



Brussels, 12.5.2021
SWD(2021) 102 final

COMMISSION STAFF WORKING DOCUMENT

STAKEHOLDER CONSULTATION - SYNOPSIS REPORT

Accompanying the document

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

**Strategic guidelines for a more sustainable and competitive EU aquaculture for the
period 2021 to 2030**

{COM(2021) 236 final}

Introduction

The Common Fisheries Policy sets as one of its objectives the promotion of aquaculture production in the EU¹ in a way that is sustainable from the environmental, economic and social point of view. In this regard, it calls on the Commission to develop non-binding strategic guidelines for the sustainable growth of the sector and on EU Member States to adopt Multiannual National Strategic Plans on aquaculture taking into consideration the specificities of their respective sector. The Commission adopted in 2013 the Communication "Strategic Guidelines for the sustainable development of EU aquaculture"² which have served as a basis for the drafting and adoption by EU Member States of their multiannual national strategic plans.

An interim evaluation of the Open Method of Coordination for sustainable development of EU aquaculture³ – the voluntary method of coordination among Member States facilitated by the Commission – launched in October 2017, concluded, *inter alia*, on the need to revise the Strategic Guidelines in order to take into consideration recent developments in the sector.

The process of revising these Guidelines was carried out in a consultative manner, including all relevant stakeholders using appropriate consultation methods. In addition to regular meetings with some targeted stakeholders (EU Member States experts on aquaculture and the Aquaculture Advisory Council), DG MARE has gathered and examined the feedback to the roadmap of this initiative and undertaken a more detailed public consultation.

This synopsis report provides information on the overall consultation work, summarises the main results of the consultation activities related to the review of the Strategic Guidelines, and gives an analysis of these results.

1. Consultation strategy

1.1.Objectives of the consultation

The consultation of different stakeholders aimed at gathering views on the challenges and opportunities of the EU aquaculture sector. More particularly, the consultation had the objective of identifying the main elements for unlocking the potential of this sector to grow and meet the demand for high quality, nutritious food produced in a way that is respectful of the environment, and provide employment and economic development to coastal and rural communities. Gathering opinions and calling for experience sharing from all interested stakeholders had the objective of allowing the Commission to produce new informed Strategic Guidelines that reflect a shared vision of the way ahead for a sustainable and

¹ [EU Regulation No 1380/2013](#) of the European Parliament and of the Council of 11 December 2013 on the Common Fisheries Policy (CFP Regulation).

² Communication "Strategic Guidelines for the sustainable development of EU aquaculture", COM(2013) 229 final.

³ Interim evaluation of the Open Method of Coordination for sustainable development of EU aquaculture, SWD(2020) 6 final.

competitive aquaculture sector in the EU. With the adoption of the European Green Deal, the consultation also looked at identifying ways for the EU aquaculture sector to contribute to this broader policy strategy. Furthermore, the consultation also took into consideration lessons learnt from the impact of the Covid-19 epidemic on the EU aquaculture sector.

The consultation took as a basis the evaluation of progress on the areas identified under the 2013 Strategic Guidelines for EU Aquaculture. It also took into consideration the new developments affecting the sector, in particular with regard to its environmental, social and economic sustainability (including in terms of research and innovation), as well as emerging issues for which there is increasing public attention (e.g. environmental performance, animal welfare).

1.2.Mapping of stakeholders

Consultations were aimed at all stakeholders with an interest in EU aquaculture. This included in the first place EU Member States and the Aquaculture Advisory Council (AAC), representing the EU aquaculture industry and other interest groups such as non-governmental organisations (NGOs). The Commission also involved other EU institutions, in particular the European Parliament and the Committee of Regions. In addition, the Commission sought the reach out to an even broader range of stakeholders with the launch of a public consultation on the initiative. Stakeholders targeted included aquaculture producers, related sectors (e.g. feed, processing), civil society organizations active on various aspects relevant to the aquaculture sector, from environmental performance and animal welfare to social rights, as well as scientists and researchers. In addition, it also targeted the individual citizen who considers that aquaculture production touches in any way its personal sphere, including as a consumer.

