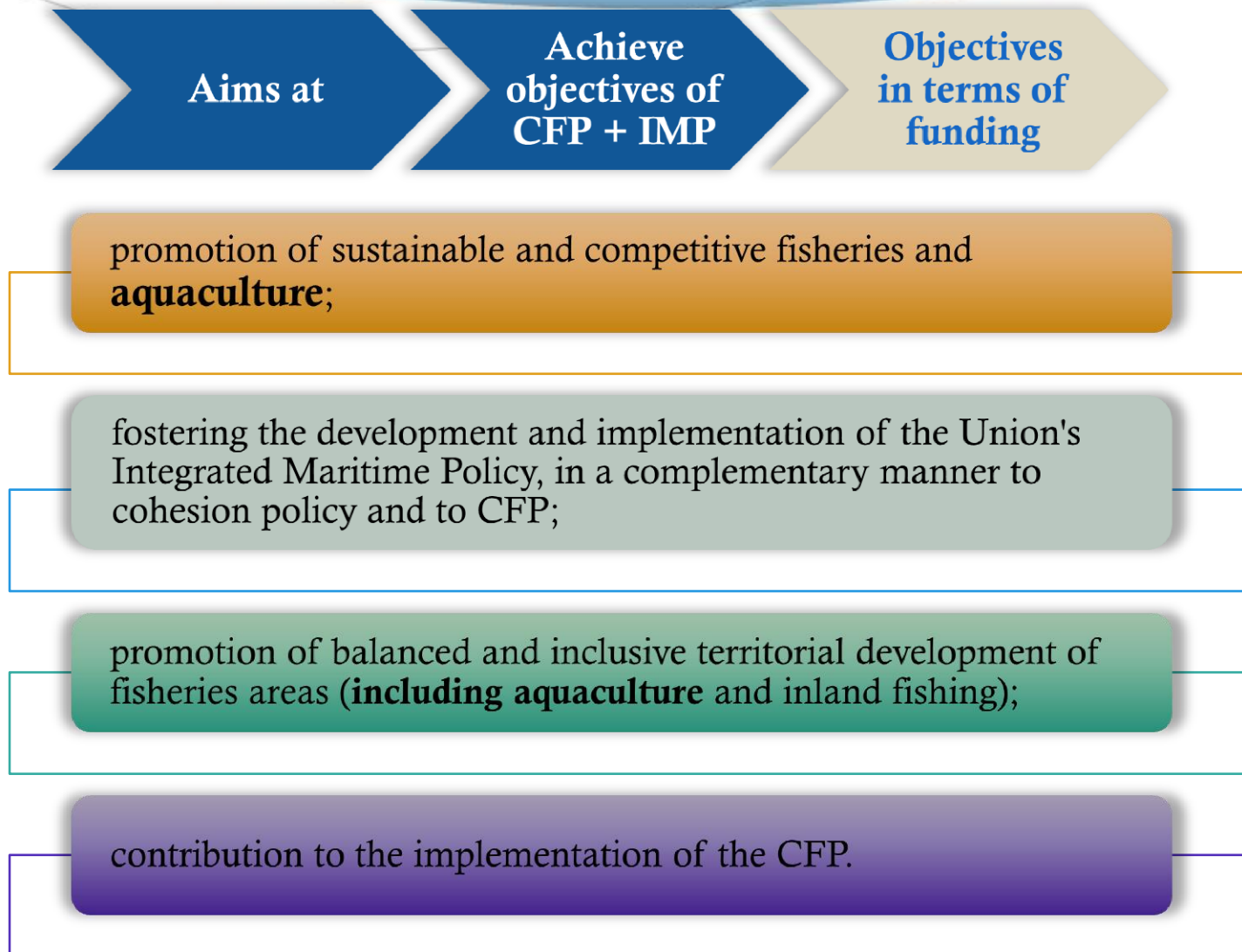
What is the Common Fisheries Policy?



The most important **areas of action** of the CFP are:

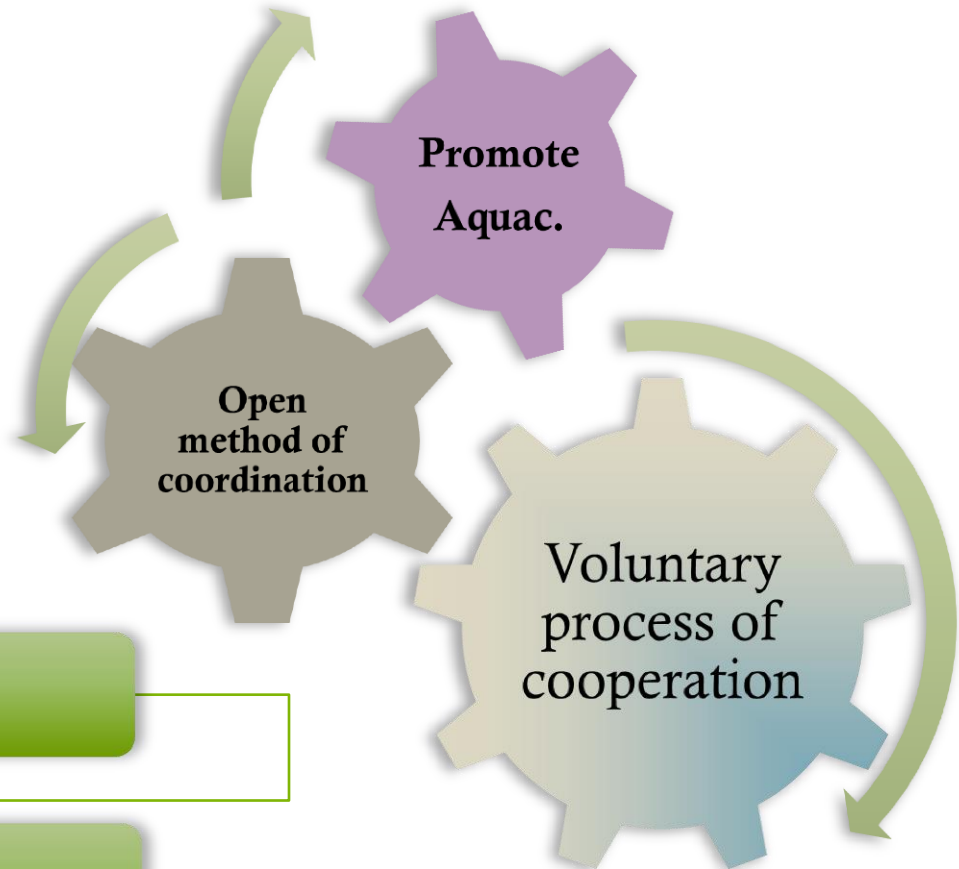
- laying down **rules** to ensure Europe's fisheries are sustainable...
- providing national authorities with the **tools** to enforce these rules...
- **monitoring** the size of the European fishing fleet and preventing ...
- providing **funding and technical support** for initiatives that can make the industry more sustainable (see European Fisheries Fund)
- **negotiating** on behalf of EU countries in international fisheries ...
- **helping** producers, processors and distributors **get a fair price** ...
- **supporting the development of a dynamic EU aquaculture sector**
- **funding scientific research and data collection, to help *decision making*.**

