



Council of the
European Union

Brussels, 20 January 2020
(OR. en)

5294/20

PECHE 20

COVER NOTE

From:	Secretary-General of the European Commission, signed by Mr Jordi AYET PUIGARNAU, Director
date of receipt:	14 January 2020
To:	Mr Jeppe TRANHOLM-MIKKELSEN, Secretary-General of the Council of the European Union

No. Cion doc.:	SWD(2020) 6 final
Subject:	COMMISSION STAFF WORKING DOCUMENT EVALUATION Interim Evaluation of the Open Method of Coordination (OMC) for the Sustainable Development of EU Aquaculture

Delegations will find attached document SWD(2020) 6 final.

Encl.: SWD(2020) 6 final



Brussels, 14.1.2020
SWD(2020) 6 final

COMMISSION STAFF WORKING DOCUMENT

EVALUATION

**Interim Evaluation of the Open Method of Coordination (OMC) for the Sustainable
Development of EU Aquaculture**

{SWD(2020) 7 final}

Table of contents

1.	INTRODUCTION	5
2.	BACKGROUND TO THE INTERVENTION	6
3.	IMPLEMENTATION / STATE OF PLAY	11
4.	METHOD.....	16
5.	ANALYSIS AND ANSWERS TO THE EVALUATION QUESTIONS	18
6.	CONCLUSIONS.....	44

Glossary

<i>Term or acronym</i>	<i>Meaning or definition</i>
AAC	Aquaculture Advisory Council
AC	Autonomous Communities
AODA	Areas for Organised Development of Aquaculture
CFP	Common Fisheries Policy
CMES	Common Monitoring and Evaluation System
CMO	Common Organisation of the Markets of Fishery and Aquaculture Products
DCF	Data Collection Framework
DG MARE	Directorate-General for Maritime Affairs and Fisheries
DG EAC	Directorate-General Education and Culture
EASME	Executive Agency for Small and Medium-sized Enterprises
EC	European Commission
EMFF	European Maritime and Fisheries Fund
EMPA	European Mollusc Producers Association
EMU	Economic and Monetary Union
EQM	Evaluation Questions Matrix
ETM	Education and Training Monitor
EU	European Union

EUMOFA	European Union Market Observatory for Fisheries and Aquaculture products
FAO	Food and Agriculture Organisation
FEAP	Federation of European Aquaculture Producers
FLAG	Fisheries Local Action Group
GIS	Geographical Information System
IBO	Inter-Branch Organisation
IMP	Integrated Maritime Policy
M&E	Monitoring and Evaluation
MANP	Multiannual National Strategic Plan
MS	Member State
MSFD	Marine Strategy Framework Directive
MSP	Maritime Spatial Planning
NA	National Administration
OECD	Organisation for Economic Cooperation and Development
OMC	Open Method of Coordination
OP	Operational Programme
OPC	Open Public Consultation
PO	Producer Organisation
RAS	Recirculation Aquaculture Systems

SME	Small and Medium-sized Enterprise
SAC	Special Areas of Conservation
SP	Spatial planning
SPA	Special Protected Area (under the Habitats Directive)
SPC	Social Protection Committee
SWOT	Strengths, Weaknesses, Opportunities and Threats (analysis)
TOR	Terms of Reference
UP	Union Priority
WFD	Water Framework Directive

1. INTRODUCTION

Purpose

This Staff Working Document (SWD) presents the results of the interim evaluation of the Open Method of Coordination (OMC) for the sustainable development of EU Aquaculture. It is based on an independent evaluation report prepared by external consultants¹, as well as on other sources of evidence, inter alia the "Economic Report of the EU Aquaculture sector" (STECF-18-19)² and the EU Fish Market 2018 Report³.

The aim of the evaluation is:

- **To assess national and EU efforts to promote the development of sustainable aquaculture** in relation to the OMC's objectives in terms of their effectiveness, efficiency, relevance, coherence and EU added value;
- **To inform Member States, stakeholders and the public** on the achievements of the OMC in this sector;
- **To provide evidence for future policy making on EU aquaculture.** The evaluation aims at identifying the factors that contributed to the success or failure of the implementation of the OMC so far. Although the evaluation is not formally required by the Regulation governing the Common Fisheries Policy (CFP)⁴, its conclusions can contribute to further develop evidence-based policy for the sustainable development of EU aquaculture.

In accordance with the Commission's Better Regulation Guidelines, the evaluation exercise was structured around the following standard evaluation criteria:

- **Effectiveness:** assessment of the OMC for the sustainable development of EU aquaculture as an effective method for policy coordination and mutual learning;
- **Efficiency:** assessment of the relationship between the resources used by the OMC and the changes and novelties generated at national, regional and local levels;
- **Coherence:** assessment of coherence within the OMC, with related policies and with other interventions impacting the aquaculture sector;
- **Relevance:** assessment of the relationship between the needs and problems in the aquaculture sector, the objectives of the OMC and how this has changed over time thanks to the OMC and what the current needs are;
- **EU added-value:** assessment of the value resulting from the OMC that is additional to the value that would have resulted from interventions initiated at regional or national levels by public authorities and the private sector.

Scope

This interim evaluation examines the period 2013 to 2017, covering all the different OMC tools (Strategic Guidelines for the sustainable development of EU aquaculture, guidance on

¹ <https://publications.europa.eu/en/publication-detail/-/publication/83f2aed6-b33c-11e9-9d01-01aa75ed71a1/language-en>

² https://stecf.jrc.ec.europa.eu/reports/economic/-/asset_publisher/d71e/document/id/2446795

³ https://www.eumofa.eu/documents/20178/132648/EN_The+EU+fish+market+2018.pdf

⁴ Regulation (EU) No 1380/2013

EU legislation, Multiannual National Strategic Plans, exchange of good practices) and covering all Member States, except Luxembourg which has very limited aquaculture⁵.

2. BACKGROUND TO THE OPEN METHOD OF COORDINATION (OMC) FOR THE SUSTAINABLE DEVELOPMENT OF EU AQUACULTURE

Background on aquaculture

According to the latest “[Economic report of the EU aquaculture sector](#)”⁶, overall the performance of the aquaculture sector is improving, reaching 1.4 million tonnes in sales volume and €4.9 billion in sales value in 2016. This corresponds to an increase of 6% in sales volume and 8% in sales value compared to 2014. However, since 2007 production has decreased by 2%, this trend is in contrast with global aquaculture production which shows continuous growth. European aquaculture production represents only 1.2% of the world aquaculture production in terms of weight and 1.9% in value.

EU aquaculture production is mainly concentrated in 5 countries: Spain (21%), France (15%), Italy (14%), the United Kingdom (14%), and Greece (10%), making up 74% of the sales volume. These 5 countries are covering 73% of the sales value in EU28.

The total number of enterprises in EU is estimated to be 12 500. Almost 90% of the enterprises in the aquaculture sector are micro-enterprises, employing less than 10 employees. The number of employees in EU was estimated to be 75 300 in 2016.

The EU aquaculture sector can be divided into three main sectors: Marine, Shellfish and Freshwater production. The marine sector is the most important economically and generated the largest turnover of €2 731 million, followed by the shellfish sector with €1 134 million and the freshwater sector with €1 028 million. The main species produced in terms of value are Atlantic salmon, rainbow trout and European seabass, whereas the unidentified mussels, which the experts believe to be Mediterranean mussels, dominate in weight.

EU aquaculture is renowned for its high quality, sustainability and consumer protection standards. EU legislation establishes the high health, consumer protection and environmental sustainability standards that EU aquaculture activities have to comply with.

The future demand for fish is expected to increase due to increasing population and income and health benefits associated with fish consumption. The growing demand offers a unique opportunity to expand the aquaculture production in the EU. However, expanding the EU aquaculture production for food security reasons should be done in a way that is environmentally, economically and socially sustainable.

The Commission intends to boost the European aquaculture sector through the CFP that aims to promote aquaculture through an OMC, a voluntary process for cooperation. Four priority areas were identified⁷ to unlock the potential of EU aquaculture and address the CFP objectives (enhance sustainability, food security, growth and employment linked to the aquaculture sector), notably: reducing the administrative burden, integrating aquaculture in spatial planning, improving the competitiveness of the aquaculture industry and promoting a level playing field for EU operators.

⁵ Eurostat has no data for aquaculture production volumes in Luxembourg

⁶ https://steef.jrc.ec.europa.eu/reports/economic/-/asset_publisher/d7Ie/document/id/2446795

⁷ See Strategic Guidelines

Description of the OMC and its objectives

The competence for the management of aquaculture lies largely with EU Member States. However, the challenges, barriers and threats that face EU aquaculture are common across many countries.

EU aquaculture policy is developed and implemented in the framework of the ‘Open Method of Coordination’ (OMC) as established under the CFP Regulation⁸. The OMC is a non-legal, voluntary process that aims at giving practical answers to the challenges identified by the Member States and stakeholders. It is a framework for national strategy development and for coordinating policies between EU Member States. It involves concerted action between EU and national policies in full respect of the principle of subsidiarity.

As described in the intervention logic in figure 1:

The **general objective** is to enhance the sustainability, food security, growth, employment and level-playing field linked to the aquaculture sector as stipulated in the CFP Regulation (Article 2).

The **specific objectives** stemming from the CFP Regulation’s Article 34 are:

- (i) Reduce the administrative burden;
- (ii) Integrate aquaculture activities into maritime, coastal and inland spatial planning;
- (iii) Improve the competitiveness of the aquaculture industry;
- (iv) Promote a level playing field for EU operators by exploiting their competitive advantage.

The **operational objectives** conceived as intermediate outcomes of the activities rolled out through the OMC are:

- (i) Develop a mutual learning process between Member States with the support of the Commission, including through the exchange of good practices and the participation to technical seminars;
- (ii) Foster changes in national legislation by feeding in lessons learned from the exchange of good national practices and technical seminars;
- (iii) Provide guidance on the EU legislation with an impact on aquaculture (such as the Water Framework Directive (WFD) and the Marine Strategy Framework Directive (MSFD)), with the objective to ensure that aquaculture activities are in compliance with their provisions and facilitate their application by Member States;
- (iv) Support realistic and sustainable investments at EU and national level in the aquaculture sector.

As requested by the CFP Regulation (Article 34), the Commission adopted in 2013 "*Strategic Guidelines for the sustainable development of EU aquaculture*"⁹. These Strategic

⁸ Regulation (EU) No 1380/2013 – Article 34

⁹ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on Strategic Guidelines for the sustainable development of EU aquaculture (COM(2013)229 final)

Guidelines define four priority areas to be addressed by the OMC to unlock the potential of EU aquaculture:

- **Simplifying the administrative procedures.** Administrative procedures related to the starting of a new aquaculture farm are time-consuming and complex in several Member States. In addition, most businesses in the sector are SMEs, which are disproportionately affected by regulatory red tape.
- **Securing sustainable development and growth of aquaculture through coordinated spatial planning.** Integrating aquaculture activities into maritime, coastal and inland spatial planning can encourage economic activity, facilitate investment and boost the development of the aquaculture sector. It also presents an opportunity to enhance access to suitable sites for aquaculture production with a view to sector expansion. Coordinated spatial planning can also reconcile the competing interests of the aquaculture sector with environmental protection.
- **Enhancing the competitiveness of EU aquaculture.** Increased competition with producers from third countries, as well as the expectations of consumers on the quality and diversity of food products present challenges for EU aquaculture producers.
- **Promoting a level playing field for EU operators by exploiting their competitive advantages.** Aquaculture products originating from the EU comply with high environmental, animal health and consumer protection standards. These are EU aquaculture's main competitive factors and could be exploited more effectively to compete on the markets.

For each priority the Strategic Guidelines set targets for the Member States, for the Commission and for the Aquaculture Advisory Council (see Annex 4).

The activities deployed for the OMC are:

- The **Multiannual National Strategic Plans (MANPs)**. In order to better coordinate actions to promote aquaculture, Member States were required under the CFP to prepare MANPs for the promotion of sustainable aquaculture based on the Strategic Guidelines that contained a draft outline of the structure. Member States were encouraged to cover the period 2014-2020, to provide quantified targets and indicators and to make a mid-term assessment of the implementation of their plan by the end of 2017. Consequently Member States developed in 2014-2015 MANPs in which they identified their national priorities and proposed concrete actions to address them. Although Member States were free to choose to which priorities they planned actions, most MANPs included actions to address the four priorities of the Strategic Guidelines (see above). These plans also include national good practices that they wish to share in the context of the OMC. The MANPs are consistent with the Operational Programmes (OPs) of Member States developed to make use of funding available through the European Maritime and Fisheries Fund (EMFF). The submission of MANPs are a pre-requisite to access EMFF funding (ex-ante conditionality).
- **Technical seminars and high-level events** on aquaculture are organised by the Commission and attended by Member States' representatives. They provide a forum for the exchange of good practices aiming to foster a mutual learning process across the EU. The technical seminars are also meant to provide learning opportunities on implementation processes or policy approaches for stakeholders across the EU. The Strategic Guidelines suggested that the Commission organises at least one technical seminar per year to present the selected good practices and facilitate the exchange of information between Member States.

- **Guidance documents on EU legislation**¹⁰ have been developed by the Commission to facilitate the implementation of relevant EU legislation such as the WFD and the MSFD. The guidance documents offer practical answers to questions about the application of EU law in relation to aquaculture.

In addition, the mandate of the **Aquaculture Advisory Council (AAC)** includes the provision of advice to the Commission and Member States for all issues contributing to the development of EU aquaculture. The AAC is the ideal platform for this purpose as it includes balanced representation of professional bodies from the 28 Member States (farmers, processors, feed manufacturers and NGOs). The AAC is expected to collect data on economics, production conditions and stimulate the exchange of good practices. The AAC is entitled to formulate advice to the Commission, the European Parliament and Member States to inform the debate and form the basis for new ideas and measures to be channelled into the decision-making process of the OMC for sustainable EU aquaculture.

