Strategic Plan for Aquaculture.

Croatian multiannual plan for aquaculture.

Workshop ZADAR 20-21 January 2014

Croatian Ministry of Agriculture Directorate of Fisheries

Experts mission.
AGR IND/EXP 54211.

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José Carlos Macias
1. Introduction - EU Vision & Policy Context
2. What is a Strategic Plan?
3. Why a Strategic Plan?
4. How a SP for Aquaculture should be done?
5. Some examples
Conclusions
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.

Strategic Sector

H2020
Blue Growth
FAO

European Fisheries Policy (EFP)

Actually in reform process


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)

**Aims at**

- promotion of sustainable and competitive fisheries and *aquaculture*;
- fostering the development and implementation of the Union's Integrated Maritime Policy, in a complementary manner to cohesion policy and to CFP;
- promotion of balanced and inclusive territorial development of fisheries areas (*including aquaculture* and inland fishing);
- contribution to the implementation of the CFP.

**Achieve objectives of CFP + IMP**

**Objectives in terms of funding**
Aquaculture in the CFP Reform.

The CFP aims at

- Promote Aquac.
- Open method of coordination
- Voluntary process of cooperation

Strategic Guidelines

Multiannual National Strategic Plans
- Common Objectives
- Indicators to measure progress

Based on
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. They provide specific strategic lines by countries.
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?
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.

**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

**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.
In any strategic planning process there are two key aspects: participatory approach and clear and achievable goals.

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)
Why a Strategic Plan…?

Starting point
- To respond / reinforce political willingness.
- 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
- Constraints of development.

Management and Planning
- Planification of the activity.
- Assessment of performance.

New opportunities
- Investors
- Synergies
- Better performance

Knowledge

Strategy

Governance

Strategic Guidelines for the sustainable development of EU aquaculture
3. How a multiannual Strategic Plan should be done?
DESCRIPTION AND ANALYSE OF THE SECTOR

COMPANIES

• Nº of application for new licenses.
• Volume of new investment
• New promoters or new projects
• Level of interest for the activity.

Legal framework & administrative competence

Evolution and trends

Level of production by species

Level of production by system

Level of production by area

Statistical data

Evolution and trends

Stakeholders

RESEARCH
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**

- **S**: Strengths
  - Helpful to achieving the objective
  - Internal origin (Source of the organization)

- **W**: Weaknesses
  - Harmful to achieving the objective
  - Internal origin (Source of the organization)

- **O**: Opportunities
  - External origin (Source of the environment)

- **T**: Threats
  - External origin (Source of the environment)

**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

**ENVIRONMENTAL**
- Permit & License Compliance
- Bio-diversity Management
- Emissions to Air
- Water/Chemical Usage and Discharges

**SOCIAL**
- Respect for the Individual
- Equality Opportunity
- Diversity
- Outreach Programmes
- Human Rights

**ECONOMIC**
- Consistent, Profitable Growth
- Risk Management
- Total Shareholder Return

**ECO-ECONOMY**
- Resource Efficiency
- Energy Efficiency
- Global Energy Issues

**SOCIO-ECONOMIC**
- Employment
- Training & Development
- Local Economies & Enterprise
- Social & Community
- Sponsorships
Design of strategic lines for Plan

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

• 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.
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).