European Maritime and Fisheries Fund (EMFF)



Aquaculture in the CFP Reform.

The CFP aims at



Strategic Guidelines

Multiannual National Strategic Plans

- Common Objectives
- Indicators to measure progress

Based on

STRATEGIC GUIDELINES



Brussels, 29.4.2013 COM(2013) 229 final

**Strategic Guidelines for the sustainable
development of EU aquaculture**

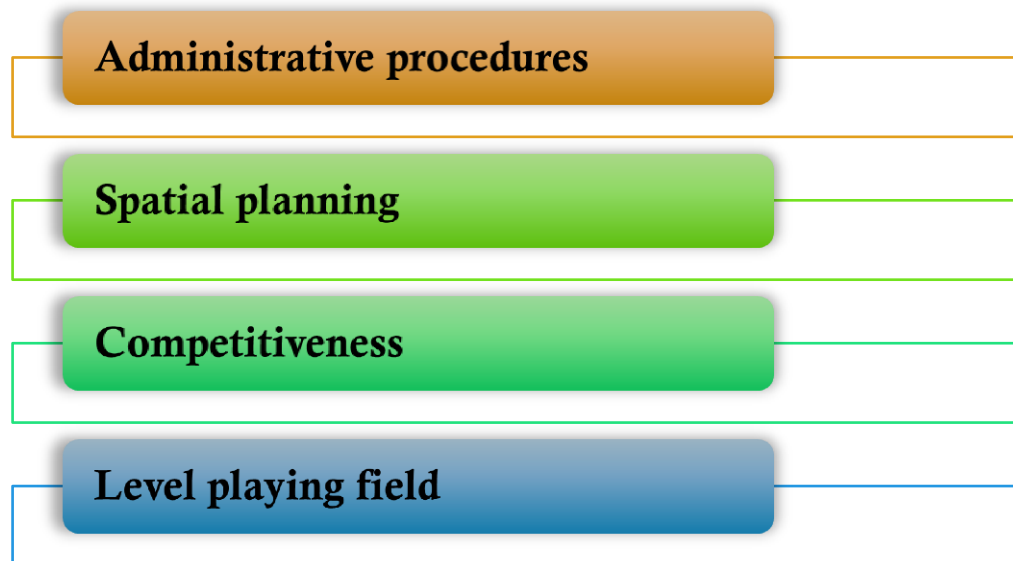
These Strategic Guidelines aim
to assist the Member States in
defining their own national
targets taking account of their
relative starting positions,
national circumstances and
institutional arrangements
Specific **strategic lines** by
countries

Strategic Guidelines for sustainable development of EU Aquaculture



This Communication is based on the outcome of consultations with stakeholders, and takes into account the analysis performed by the Joint Research Centre.

Four priority areas will be addressed in order to unlock the potential of EU aquaculture:



2. What is a Strategic Plan ?



Strategy

A strategy is a set of rules that ensure an optimal decision in the right moment.

The strategy would be the path to follow in order to achieve a clear objective.

The term "**strategy**" is usually associated with the concept of **planning**, shaped by strategic lines or priorities, deadlines and specific actions to implement in order to achieve the objectives.

strat.e.gy

(strät' ə-jē) n.

1. Plan of action
designed to achieve
a particular goal.

Multi-year strategic plan for aquaculture:

Technical document that set up the objectives of development...
from a deep analysis of real options of development...
based on a set of actions...
scheduled in time...
within the principles of sustainable development



Vision and Mission



VISION

Croatian aquaculture will be (or wants to be) in 2030 in an outstanding position in the context of aquaculture in the EU, in terms of production and economic. All of this strengthening its dynamic role in rural and coastal areas through employment creation and assuring consumers the highest quality products and sustainable processes.

MISSION

The Sustainable Development of Croatian aquaculture supported by a Multiannual Strategic Plan defined through a participatory approach and adapted to the Croatian context.