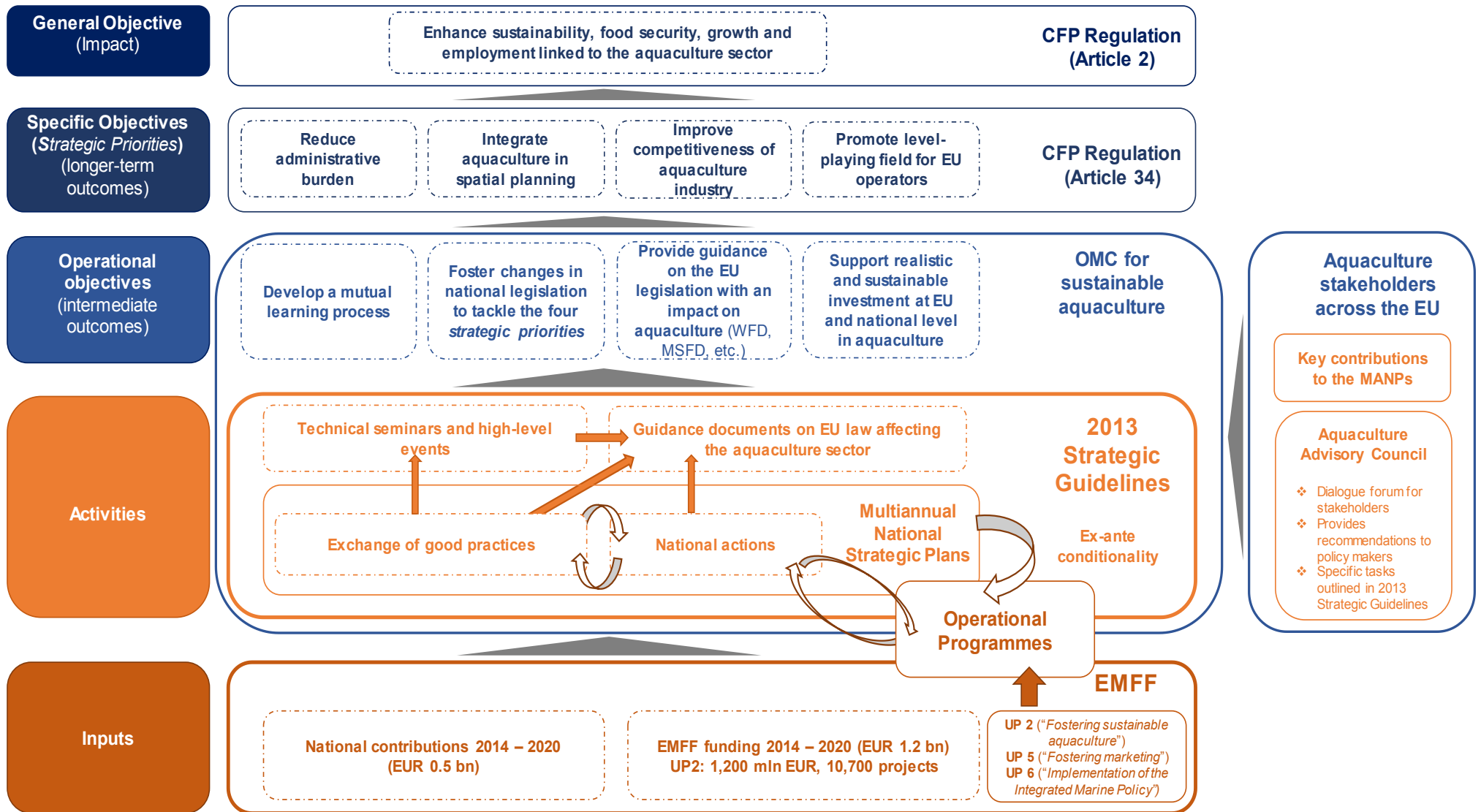
The development of sustainable EU aquaculture is financially supported through:

- the **EMFF for the period 2014 to 2020** and through **national contributions**. The main contribution of the EMFF to sustainable aquaculture occurs in the context of Union Priority 2 (UP2) to foster sustainable aquaculture and is coherent with Union Priority 6 (UP6) on the implementation of the Integrated Maritime Policy (IMP) Regulation¹¹. The Strategic Guidelines note that the EMFF provides vital funding for initiatives foreseen in the MANPs for the sustainable development of EU aquaculture. The support to aquaculture focuses on aid for productive investments, conversion to eco-management and organic aquaculture, develop aquaculture providing environmental services, and support aquaculture for conservation and biodiversity protection. The total commitments of the EMFF for 2014 – 2020 for the sector of aquaculture amount to EUR 1.2 billion or 21% of all available funding. The EMFF funding for UP2 is complemented by EUR 0.5 billion of national contributions of the Member States to the funding of their OPs. There are differences between Member States, both in terms of total EMFF funding of their OPs and the degree to which they choose to focus resources on the development of their aquaculture sector.
- **other EU funding instruments** such as the EU's Seventh Framework Programme for Research and Development, Horizon 2020, Life+ and the European Regional and Development Fund.

¹⁰ Guidance document on the application of the Water Framework Directive (WFD) and the Marine Strategy Framework Directive (MSFD) in relation to aquaculture; CEFAS background document on Sustainable Aquaculture Development in the context of the Water Framework Directive and the Marine Strategy Framework Directive; Guidance document on aquaculture activities in the Natura 2000 Network, 2012; Guidance document on the Great cormorant, Applying derogations under Article 9 of the Birds Directive 2009/147/EC; Guidance documents on Environmental Impact Assessments

¹¹ Regulation (EU) No 1255/2011

Figure 1: Intervention Logic



Baseline and points of comparison

National strategies for the sustainable development of aquaculture existed before the start of the OMC in 2013 in most Member States, but they were integrated into wider strategies in many cases (e.g. strategies for the fisheries and aquaculture sector as a whole). The Strategic Guidelines and the MANPs have encouraged Member States to develop a comprehensive strategy for aquaculture, with quantified targets for growth.

In the Strategic Guidelines each Member State is encouraged to indicate in the MANP its own **aquaculture growth objective** in the period covered by the plan. All Member States have set quantified objectives for growth¹². For example:

- National growth objective (2014-2020) for Austria: production volume from 3 100 tonnes to 5 500 tonnes in 2020.
- National growth objectives (2013-2023) for Cyprus: production volume from 5 339.3 tonnes to 6 332 tonnes in 2023 (19% increase). Production value from 29.2 million euro to 34,5 million euro in 2023.

In the Strategic Guidelines Member State are encouraged to **set quantified targets and indicators for the proposed actions**. However, in most cases this was not possible. For example: Romania's action for the first priority "simplify administrative procedures" is "*to identify the potential for improving procedures and reducing administrative tasks*".

The Strategic Guidelines set for the four priorities, **targets for the Member States, for the Commission and if relevant for the Aquaculture Advisory Council** (see Annex 4). The targets are sometimes quantifiable (eg. number of new licences granted, success rate of applications for licences), sometimes concrete (eg. organise a seminar, prepare guidance documents), but mostly they are not quantifiable (eg. to make full use of the proposed CMO and EMFF).

The officially published MANP for each Member State, and a very short summary of each plan (in English) prepared by the Commission as well as a summary document of the 27 MANPs can be found on the Commission's aquaculture website¹³.

3. IMPLEMENTATION / STATE OF PLAY

The progress against the four specific objectives of the OMC is described below:

1. Simplifying administrative procedures

Almost all Member States, except Latvia and Lithuania, identified the administrative simplification as a priority for the development of the aquaculture sector in their country and recommended 76 actions on this priority in their MANPs. Twenty-two Member States made progress since 2014. This concerns the simplification of licensing systems both in terms of regulatory framework and in terms of administrative organisation. Overall, the

¹² See English summary of 27 MANPs: https://ec.europa.eu/fisheries/cfp/aquaculture/multiannual-national-plans_en

¹³ https://ec.europa.eu/fisheries/cfp/aquaculture/multiannual-national-plans_en

main success factor for the simplification of administrative procedures is the close collaboration between administration and professionals to establish a new administrative process to attribute exploitation licenses. The most common hindering factors is the complexity of institutional and regulatory frameworks and the number of administrations involved, which range between two and thirteen public entities being involved in an authorisation procedure.

The key findings on the results of actions undertaken to support administrative simplification are:

- changes to the public administration and licencing systems in 15 Member States (MS);
- setting up of platforms for dialogue between industry and the public administrations in 13 MS;
- alignment of procedures between regions in 6 MS.
- establishment of one-stop-shops in 5 MS

This has led to the following impacts:

- increase in the number of new licences in 7 MS;
- decrease in the average time for licensing procedures in 6 MS;
- increase in the number of applications processed per year in 6 MS;
- increase in the success rate of applications in 4 MS.

Overall, Member States consider that the actions related to administrative simplification involve long term processes. The high costs of some actions in comparison to their expected benefits could hinder the completion of the actions. This is related to the creation of electronic platforms for the submission, analysis and processing of licenses (e.g. producers are used to paper-based systems). The complexity of institutional or regulatory frameworks is also one of the main difficulties. France indicated for example the high number of administrative bodies to coordinate and Spain highlighted the difficulties related to the decentralised organisation of the aquaculture governing bodies (autonomous communities have the exclusive competences for aquaculture management).

Role of the OMC and the Commission:

The Strategic Guidelines have clearly contributed to focus the national strategies on administrative issues.

2. Securing sustainable development and growth of aquaculture through coordinated spatial planning.

Progress on spatial planning is highly variable. According to the survey of National Administrations (NA)¹⁴, the mapping of existing aquaculture facilities has been the most common type of action in the field of spatial planning. Twelve Member States indicated that they have made public up-to-date maps of existing aquaculture facilities since 2014, and four other Member States intend to do so by 2020. Eleven Member States shared best practices at regional/local level, with four Member States planning to do the same by 2020. From the 15 Member States that answered this question, ten have reported at least a

¹⁴ See section 4 – short description of methodology

marginal increase in the surface area covered by Marine Spatial Planning (MSP) since 2014 and Belgium, France, Malta, Portugal and the UK all indicated that the surface area increased significantly. Five Member States did not increase the surface area covered by MSP since 2014, citing the following reasons:

- MSP procedures are too long for building permit approvals (Estonia);
- A delay in the incorporation of the MSP Directive (Greece);
- The country does not have access to sea (Hungary);
- The plan is under development and significant stakeholder engagement is ongoing (Ireland);
- The entire maritime territory is already covered by spatial planning (Slovenia).

In **Scotland**, an Aquaculture Infrastructure Map has been created to support discussions about aquaculture developments that may help to increase aquaculture productivity in the country. The map is designed to assist strategic planning in this industry. In addition, Marine Scotland's online National Marine Plan interface (NMPi) also includes aquaculture sites. **Hungary's** Fisheries Information System includes regional technical and economic data on aquaculture production but does not include any spatial information on licensing or permitting, as this information is held by too many different government bodies. **Croatia** is developing an online register of aquaculture licensing with a new aquaculture law, and already collects aquaculture production data electronically. **Denmark** has an online aquaculture licensing system that includes environmental information, which also supports a one-stop-shop approach.

It is evident from the above that spatial planning for aquaculture across the EU is both highly variable in terms of progress and in terms of approach. Whilst the MSP Directive provides some rigour in ensuring common approaches to transboundary spatial planning in marine areas – supported through various elements of direct funding under the EMFF – there is significant potential for developing common approaches, definitions and Geographical Information (GIS) tools in the future.

Role of the OMC and the Commission.

The Strategic Guidelines provide a target for the Commission to “*monitor the implementation of coordinated maritime planning, to disseminate studies and experiences to help Member States in their planning. To organise a best practice exchange seminar in summer 2014*”.

Since the EMFF Regulation¹⁵ requires the development of MANPs as an ex-ante conditionality¹⁶ for accessing EMFF funding, all Member States (except Luxemburg) produced MANPs that included a section on spatial planning. In many cases, this was the first time Member States engaged in spatial planning for aquaculture.

Spatial planning has been a recurring feature in the various technical seminars organised by the Commission, being covered in: November 2015 (spatial planning and governance), May 2016 (spatial planning) and April 2017 (spatial planning and GIS). In most cases, the focus has been on marine finfish and shellfish farming, although the role of spatial planning in freshwater environments has been acknowledged.

¹⁵ Regulation (EU) N° 508/2014

¹⁶ Article 9 and Annex IV of Regulation (EU) N° 508/2014

A recent evaluation of EMFF expenditure¹⁷ examined the progress made in spatial planning. The evaluation is not yet completed by the Commission but the study concluded that EMFF support under direct management to date has catalysed Member States actions, allowed the development of Maritime Spatial Planning (MSP)¹⁸ implementation structures and frameworks, and facilitated a progress towards pilot national maritime spatial planning in certain sea bodies. Direct EMFF funding into transboundary MSP has had the added benefit of encouraging inter-sectoral discussions and their engagement with counterparts in neighbouring waters. It has also encouraged proactive MSP engagement across maritime boundaries, building confidence in MSP at both national levels and allaying concerns over political uncertainties in geo-political issues such as Brexit.

3. Enhancing competitiveness of EU aquaculture

The case studies highlighted the diversity of strategies and actions carried out to improve competitiveness in the sector and show that there is a direct link between achievements related to the reduction of administrative burden and spatial planning on one hand, and the improvement of competitiveness on the other.

Considering the importance of EMFF funding to support the improvement of competitiveness (EUR 1.8 billion of EMFF allocated to the sustainable development of aquaculture including national contributions), delays in the implementation of the EMFF have significantly impacted the achievements under this objective.

The analysis of the mid-term review reports showed that three¹⁹ of the 20 Member States that submitted their mid-term reports did not indicate any progress towards this priority. Progress in the other 17 Member States is variable, but according to the NA survey, Member States expect to have completely fulfilled about one third of their actions by 2020 and to have partially fulfilled most of the remaining ones.

The most important actions that have been implemented concern research developments in aquaculture sectors, cooperation and knowledge-sharing and modernising existing aquaculture units and techniques. Less importantly, some Member States made progress in enhancing the business resilience against fish disease and improving the marketing of aquaculture products.

Six Member States²⁰ indicated some quantifiable effects, mostly relating to production volumes. In all cases, there has been an increase in production and targets are expected to be achieved by 2023 or before. Data Collection Framework (DCF) data also confirm the increase in production at EU level between 2013 and 2016 (+13%) and the Economic Report of the EU Aquaculture sector²¹ shows that recent forecasts from various organisations (FAO, EU Parliament, OECD) indicate that targets set for 2023 are realistic based on current trends.

¹⁷ "Interim evaluation study of the implementation of the direct management component of the EMFF Regulation (Art.15 and 125), Coffey International. <https://op.europa.eu/en/publication-detail/-/publication/1f424d68-d670-11e8-9424-01aa75ed71a1/language-en>

¹⁸ Directive 2014/89/EU

¹⁹ Croatia, Czech Republic and Slovakia

²⁰ Cyprus, Croatia, Ireland, Lithuania, Spain and Portugal

²¹ Economic Report of the EU Aquaculture sector, STECF, 2018-2019.

Significant progress has been made in this area even if it is not emphasised in national strategies, as 11 out of the 28 recognised Producer Organisation (POs) were established after 2015.

Role of the OMC and the Commission

The Strategic Guidelines provide a target for the Commission to “*coordinate and support research and innovation for aquaculture through all the relevant EU programmes and funds. To promote the transfer of knowledge, best practices and innovation, including EU research project findings. To deliver a user-friendly EU market Observatory to provide market intelligence.*”

The Strategic Guidelines and the obligation to draft the MANP as a pre-requisite to access EMFF funding has contributed to a favourable dynamic for the sector and to some convergence of national objectives. Even if strategies and actions implemented at national level remain very diverse when it comes to competitiveness, the focus, almost in all Member States, on administrative procedures, spatial planning and innovation (under competitiveness) has contributed to create a more favourable context.

Between 2013 and 2017 research projects related to aquaculture were funded under the EU Seventh Framework Programme for Research and Development (FP7), under Horizon 2020, the EU LIFE+ programme and under the European Regional Development Fund. It provided new insights on new species, diseases, fish welfare, sustainability, new production systems and environmental impacts. Up to December 2017 the EMFF²² has funded several projects leading to more knowledge on innovation in aquaculture.

4. Promoting a level-playing field for EU operators by exploiting their competitive advantages.

The case studies show that this priority was not always well understood and that there is no clear line between the strategy to improve competitiveness and the strategy to improve level-playing field.