1.3.Methods and tools of the consultations

The successive meetings and discussions with stakeholders made it possible to define in detail the content of a discussion paper initially proposed by the Commission for the consultations on the new Strategic Guidelines. This document has served as a basis for the work on the new Strategic Guidelines.

The Commission held detailed discussions on the future Guidelines with aquaculture experts in **EU Member States** on the basis of a discussion paper in the context of the technical expert seminars held under the Open Method of Coordination for EU aquaculture policy established in the Common Fisheries Policy Regulation. The update of the Strategic Guidelines was the topic of discussion during technical seminars held on 17-18 October 2019, on 20-21 April 2020 and on 29-30 June 2020.

In this context, EU Member States had also the opportunity to provide written contributions. Contributions made by EU Member States experts (either orally or in writing) were examined by the team in the Commission responsible for the review of the Guidelines and shared with

other associated services in the Commission. Each contribution was examined taking into consideration the nature, purpose and policy objectives pursued by the review of the Strategic Guidelines, the feasibility of what was proposed, and their value in achieving an overall balanced proposal considering the double objective of supporting the sustainability and the competitiveness of the EU aquaculture sector.

Finally, those contributions were further discussed with Member States experts in the context of the technical seminars on aquaculture, and the Commission explained how it had taken into consideration the contributions received.

The Commission also presented on two occasions the progress on the work on the review of the Strategic Guidelines to the Fisheries Working Group of the Council (November 2019 and September 2020) and made also a presentation to the EMFF Member States Expert Group (December 2020).

The same type of approach was used in the consultations with the **Aquaculture Advisory Council** (AAC). The Commission held detailed discussions with the AAC on several occasions, the latest in June 2020, and four Opinions from this consultative body were received (dating October 2019, January 2020, May 2020 and June 2020). The Commission also organised joint sessions with EU Member States experts and members of the AAC to discuss the work on the new Guidelines.

The Commission examined the four Opinions issued by this Advisory Council, as well as other contributions made during discussions on the work on the review of the Guidelines with its members. The Commission explained how it had taken them into consideration. Moreover, the Commission reacted directly to comments provided during the presentation of the work on the Guidelines on the occasion of different meetings with other institutions or expert groups (as mentioned above), and took into consideration those comments that were considered relevant in its further work on the review of the Guidelines.

The Commission presented its approach to the review of the Guidelines to the **European Parliament's Committee on Fisheries (PECH Committee)** on two occasions (in September 2019 and during a public hearing in February 2020).

DG MARE representatives also participated in several workshops and conferences organised by different entities and bodies, including the **Committee of the Regions** (November 2019), where the main ideas underpinning the work towards the Guidelines were presented and where interesting contributions from stakeholders were collected.

The **roadmap** of this initiative was published on the European Commission [webpage](#) "Have Your Say", and feedback to this initiative was open from 24 March to 21 April 2020. Seventeen replies were received and can be consulted in the above-mentioned webpage.

Finally, a **public consultation** on the basis of a questionnaire linked to the overall initiative took place from 14 July to 27 October 2020 and ran for an exceptional period of 15 weeks. The 110 contributions can be found on the dedicated [webpage](#).

The analysis of the replies to the questionnaire of the public consultation allowed the Commission to verify whether the approach of the work on the revision of the Guidelines was the correct one. In addition to the replies to the questionnaire, participants were also given the possibility to provide written contributions on some aspects. These contributions were also examined taking into consideration their relevance for the work on the Guidelines.