Key aspects to take into consideration

In any strategic planning process there are two key aspects:

participatory approach and **clear and achievable goals**



Stakeholders identification

Where we want to be Croatian aquaculture in 2030?...There must be a clear vision of the sector, describing the future, realistic, easy to remember and shared by all agents, among other attributes

Other aspects for a good strategy:

1. Should have good connection between strategy and resources
2. Provides a competitive advantage
3. Should be flexible and adaptable to changing situations



2. Why a Strategic Plan ?



Why a Strategic Plan?

Basically two reasons...



Planning of the
sector



Funding
allocation
(FEMP)



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Why a Strategic Plan...?

Starting point

- To respond / reinforce political wiliness.
- To respond to the demand of the sector.

Vision of the sector

- Prospective analysis.
- Previous and actual state of the sector.
- Identification of stakeholders.

Perspectives of the sector.

- Set up the Objectives of development
- Constrains of development.

Management and Planning

- Planification of the activity.
- Assessment of performance.

New opportunities.

- Investors
- Synergies
- Better performance

Knowledge



Strategy



Governance



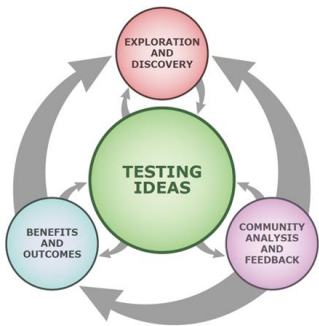
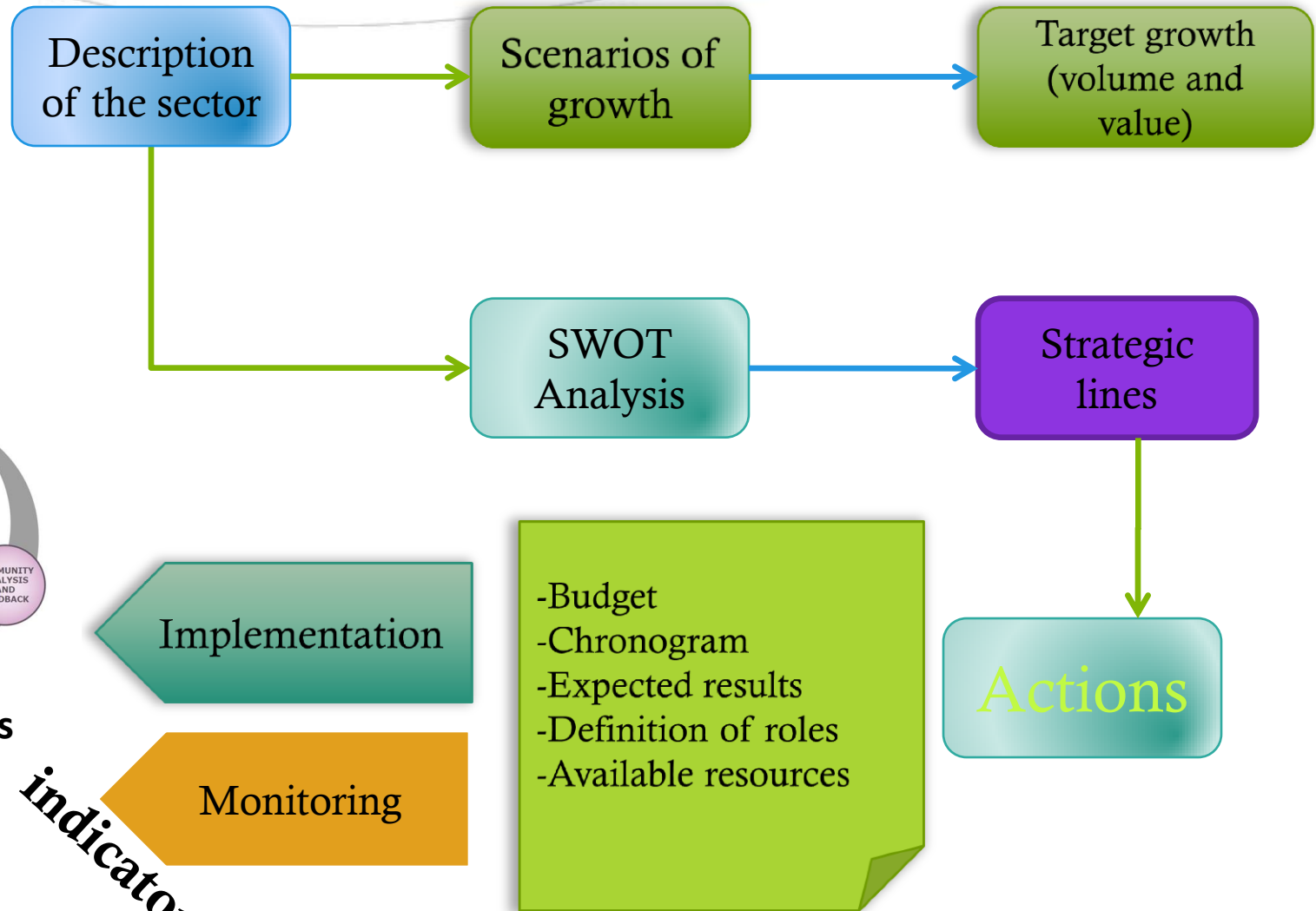
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3. How a multiannual Strategic Plan should be done ?



General scheme



Dynamic process

indicators

DESCRIPTION AND ANALYSE OF THE SECTOR

COMPANIES

facilities

Legal framework & administrative competence

Level of production by species

Level of production by system

Level of production by area

Statistical data

species

RESEARCH

Stakeholders



Evolution and trends

- N° of application for new licenses.
- Volume of new investment
- New promoters or new projects
- Level of interest for the activity.