The analysis of mid-term review reports shows that a limited number of initiatives has been implemented for promoting a level-playing field between EU operators. From the 20 Member States that submitted their mid-term review, six Member States did not provide any information on this type of initiative. The remaining 14 Member States implemented a variety of measures, including the promotion of aquaculture products, market research, promoting product safety, labelling, certification and establishment of producer organisations. The NA survey results also show that 19 Member States supported cooperation between research institutions and producer organisations under this priority.

No quantified results have been provided for the actions implemented under the level-playing field, but feedback from the NA survey indicates that the expected impacts are increased transparency, increased organisation of the sector, increased public awareness and an increase in the number of certifications.

²² Article 47 of EMFF Regulation

Role of the OMC and the Commission

The Strategic Guidelines provide a target for the Commission to “*ensure that labelling rules, in particular as regards freshness, provenance and commercial name are fully implemented. To improve markets transparency and disseminate markets information on trends at local, EU and international levels. To launch by the end of 2013, a Communication campaign on the strengths of EU aquaculture*”.

Some convergence of national strategies can be observed. Many Member States have implemented actions to improve labelling, but these actions generally focus on the country of origin rather than on environmental specifications that could apply EU-wide, as foreseen in the Strategic Guidelines. The Member States have supported the establishment of new POs, but no Inter-Branch Organisation (IBO) or transnational PO has been set up. The EU launched the campaign ‘Farmed in the EU’ in 2016, but stakeholders refer more to national campaigns promoting national products.

Ensuring that labelling rules are fully implemented depends on the implementation of the Control Regulation and has not been fully analysed.

Dissemination of markets information is done mainly through EUMOFA, the Market Advisory Council and the technical seminars. EUMOFA was set up in 2008, although the OMC may have played a role in the increased focus on aquaculture products since 2014.

4. METHOD

Short description of methodology

The interim evaluation is coordinated by Unit A.2 of the Commission's Directorate-General for Maritime Affairs and Fisheries (DG MARE), with the support of an Inter-Service Steering Group comprised of other Commission services (see Annex 1). It is based on a study carried out by external consultants²³ between October 2017 and July 2019 as well as on the "Economic Report of the EU Aquaculture sector" (STECF-18-19)²⁴ and the EU Fish Market 2018 Report²⁵.

The study was conducted in three main phases: inception, data collection and analysis.

During the inception phase interviews were conducted with relevant services in the Commission as well as with the Aquaculture Advisory Council. An initial analysis of existing data took place. Methods and tools for data collection and analysis were designed and refined such as the Evaluation Questions Matrix (see Annex 3), a questionnaire for the stakeholder public consultation, a survey tool for the consultation of national administrations and the approach to the case studies.

During the data collection phase the main evidence required to answer the evaluation questions was collected. Data was collected from a range of stakeholders at EU, national and regional/local levels using different methods:

²³ “*Study on an interim evaluation of the OMC for the sustainable development of EU Aquaculture*”, Coffey.

<https://publications.europa.eu/en/publication-detail/-/publication/83f2aed6-b33c-11e9-9d01-01aa75ed71a1/language-en>

²⁴ https://stecf.jrc.ec.europa.eu/reports/economic/-/asset_publisher/d7Ie/document/id/2446795

²⁵ https://www.eumofa.eu/documents/20178/132648/EN_The+EU+fish+market+2018.pdf

- **Analysis of the mid-term reports on the MANPs** leading to the development of a synthesis of the mid-term reports on the MANPs²⁶ and the drafting of two-page country fiches²⁷ presenting the state-of-play in each of the Member States.
- **Targeted consultation of national administrations (NA)** aiming to provide more detailed and up-to-date information on the achievements, potential effects and impacts of the objectives set in the sustainable development of the aquaculture sector across the 27 Member States. The consultation was conducted in 20 languages and questions were tailored to the specific objectives set by each Member State.
- **Commission's stakeholder consultations:** showcasing the evaluation at the Sixth and Seventh Technical Seminars.
- **Open Public Consultation (OPC)** carried out from 26th May 2018 until 20th July 2018.
- **Case studies in five Member States**²⁸ to explore the evolution of the aquaculture sector, the influence of the OMC and the drivers and limitations behind the current status quo.

In the analysis and reporting phase data were analysed. Key findings were developed from the desk research, the targeted consultation of NA, the OPC, the stakeholder consultation events and the case studies. In a second stage, key findings were triangulated according to the evaluation criteria (effectiveness, efficiency, coherence, relevance and EU added value). Triangulated findings were analysed to develop responses to each evaluation question and to draft conclusions.

Robustness of findings

Although quantitative data has been derived from the analysis of the MANPs and responses from the NA survey and the public consultation, many of the in-depth insights at Member State level rely on qualitative data. This is due to the nature of the tools analysed, the state of progress of implementation and the fact that there are no quantified objectives or monitoring systems in place for the OMC. This is understandable given the voluntary nature of Member States' engagement in the OMC. The data gathered from the analysis of the mid-term review reports, the targeted consultation of NA and the OPC, do, however, provide robust information on the progress achieved to date in Member States in addressing the four strategic priorities. Twenty-seven Member States²⁹ responded to the consultation of NA and provided data. The OPC provided an opportunity for feedback from stakeholders who might not have otherwise been consulted. Together, these consultations provide a solid body of evidence. The case studies, which were used to examine the situation in five Member States, provide more in-depth insight into progress at national level, coherence with other EU legislation, the difficulties encountered to achieve the MANPs objectives, rationale for the Member States' various implementation choices, and the aquaculture sectors' needs.

²⁶ See study Annex I

²⁷ See study Annex VI

²⁸ Ireland, France, Spain, Poland and Greece

²⁹ Excluding Luxembourg, which was excluded from the evaluation due to its low aquaculture production

Key limitations

The lack of common OMC indicators: the OMC has not been set up to provide systematic and accurate data on Member States' activities and impacts; there is no common monitoring system to allow direct comparisons to be made.

The heterogeneity of the qualitative information provided by the Member States in the MANPs, mid-term review reports and the survey of NA makes comparisons difficult.

The OMC lacks quantified targets in terms of reaching its specific objectives.

The MANPs set few quantified targets (and none for the mid-term) and no indicators.

Attributing causality to the OMC: it can be difficult to disentangle the actions that Member States would have taken any way and the actions upon which the OMC has had a direct impact.

The lack of data on costs and cost savings: limited data could be gathered on the current costs and cost savings. The costs of administrative procedures are not monitored by Member States and are difficult to estimate when procedures involve more than one service or administration. The analysis of cost savings in Member States relies mainly on qualitative information and examples.

The timing of the evaluation: due to the interim nature of the evaluation, it is in many cases too early to observe a significant impact from the various activities. Many of the improvements involve long and complex processes.

5. ANALYSIS AND ANSWERS TO THE EVALUATION QUESTIONS

It should be noted that the analysis is often vague and limited. This is due to the above-mentioned list of key limitations.

This chapter will address the 5 evaluation criteria. Answers are given to all the evaluation questions listed in Annex 3. In order to improve the readability of the document the replies are presented to groups of related questions.

5.1 EFFECTIVENESS

1) Achievements of Member States' actions.

Member States addressed in their MANPs the four priorities identified in the Strategic Guidelines for the sustainable development of aquaculture. While Member States focused on administrative simplification and enhancing the competitiveness of the aquaculture sector, they have not addressed spatial planning in the same manner, because some Member States (including the landlocked countries) did not consider it as a priority. Moreover, although almost all Member States identified promoting a level playing field as a priority, the actions pursued are very similar to those defined under the third priority and progress is limited.

The level of achievement of the MANPs' actions at this stage is difficult to assess because there were few quantified targets (and none for the mid-term), and because actions planned under the MANPs often involve long-term processes. The overall level of achievement can therefore only be

measured through the percentage of national actions expected to be partially or fully achieved by 2020 under each of the four priorities.

It is estimated that by 2020, the majority of actions described in the MANPs will have been at least partially achieved: administrative simplification (96%), spatial planning (96%), improved competitiveness (92%) and a better level playing field (86%). However, the proportion of actions likely to be fully completed by 2020 is lower: administrative simplification (43%), spatial planning (49%), competitiveness (33%) and level playing field (23%).

Evidence and argumentation

Administrative simplification: In their MANPs, Member States defined 76 actions to address administrative simplification to be implemented by 2020, except for Latvia and Lithuania³⁰. Table 1 provides a general overview of the expected level of achievement regarding administrative simplification by 2020.

Table 1: Expected level of achievement of Member State actions on administrative simplification by 2020

Total number of actions in the MANPs	Number of actions that are still valid	Fully achieved (valid actions) by 2020	Partially achieved by 2020	At least partially achieved	Actions that will not be achieved by 2020
76	72	31 (43%)	38 (53%)	69 (96%)	3 (4%)

Source: consultation of national administrations (N=27)

The results of the NA survey show that **43%** of MANP actions will be fully achieved by 2020. They involve different types of actions depending on their national contexts and priorities. Only three Member States indicated that all their administrative simplification actions will be fully implemented (Czech Republic, Greece and Portugal), while the remaining Member States indicated that some of their objectives will be partially or not achieved by 2020. This indicates different levels of progress between Member States and confirms that in most cases, administrative simplification is seen as a long-term process.

The results of the consultation of NA indicate also that **53%** of actions will be partially achieved. Seven Member States indicated that all their actions will be partially achieved (Cyprus, Germany, Denmark, Spain, Hungary, Ireland and Sweden). Only **4%** of the actions (3 actions) set by Member States in their MANPs and which are still valid will not be achieved.

Enhancing coordinated spatial planning: spatial planning issues were not addressed by Member States to the same extent as administrative simplification. Member States placed different levels of priority on aquaculture-oriented spatial planning, which relates to their different national contexts. The landlocked countries (Austria, Czech Republic, Hungary, and Slovakia) in addition to Belgium, Latvia and Lithuania did not define specific actions on this priority. Overall, Member

³⁰ In Lithuania, analysis of administrative burden found that administrative procedures did not limit development in the sector. In Latvia, two actions were recommended in the MANP, but they concern improving knowledge about the aquaculture sector by improving data collection and are not directly linked to simplification.

States developed 69 actions related to spatial planning. Although these actions address a wide range of topics, half of Member States focussed on the identification of new aquaculture zones. There was some focus on exploring opportunities for diversification and for integrated aquaculture and possible synergies with other marine activities. In contrast, other actions target the better regulation of the existing aquaculture facilities. Most Member States set out in their MANPs both types of action (i.e. addressing issues of existing facilities and developing new areas for aquaculture). Table 2 provides a general overview of the expected level of achievement on spatial planning by 2020.

Table 2: Expected level of achievement of Member State actions on spatial planning by 2020

Total number of actions in the MANPs	Number of actions that are still valid	Fully achieved by 2020	Partially achieved by 2020	At least partially achieved	Actions that will not be achieved by 2020
69	60	30 (50%)	28 (46%)	58 (96%)	2 (4%)

Source: consultation of national administrations (N=27)

From the 60 actions that are still valid, half will be fully achieved by 2020. Five Member States (Bulgaria, Finland, Hungary, Ireland and Portugal) indicated that they will fully achieve all their actions by 2020. Those actions concern mainly harmonising criteria, carrying out preliminary studies and surveys and the development of guidelines to be used for identifying suitable areas for aquaculture. Actions aimed at mapping designated areas suitable for aquaculture and the development of a Geographical Information System will be fully implemented in most countries, except Croatia, France, Greece and Malta.

46% of actions (28) that are still valid will be partially achieved by 2020. The actions that will be partially implemented concern the full implementation of MSP for aquaculture (e.g. the integration of areas suitable for aquaculture in local/regional/national spatial plans), the support of new investments and the development of aquaculture production in the designated areas. **Only 4%** (2 actions) which are still valid will not be achieved by 2020.

Enhancing competitiveness of the aquaculture sector is an important objective for all Member States. Analysis of the MANPs shows that the largest number of actions relates to this priority and that all Member States developed actions in this area. The number of actions is variable across Member States and range from one action in Slovakia to thirteen actions in Lithuania. Analysis of the MANPs shows also that 16 out of 27 Member States developed actions regarding research and innovation aimed at developing farming technologies to support sustainable fish production (e.g. recycling systems), energy saving and diversification with new species. In many cases (e.g. Germany, Ireland and UK), the actions described in the MANPs concern both research and innovation and cooperation, networking and knowledge share. Table 3 provides a general overview of the expected level of achievement regarding competitiveness by 2020.

Table 3: Expected level of achievement of Member State actions on competitiveness by 2020

Total number of actions set in the	Number of actions that are	Fully achieved	Partially achieved	At least partially	Actions that will not be achieved by

MANPs	still valid	by 2020	by 2020	achieved	2020
121	112	37 (33%)	66 (59%)	103 (92%)	9 (8%)

Source: consultation of national administrations (N=27)

Most of the actions foreseen in the MANPs are still valid. **33%** (37 actions) will be fully achieved by 2020. Only 4 Member States (Finland, Ireland, Poland and Portugal) indicated that all actions related to this priority will be fully achieved. These actions concern different topics as Member States tend to choose initiatives that address their local issues.

59% (66 actions) of actions that are still valid will be partially achieved by 2020. Eleven Member States (Austria, Belgium, Bulgaria, Czech Republic, Germany, Spain, France, Croatia, Italy, Slovenia and Slovakia) indicated that all of their actions related to enhancing the competitiveness of aquaculture businesses will be partially achieved by 2020. The EMFF plays a central role in the achievement of objectives by supporting several initiatives set by Member States. The effective implementation of the EMFF will determine the level of achievement of actions related to this priority in the coming two years. By 2020, **only 8%** of actions will not be achieved. Member States explain this by the delay in the implementation of the EMFF and the small scale of aquaculture businesses.

The mid-term review reports were the most relevant source of information. Only 20 reports were available - as a result, the following findings did not provide a full picture of the progress. According to the analysis, 3 of the 20 Member States that submitted their mid-term review reports did not indicate any progress towards this priority (Croatia, Czech Republic and Slovakia). The remaining 17 Member States reported unequal progress in implementing this priority, with Cyprus, France and Germany among the Member States that have been most proactive in enhancing the competitiveness of the aquaculture sector. The most important actions implemented so far concern the **development of research in the aquaculture sector, cooperation and knowledge share and modernising the existing aquaculture units and techniques**. The willingness to use research findings in aquaculture is reflected in the adoption of relevant planning documents. For example, Scotland published its first comprehensive aquaculture science and research strategy, while the Netherlands launched a multi-annual research programme for the cultivation of seaweed. Actions aimed at knowledge transfer and exchange took various forms and a group of Member States placed emphasis on the modernisation of existing aquaculture units and techniques. For instance, Cyprus, France, Latvia and Lithuania are all providing funding for the modernisation of farms or stimulating productive investments. Less importantly, some Member States have made progress in **enhancing the businesses resilience against fish diseases and improving marketing of aquaculture products**. France, Germany and Spain implemented initiatives aiming to combat endemic fish diseases³¹. France has also been one of the Member States that put animal health issues on the agenda, focusing particularly on shellfish aquaculture³². The Member States that worked in **improving marketing** of aquaculture production were Lithuania and Estonia and conducted a study on the market outlook for aquaculture products.