2. Consultation activities

- A roadmap was published on 23 March 2020 and a feedback exercise was held from 24 March to 21 April 2020.
- Three consultations on the basis of a discussion paper were held with EU Member States’ experts on aquaculture, in the framework of the Aquaculture Technical Seminar on 17-18 October 2019, 20-21 April 2020 and 29-30 June 2020.
- The Aquaculture Advisory Council was invited to join the three Aquaculture Technical Seminars mentioned above and was also consulted on the basis of a discussion paper in parallel of these meetings. The AAC has provided three general recommendations⁴ on the future EU Aquaculture Strategic Guidelines as well a specific recommendation on shellfish⁵.
- Fisheries Working Party of the Council: two presentations on progress on the work on the new Guidelines were given on 19 November 2019 and on 16 September 2020.
- Member States Expert Group (MSEG) on Integrated Maritime Policy: a presentation on the state of play of the work on the Guidelines was made on 5 December 2019.
- A presentation on the state of play of the work on the Guidelines with the Integrated Maritime Policy (IMP) Friends of Presidency of the Council was given on 17 June 2020.
- A presentation on the state of play of the work on the Guidelines was organised with the European Maritime and Fisheries Fund (EMFF) Expert Group on 19 November 2020.
- Several information points on progress of the work on the new Guidelines have been tabled during PECH Committee meetings on 24 September 2019, 19 February 2020 (public hearing on sustainable EU aquaculture), and 10 June 2020 (short update in the context of the presentation on Farm to Fork).
- A presentation on the Commission views on the review of the Guidelines was made at a workshop organised by the Committee of Regions on freshwater fisheries and aquaculture on 13 November 2019.
- A public consultation was held from 14 July to 27 October 2020.

Consultation Activity	Feedback to the	Information session with	Exchange of views	Presentation to the	Presentation to the	Public Consultation
------------------------------	-----------------	--------------------------	-------------------	---------------------	---------------------	---------------------

⁴ [Recommendation on the Future Strategic Guidelines for the sustainable development of EU aquaculture \(30/10/2019\)](#), [Second Recommendation on the Future Strategic Guidelines for the Sustainable Development of EU Aquaculture \(23/01/2020\)](#), and [Third Recommendation on the Future Strategic Guidelines for the Sustainable Development of EU Aquaculture \(20/05/2020\)](#).

⁵ [Strategic Guidelines IV – AAC recommendation on the development of shellfish-specific guidelines \(26/06/2020\)](#).

	roadmap	the Aquaculture Advisory Council	with Member States Experts	European Parliament	Council Fisheries Working Party	
Indicative Planning	24 March 2020 – 21 April 2020	October 2019 April 2020	October 2019 April 2020 June 2020	June 2020	June 2020	July 2020 – October 2020
Targeted Stakeholders						
Citizens	x					x
Industry	x	x				x
Member States Authorities	x		x		x	x
EU Institutions				x	x	x
Research bodies	x					x
NGOs	x	x				x

3. Results of the consultation activities

The analysis of the contributions and comments received during the consultation exercises has confirmed the need to review the Strategic Guidelines in order to provide a vision for the sector for the coming years. The great majority of stakeholders agree with this view, with industry stakeholders sometimes putting more emphasis on the competitiveness aspects, while NGOs tend to focus on the sustainability angle.

The **roadmap** of the initiative aimed to inform citizens and stakeholders about the Commission's work in order to allow them to provide feedback and to participate effectively in the consultation activities. Citizens and stakeholders were in particular invited to provide views on the Commission's understanding of the problem and possible solutions and to make available any relevant information that they could have.

Seventeen feedback contributions were received from different stakeholders. All these contributions were analysed and contributed to structure and feed the work on the new Strategic Guidelines. For example, topics such as administrative hurdles, better information to consumers/citizen, feed efficiency, reduction of nutrient losses or concrete proposals on fish welfare were highlighted in the feedback to the roadmap and were included in the work on the new Strategic Guidelines.

As for the **public consultation**, one hundred and ten responses have been received. Although participation in this public consultation was overall very balanced, the majority of the survey respondents participated on behalf of a business organization or association with 24 and 14 respondents respectively. It worth noting also the high participation of NGO with 21

respondents, and EU citizens with 17 respondents. Moreover, this public consultation was very balanced in terms of the organization sizes of respondents and brought together 33% of micro (1 to 9 employees) organisations, 25% of large ones (250 and more), 13% of small and 12% of medium-sized organisations.