Projection-Evolution of the sector

Possible evolution of the sector in the;

- short (2015)
- medium (2020)
- long term (2030).

Based on the review of

- the **background**,
- the evolution of the aquaculture sector until today,
- and the prospects of development of the sector in each of the areas of country.

Factors to help estimation of future scenarios:

- Previous tendencies of growth.
- Actual production capacity; volume and value of production
- Number of licenses...
- Potential estimated growth by existing companies...
- Potential licenses; number of new applications...
- Holding capacity of the system (Physical plans...)
- Production and consumption rate.

...



Different ways to

SWOT ANALYSIS

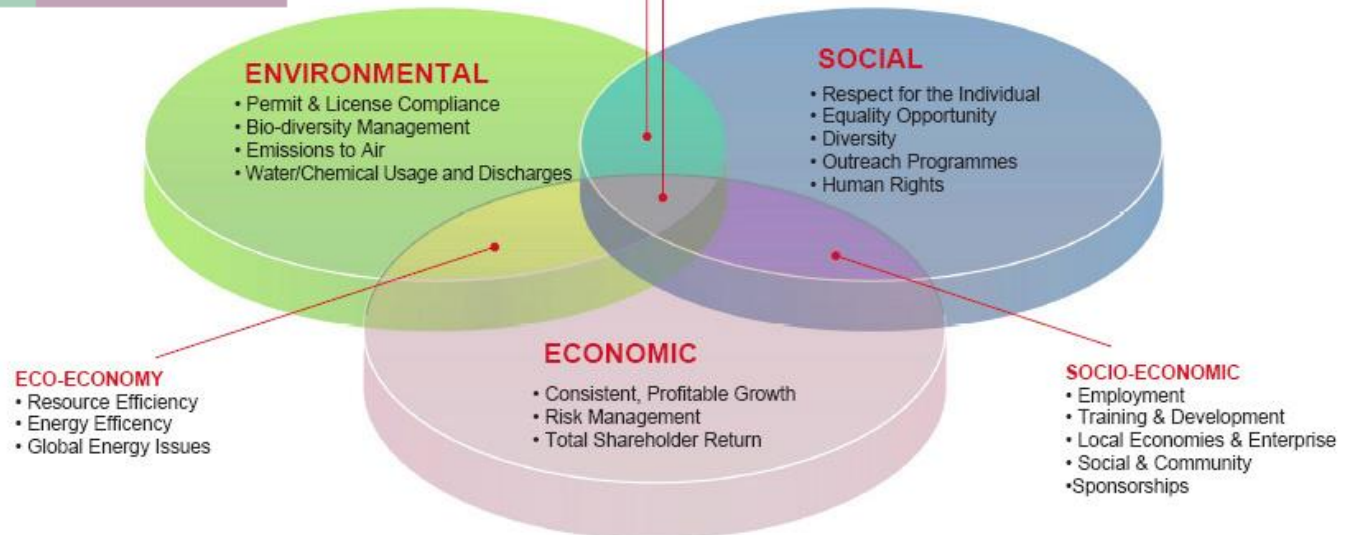
	Helpful to achieving the objective	Harmful to achieving the objective
Internal origin (attributes of the organization)	S Strengths	W Weaknesses
External origin (attributes of the environment)	O Opportunities	T Threats

SOCIO-ENVIRONMENTAL

- Health & Safety
- Legislation & Regulation
- Climate Change
- Crisis Management

SUSTAINABILITY

An integrated approach to Environmental, Social & Economic impact issues (both internal and external) leads to long term, sustainable profit growth



Design of strategic lines for Plan

- The selection of the strategic lines is an important issue, however, these general lines will be almost the same for all European and Mediterranean aquaculture.
- The key issue is to make a good analysis of each line and taking into account the reality of each country.

1. Regulatory framework
2. Sectoral planning: selecting sites
3. Environmental Management
4. Animal Health and Welfare
5. R+D+i
6. Training and University education
7. Markets: marketing, processing, i.e
8. Communication and Image

Strategic line analysis
based on...



**Current
situation**



**Ideal
situation**



Perspectives



**Strategic
actions**

Proposal for implementation.

Based on the information obtained the work team will propose, well justified and detailed to develop concrete actions to achieve the objectives of the Strategic Plan within the prescribed period (short, medium and long term).

ACTIONS



ACTION

- Who is the responsible to do it?
- How long time?
- How much budget we need?
- What are the expected results?
- Which are the recipients?

It will be useful to develop a series of fact sheets for every actions to be developed with all the information relating to its application.