³¹ The Member States which did include these issues in their MANPs are Germany, France, Hungary, Greece and Ireland. Spain worked on this issue, although it was not initially planned in its MANP.

³² Mortalities are one of the most important challenge for maintaining and developing the shellfish sector in France.

Promoting a level playing field for EU operators: Twenty-six Member States developed 85 actions to promote a level playing field for EU operators. Only Poland did not set actions on this specific objective. The promotion of aquaculture products was one of the most important actions defined by Member States (e.g. Bulgaria, Cyprus, the Czech Republic, Germany, Estonia, Finland, Greece, Italy, Netherlands and Portugal). Member States also put a lot of attention on collaboration and sharing experience and promoting sustainable aquaculture practices. Some Member States developed actions to develop advertising campaigns and promote local products with a high export value (e.g. Estonia). However, actions defined under “*level playing field*” are very similar to actions set under “*competitiveness*”. Table 4 provides a general overview of the expected level of achievement regarding level playing field by 2020.

Table 4: Expected level of achievement of Member State actions on level playing field by 2020

Total number of actions in the MANPs	Number of actions that are still valid	Fully achieved by 2020	Partially achieved by 2020	At least partially achieved	Actions that will not be achieved by 2020
85	73	17 (23%)	46 (63%)	63 (86%)	10 (14%)

Source: consultation of national administrations (N=27)

Table 4 shows that from the 73 actions that are still valid, **23%** (17 actions) will be fully achieved. Only 3 Member States indicated that they will implement all the actions in their MANPs by 2020. There is no specific trend among Member States on the types of actions that will be fully achieved. The results from the consultation of NA also indicate that **63%** (46 actions) will be partially achieved and **14%** (10 actions) will not be achieved by 2020.

2) Results of the OMC in the Member States.

For *administrative simplification*, the analysis showed that the implementation of MANPs did not bring major changes to the indicators "management of authorisation procedures (i.e. public bodies involved in authorisation, average license duration and average license costs)". The only indicator which has seen significant impact is the length of the licensing process, which decreased in 6 Member States. However, indicators related to the "results of the authorisation procedure (i.e. number of processed applications, new licenses and success rate)" saw significant improvements in most Member States since the implementation of the MANPs.

For *enhancing coordinated spatial planning*, the impact of MANP implementation was less obvious. Only ten Member States reported an increase of the surface covered by spatial planning, even if marginal. This improvement was most obvious in coastal states, which have obligations for MSP. The other Member States indicated that it is a long-term process involving different stakeholders and the spatial planning is under development.

For *competitiveness* the effects of MANP implementation concern increasing production volume with five Member States³³ indicating progress in this field.

For *promoting a level playing field* little information on the impact of MANP implementation has

³³ Cyprus, Croatia, Ireland, Spain and Portugal

been gathered: only Italy, Greece and Spain reported tangible improvements.

Evidence and argumentation

Administrative simplification

Impacts of the progress on administrative simplification since the implementation of the MANPs is assessed through analysis of indicators proposed in the Strategic Guidelines. Since 2013, the European Commission encourages Member States to collect information on the following indicators:

Category 1: management of authorisation procedures

- Number of public bodies involved in the authorisation procedure;
- Average time to complete licensing procedure in months;
- Average costs of licensing procedures for new businesses;
- Average duration of a license (Years/ months).

Category 2: results of authorisation procedures

- Number of applications processed per year;
- Number of new licences granted per year;
- Success rate of applications for licenses.

Only 13 Member States provided quantitative information for both 2014 and 2016. Austria, Hungary and Slovakia provided only information for one year - trend analysis is therefore not possible for these countries.

Management of authorisation procedures

There have been **no significant changes** in these indicators since the implementation of the MANPs, except for the indicator on the *average length of the licensing processing*. This indicator has seen the most significant progress, with 6 Member States³⁴ noting a shorter average length of the licensing processing in 2016 than in the baseline year. The most significant progress has been made by Portugal where the average length of the licensing processing decreased by 52%. For the indicators related to the *number of public bodies involved in authorisation procedures* and the *average licenses duration*, there are no major changes between 2014 and 2016. This suggests that the implementation of MANPs did not result in major changes to these indicators. The *average costs of licensing procedures for new businesses* have overall remained unchanged, except in Greece where cost of licences increased. The survey revealed major differences across Member States. *Average license durations* have only changed in Greece (from 10 to 20 years). Overall, the consultation of NA indicates that the average license duration varied from ten years in Cyprus to up to 50 years in Croatia in 2016. Both Romania and Estonia reported that they grant unlimited aquaculture licenses.

Results of the authorisation procedures

This category of indicators has seen **significant changes** since the implementation of the MANPs by the Member States. For Member States that provided data for both 2014 and 2016, 6 reported an increase in *numbers of processed applications*. Sweden and the United Kingdom progressed the most with an increase of 100% and 138% respectively in the number of processed applications.

³⁴ Greece, Ireland, Portugal, Slovenia, Spain and the United Kingdom

Out of the 11 Member States that provided figures for both 2014 and 2016, in 7 Member States³⁵ there was an increase in the *number of new licenses* granted in 2016 compared to the baseline year, 3 Member States³⁶ experienced a decrease, while in Slovenia the number of new licences stayed the same. Most progress occurred in Ireland where the number of new licenses increased from 14 to 122. Concerning the *success rate*, all Member States who reported on this indicator in the survey confirmed a success rate of 50% or over and 6 Member States reported a success rate of 90% or over, with Estonia, Greece and Croatia all reporting a 100% success rate. Four Member States³⁷ had a higher success rate in 2016 compared to the baseline year, the United Kingdom saw a decrease, and 3 Member States³⁸ reported the same numbers for both years.

Overall, there is no correlation between progress made on the two categories of indicators. In fact, even though in some cases the length of the licensing process or number of public bodies involved in authorisation remained unchanged, the number of processed applications, new granted licenses and success rates increased.

Enhancing coordinated spatial planning

In the NA survey ten Member States reported an increase in the surface covered by SP, even if marginal. From these Member States, Belgium, France, Malta, Portugal and the UK indicated that this area increased significantly. Five Member States did not increase the surface area covered by SP since 2014. In their mid-term reviews, Member States indicated that their limited progress reflects the long-term processes involving different stakeholders, which are required. The most frequently mentioned reasons are related to the lack of quantitative data and the small amount of time since the adoption or the implementation of the MANPs. Portugal and Estonia provided quantitative information in their mid-term review reports: Portugal reported on the creation of two new aquaculture production areas, one in the Central region (area with 1,000 hectares) and the other in the Algarve (974 hectares); Estonia reported that its aquaculture production doubled during the period of 2012-2016, linking this increase to the creation of new aquaculture facilities.

Stakeholders from the industry generally considered that initiatives implemented are of significant importance for the development of aquaculture. They also shared views on different spatial planning tools developed in the different Member States. For instance, in Greece, stakeholders considered that there was a serious problem of incompatibility between different spatial plans creating conflicts between aquaculture and other maritime activities. In France, the surface area covered by spatial planning increased as almost all regions developed their own regional schemes for the development of aquaculture. However, stakeholders consulted during the fieldwork considered that these regional schemes must be integrated in broader regional development schemes of maritime activities. Also, there is a problem related to low social acceptability of aquaculture activities.

Enhancing the competitiveness of aquaculture operators

According to Data Collection Framework (DCF) data, overall EU aquaculture production increased by 13% between 2013 and 2016. The most important increases were in Slovakia and Slovenia with 96% and 77% respectively. However, 2013 saw a production decline in most of the five largest aquaculture producers in Europe, which influenced production achievements in 2016.

³⁵ Spain, Greece, Croatia, Ireland, Romania, Sweden and the United Kingdom

³⁶ Cyprus, France and Portugal

³⁷ Greece, Ireland, Portugal and Portugal

³⁸ Croatia, Slovenia and Romania

The view of industry is that the impact and results of progress made regarding the implementation of initiatives related to the competitiveness are not obvious. Stakeholders considered that aquaculture production could be increased through administrative simplification and the full implementation of spatial planning. The EMFF plays an important role to support producers in adopting sustainable technologies (recirculation systems for instance).

National authorities in Member States monitor results at macro level (national production). However, industry reported results related to farm level (producers) or sector level (representative organisations).

Promoting a level playing field for EU operators

The **mid-term reports** provide almost no information on quantifiable effects of these initiatives. Member States reported that their MANPs are still in the early stages of implementation. The only 2 Member States that reported impact are Spain and Italy. Italy reported an increase in the number of farms that adopt sector certification schemes (in freshwater fish farming in particular). Spain monitors some relevant indicators such as consumption of aquatic products, trade balance of fishery products and weight of aquaculture in GDP. The **case studies** provided little information on the results and impact of initiatives targeted at creating a level playing field, except in Greece. To reward high production costs of the Greek aquaculture (qualitative products, shipping costs of reaching remote islands), national authorities established POs which proposed a set of actions to improve the competitiveness of Greek products (creation of labels, promoting collective actions and research and technology) and to promote marketing. Only part of these results was achieved, and it is expected that full impact will be seen in the coming years. Feedback from industry indicates that the results achieved at national level are not perceived at industry level, where the focus is placed on tackling issues related to administrative simplification, spatial planning and difficulties with claiming EMFF to enhance the competitiveness of their companies.

3) Results of the OMC at EU level.

The targets set in the Strategic Guidelines have been partially achieved: almost all Member States have drafted a MANP and have set quantified targets for growth in the sector. There has been an increased focus on administrative procedures and spatial planning in national strategies.

The Strategic Guidelines contributed to promoting the aquaculture sector within EU policy, encouraging funding from other sources (e.g. Horizon 2020) and greater focus in EUMOFA.

The Strategic Guidelines and the MANPs have contributed to improve strategic planning and create a sense of common goals across Member States. National strategies existed before the OMC in most Member States, but they were integrated into wider strategies in many cases (e.g. strategies for the fisheries and aquaculture sector as a whole). The Strategic Guidelines and the MANPs have encouraged Member States to develop a comprehensive strategy for aquaculture, with quantified targets for growth.

Evidence and argumentation

Responses to the OPC³⁹ about participation in the development and actual use of OMC tools indicate that the **MANPs** are the tools that have involved the largest number of stakeholders and that are the most widely used (25 respondents out of 42 participated in their development and/or

³⁹ See Annex 2

used them), followed by seminars and events (21 respondents), EU guidance documents (20 respondents, but with a smaller share of stakeholders involved in the development and a larger share of users), and finally the Strategic Guidelines and available documents on best practice (17 respondents each).

Feedback from the case studies show that the Strategic Guidelines contributed to focus national strategies on administrative issues and spatial planning. Even if MANPs are not always structured around the four EU specific objectives, the MANPs involved large consultations with the industry at national and regional level, and contributed to promote the priorities of the Strategic Guidelines.

Analysis of the actions set by MS in their MANPs also shows some convergence of strategies, especially for the first two specific objectives (administrative burden and spatial planning).

On the contrary, except for Greece, there is no evidence from the case studies, that authorities in charge relied significantly on **EU guidance documents**. They may have been used for transposition into national laws (especially the EU guidance for the implementation of the WFD and the MSD) but there has been little dissemination; and administrations in charge of administrative procedures and MSP, as well as the industry, tend to refer to the legislations rather than to the guidance documents.

4) Factors that influenced the achievements at national level and EU level.

Simplification of the licensing procedure can be hindered by complex regulatory frameworks and a significant number of entities involved. On the other hand, good collaboration between stakeholders can facilitate change. The general development of spatial planning regulation and tools contributes to improving spatial planning for aquaculture but its actual contribution to the sustainable development of aquaculture is limited by the competition for land and marine use, as well as low social acceptance. Targeted investments through the EMFF should have contributed to enhance the competitiveness of aquaculture but delays in the implementation have limited the impact. The main issues identified in terms of level-playing field are differences in requirements for products entering the EU market, which are not addressed through the OMC tools.

Evidence and argumentation

Simplify administrative procedures: the tight collaboration between administration and professionals has been identified as a key factor to establish new administrative processes. According to the NA survey, 17 out of 25 Member States that provided responses, declared to have established a platform for dialogue between industry and public administrations. These tools either existed before 2014 (4 cases) or have been implemented since, in order to foster collaboration between stakeholders with the objective to reduce the complexity of administrative procedures. On the contrary, the **complexity** of institutional and regulatory frameworks and the **number** of administrations involved have hindered improvements in this area. The issue of complex bureaucratic procedures was highlighted for example in the mid-term reports of Italy, Germany and Romania. The case studies in France, Greece and Spain also show that the large number of organisations involved results in lengthy procedures and also makes it more difficult to implement changes. The Polish administration established a new entity in 2018, which focuses on water management and administrative procedures related to water permits, including for aquaculture, with the objective to streamline and shorten procedures, but it is too early to assess the impact on the administrative processes. The information provided shows that the number of administrations involved has not been reduced between 2014-2016, which can be explained by the fact that it usually reflects the administrative organisation of the Member State and the allocation of competences among the

different organisations. The example of Galicia shows that even where one-stop-shops have been or are being set-up, it does not necessarily translate into a reduction of the overall number of administrations involved.

Coordinated spatial planning: the level of Member State experience in spatial planning is a key driver and pre-requisite for the integration of aquaculture in spatial planning. The difficulties encountered in Poland because of **the absence of maps** and databases in areas where inland aquaculture could be developed is a good illustration of this. The adoption by Member States of new **regulatory frameworks** for spatial planning also contributed to achievements in this area. Nevertheless, **land pressure** and, in the case of marine aquaculture, **competition for space** with other marine activities remain strong barriers. Conflicts can arise with other activities such as fishing (professional and recreational), tourism and other marine activities or among different aquaculture sectors. Therefore, the ability to identify suitable space for the development of aquaculture strongly depends on local policies and priorities, which can be different from the national strategy for aquaculture. Although conflicts of use exist for both inland and marine aquaculture, they appear to be stronger in the latter case. In some Member States, the **low social acceptance** of aquaculture and the controversial image of farmed products tend to disadvantage fish farmers in this competition for space. Spatial planning can also be more difficult to implement in **decentralised** Member States. For instance, in Spain, the central government has competence for the marine public domain but the Autonomous Communities (AC) have competence for the development of aquaculture, which raises legal issues about the implementation of the MSP Directive and the definition of areas of interest for aquaculture. Some Member States are trying to address the issue of conflicts of use, for instance through positive communication on aquaculture, by integrating aquaculture into tourism activities (e.g. *Taste the Atlantic route*⁴⁰ in Ireland) or by pre-empting possible changes of use when producers retire, so the property remains allocated to aquaculture (e.g. shellfish sector in France⁴¹), but these initiatives do not allow to identify potential new spaces for aquaculture. Other Member States are exploring developing **off-shore farms** as a way to limit conflicts of use (e.g. in Greece).