- 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.
<table>
<thead>
<tr>
<th>OBJECTIVE</th>
<th>ACTIONS and ACTIVITIES¹</th>
<th>DEPARTMENT</th>
<th>TIMELINE</th>
<th>PERFORMANCE MEASURES (we will know we have succeeded when)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A Healthy Aquatic Environment</strong></td>
<td>Provide risk-based guidance to support ecological impact assessments.</td>
<td>MIT, DOC</td>
<td>2011/12, 2013/14, 2015/16</td>
<td>• PMAs informed by a national risk assessment of ecological effects</td>
</tr>
<tr>
<td></td>
<td>Establish a national aquaculture working group to review science for important applications and planning initiatives.</td>
<td>MIT, MSI</td>
<td>2011/12, 2015/16</td>
<td>• Councils in relevant regions have developed an integrated approach to aquaculture that maintains healthy aquatic ecosystems by 2016</td>
</tr>
<tr>
<td></td>
<td>Through the implementation of national policy statements², facilitate integrated management to support healthy aquatic ecosystems and maintain water quality in aquaculture growing areas.</td>
<td>DOC, MPI, MFI</td>
<td>2013/14, 2015/16</td>
<td>• Water quality in core aquaculture growing areas maintained or improved</td>
</tr>
<tr>
<td></td>
<td>Establish a process to monitor and review environmental performance.</td>
<td>MIT, DOC, MFI</td>
<td>2013/14, 2015/16</td>
<td>• Industry biosecurity plans in place by 2014</td>
</tr>
<tr>
<td></td>
<td>Establish biosecurity plans for key growing regions.</td>
<td>MIT</td>
<td>2015/16</td>
<td>• New Zealand’s environmental performance as an aquaculture producer assessed as world leading</td>
</tr>
<tr>
<td><strong>Quality Planning &amp; Permitting</strong></td>
<td>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 exiting space.</td>
<td>MIT, DOC, MFI</td>
<td></td>
<td>• 80% of regional coastal plans include aquaculture provisions in accordance with the policies in the NZOFS by 2016</td>
</tr>
<tr>
<td></td>
<td>Partner with industry to develop regional growth scenarios to inform planning and prioritisation.</td>
<td>MIT</td>
<td></td>
<td>• 4000 ha of new aquaculture space developed by 2016</td>
</tr>
<tr>
<td></td>
<td>Work with district councils to ensure district planning enables aquaculture growth.</td>
<td>MIT, MFE</td>
<td></td>
<td>• District plans provide for essential infrastructure in key growth regions</td>
</tr>
<tr>
<td></td>
<td>Develop best practice guidance for consent processing, consent conditions, information requirements and changes of use to promote national consistency.</td>
<td>MIT, DOC, MFI</td>
<td></td>
<td>• 55% of consents and IAE tests within statutory timeframes</td>
</tr>
<tr>
<td></td>
<td>Efficiently administer undue adverse effects on fishing test processes (IAE) and other permitting processes.</td>
<td>MIT, LBA</td>
<td></td>
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<td></td>
<td>Establish and administer the ‘Planning Fund’ to assist councils’ plans for aquaculture growth.</td>
<td>MIT</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Collate and improve information on the ecological, cultural and social costs and benefits of aquaculture to support decisions and community conflict.</td>
<td>MIT, DOC, MFI</td>
<td></td>
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</tr>
<tr>
<td><strong>Effective and Responsive Regulation</strong></td>
<td>Develop options to improve the management of land-based aquaculture.</td>
<td>MIT, DOC</td>
<td></td>
<td>• Ministers are advised on options to review land-based aquaculture in 2013</td>
</tr>
<tr>
<td></td>
<td>Complete outstanding components of marine aquaculture reforms transferred to RMA Phase II reform.</td>
<td>MIT, DOC, MFI</td>
<td></td>
<td>• Reviews of relevant legislation and policy are informed by, and recognise the implications for, aquaculture</td>
</tr>
<tr>
<td></td>
<td>Ensure aquaculture is considered in future reviews of relevant legislation and policy governing the sector (e.g. IIE, biosecurity, animal welfare).</td>
<td>ALL departments</td>
<td></td>
<td>• Ministers are advised on future management frameworks for ranching and enhancement activities by 2014</td>
</tr>
<tr>
<td></td>
<td>Review the interface between aquaculture and the QMS framework to enable appropriate enhancement and ranching activities.</td>
<td>MIT</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Support Māori Objectives³</strong></td>
<td>Deliver the Crown’s aquaculture settlement obligation.</td>
<td>MIT, DOC</td>
<td></td>
<td>• Aquaculture settlement achieved within statutory timeframes</td>
</tr>
<tr>
<td></td>
<td>Assist Māori in developing aquaculture objectives as part of iwi fisheries plans, forum fisheries plans, or other processes.</td>
<td>MIT</td>
<td></td>
<td>• Iwi fish plans include Māori aquaculture objectives as appropriate</td>
</tr>
<tr>
<td></td>
<td>Recognise specific Māori interests across the aquaculture work programme.</td>
<td>MIT</td>
<td></td>
<td>• Māori interests are actively considered in aquaculture actions and recorded in advice</td>
</tr>
<tr>
<td></td>
<td>Provide ongoing support for Māori development in aquaculture.</td>
<td>MIT, TPI, NZTE</td>
<td></td>
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<tr>
<td></td>
<td>Develop an aquaculture investment plan to support growth.</td>
<td>NZTE, MFAT</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Fund market co-ordination role within Aquaculture New Zealand.</td>
<td>NZTE</td>
<td></td>
<td>• Increased export volume and value</td>
</tr>
<tr>
<td></td>
<td>Ensure where appropriate that government funding for market support includes aquaculture within scope.</td>
<td>NZTE, MFAT</td>
<td></td>
<td>• Trade conditions for aquaculture products improved</td>
</tr>
<tr>
<td></td>
<td>Review and document trade barriers in key markets for seafood products.</td>
<td>NZTE, MFAT</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Within trade negotiations work to improve trade conditions for seafood products.</td>
<td>MPI</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Within markets, provide intelligence and market access support.</td>
<td>MPI, NZTE</td>
<td></td>
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<tr>
<td></td>
<td>Maintain and review animal health, biosecurity and food safety management to gain and/or maintain trade access.</td>
<td>MIT</td>
<td></td>
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<tr>
<td></td>
<td>Support efforts to demonstrate and market the sustainability of New Zealand aquaculture production, including through third party certification of aquaculture.</td>
<td>NZTE, MPI, MFAT</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Increase Market Revenues</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Increase Value through Research and Innovation</strong></td>
<td>Develop and implement a strategy for new aquaculture species.</td>
<td>NZTE, MPI, MSI</td>
<td></td>
<td>• An agreed plan is in place to implement a new species strategy by 2023</td>
</tr>
<tr>
<td></td>
<td>Establish a fit-for-purpose approach to improve prioritisation, co-ordination and alignment of aquaculture research with industry priorities.</td>
<td>MGL, MPI</td>
<td></td>
<td>• An agreed medium-term research plan is developed for aquaculture by 2013</td>
</tr>
<tr>
<td></td>
<td>Ensure government innovation funding includes aquaculture within scope.</td>
<td>MGL, NZTE</td>
<td></td>
<td>• Climate change implications considered across the aquaculture work programme</td>
</tr>
<tr>
<td></td>
<td>Identify opportunities to enable research and field trials in a timely manner.</td>
<td>MIT</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Investigate the impacts of climate change and measures to adapt and respond.</td>
<td>MIT, MFI</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Sound Governance</strong></td>
<td>Establish appropriate governance groups to support implementation of this strategy, such as the ‘Aquaculture Forum’.</td>
<td>MIT</td>
<td></td>
<td>• Stakeholders actively engaged in identifying opportunities and risk for aquaculture and the future management of the industry</td>
</tr>
<tr>
<td></td>
<td>Complete annual reviews of the strategy and action plan.</td>
<td>MIT</td>
<td></td>
<td>• Performance objectives for the other six objectives achieved</td>
</tr>
</tbody>
</table>