OBJECTIVE	ACTIONS and ACTIVITIES ¹	DEPARTMENT Lead	TIMELINE					PERFORMANCE MEASURES (we will know we have succeeded when)
			2011/12	2012/13	2013/14	2014/15	2015/16	
A Healthy Aquatic Environment	Provide risk-based guidance to support ecological impact assessments.	MPI, DOC						» RMA decisions informed by a national risk assessment of ecological effects » Councils in relevant regions have developed an integrated approach to aquaculture that maintains healthy aquatic ecosystems by 2016 » Water quality in core aquaculture growing areas maintained or improved » Industry biosecurity plans in place by 2014 » New Zealand's environmental performance as an aquaculture producer assessed as world leading
	Establish a national aquaculture working group to review science for important applications and planning initiatives.	MPI, MSI						
	Through the implementation of national policy statements ² , facilitate integrated management to support healthy aquatic ecosystems and maintain water quality in aquaculture growing areas.	DOC, MPI, MFE						
	Establish a process to monitor and review environmental performance.	MPI, DOC, MFE						
	Establish biosecurity plans for key growing regions.	MPI						
Quality Planning & Permitting	Work with regional councils to ensure planning to identify opportunities for aquaculture growth, including through identifying new growing areas in appropriate places and provisions to enable better use of existing space.	MPI, DOC, MFE						» 80% of regional coastal plans include aquaculture provisions in accordance with the policies in the NZCP5 by 2016 » 4000 ha of new aquaculture space developed by 2016 » District plans provide for essential infrastructure in key growth regions » 95% of consents and UAE tests within statutory timeframes
	Partner with industry to develop regional growth scenarios to inform planning and prioritisation.	MPI						
	Work with district councils to ensure district planning enables aquaculture growth.	MPI MFE						
	Develop best practice guidance for consent processing, consent conditions, information requirements and changes of use to promote national consistency.	MPI, DOC, MFE						
	Efficiently administer undue adverse effects on fishing test processes (UAE) and other permitting processes.	MPI, EPA						
	Establish and administer the 'Planning Fund' to assist councils' plans for aquaculture growth.	MPI						
	Collate and improve information on the ecological, cultural and social costs and benefits of aquaculture to support decisions and community comfort.	MPI, DOC, MFE						
Effective and Responsive Regulation	Develop options to improve the management of land-based aquaculture.	MPI, DOC						» Ministers are advised on options to review land-based aquaculture in 2012 » Reviews of relevant legislation and policies are informed by, and recognise the implications for, aquaculture » Ministers are advised on future management frameworks for ranching and enhancement activities by 2014
	Complete outstanding components of marine aquaculture reforms transferred to RMA Phase II reforms.	MFE, DOC, MPI						
	Ensure aquaculture is considered in future reviews of relevant legislation and policy governing the sector (e.g. EEZ, biosecurity, animal welfare).	ALL departments						
	Review the interface between aquaculture and the QMS framework to enable appropriate enhancement and ranching activities.	MPI						
Support Māori Objectives ³	Deliver the Crown's aquaculture settlement obligation.	MPI, DOC						» Aquaculture settlement achieved within statutory timeframes » Iwi fish plans include Māori aquaculture objectives as appropriate » Māori interests are actively considered in aquaculture actions and recorded in advice
	Assist Māori in developing aquaculture objectives as part of iwi fisheries plans, forum fisheries plans, or other processes.	MPI						
	Recognise specific Māori interests across the aquaculture work programme.	MPI						
	Provide ongoing support for Māori development in aquaculture.	MPI, TPK, NZTE						
Increase Market Revenues	Develop an aquaculture investment plan to support growth.	NZTE, MFAT						» Increased export volume and value » Trade conditions for aquaculture products improved
	Fund market co-ordination role within Aquaculture New Zealand.	NZTE						
	Ensure where appropriate that government funding for market support includes aquaculture within scope.	NZTE, MFAT						
	Review and document trade barriers in key markets for seafood products.	MPI, MFAT						
	Within trade negotiations, work to improve trade conditions for seafood products.	MFAT, MPI						
	Within markets, provide intelligence and market access support.	NZTE, MFAT						
	Maintain and review animal health, biosecurity and food safety management to gain and/or maintain trade access.	MPI						
Increase Value through Research and Innovation	Support efforts to demonstrate and market the sustainability of New Zealand aquaculture production, including through third-party certification of aquaculture.	NZTE, MPI, MFAT						» An agreed plan is in place to implement a new species strategy by 2013 » An agreed medium-term research plan is developed for aquaculture by 2013 » Climate change implications considered across the aquaculture work programme
	Develop and implement a strategy for new aquaculture species.	NZTE, MPI, MSI						
	Establish a fit-for-purpose approach to improve prioritisation, co-ordination and alignment of aquaculture research with industry priorities.	MSI, MPI						
	Ensure government innovation funding includes aquaculture within scope.	MSI, NZTE						
	Identify opportunities to enable research and field trials in a timely manner.	MPI						
Sound Governance	Investigate the impacts of climate change and measures to adapt and respond.	MPI, MSI						» Stakeholders actively engaged in identifying opportunities and risk for aquaculture and the future management of the industry » Performance objectives for the other six objectives achieved
	Establish appropriate governance groups to support implementation of this strategy, such as the 'Aquaculture Forum'.	MPI						
	Complete annual reviews of the strategy and action plan.	MPI						

1 Each action and activity will have a work plan developed elaborating on how the action will be delivered and the roles of particular agencies.
 2 Including the New Zealand Coastal Policy Statement 2010 and the National Policy Statement for Freshwater Management 2011.
 3 Actions aligned with other objectives in this strategy will also contribute to this specific objective given the core role of Māori in the aquaculture sector.



Core action



Implementation/
business as usual



No activity

Global Work Plan...



Communication

And after to do it...what is the next step?

BUILD A NATIONAL PLAN

**DEVELOPMENT and
IMPLEMENTATION**

**MONITORING AND
CONTROL**

Strategic lines	Actions	Leader	Actors	Budget	Deadli ne	Deliverab les
Simplification of Administrative procedures	Collection and analyze of all regulations	Ministry with competence	All agents involved in the licenses process	€ + % of co-financiati on	6 months	Official guide for administrative procedures
Establishment of a collective brand for..	Developed a integrate process to establishment the brand	Sector Organizati on	Ministry	€ + % of co-financiati on	8 months	Collective Brand Scheme

Monitoring and feed-back.

2.4. Proceedings to review and feed-back.



A system of control and monitoring of the implementation of the measure should be designed. in the plan and the establishment of reliable indicators for monitoring compliance with the objectives in the short and medium term. In the case of non-compliance with the targets set, there will be a reorientation strategy of the Plan.