Enhancing the competitiveness of EU aquaculture: The key success factors to enhance the competitiveness of EU aquaculture are the access to funding, through public funding or access to credits, the level of knowledge about the aquaculture and industry in administrations and relevant private stakeholders (banks in particular), ability to find trained staff and access to space and licenses. The specific pillar for aquaculture under the EMFF has encouraged Member States to support targeted investments. However, this was hindered by delays and other difficulties encountered in the implementation of the EMFF. The negative image of some consumers towards aquaculture products can be another limiting factor. Marketing and communication campaigns were implemented to improve consumer's perception of aquaculture products (e.g. campaign for the *Label Rouge* in France, supported by the EMFF), but the main barriers (*i.e.* access to funding, space and licences) have not been really addressed.

Promoting a level playing field for EU operators by exploiting their competitive advantage: Success and hindering factors to promote a level playing field were difficult to identify as this priority was interpreted differently among Member States and was generally not well understood. Whereas the

⁴⁰ <https://www.wildatlanticway.com/highlights/taste-the-wild-atlantic-way>

⁴¹ in April 2018, in Brittany (France), in order to prevent land from being inaccessible to producers, the two Shellfish Regional Committees (Bretagne Sud and Bretagne Nord) signed a convention with the Société d'aménagement foncier et d'établissement rural (SAFER), a network of companies with a mission of public service, specialised in the sale of rural properties. According to this convention, the SAFER can intervene and buy an aquaculture farm and resell it later to another active producer. This would protect shellfish farming in terrestrial areas, and thus reduce pressures on space.

Strategic Guidelines implied that the Member States should improve the level playing field in particular through a better organisation of the sector, only few Member States included actions related to this aspect in their MANPs. The main issues usually highlighted by the industry in terms of level playing field are not addressed by the OMC tools: (1) Differences in production costs among EU Member States and with third countries (e.g. labour costs for France, extra costs on remote Greek islands); (2) Differences in legal requirements, in particular with third countries.

5) Impact of the OMC on the CFP objectives.

At this stage, the impact of the OMC on the wider objectives of the CFP can be considered marginal. Only few Member States could measure effects in terms of sector growth. Some of the measures of the MANPs are related to enhanced sustainability or food security, one Member State reported an increase in the number of organic farms under the competitiveness objective. The EU guidance should theoretically contribute to enhanced sustainability through a better and harmonised implementation of EU directives, but the information collected does not allow for a full assessment of its impact on the environment or long-term sustainability of aquaculture production. Likewise, the technical seminars and the high-level events addressed sustainability and food security issues, but impact will only be measurable in the long run.

The MANPs reflect the OMC specific objectives, therefore the measures implemented by Member States relate to those objectives by definition. More generally, the intermediate results observed at EU level (increased focus on administrative procedures and spatial planning, increased support to aquaculture through various EU programmes) should have a positive impact on the general objectives of the CFP.

6) Communication.

Although communication is a key tool to exploiting the high environmental, animal health and consumer protection standards in the EU, there has been little formal advice, standardisation or coordination on communication between Member States. The one exception is the ‘Farmed in the EU’ campaign, which includes some online resources, as well as a school project in around 10 EU Member States. There is some consistency over the nature of communication messages coming from Member States as a result of the OMC. The OMC supports the use of good communication for promoting the benefits and competitiveness of EU-farmed seafood. This can be provided through the MANPs, with some funding available via the EMFF⁴². However, in practice, there is limited evidence that improved communication at Member State level has been actively facilitated by the OMC. Some simple guidance, based on practical experience of communicating to stakeholders in similar primary industries, would be a useful addition to the OMC tool set.

5.2 EFFICIENCY

1) Reduction of administrative procedures in the Member States.

The three main actions taken to simplify administrative procedures have been (1) improvements to coordination within public administrations, (2) streamlining and reductions of administrative procedures, and (3) the provision of a platform for dialogue between industry and the public administration. Fewer Member States took actions to review assessment procedures, prolonging

⁴² Article 83 (c) and Article 91

license durations, align assessment procedures in different regions, and establish a mandatory timeframe for procedural steps. Only two Member States plan to set up a one-stop-shop in the future. There were other planned initiatives to support administrative simplification beyond what was described in the MANPs, confirming the wide-ranging set of initiatives to simplify administrative procedures across the Member States (simplifying the environmental regulatory framework, reforming aquaculture legislation, as well as developing data management and information systems).

However, the lack of quantitative information makes it difficult to confirm that administrative procedures have been reduced across the Member States. There is also an inherent difficulty in attributing any changes directly to the OMC. Nonetheless, the available evidence indicates that the impacts that can be identified relate to an increase in the number of new licenses and a decrease in the average time to complete licensing procedure.

Evidence and argumentation

Number of new licenses granted per year: Eleven Member States provided figures for both 2014 and 2016. In seven Member States (Greece, Croatia, Ireland, Romania, Spain, Sweden, UK) there was an increase in the number of new licenses in 2016, in three (Estonia, France, Portugal) there was a decrease and in one (Slovenia) the number of new licences granted was the same number in both years.

Success rate of applications for licenses: As only 11 Member States provided data, the survey provides an incomplete picture. However, the evidence suggests that four Member States (Greece, Ireland, Portugal, Sweden) had a higher success rate in 2016, one (UK) saw a decrease and four (Estonia, Croatia, Romania, Slovenia) reported the same numbers for both years⁴³.

Average time to complete licensing procedure in months: From the ten Member States that provided data for both years, six (Spain, Greece, Ireland, Portugal, Slovenia, UK) had a shorter average length of licensing procedure in 2016 than in 2014.

Number of public bodies involved in the authorisation procedure: Seven of the 12 Member States for which 2016 data is available had five or more public bodies participating in the authorisation procedure. However, the figures reported for both 2014 and 2016 were largely the same, indicating that the implementation of MANPs did not bring major changes to the management of authorisation procedures.

Average duration of a license: In 2016, the average license duration varied from ten years in Cyprus, Spain and Ireland to up to 50 years in Croatia. Among the 11 Member States that provided data for both 2014 and 2016, there were almost no change in the average duration of a license. The only exception was Greece, where the average license duration increased from ten to 20 years.

The lack of quantitative information (and the sparse data) makes it difficult to confirm improvements. However, the case studies largely confirmed the key findings from the NA survey. The evidence indicates that the actions simplifying administrative procedures had not much impact on the ease and speed of use of procedures and processes except for the number of new licenses and the average time to complete licensing procedures.

⁴³ Since the figures provided by Romania appear to be incorrect, they were excluded from this review. According to the data entered by the national administration of Romania, there were more new licenses granted than processed in Romania, while the success rate was 1%.

2) Cost savings from administrative simplification.

There is limited information on costs available, both by national administrations and other private stakeholders. There is some information on costs of licenses, although there does not seem to be a clear link between the simplification of administrative procedures and a decrease in costs of licenses, and private stakeholders in particular have not experienced a reduction in costs. There is some evidence to suggest that administrative simplification will result in time saved by administrations and operators, such as through shortening of licensing procedures and new authorisations. However, the limited available data shows that administrative simplification has not yet significantly resulted in cost savings for the aquaculture sector.

There is some evidence quantifying the average costs of licensing procedures for new businesses. Nine Member States provided data on this for 2014 and 2016⁴⁴, although not all nine provided data for both years. While in both 2014 and 2016 the procedure was free of charge in France and the UK, the costs were as high as €1,300 in Croatia and €15,000 in Greece for the year 2016. From 2014 to 2016, there were very little changes in the average costs of licensing procedure for new businesses in the seven Member States (Belgium, France, Greece, Croatia, Romania, Slovenia, UK) that provided the figures for both years. None of these seven Member States reported a decrease in costs in 2016 compared to the baseline year (2014).

The evidence from the case studies in the five Member States shows a complicated picture. In Greece, the experience of operators submitting requests following licencing procedures showed that the gain in time booked through simplification of legislation did not imply a proportional reduction in terms of costs. The direct cost remains the same or even higher for locations included in Natura 2000 areas. Similarly, in Spain, there was no evidence that simplifications in administrative procedures would result in increased cost savings, although according to the national authority cost savings could be expected from the increased use of IT tools.

3) Expected cost savings from further reductions in administrative burdens.

The further planned simplification measures are wide-ranging across the Member States. They include, for example, introducing or shortening the time limits for certain administrative procedures, improving the data collection and information systems, simplifying regulations, and improving coordination within the public administration.

There is no evidence to suggest that Member States have quantified the expected cost savings from the planned actions and there is an inherent difficulty in quantifying costs. Moreover, there is a lack of consensus among stakeholders on the potential impacts of future actions, for example in Greece, there was a general expectation that the establishment of Areas for Organised Development of Aquaculture (AODAs) would lead to cost savings and in Galicia the setting up of a one-stop-shop was expected to significantly improve processes, but some stakeholders were concerned about the potential for increased delays.

Given the limited evidence presented by stakeholders, including national administrations on actions planned in the next two years and possible savings, it is not possible to say with certainty that additional savings can be expected from planned improvements.

⁴⁴ The nine Member States that provided data were: Austria, Belgium, Spain, France, Greece, Croatia, Romania, Slovenia, UK.

4) Cost of engaging with the OMC.

It is difficult to quantify Member States' costs of engaging with the OMC. In general, however, it can be expected that the costs are minimal. Nevertheless, there is evidence that stakeholders see the OMC as a benefit, emphasising the added value of the mechanism compared to what could be achieved without EU action. There is, therefore, a strong sense that the benefits provided justify time and resources committed by Member States, particularly as the OMC facilitated more cooperation and mutual learning.

There is no evidence to confirm the costs in terms of time and resources at Member State level. In France, it was noted that the financial resources available are often limited to implement all the actions included in the MANP. In general, however, it can be expected that Member States' costs are minimal.

There is no evidence to confirm that the costs of engaging with the OMC are compensated by the benefits that are generated at Member State and EU level. However, most stakeholders consulted considered that the OMC is a benefit and emphasised its added value compared to what could be achieved by Member States at national/regional level without EU action. The OMC facilitated a common approach as well as more cooperation and mutual learning. The OMC also helped to ensure that Member States are more aligned with EU policies and objectives and provided a platform for Member States to exchange information and experiences.

5) Good practices and difficulties influencing the efficiency of the changes to the administrative procedures.

The two main good practices were: setting up coordination bodies and making legislative reforms.

The main difficulties include the complexity of the regulatory landscape, the level of decentralisation, and the lack of coordination between institutions. Lack of cooperation and coordination among institutions, including in highly decentralised Member States, inhibits the development of an overarching framework to make administrative changes and makes administrative procedures particularly burdensome for industry.

The main factors supporting increased administrative simplification relate to the existence and set up of coordinating bodies and legislative changes. In some Member States, such as Greece, Ireland, Sweden and the UK, legislative reforms are the drivers of administrative simplifications. For example, Sweden simplified the animal health regulations by merging four legislative acts into one while Greece has simplified administrative procedures through the law 4282/2014 (entitled aquaculture development and other provisions).

The factors that limited administrative simplifications include the complexity of the regulatory landscape, the level of decentralisation, and the lack of coordination between institutions. **In France**, there are a large number of regulations governing aquaculture activities. Administrative procedures are different according to the types of farming practiced and the decentralisation of aquaculture management means that several authorities could intervene in any application. The decentralised landscape of the management of the aquaculture sector in **Spain's** ACs also limits administrative simplification. The ACs have exclusive competence for aquaculture, such that actions implemented at national level are mainly limited to coordination and harmonisation effects (e.g. IT harmonisation, guidelines, exchange of information, etc.). This coordination requires feedback and contributions, which can be varied as it is dependent on the capacity and relative importance of aquaculture in each AC. Lack of coordination is also an issue in **Poland**.

Documents are issued by various independent institutions not cooperating with each other. Although there is no licence system in Poland, growers complain about the multitude of documents that they have to produce.

5.3 COHERENCE

1) The OMC and its tools are fully coherent with the reformed CFP and its strategic objectives. The CFP's strategic priorities include ensuring that “*aquaculture activities contribute to long-term environmental, economic, and social sustainability*” and “*Aquaculture should contribute to the preservation of the food production potential on a sustainable basis throughout the Union*”. The CFP also recognises that the Commission's Strategy for the Sustainable Development of European Aquaculture (adopted in 2009) is the key starting point for the OMC, providing the basis for the Strategic Guidelines. The subsequent MANPs are also an explicit tool for promoting sustainable aquaculture (under Art. 34). The reformed CFP states the need for Member States to exchange information and best practises through the OMC and it outlines the role of the Commission in encouraging the exchange of information and best practices among Member States and the coordination of national measures foreseen in the MANPs.

Evidence and argumentation

Unlike wild fisheries management, the EU shares competence for aquaculture management, with the primary competence lying with the Member States. Therefore, there was a need for a coordinated approach to ensuring sustainable development across the EU, as well as remaining competitive in a global market. The OMC was developed to fulfil this purpose through a voluntary approach. It is also considered a ‘joined up’, sequential approach in that the Strategic Guidelines established the key objectives of the OMC following considerable stakeholder input, and that public financial support through the EMFF built upon this strategy. This was further reinforced by the development of the MANPs at Member State level, which again was fully coherent with the earlier strategy and Strategic Guidelines.

The main tools of the OMC are (i) the Strategic Guidelines, (ii) the design and implementation of the MANPs, and (iii) the exchange of good practices within and between Member States. These tools have been delivered sequentially and are fully consistent and interrelated:

1. The Strategic Guidelines, which included an outline structure of the MANPs, linkages to the EMFF Operational Programmes and the introduction of ‘exchange of best practices’ based around technical seminars.
2. The MANPs were developed in preparation of the EMFF OPs (and are an ex-ante conditionality for EMFF fund eligibility) and explicitly based around the specific objectives of the OMC and thus effectively enforce coherence with the Strategic Guidelines.
3. The exchange of good practice is linked to the MANPs, in that Member States are encouraged to submit three proposals of good practice in their MANP. The Commission organises, at least once a year, technical seminars to present the selected good practices and exchange information between Member States.

The five case studies noted that this process was a logical and functional approach and that the main OMC tools are synergistic.

The overlap between the CFP and the OMC is limited. However, although the CFP is EU policy

and aquaculture management via the OMC is a voluntary process, the reformed CFP⁴⁵ which entered into force on 1 January 2014 does include aquaculture in its scope. It states that “*the CFP should ensure that fishing and aquaculture activities contribute to long-term environmental, economic, and social sustainability*”. The CFP also explicitly recognises the role of the OMC, stating in paragraph 55 that “*Union Strategic Guidelines for national strategic plans should be developed to improve the competitiveness of the aquaculture industry, supporting its development and innovation, and encouraging economic activity, diversification and improving the quality of life in coastal and inland areas. Furthermore, mechanisms should be introduced for the exchange between Member States of information and best practices through an **open method of coordination** of national measures concerning business security, access to Union waters and space, and the simplification of licensing procedures*”. This is defined in more precise terms in Art. 34 (promoting sustainable aquaculture), where the role of MANPs is explained and that “*Member States shall exchange information and best practices through an open method of coordination of the national measures contained in multiannual national strategic plans*”. The nature and role of an Advisory Council for aquaculture is also explicitly required and detailed in the reformed CFP.