The main concerns identified by the respondents had already been addressed in the work on the new Strategic Guidelines (see Figure 1), resulting from the consultations within the Commission, with EU Member States experts and with the Aquaculture Advisory Council. For instance, the consultations confirmed that environmental sustainability is a key topic to address. Improving environmental performance has been identified as one of the main objectives of the proposed Guidelines, and it is a consideration that should cut through most topics addressed in them. Indeed, the Guidelines are in particular aimed at ensuring that aquaculture plays a role in the context of the European Green Deal and Farm to Fork Strategy and should include guidelines and recommendations for future action in terms of “environmental performance”. The future Guidelines will also have as a key objective the strengthening of the competitiveness of the EU aquaculture sector.

The results of the consultations also support the view that achieving these objectives requires a comprehensive approach taking into consideration multiple aspects. They confirm that issues such as access to space and water and administrative burden (areas already identified in the 2013 Guidelines) remain an obstacle for unlocking the potential of the sector, especially SMEs, and require further efforts. They stress the need to increase the environmental performance of the sector (including by further mitigating and monitoring its impacts and supporting the most environmentally friendly forms of aquaculture). They also confirm the need to ensure appropriate adaptation of the sector to climate change impacts. Improving communication on EU aquaculture activities, including the efforts of the EU aquaculture sector in terms of sustainability, is also considered an important issue to address, not only to provide transparency and information to the citizen/consumer, but also to ensure a level playing field for EU aquaculture producers in the EU market. Animal health has been identified as an important challenge for the industry also. Further work on animal welfare targeting the aquaculture sector is also widely supported.

The work on the new Strategic Guidelines has considered the results of the consultation in the work on the new Strategic Guidelines and, in particular, has served to set an order of priority of actions and tools proposed.

To illustrate what has been said, the 110 respondents of the public consultation were asked to rate the degree of importance of 16 specific areas in terms of importance for the development of EU aquaculture: going from 1, not important, to 5, very important. To have a method for analysing these results that is both realistic and inclusive, scores 4 and 5 are added together as indicating a high importance attributed to the subject. As such, Figure 1 (below) presents the rating by areas from the top most supported to the least ones.