Indicators to monitoring goals

Marine finfish production

Freshwater production

Mollusc production

Micro and Macro algae production

N° of employment

N° species in culture

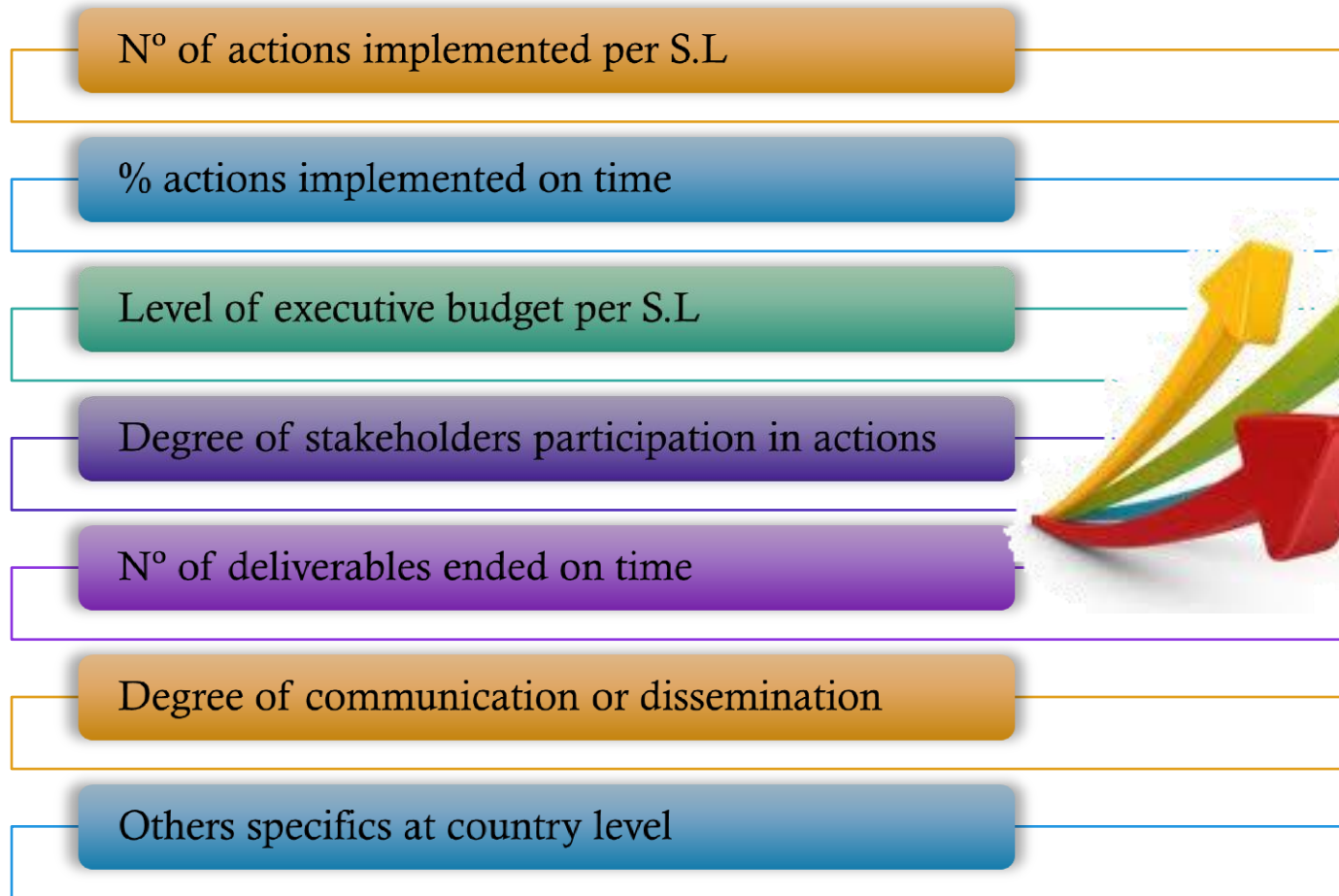
N° companies and facilities

N° research centers

Others specifics



Indicators of performance



Phase 3: Definition and development of communication actions

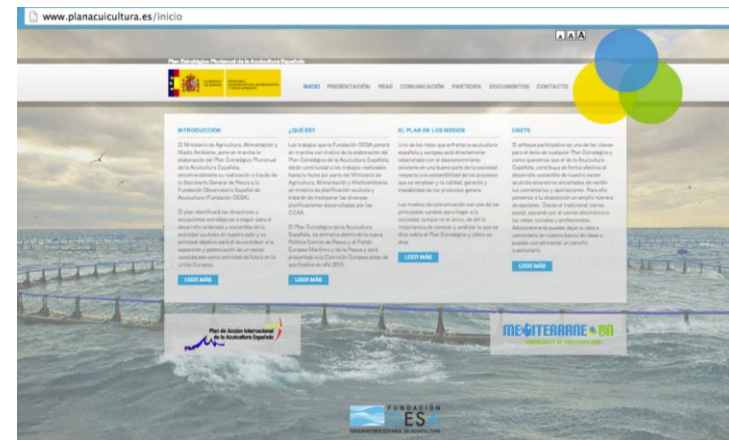


Phase 3: Web site for Plan

One more and better instruments can contribute to the dissemination of the Plan will be a web page, which should contain at least:

- The information contained in the plan.
- Open forms of participation
- Documents for download
- List of participants
- Hotspot to participate.
- Other.

It should be a dynamic Web Plan is updated as running and moves in their actions.