2) The EMFF Regulation is fully coherent with the specific objectives of the OMC. It has a similar origin, in that it was designed to support implementation of the reformed CFP, replacing various previous financial mechanisms and merging policy direction with the Integrated Maritime Policy (IMP) Regulation⁴⁶. The EMFF Regulation also explicitly recognises the role of the Strategic Guidelines, stating that “*the EMFF should support the environmentally, economically and socially sustainable development of the aquaculture industry*”⁴⁷. With MANPs being an ex-ante conditionality for EMFF funding, the structure and policy objectives of the OMC are further integrated into aquaculture development at Member State level.

Evidence and argumentation

Given the structural integration of the EMFF as a support tool to the reformed CFP and the latter’s goal of ensuring that “*aquaculture activities contribute to long-term environmental, economic, and social sustainability*”, there was broad consensus that the OMC objectives are fully coherent with the EMFF Regulation. In particular, it was noted that the OMC has a strong role in ensuring that Member State MANPs were fully aligned with the Strategic Guidelines and thus integrated into the Member State EMFF OPs.

The EMFF Regulation was adopted a year after the Strategic Guidelines were published and the same year as the reformed CFP entered into force (2014). The EMFF Regulation intends to support the implementation of the CFP and includes aquaculture within its scope. Aquaculture support is provided under the shared management component, although the AAC is funded via direct management. The EMFF Regulation recognises the role of the Strategic Guidelines, stating that “*the EMFF should support the environmentally, economically and socially sustainable development of the aquaculture industry*”. In recital 49, the EMFF Regulation focuses on financial assistance on SMEs, and specifically refers to increasing the competitiveness and economic performance of aquaculture activities. Recital 51 notes the role of the EMFF in supporting the definition and mapping of [aquaculture] zones, thus contributing to maritime spatial planning.

The EMFF Regulation also sets out six Union Priorities (UP) for the sustainable development of

⁴⁵ Regulation (EU) No 1380/2013

⁴⁶ Regulation (EU) No. 1255/2011

⁴⁷ Recital (47)

fisheries and aquaculture, which includes “*Fostering environmentally sustainable, resource-efficient, innovative, competitive and knowledge-based aquaculture*”, which lays the basis for the subsequent Chapter II on the sustainable development of aquaculture (see table below).

Key aspects of the EMFF Regulation Chapter II (Art. 45 – 57) relevant to the OMC include:

Specific Objectives of the OMC	EMFF Regulation
Simplifying administrative procedures (reducing administrative burdens)	<ul style="list-style-type: none"> • Provides integrated financing of CFP and IMP expenditure. • The ex-ante conditionality for the development of MANPs ensures that a strategic approach to reduce administrative burden is reflected in Member State EMFF OPs.
Securing sustainable development and growth of aquaculture through coordinated spatial planning (improving access to space and water)	<ul style="list-style-type: none"> • EMFF support in marine protected areas is only eligible if an environmental impact assessment (EIA) shows that there is no negative environmental impact that cannot be adequately mitigated (Art. 46(5)). • Identification and mapping of the most suitable areas for developing aquaculture (Art. 51).
Enhancing the competitiveness of EU aquaculture	<ul style="list-style-type: none"> • Innovation e.g. technical, new species development, new or improved processes, etc. (Art. 47). • Modernisation and diversification of aquaculture & species cultured (Art. 48). • Increasing energy efficiency (Art. 48). • Support organic or energy-efficient aquaculture (Art. 53). • Reduce risk through aquaculture stock insurance (Art. 57).
Promoting a level playing field for EU operators by exploiting their competitive advantages (high quality, health and environmental standards).	<ul style="list-style-type: none"> • Reducing environmental impact (Art. 48) and support for EIAs (Art. 49). • Enhance the quality of, and adding value to, aquaculture products (Art. 48). • Improving health and safety standards (Art 49). • Supporting public health measures (Art. 55). • Foster animal health and welfare (Art. 56).

The MANPs are also closely related and complementary to the OPs of the EMFF, as:

- Article 18 of the EMFF provides that SWOT analyses of the OPs shall be consistent with the MANPs.
- Article 48(3) of the EMFF restricts the eligibility of measures for the increase in production and/or modernisation of existing aquaculture enterprises, or for the construction of new ones to operations that are consistent with the multiannual national strategic plan for the development of aquaculture.
- Annex IV of the EMFF makes the establishment of a MANP on aquaculture an ex-ante conditionality for the use of UP2 of the EMFF. A MANP had to be transmitted to the Commission at the latest by the day of transmission of the OP. The OP has to also include information on the complementarities with the MANP on aquaculture.
- The EMFF shall be a major source of financing for initiatives foreseen in the MANPs (see also Section 4.2 of the Strategic Guidelines for the sustainable development of EU aquaculture).

The EMFF Regulation is entirely consistent with the specific objectives of the OMC. This is logic since they both emerged over a similar time period and are underpinned by the reformed CFP and its pre-cursor developments.

3) There are no major inconsistencies in policy texts concerning (i) environment, (ii) food safety, (iii) animal health and welfare and (iv) research and innovation. EU strategic thinking on sustainable aquaculture development is implicit both in the reformed CFP and the Strategic Guidelines. Both of these key processes emerged after the Birds and Habitats Directives (1992), WFD (2000) and MSFD (2008) and thus are broadly coherent with these cornerstone environmental directives. Much of the current policy directives and funding mechanisms are aligned with Europe 2020, and with the synchronisation of public funding through the EU cohesion mechanism, specifically the Common Provisions Regulation⁴⁸ over the 2014 – 2020 period. This has helped enforce complementarity and coherence between the EMFF and other EU regulations in the environment, food safety and animal health and welfare in particular.

Evidence and argumentation

Although competence for aquaculture management is shared with the Member States, many related policy areas are set at EU level. These include:

1. **Fisheries:** Common Fisheries Policy;
2. **Environment:** Birds and Habitats Directives⁴⁹ ensuring that aquaculture is not environmentally damaging in Special Areas of Conservation (SACs) and Special Protected Areas (SPAs), MSFD⁵⁰ and the WFD⁵¹ aiming at improving water quality and aiming at ‘good ecological status’ in inshore coastal waters, estuaries, rivers and ground water and at “good environmental

⁴⁸ Regulation No 1303/2013

⁴⁹ Directive 92/43/EEC

⁵⁰ Directive 2008/56/EC

⁵¹ Directive 2000/60/EC

status” in marine waters.

3. **Food safety:** General Food Law⁵²;
4. **Animal health and welfare:** Protection of animals kept for farming purposes⁵³, European Strategy for the Protection and Welfare of Animals 2012-2015⁵⁴, Council Directive on animal health requirements for aquaculture animals and products thereof, and on the prevention and control of certain diseases in aquatic animals⁵⁵, Regulation on transmissible animal diseases and amending and repealing certain acts in the area of animal health (the ‘Animal Health Law’⁵⁶);
5. **Research and innovation:** Europe 2020; Horizon 2020.

The evaluators could not find any significant inconsistencies between the Strategic Guidelines and the abovementioned policies.

Environmental protection and sustainability are strongly built into the CFP and relative instruments such as the EMFF. In 2010, a gap analysis assessed the adequacy of EU legislation to address the key pressures related to aquaculture (e.g. introduction of alien species, changes in water biochemistry etc), and no significant regulatory gaps were detected⁵⁷. This review includes the Birds and Habitats Directives, MSFD and WFD and is thus still relevant. In 2012 the Commission produced a ‘Guidance document on aquaculture activities in the Natura 2000 Network’⁵⁸. Another review into the legal and regulatory constraints in EU aquaculture⁵⁹ noted Member States’ concern over the ability of the WFD to provide the same level of protection as the Shellfish Waters Directive that was repealed in 2013 as the WFD became better consolidated. In 2016 the Commission produced a Commission Staff Working Document on the application of the WFD and the MSFD in relation to aquaculture⁶⁰.

Food safety is an important issue for aquaculture, especially given the extensive trade in fresh seafood products, including highly perishable items such as shellfish and oily finfish (e.g. salmon). The Food and Veterinary Office in the Commission and the Rapid Alert System for Food and Feed (RASFF) both cover aquaculture products.

Research and innovation are a key part of the OMC’s objective to remain competitive. As discussed above, mechanisms to fund innovation and research in aquaculture are part of the EMFF, and “Competitive and environmentally-friendly European aquaculture” is a specific topic under Horizon 2020, most recently under a ‘Blue Growth’ banner.

52 Regulation (EC) No 178/2002

53 Council Directive 98/58/EC

54 COM(2012) 6 final

55 Council Directive 2006/88/EC of 24 October 2006

56 Regulation (EU) 2016/429

57 Huntington et al, 2010: Huntington, T., R. Cappell, J. McCue, K. Winnard, P. Tett, J. McCue, C. Hedley, S. Payne, M. van Rijswijk, S. Comber and L. Griffiths (2010). ‘Impacts and pressures by aquaculture activities: evaluation, relations with good environmental status and assessment of the EU responses. Final Report to the DG Environment of the European Commission. 30 pages plus appendices.

58 http://ec.europa.eu/environment/nature/natura2000/management/docs/Aqua-N2000_guide.pdf

59 Hedley and Huntington, 2009 Hedley, C., and T. Huntington (2009). Regulatory and legal constraints for European aquaculture. Directorate General for Internal Policies, Policy Department B: Structural and Cohesion Policies, European Parliament. IP/B/PECH/NT/2008_176. 91 pp plus appendices.

60 SWD (2016) 178 final

EU policies affecting aquaculture are coherent. However a couple of minor issues were noted:

- The OMC is lacking quantified targets in terms of reaching its specific objectives, and how they relate to other policy targets. It is recognised that this was probably not possible nor advisable at the time, but any revision of the OMC should consider broad targets, both for aquaculture and related policy areas.
- A number of MANPs were seen to lack recognition of the possible environmental consequences of some of the actions. It is recommended that this is addressed in the context of the Strategic Environmental Assessment (SEA) for the next generation of EMFF programmes, as consistency between such programmes and MANPs is required in Article 23 (2) of the Commission’s proposal for the 2020-2027 programming period⁶¹.

Evidence and argumentation

In France, EMFF funding (via Art. 58) has been used to support communication, especially on the benefits of their *Label Rouge* ecolabel when used with farmed seafood. Through this approach, the trout market has experienced significant growth in terms of value. This approach has been similar to that adopted in **Spain and Greece**, although there has been less dependence upon third-party certification, and more on (i) the role of POs in promoting the products from particular aquaculture segments (e.g. shellfish), (ii) improving labelling and traceability and (iii) promoting linkages between aquaculture and tourism. **In Ireland**, the latter theme is also common. The government agency *Bord Iascaigh Mhara* (BIM) is proposing an EMFF-funded project focussing on improving communication concerning aquaculture. Working closely with the European Commission’s ‘Farmed in the EU’ initiative, this study will assess the economic and societal benefits of aquaculture to coastal and rural communities. **In Spain**, the MANP highlighted the absence of strategic, sectorial communication and of specialised communication professionals in this field. As a result, a “National Plan for the Communication on Spanish Aquaculture” was put in place under the ‘level-playing field’ priority, with 21 specific actions initiated to date. In Spain, it was also noted that development of the “*Acuivisor* online GIS aquaculture planning tool” had limited levels of stakeholder communication and validation to date.

5) What about the coherence between Member States’ aquaculture objectives and their environmental policy objectives ?

EU environmental objectives (as provided via the Birds and Habitats Directives, the WFD and the MSFD) apply to aquaculture. Whilst environmental sustainability is a common theme running through the MANPs, there is little evidence of any formal, systematic analysis ensuring coherence between environmental issues and aquaculture development.

Evidence and argumentation

The Strategic Guidelines stated that aquaculture is dependent on clean and healthy marine and fresh waters and that EU environmental legislation – in particular the WFD, the MSFD and the Regulation concerning use of alien and locally absent species in aquaculture - ensures that these preconditions are met⁶². There has been previous work on the subject^{63, 64}, and in 2016 the

⁶¹ COM(2018)390 final

⁶² para. 1, page 3

⁶³ See Huntington, T., H. Roberts, N. Cousins, V. Pitta, N. Marchesi, A. Sanmamed, T. Hunter-Rowe, T. Fernandes, P. Tett, J. McCue and N. Brockie (2006). ‘Some Aspects of the Environmental Impact of

European Commission produced a Commission Staff Working Document on the application of the WFD and the MSFD in relation to aquaculture⁶⁵.

The suggested outline structure for MANPs - provided as an Annex to the Strategic Guidelines - does not provide specific guidance on how ‘national environmental objectives’ are defined, how environmental considerations should be included in the MANPs, how they might be related to specific aquaculture objectives nor any discussion of the possible trade-offs that might have to be considered as a result.

A review of the results of the targeted consultations with the NA suggests that there was little cross analysis of aquaculture development objectives and environmental considerations (or objectives, as set out in the Birds and Habitats Directives, the WFD or the MSFD). An examination of the MANPs from the five case study countries confirms this. For example, in **Ireland** there is no cross-analysis of aquaculture development and environmental management objectives in the early framework and context setting sections. However, there is a section on ‘Ensuring Sustainability’, which does specifically require that aquaculture monitoring is consistent with the requirements of the MSFD. The **French** MANP did include the ‘sustainability of aquaculture ecosystems’ as an objective and refers to the role of the WFD in assessing water quality. The **Spanish** MANP includes a general principle that sustainability is a pre-requisite for competitiveness and includes a specific objective on ‘Strengthening of environmental aspects’. No environmental objectives were set in **Poland** due to the lack of information on the environmental impacts of aquaculture, especially for traditional carp farming systems.

MANPs and their mid-term reviews rarely provide any details of ‘national environmental objectives’. On this basis, it is not possible to say whether they are contradictory or not. Likewise, the MANP mid-term reports usually provide little information on whether environmental aspects are being assessed as part of the spatial planning initiatives (with the positive exception of Cyprus⁶⁶).

5.4 RELEVANCE

1) **The OMC is still the most appropriate and relevant tool to address barriers to sustainable aquaculture across the EU.** The OMC has, through the Strategic Guidelines and the EMFF ex-ante conditional MANPs, provided a common but largely relevant development framework across the EU. It is also valued for its participatory nature and the non-prescriptive approach. However, the needs of the sector have changed since 2013 and this should be taken into account. In addition, the potential of non-food production⁶⁷ (e.g. algae, seaweeds for value added products, biotechnology) should be recognised and the linkages with the EU’s ‘Blue Growth’ agenda should be incorporated.

Evidence and argumentation

The ex-ante conditionality for the development of MANPs to access EMFF funding has been a useful mechanism to encourage Member States to develop commonly structured high-level strategic plans for

Aquaculture in Sensitive Areas’. Report to the DG Fish and Maritime Affairs of the European Commission.

See https://ec.europa.eu/fisheries/sites/fisheries/files/docs/publications/aquaculture_environment_2006_en.pdf

⁶⁴ <http://ec.europa.eu/environment/nature/natura2000/management/docs/Aqua-N2000%20guide.pdf>

⁶⁵ SWD (2016) 178 final.

⁶⁶ Cyprus not only designated a new aquaculture zone but also carried out the associated environmental impact study, which should be considered a good practice example.

⁶⁷ See ‘Food from the Oceans’ https://ec.europa.eu/research/sam/pdf/sam_food-from-oceans_report.pdf

aquaculture development going beyond the identification of needs related to funding possibilities. It has really contributed to define strategies in terms of administrative simplification and spatial planning.