FIGURE 1. AREAS CONSIDERED AS PRIORITIES FOR THE DEVELOPMENT OF EU AQUACULTURE

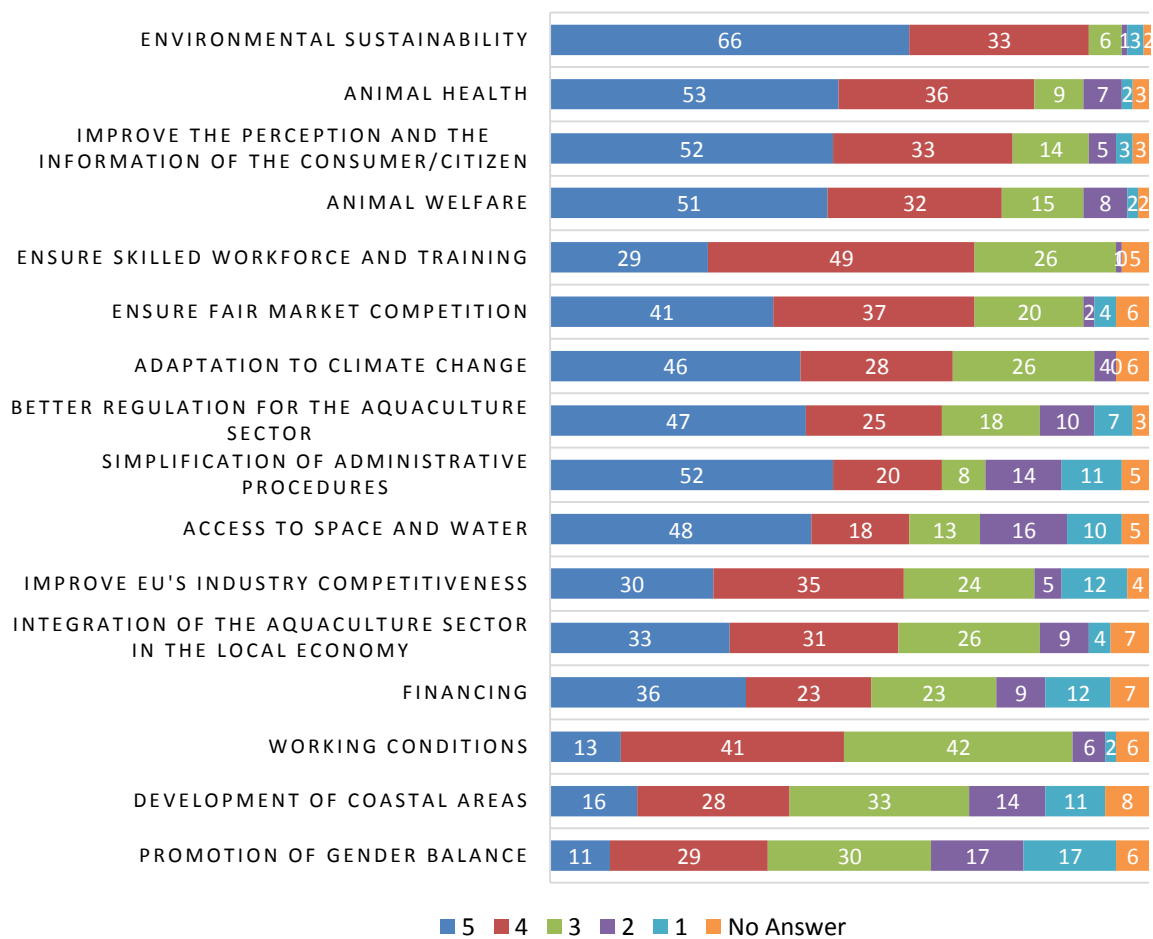
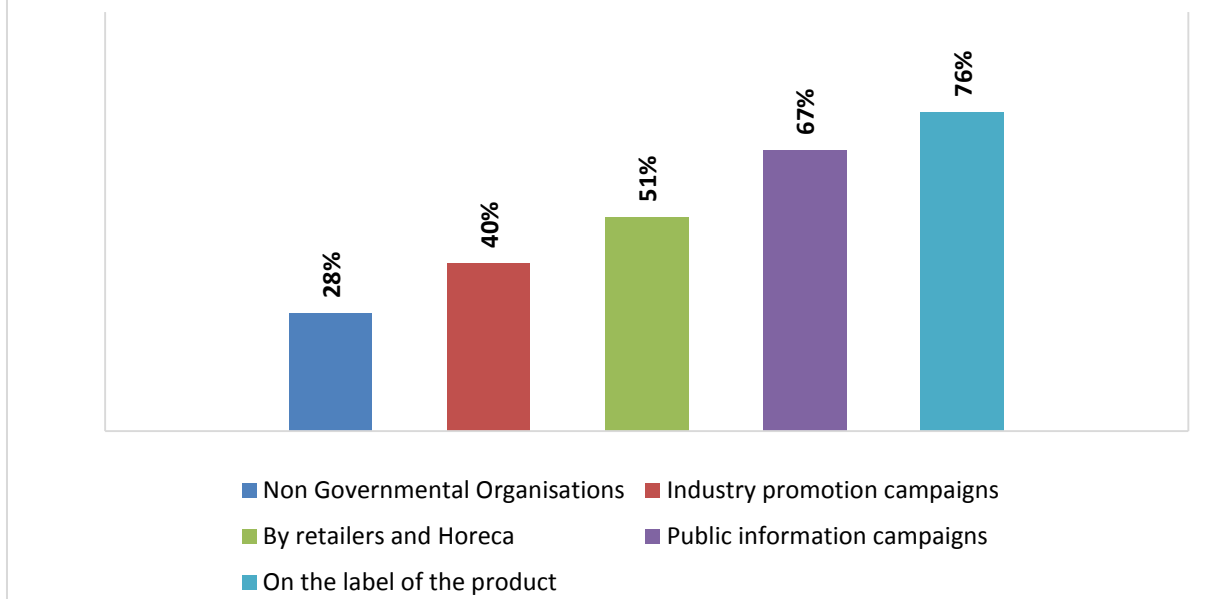


FIGURE 2. BEST WAYS TO PROVIDE BETTER INFORMATION ON AQUACULTURE PRODUCTS AND SERVICES TO THE CONSUMER/CITIZEN



Analysis of the Aquaculture Advisory Council (AAC) consultation activities.