<http://www.planacuicultura.es/>

Phase 3: Strategy of communication



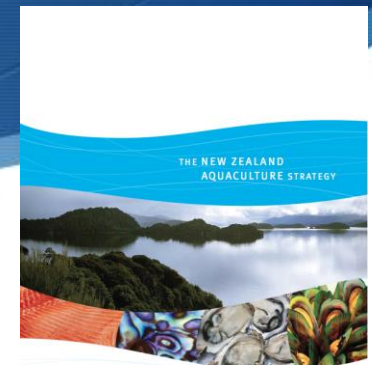
Should be designed and developed one strategic communication through different media, and most appropriate channels as:

- Specialized press
- Social Networking
- General News
- Channels of communication between the administration and the industry.
- Other



5. Some examples...

Case study in others countries: New Zealand



VISION

The New Zealand Aquaculture Strategy aims to ensure high quality products.

GOAL

The goal of the New Zealand Aquaculture Strategy is to ensure high quality products.

GUIDING PRINCIPLES

The strategy is guided by the following principles:

- The strategy is viable, achievable and sustainable.
- It requires a partnership approach between government, industry and Maori.
- Growth in aquaculture production is a key priority for the new strategy.
- Growth in aquaculture production is a key priority for the new strategy.
- The strategy is sustainable and resilient.
- The strategy is sustainable and resilient.

1. ESTABLISH A NEW NATIONAL SECTOR ORGANISATION

For some years the industry has sought to find a collective over-arching representation, that had national recognition, avoided duplicated effort and cost, and achieved support and buy-in from industry participants. The development of an aquaculture strategy has provided an opportunity for establishing a new national body for the sector.

It is proposed that the new organisation be called New Zealand Aquaculture Ltd. It will be formed through the amalgamation of the New Zealand Aquaculture Council and the species groups (Mussels, Salmon and Oysters). The detail of the new organisation is currently being worked through with the membership of the stakeholder

groups⁴ and it will be launched later this year. Proportional representation will ensure the organisation adapts to changes within the sector (e.g. the emergence of new species).

The objectives of the new body are to:

- Provide a unified 'overarching' structure representing all commercial aquaculture activity and participants
- Present one voice for aquaculture
- Manage and promote generic aquaculture activities
- Facilitate species-specific activities

ACTION	PARTNERS*	TIME
Establish New Zealand Aquaculture Ltd with the support of the aquaculture species groups, regional aquaculture organisations and Maori.	NZAC	December 2006
Build the capacity of the national body.	NZA	2006/07
Coordinate the implementation of the Sector Strategy in cooperation with industry, government, regional, service provider, Iwi, the Takutai Trust and community stakeholders. ⁵	NZA Stakeholders	2006 onwards
Establish a monitoring and evaluation process to measure the impact of the strategy.	NZA	2006 onwards

* Lead partners are indicated in bold.

ALL COMMERCIAL
AQUACULTURE
PARTICIPANTS ARE
PRESENT ONE VOICE
FOR AQUACULTURE

PLAN WILL:

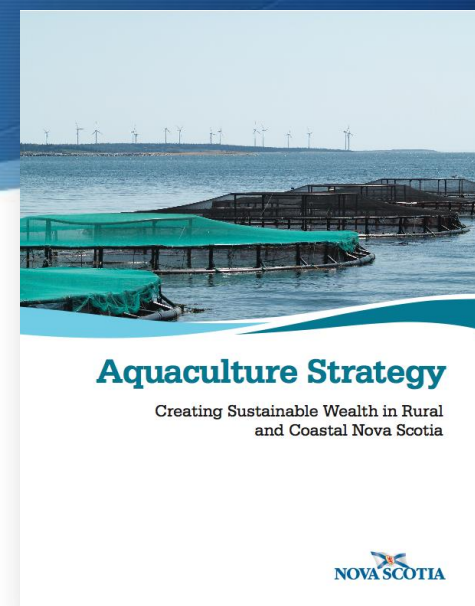
national sector organisation
partnership with government
stakeholder partnerships
Investment in aquaculture
understanding and support

business in aquaculture
for New Zealand
sustainable
activities for innovation
mental sustainability and
culture
education and workforce

Case study in others countries: New Scotia

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A Strategy for Nova Scotia

The province can create economic wealth in rural and coastal Nova Scotia, while at the same time respecting the environment and sharing coastal resources with others. Ongoing efforts will build upon the steps already taken by government so that Nova Scotia can further benefit from the long-term opportunity that aquaculture represents.

Case study in others countries: Canada

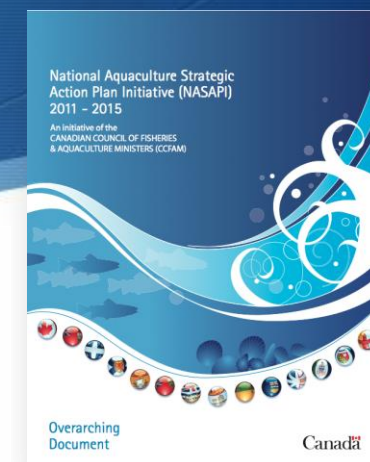


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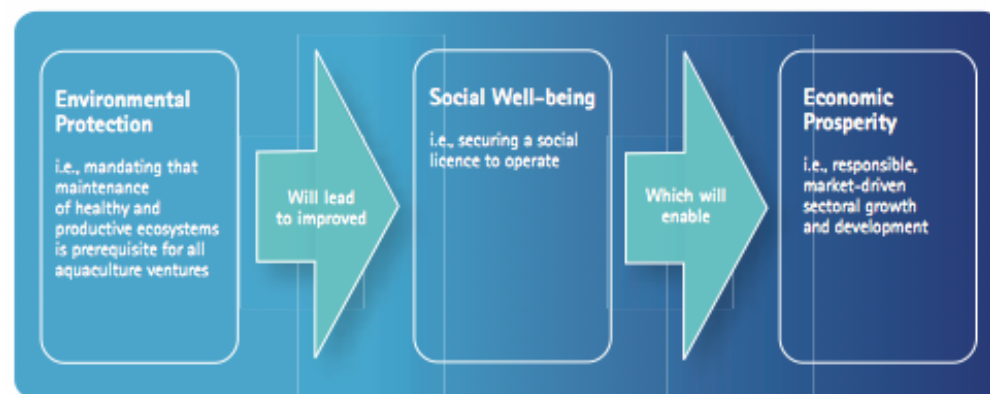
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Vision Statement and Strategic Objectives