The five case studies were unanimous in their support for the OMC process and its continued relevance to supporting sustainable aquaculture development. Whilst the process is still relevant and appropriate, there is a need for some change. For instance, the current feeling **in Ireland** is that the process needs to be refreshed, possibly through an update of the Strategic Guidelines that could prepare for new MANPs. It should address emerging issues, such as the need for a more integrated approach to aquaculture development in coastal and inland economies, as well as a move to new systems that are both adaptive and resilient to climate change, as well as being responsive to changing consumer needs. **France** raised a number of issues related to the relevance of the OMC such as (1) the need for an in-depth benchmarking of administrative procedures in all Member States, (2) the need for environmental experts to participate in OMC meetings, (3) the lack of resources that could be an important barrier to finance all actions recommended by the MANP and (4) the fact that the EMFF could be used with a more strategic approach, by supporting collective projects, new installations and the development of new technologies and innovative production methods.

2) The OMC needs to evolve in two key ways.

(1) The Specific OMC objectives (= priorities of the Strategic Guidelines) remain highly relevant: administrative simplification is considered a top priority, spatial planning continues to be a high priority, enhancing the competitiveness of EU aquaculture is still relevant and promoting a level playing field remains relevant although it is not always well understood. In addition there are other emerging issues that need addressing, such as the emergence of non-food aquaculture, and the role of aquaculture in the wider IMP/blue growth environment. In order to ensure that MANPs reflect this change, the Strategic Guidelines need to be reviewed and refreshed.

(2) The tools and processes as encompassed by the operational objectives of the OMC also need to evolve. Their generic nature means they remain relevant, but they need more structure and presence.

Evidence and argumentation

Eight persons from EU public authorities responded to the OPC and ranked the continued need for administrative simplification as highest of six criteria explored. Improving communication campaigns for EU aquaculture was ranked second, whilst spatial planning was ranked last.

The five case studies also considered the continued relevance of the four specific objectives:

- a. **Simplify the administrative burden:** In Ireland, delays in aquaculture licensing, and implementation of the recommendations of the Independent Aquaculture Licensing Review are still considered as top priority. In France administrative simplification is considered a long-term aim, and thus needs to be continued. In Spain respondents considered that administrative simplification is still relevant.
- b. **Securing sustainable development and growth of aquaculture through coordinated spatial planning:** Spatial planning continues to be a high priority in Greece, as disagreements over planning priorities in coastal areas still inhibits aquaculture development. A key future need is to develop local capacity in MSP in line with the MSP Directive requirements. In Ireland MSP is also still highly relevant, especially as Ireland moves beyond its current ‘MSP Roadmap’ and

starts to develop its national MSP plan in readiness for the 2021 EU deadline imposed by the MSP Directive. France indicated that MSP is also considered a long-term aim, and thus needs to be continued.

- c. **Enhancing the competitiveness of EU aquaculture:** In Ireland the industry considered that measures to improve competitiveness are still relevant, but they are not really addressed by the OMC to date. In particular there is a need to address the lack of scale in Irish aquaculture by building on specific issues like low-density farming and organic farming. In France this is considered one of the most challenging objectives and maintaining linkages with the EMFF is key. In Greece, competitiveness is strongly linked to resolving the spatial planning ‘bottleneck’, especially when compared to other Mediterranean countries.
- d. **Promoting a level playing field for EU operators by exploiting their competitive advantages:** In Ireland development of a level-playing field was not part of the MANP, and stakeholder responses suggest that the concept itself is difficult to understand. In Greece the level playing field issue is considered to remain relevant, but the Greek aquaculture industry thinks rather of level playing field in European dimension. It has been emphasized from all operators that the Greek industry suffers from unfair competition from non-EU countries which have privileged export status to the European markets without the obligations of the EU producers.

One of the common lessons learned from the interviews with the MS authorities is the benefit of the holistic yet non-prescriptive approach of the OMC. This means that these generic tools can be applied in each MS at a level and in a way suitable for local conditions. It also allows the OMC to focus on new and emerging issues relevant to one or more MS. With such a wide bio-geographical area covered by the EU, there will always be different development and management priorities, but so long as the EU remains responsive to stakeholder needs, the system is considered sufficiently flexible.

A key mechanism to ensuring realistic and sustainable investments at EU and national level is the linkage with the EMFF. It is important that the Strategic Guidelines are reviewed before the next funding period starts. The MANPs will also require discussion in order to ensure it fully captures the emerging needs and requirements.

3) The current OMC tools are still appropriate and relevant to the sector but they could be better tailored to address the current needs of the sector. Their adaptive and participatory nature has made them a valuable approach to cross-fertilising good practice and innovative solutions across EU aquaculture. However, they do need to evolve to have greater regional impact, as well as responding to demand to address new challenges as they emerge. This may require the development of new tools to inform and enable stakeholders to contribute to the objectives of the OMC.

Existing tools could be better tailored in the following way:

1. **High level events on aquaculture** have limited lower-tier industry and SME industry involvement, especially for those sub-sectors dominated by SMEs. It is necessary to find new mechanisms – including at national level, to reach all parts of the industry. Greater use could be made of the outputs, both at EU and MS levels, to ensure they are better communicated across and down the sector. Further efforts could be made to ensure that a wide range of subject matters are regularly reviewed, prioritized and allocated to the appropriate fora.
2. **Technical seminars:** are useful for aligning MS administrations with EU legislation, especially

associated with the EMFF, key EU environmental legislation, the MSP Directive, as well as with EU data collection requirements. A greater focus on specific issues, rather than generic guidance, was voiced. The current participatory system to identify and prioritise subjects of common interest to EU Member States needs to be systemised to ensure that finite resources for seminars and meetings are spent effectively and to a wide audience across the different EU aquaculture stakeholders as possible.

3. **Guidance on relevant EU environmental legislation** is too general and not focused on specific legal issues that are commonly encountered across a range of Member States. A similar situation exists for spatial planning, which is likely to become more acute as the March 2021 MSP Directive deadline draws nearer, and practical difficulties in including aquaculture at local level MSP become more apparent.
 4. The OMC should have a **greater regional focus** especially in the area of MSP which will require local, rather than national aquaculture spatial planning solutions. This suggests that the regional approach needs to be extended 'up' the OMC process e.g. to be made implicit in the MANPs.
 5. **Communication:** a number of the communication tools have been poorly disseminated and are only available in English. More effort should be made to organize outputs e.g. via some form of portal and meta-database, with documents translated into different EU languages if demand exists. The 'Farmed in the EU' initiative has shown that communication with concerned citizens and consumers is a valid tool, especially when linked to the younger generations via school-based campaigns. It should be taken up by Member States, especially in cooperation with aquaculture-related POs. This also infers a role of the EMFF in funding such initiatives, thus requiring a scoping and prioritisation process via the MANPs.
 6. **New mechanisms** to make the OMC relevant to more **disconnected stakeholders** are required. They will need to be demand-led, suitable (e.g. the internet is still not widely used by all stakeholders, although this situation is changing) and adaptive. Information portals and toolboxes are useful for stakeholders to understand the implications and necessary responses to new EU and national legislation affecting their aquaculture businesses and again need to be developed on a demand-led basis.
- 4) **There is some pressure to better engage regional stakeholders in the OMC processes.** To some extent, this is already occurring, with national authorities coordinating with their regional counterpart bodies to reflect the OMC specific objectives in their local planning and development support functions. However, it is far from systematic, and there is no doubt that lower-tier stakeholder feel disconnected from the OMC. This is not deliberate (the EMFF support to aquaculture is specifically aimed at smaller businesses) but is largely the consequence of the OMC being a relatively low budget and voluntary approach.

One approach to encouraging a more systematic access to regional and local authorities (and other stakeholders) is by asking each Member State to develop a structured stakeholder communication and outreach programme into the MANPs. But this process itself needs to be fully participatory to ensure it is balanced, needs driven and not seen as too prescriptive.

Evidence and argumentation

The evaluation focused mainly on the role of regional authorities and their progress on enhancing coordinated spatial planning. Of the 24 MS authority respondents, 16 had or were going to share

best practices at regional / local levels, whilst eight considered it either not applicable or undesirable. Seven national administrations indicated that they aim to promote the use of common criteria for the identification of aquaculture sites at regional and local level by 2020, although only six Member States have already taken this action.

Outside MSP, in **Italy** regional ‘one stop shops’ have been set up in some areas for site licensing. Other MS, such as **Croatia**, have adapted their national aquaculture laws to include a regional dimension. Others (**CZ, DE**) have tried to promote regional aquaculture products via branding and promotional schemes. Another approach has been linking the Fisheries Local Action Groups (FLAGs) with the local aquaculture sector to access EMFF funding for community-led local development. In the **UK** there has been an attempt to promote partnerships between the devolved administrations, growers and research bodies to drive competitiveness in the sector. In summary, where deemed necessary, Member States have tried to devolve responsibility for some aspects of the OMC to regional level, especially in licensing and MSP. However, others, such as **Ireland**, have decided that a single, centralised approach is more efficient and less prone to contradictory approaches merging at regional levels. In the end there is no single ‘best’ approach, as the structure, geography and make-up of regional governance varies so much within the EU Member States.

One issue is the diversity of regional management and its extent through the EU. For instance, in Ireland the sector is managed at central level, whilst some other countries have some level of devolved government at regional and departmental levels. In term of aquaculture management, this devolvement may take a number of forms, including developing sub-plans for local implementation of the MANPs, local spatial planning for marine and inland aquaculture, and establishing ‘one stop shops’ for aquaculture and environmental permitting.

There was a willingness to engage regional and local authorities further with the OMC, but only if this did not interfere with or contradict national level activities. This was echoed by the national authorities who preferred to coordinate this activity from a central level to ensure a united front.

One possible method of increasing and formalising regional involvement in the OMC is via the MANPs. The current guidance (from the Strategic Guidelines) includes a section of ‘Governance and partnership’, including key contributions from the main actors involved (regional and / or local authorities, industry, stakeholders and NGOs). This could be made explicit, requesting a more formal communication and outreach plan for OMC related activities, including who should be involved in sector decision-making, the means by which this will be achieved and how this can be enabled. The problem with this is that it is moving towards a more prescriptive approach, so any such approach needs to be carefully formulated in consultation with the stakeholders themselves.

5. 5 EU ADDED VALUE

1) EU Added value resulting from the OMC.

The OMC has facilitated a common approach as well as more cooperation and mutual learning. The technical seminars in particular are useful in demonstrating that there are common issues and constraints faced by other Member States. The OMC has also ensured that Member States are more aligned with EU policies and objectives and provides a platform for Member States to exchange experiences. The non-binding and bottom-up nature of the OMC is well-regarded, as it is considered to be responsive to Member States’ needs and consistent with the expectations of industry. Despite initial results achieved in addressing the four specific objectives across Member States, there is a difficulty in attributing causality of results directly to the OMC. The OMC has given the European Commission a

much more in-depth understanding of the evolution of the aquaculture sector at Member State level.

Evidence and argumentation

All stakeholders consulted overwhelmingly accept that there are key benefits to the OMC, emphasising the added value of the mechanism compared to what could be achieved by Member States at national/regional level without EU action. They underline that without the OMC, it would take longer for Member States to address the specific objectives by themselves. As emerged from the case study in Spain, stakeholders agree that the aquaculture sector would be worse without the OMC. The case study in France highlighted that the OMC has provided a common and relevant development framework across the EU, allowing stakeholders to concentrate existing efforts and initiatives in a common strategic framework and encouraging stakeholders to take part in its implementation. Before the OMC, the Commission's information on aquaculture was limited to EMFF actions. The OMC has enabled the EU to support national-level progress and has facilitated a more common approach that would otherwise not be there.

2) Do the needs of the aquaculture sector addressed by the OMC still require action at EU level ?

EU level action is still required to address the issues faced by the aquaculture sector, which are addressed by the OMC (simplified administrative procedures, spatial planning, competitiveness). Although Member States are at different stages of aquaculture development, many of the problems faced relate to administrative burdens, overall sector planning and coordination which are issues that require EU-level support and that the OMC aims to address. However, the sector is evolving, and the focus of the OMC needs to be considered in this light and brought up to date. Improvements could be made to the scope of the OMC, which would strengthen its EU added-value. The meaning of "enhancing competitiveness" and "creating a level-playing field" should be clarified and a focus on the European environmental directives, border controls, and labelling and traceability of EU aquaculture products should be included.

Evidence and argumentation

Member States confirm that EU level support will continue to add value and is still necessary to meet the needs of the sector. Several issues were identified that are not addressed yet and that could bring additional EU added value notably: several Member States are still hampered by bureaucracy especially at the regional level, the objective of 'level playing field' is not universally understood and needs clarification, EU aquaculture products need to be better labelled and traceable, there are concerns about competition from third countries leading to cheaper imports in the EU, there is a need for a more integrated approach to aquaculture development in coastal and inland economics, a regional approach could be helpful to address some challenges, and the image of aquaculture still needs to be improved.

Most of these points were also raised during the public consultation: 78.5% noted that simplified administrative procedures is one of the areas that most requires improvements, 67% of stakeholders suggested there is a strong need⁶⁸ for improved communication campaigns on domestic aquaculture. Complicated and time-consuming administrative procedures (e.g. licensing), competition from outside the EU and communication to consumers about aquaculture were selected by stakeholders as some of the factors most affecting the sustainable development of

⁶⁸ 'Strong need' is defined as respondents who selected the rating '4' or '5'.

aquaculture⁶⁹.

The need for further guidance on the application of the European environmental directives (mainly the MSFD and the WFD) to the aquaculture sector was highlighted by stakeholders in France. Another issue raised by stakeholders in Poland concerns border controls: reliable and thorough controls (biological, genetic and documentary control) on fish entering the EU market is needed in order to prevent the presence of antibiotics and other prohibited substances, as well as the spread of diseases.

6. CONCLUSIONS

This section summarises the main conclusions of the evaluation.

Effectiveness

- **The four priorities of the Strategic Guidelines were addressed in most MANPs.** Even in Member States that drafted their strategy around priorities defined at national level, there has been specific attention to cover the issue defined in the Strategic Guidelines.
- **The level of achievement of the MANPs' objectives at this stage is difficult to assess** as there were few quantified targets (and none for mid-term), and because actions planned under the MANPs often involve long-term processes. The overall level of achievement can therefore only be measured through the percentage of national actions expected to be partially or fully achieved by 2020 under each of the four priorities. A majority of those actions are expected to be partially achieved by 2020, with a better level of achievement for the *administrative simplification* and *spatial planning* objectives, than for *competitiveness* and *level-playing field*.
- **Measurable results or impacts at this stage are still limited.** The number of processed aquaculture applications, new licenses and success rates have improved in some Member States. The duration of licensing procedures has decreased in six Member States. Ten Member States reported an increase of the surface covered by spatial planning, even if marginal.
- **The targets set in the Strategic Guidelines have been partially achieved.** Almost all Member States drafted a MANP and set quantified objectives for growth in the sector. *Administrative procedures* have been analysed, bottlenecks have been identified, there has been progress at national level towards simplification of administrative procedures and there is a better monitoring of some key indicators at EU level. The integration of aquaculture in *spatial planning* has improved or is expected to improve by 2020 in most Member States. EMFF implementation has been delayed but the budget allocated to aquaculture at EU level is significant (€1.8 billion). The number of POs has significantly increased from 17 to 28. The EU has supported aquaculture through different funds and programs.