The Commission has worked closely with the AAC from the very beginning of the initiative, by attending AAC’s working groups, following-up on the on-going work on the Guidelines. In return, the AAC contributed to the Guidelines in various ways.

In October 2019 and January 2020, following the announcement of on-going work on the update of the Strategic Guidelines and ahead of consultation work, the AAC adopted its two first [Recommendations on the Guidelines](#). The first Recommendation focused on identifying three priorities and invited to review the Guidelines every 18 months, in order to ensure flexibility in adapting the priorities to challenges. The Commission has nevertheless explained that 18 months might not be a sufficiently long period to see the results from the actions proposed and has therefore suggested that an assessment every three years is more appropriate and efficient. Priorities issues identified by the AAC were the following: securing sustainable growth through optimising licensing procedures and use of space, enhancing the competitiveness of EU aquaculture and promoting a level playing field. The first Recommendation detailed the ideas between these priorities, while the second Recommendation listed actions by involved partners (Member States, European Commission and AAC). The Commission has taken into consideration the AAC’s specific proposals in the work on the discussion paper, which served as a basis for the drafting of the updated Guidelines.

The Commission also presented the work on the Guidelines and the discussion paper while attending all working groups of the AAC where dedicated agenda points were included. The Commission joined these meetings in June 2019, October 2019, June 2020 and October 2020.

Exchanges of views with AAC members were thus taken into consideration and helped to frame the discussion paper on the Guidelines.

The AAC members were invited to join the Member States Aquaculture Experts in a joint session dedicated to a draft outline of the Guidelines. AAC Chair and Vice-Chairs were also associated to all Member States aquaculture Experts seminars in 2019 and 2020.

The AAC further adopted a third general [Recommendations on the Guidelines](#) on 20 May 2020, welcoming proposals detailed in the continuously evolving discussion paper and proposing specific inputs. The Working Group on Shellfish further worked on a fourth Recommendation, namely a specific Recommendation on the development of Shellfish-specific guidelines, adopted on 26 June 2020.

The third general Recommendation, adapted to the evolution of the discussion paper, brought forward specific proposals, such as:

- a pledge for fish welfare to be considered broadly in the Guidelines,
- importance of scientific monitoring of environmental services and of environmental legislation implementation across Member States,
- support to an EU-wide communication campaign if educational on sustainability issues,
- overall support to the idea of EU aquaculture sector being carbon neutral by 2050,
- encouragement to widen the scope of indicators in terms of data and monitoring and of indicators on environmental performance.

The Commission has also taken into consideration these proposals in the work on the new Strategic Guidelines.

Finally, the [fourth Recommendation](#), dedicated to Shellfish-specific guidelines brought up the following supports and proposals: increasing availability of space across Member States and ensuring appropriate water quality; the creation of a network of statistics specific to shellfish sector; a reorganisation of representative structures of the sector, particularly at transnational and EU level; the development of the traceability of shellfish products; ensuring the adequacy between consumer demand in the EU and an increased EU shellfish production (namely referring to a better knowledge of distribution channels), and applied research and development efforts. Some of these recommendations could be applicable also to other parts of the EU aquaculture sector and were incorporated to the work on the new Strategic Guidelines. In addition, work on the Guidelines took into consideration issues that are specific to the shellfish sector as mentioned by the AAC.

In parallel, the AAC and its members participated in the feedback on the Roadmap of the initiative as well as to the Public Consultation (see above).