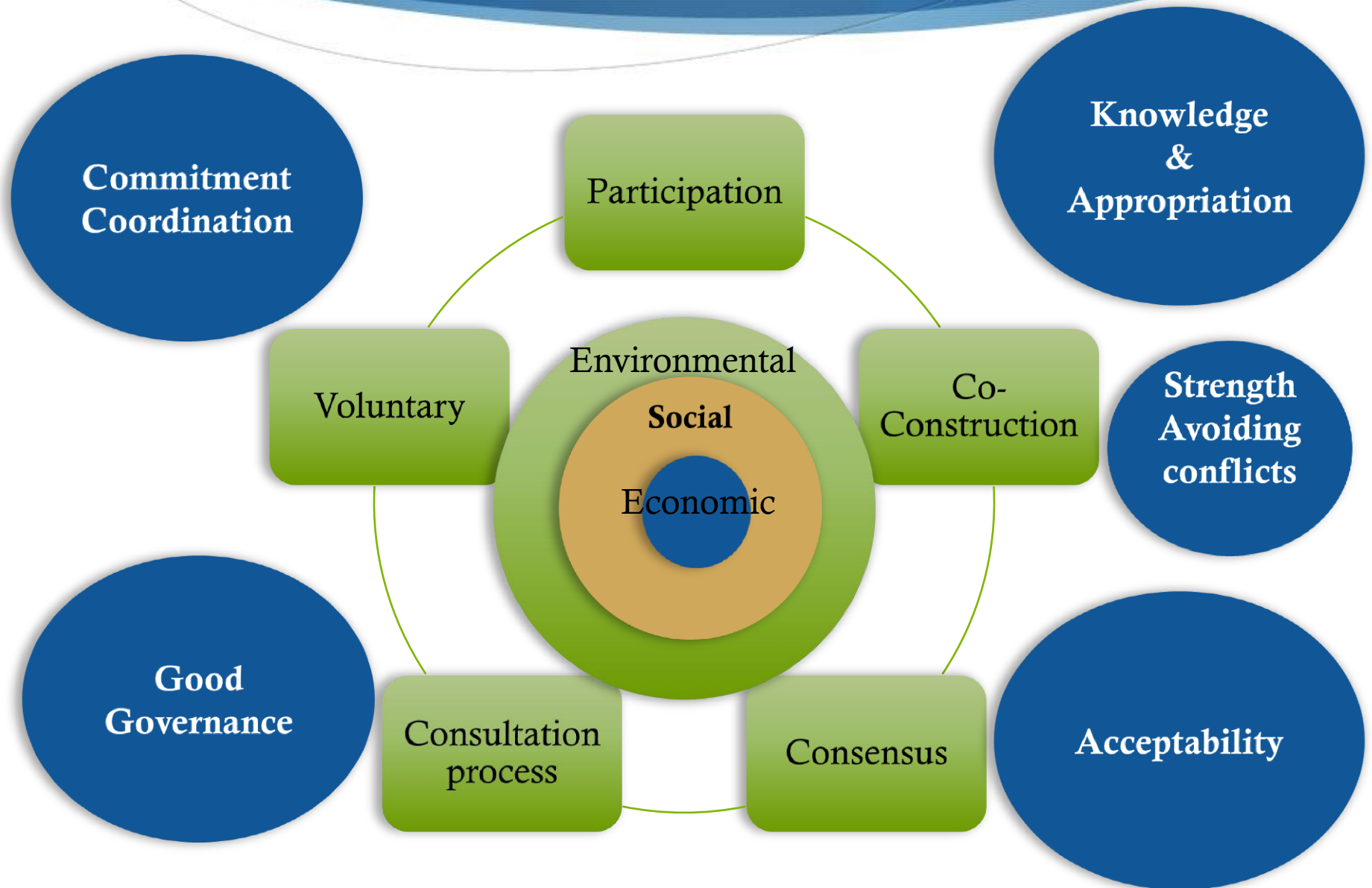
In this context, the vision for NASAPI is:

Supplying quality products and generating rural and coastal prosperity through environmentally, socially and economically sustainable aquaculture development.

Framework to advance aquaculture based on the three principles of sustainable development.



How a multiannual Strategic Plan should be done ?



Strategic Guidelines for sustainable development of EU Aquaculture



**Commitment
Coordination**

**Knowledge
&
Appropriation**

Administrative procedures

Spatial planning

Competitiveness

Level playing field

Acceptability

**Strength
Avoiding
conflicts**

**Good
Governance**



Conclusions

- The global, European and Mediterranean aquaculture shows a positive growth scenario, with good expectations and great potential.
- European Commission support this growth through CFP and EFMF, applying Good Governance Methods, based on country strategic plans of development.
- Building a Strategic Plan for Aquaculture is the starting point towards the Sustainability of the sector in the long term.

Thanks you very much for your attention

Hvala na pažnji.