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.
³ Actions aligned with other objectives in this strategy will also contribute to these specific objectives.
Global Work Plan

Planning
- Data review
- Preliminary Report index
- 1st Meeting I+C

1st Report Goals & STL
- Analyses
- Interviews
- Data collection

1st Workshop agreement
- 1st Draft of Strategic Plan
- Communication and consultations
- Feedback

We get it
- Deliverable
- 2nd Meeting
- Final draft

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

<table>
<thead>
<tr>
<th>Strategic lines</th>
<th>Actions</th>
<th>Leader</th>
<th>Actors</th>
<th>Budget</th>
<th>Deadline</th>
<th>Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simplification of Administrative procedures</td>
<td>Collection and analyze of all regulations</td>
<td>Ministry with competence</td>
<td>All agents involved in the licenses process</td>
<td>€ + % of co-financiation</td>
<td>6 months</td>
<td>Official guide for administrative procedures</td>
</tr>
<tr>
<td>Establishment of a collective brand for..</td>
<td>Developed an integrate process to establishment the brand</td>
<td>Sector Organization</td>
<td>Ministry</td>
<td>€ + % of co-financiation</td>
<td>8 months</td>
<td>Collective Brand Scheme</td>
</tr>
</tbody>
</table>
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 Marco algae production
- Nº of employment
- Nº species in culture
- Nº companies and facilities
- Nº research centers
- Others specifics
Indicators of performance

- No of actions implemented per S.L
- % actions implemented on time
- Level of executive budget per S.L
- Degree of stakeholders participation in actions
- No of deliverables ended on time
- Degree of communication or dissemination
- Others specifics at country level
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 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.

GOAL
The goal of the aquaculture strategy is to establish the new organisation 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 groups 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

GUIDING
The strategy:
- The strategy is viable,
- It requires
- Growth:
  - New species groups, regional aquaculture organisations and Māori
  - Build the capacity of the national body.
  - Coordinate the implementation of the Sector Strategy in cooperation with industry, government, regional, service provider, iwi, the Takutai Trust and community stakeholders.
- The strategy between regions,
- Establish a monitoring and evaluation process to measure the impact of the strategy.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>PARTNERS*</th>
<th>TIME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish New Zealand Aquaculture Ltd with the support of the aquaculture species groups, regional aquaculture organisations and Māori.</td>
<td>NZAC</td>
<td>December 2006</td>
</tr>
<tr>
<td>Build the capacity of the national body.</td>
<td>NZA</td>
<td>2006/07</td>
</tr>
<tr>
<td>Coordinate the implementation of the Sector Strategy in cooperation with industry, government, regional, service provider, iwi, the Takutai Trust and community stakeholders.</td>
<td>NZA Stakeholders</td>
<td>2006 onwards</td>
</tr>
</tbody>
</table>

* Lead partners are indicated in bold.
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.
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.

- **Environmental Protection**
  - i.e., ensuring the maintenance of healthy and productive ecosystems is prerequisite for aquaculture ventures
  - Will lead to improved

- **Social Well-being**
  - i.e., securing a social licence to operate
  - Which will enable

- **Economic Prosperity**
  - i.e., responsible, market-driven growth and development
  - Which will enable
How a multiannual Strategic Plan should be done?
Strategic Guidelines for sustainable development of EU Aquaculture

Commitment Coordination

Knowledge & Appropriation

Acceptability

Strength Avoiding conflicts

Good Governance

Administrative procedures

Spatial planning

Competitiveness

Level playing field

Strategic Guidelines for the sustainable development of EU aquaculture

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.