⁶⁹ 34 out of 42 respondents indicated that the administrative procedures had a considerable affect. Competition from outside the EU was the 2nd most significant factor listed affecting the development of sustainable aquaculture. A slightly lower number of respondents chose the response options 5 and 4 when assessing the importance of the amount of space available in waters and land (21), communication to consumers about aquaculture products (21) & the lack of innovation in the sector (20).

- **The OMC tools have contributed to improve strategic planning and created a sense of common goals across EU.** The Strategic Guidelines and the MANPs have encouraged Member States to develop a comprehensive strategy specifically for aquaculture, with quantified targets at least for the level of production. The guidance documents provide a common interpretation of relevant EU legislation, but are not always well-known. The number of Member States contributing and participating in the technical seminars and high-level events shows that there is a common interest in making progress on some key issues and learning from practices in other MS.
- **The main hindering factors in the achievement of the priorities identified in the Strategic Guidelines are a result of the complexity of the regulatory framework for aquaculture activities and the number of entities involved,** which led to delays in *simplifying administrative procedures* and implementing *spatial planning*. The competition for marine space and land with other users also makes it difficult to identify potential areas of interest. Actions planned under the *competitiveness* priority may have been delayed partly as a result of delays in implementing the first two priorities, but also as a result of the delayed implementation of the EMFF. Promoting the *level-playing field* was not well understood and the actions planned were considered to be lower priority.
- At this stage, **there is little information on the impact of the OMC on the wider objectives of the CFP e.g. on sector growth and competitiveness.** Only a few Member States could measure the direct effects in terms of sector growth. Some of the measures described in the MANPs are related to enhanced sustainability or food security. EU guidance should contribute to enhanced sustainability through a better and harmonised implementation of EU directives, but the information for this evaluation collected does not allow for a full assessment of its impact on the environment. The technical seminars and high-level events addressed sustainability and food security issues, but their impact may be longer term.

Efficiency

- **All Member States have taken steps to simplify administrative procedures** during the evaluation period. A range of initiatives were undertaken, including a focus on improvements to coordination within public administrations, streamlining and reductions of administrative procedures, and the provision of platforms for dialogue between industry and the public administration.
- Although there is a lack of data to confirm specific reductions in administrative procedures, the evidence suggests that **administrative simplification does not necessarily equate to a reduction in the number of steps or length of administrative procedures.** However, in a few Member States there has been an increase in the number of licences issued and/or a decrease in the duration of licence procedures.
- **It cannot be concluded that steps taken to simplify administrative procedures had a direct impact on cost or generated savings for the aquaculture sector.** Public administrations do not have processes in place to calculate these cost. Private sector stakeholders were also not able to define whether cost savings were generated.
- **It is not possible to make a clear cost-benefit analysis of participation in the OMC from a Member State perspective.** It has not been possible to quantify Member States'

exact costs of engaging with the OMC, but Member States consider that the costs are at an acceptable level. There is consensus that the OMC provides significant benefits, and feedback that it supports greater efficiency compared to what could be achieved without EU action. From a Member State perspective, the benefits provided by the OMC justify their time and resource commitment.

- **It is difficult to assess the appropriateness and sufficiency of European Commission support** to the OMC, because of the lack of available benchmarks. The Commission's financial resources suffice even if there is no dedicated budget line or funding ring-fenced for the OMC. However, there are some efficiency gains possible in the application of the different OMC tools. For example, high-level events are considered to offer less value for money than the technical seminars. For communication, resources should be increased to strengthen communication and collaboration at the regional level.
- **Key limiting factors** to simplify administrative procedures include **the complexity of the regulatory landscape and the level of decentralisation and coordination between institutions**. Setting up coordination bodies and making legislative reforms are crucial to pave the way for simplified administrative procedures.
- **Whilst the guidelines on EU legislation have been valued in many Member States**, some Member States indicated that they could be made simpler and more understandable and be better disseminated, possibly through an online information platform.

Coherence

- **The CFP explicitly recognises the role of the OMC** stating that "*Union Strategic Guidelines for national strategic plans should be developed to improve the competitiveness of the aquaculture industry, supporting its development and innovation, and encouraging economic activity, diversification and improving the quality of life in coastal and inland areas*". It also explicitly recognises the role of the OMC in developing mechanisms for the exchange of information and best practices between Member States.
- **The CFP also explicitly recognises the role of the MANPs and of the Aquaculture Advisory Council (AAC) for the promotion of sustainable aquaculture**. Both the MANPs and the AAC are strongly linked to the EMFF. The development of an MANP is an ex-ante conditionality for EMFF funding. The AAC is funded via the direct management element of the EMFF.
- **The EMFF explicitly supports the environmentally, economically and socially sustainable development of the aquaculture industry**. The MANPs provide a direct linkage between the EMFF and the OMC. Many of the EMFF funding criteria are directly related to the specific objectives of the OMC, including supporting environmental sustainability, innovation, energy efficiency and improving the safety and quality of aquaculture products.
- **EU policies affecting aquaculture are generally coherent**, especially the Birds and Habitats Directives (e.g. ensuring that aquaculture is not environmentally damaging in SACs/SPAs) and the WFD (improving water quality and achieving 'good ecological status' in in-shore coastal waters, estuaries, rivers and ground water). Some actions in the MANPs lack recognition of possible environmental consequences.
- **At EU level, there is no evidence of any major inconsistencies in EU policy texts concerning (i) environment, (ii) food safety, (iii) animal health and welfare and (iv) research and innovation and the OMC**. Much of the current policy directives and

funding mechanisms are also aligned with the “Commission’s Europe 2020 Strategy”⁷⁰, and with the synchronisation of public funding through the EU cohesion mechanism, specifically the Common Provisions Regulation⁷¹ over the 2014 – 2020 period.

- Although **communication** is a key tool for exploiting the high environmental, animal health and consumer protection standards in the EU, **there has been little formal advice, standardisation or coordination between Member States**. The one exception is the ‘Farmed in the EU’ campaign launched by the EU.
- **There is some consistency over the nature of communication messages coming from Member States as a result of the OMC**. No good practice guidelines exist on communication related to aquaculture - some simple guidance, based on practical experience of communicating to stakeholders in similar primary industries, would be a useful addition to the OMC tool set.
- **EU environmental objectives (as provided via the Birds and Habitats Directives, the WFD and the MSFD) are coherent with the objectives of EU aquaculture**. MANPs and their mid-term reviews rarely provide any details of ‘national environmental objectives’.

Relevance

- The **OMC has - largely through the Strategic Guidelines and EMFF ex-ante conditionality of the MANPs - provided a common but largely relevant development framework across the EU**. The strong linkages with the CFP and the EMFF ensure it remains relevant to EU fisheries policy and implementation approaches.
- The **non-binding nature of the OMC means that it is adaptable and well balanced**. This adaptability allows Member States to determine the subject and agenda of technical consultations.
- Since the aquaculture sector in the EU is evolving, **some aspects of the Strategic Guidelines may be less relevant, and there are emerging challenges that may need a greater strategic focus**. (1) Simplifying administrative procedures is still highly relevant, despite being the OMC focus to date. (2) Coordinated spatial planning of aquaculture is becoming increasingly relevant as the 2021 deadline for maritime spatial planning approaches. (3) Enhanced competitiveness of EU aquaculture is still as relevant as before with the continued growth of low-cost aquaculture outside of the EU. Progress in achieving this specific objective has been slow. (4) Promoting a level playing field was not always well understood and there is no clear line between the priority “*improve competitiveness*” and “*improve level-playing field*”.
- **The Commission's Strategic Guidelines need to be revisited**. Although still largely relevant, the latest challenges and opportunities for aquaculture should be included and the priorities should be re-evaluated.
- The **majority of the OMC tools e.g. development of MANPs and the need-driven technical seminars are still useful and relevant**. However, there are demands for the OMC to have a **greater regional focus** as the approach matures, especially in the area of MSP, which will require local, rather than national aquaculture spatial planning solutions.

⁷⁰ COM(2010)2020. Communication from the Commission “EUROPE 2020 - A strategy for smart, sustainable and inclusive growth”

⁷¹ No 1303/2013

- **There is some pressure to better engage regional stakeholders in the OMC processes.** To some extent, this is already occurring, with national authorities coordinating with their regional counterpart bodies to reflect the OMC specific objectives in their local planning and development support functions. However, it is far from systematic.

EU Added-Value

- **Consulted stakeholders see the added-value of the OMC** as a mechanism to support aquaculture with an EU-wide approach that would not otherwise have been developed by Member States at national/regional level without EU action. The OMC has facilitated a common approach as well as increased cooperation and mutual learning. It has ensured that Member States are more aligned with EU policies and objectives. Without the OMC, it would take longer for Member States to address the specific objectives by themselves.
- **The OMC has given the European Commission a much more in-depth understanding of the evolution of the aquaculture sector** at Member State level. Before the OMC, the Commission’s information on aquaculture was limited to EMFF actions. The OMC has enabled the EU to support national-level progress and has facilitated a more common approach that would otherwise not be there.
- **The underlying needs of the aquaculture sector addressed by the OMC still require EU action.** Although Member States are at different stages of aquaculture development, many of the challenges faced relate to administrative burdens, overall sector planning and coordination. These challenges are linked to areas that the OMC aims to address or that require EU-level support.
- **Improvements could be made to the scope of the OMC**, which would strengthen its EU added-value. The Strategic Guidelines should clarify the meaning of “enhancing competitiveness” and “creating a level-playing field” and include a focus on the European environmental directives, border controls, and labelling and traceability of EU aquaculture products.

Annex 1: Procedural information

1. LEAD DG, DeCIDE PLANNING

Lead DG: Directorate-General Maritime Affairs and Fisheries (DG MARE)

Decide planning reference: 2017/DG MARE/1068

The evaluation of the OMC for aquaculture is not formally required by the Regulation governing the Common Fisheries Policy (CFP). However, its conclusions will contribute to further developing evidence-based policy making for the sustainable development of EU aquaculture.

2. ORGANISATION AND TIMING

A **roadmap** summarising the design, purpose and scope of the interim evaluation was published on 21 June 2017.

The "*Study on an interim evaluation of the Open Method Of Coordination (OMC) for the sustainable development of EU Aquaculture*", Coffey (Specific contract 2: S12. 769 633) was launched on 15 December 2017 and ended on 26 April 2019. The final report was approved on 22nd July 2019.

An **Inter-Service Steering Group (ISSG)** was set up composed of representatives of Directorates-General ENV, SANTE, SG, GROW, EMPL, RTD, EAC and DEVCO. In the course of the evaluation the ISSG met several times and the main task of the group was to ensure the overall quality of the evaluation work. The last ISSG meeting took place on 24 May 2019.

An **open public consultation** has been carried out in the period from 26th May 2018 until 20th July 2018. A total of 42 responses was received from 16 EU Member States (see Annex 2 for summary of the results).

3. EVIDENCE AND SOURCES

The evaluation is based on a wide range of evidence and sources comprising:

- Study on an interim evaluation of the Open Method Of Coordination (OMC) for the sustainable development of EU Aquaculture", Coffey.⁷²
- "Economic Report of the EU Aquaculture sector" by the Scientific, Technical and Economic Committee for Fisheries (STECF-18-19)⁷³
- The EU Fish Market 2018 Report⁷⁴

⁷² <https://publications.europa.eu/en/publication-detail/-/publication/83f2aed6-b33c-11e9-9d01-01aa75ed71a1/language-en>

⁷³ https://stecf.jrc.ec.europa.eu/reports/economic/-/asset_publisher/d7Ie/document/id/2446795

⁷⁴ https://www.eumofa.eu/documents/20178/132648/EN_The+EU+fish+market+2018.pdf

Annex 2: Stakeholder consultation

The following consultation activities were conducted to reach the different stakeholder groups:

- **Open Public Consultation:** The European Commission's Directorate-General for Maritime Affairs and Fisheries ran an Open Public Consultation from 26 May 2018 to 20 July 2018 regarding the effectiveness of the OMC as a process to promote and guide the sustainable development of aquaculture across the European Union.
- **Consultation of national administrations:** a survey of all 27 national administrations⁷⁵ was carried out by the independent consultant with the aim of assessing the progress made in the field of EU aquaculture. The survey was sent to Member States between 30 April and 6 June 2018; all 27 Member States completed the survey by 1 July 2018. .
- **Targeted consultations – case studies in five Member States (Ireland, France, Spain, Poland and Greece).** The case studies, carried out by the independent consultant provide more in-depth insight into progress at national level, coherence with other EU legislation, the difficulties encountered to achieve the MANPs objectives, rationale for the Member States' various implementation choices, and the aquaculture sector's needs.
- **Consultations with experts in the Technical seminars and with the Aquaculture Advisory Council (AAC)** provided an opportunity to gather feedback on the OMC. During the technical seminars - organised by the European Commission at least once a year - experts from the Member States expressed their views on the working of the OMC. The AAC includes balanced representation of professional bodies from the 28 Member States (farmers, processors, feed manufacturers and NGOs) and is entitled to formulate advice to the Commission, the European Parliament and Member States.

Description of the results of the consultations.

1. Open Public Consultation.

Introduction

The OPC questionnaire asked respondents about the OMC and their experiences on its impact on aquaculture development. It had a total of 18 questions⁷⁶. Respondents were able to provide additional comments when answering the questions and could also submit contributions. The European Commission received two formal contributions through this OPC⁷⁷. The following sections provide an overview of the main results of the consultation and issues raised by respondents.

Overview of profile respondents

More than half of the 42 survey respondents participated in the public consultation in their professional capacity or on behalf of an organisation. Eighteen respondents who were replying in their personal capacity resided in 12 different Member States. There were four respondents from Spain, three from France and two from Greece. The remaining nine respondents indicated nine different countries of residence, with one of them residing in a non-EU country (Albania).. Fourteen of the 24 respondents indicated that their organisation was established in either Belgium (five), Spain (five) or Czech Republic (four). The majority of the respondents replying in their professional

⁷⁵ The only EU Member State that did not participate in the survey was Luxembourg as it does not have a MANP.

⁷⁶ Ten questions were in section 1, though this excludes counting e.g. 7a etc. as a separate question.

⁷⁷ The contributions received cannot be regarded as the official position of the European Commission and its services and thus does not bind the European Commission.

capacity or on behalf of an organisation worked in a private enterprise (nine) or regional/local authority (five, with four of them in a regional authority). Three respondents worked in a trade, business or professional association, with two of them specifying that their employer was a representative of professions or crafts and one categorising his employer as a business organisation. Two respondents worked for a national public authority or agency. Two respondents worked in an academic institution. Finally, there were two respondents who worked in a non-governmental organisation, platform or network and one person who chose the response option “Professional consultancy, law firm, self-employed consultant”.

Questions

Question 1: To what extent are you familiar with the following EU policy, programmes and guidance? Please indicate in the scale: 1 (not very familiar at all) to 5 (very familiar).

Respondents’ familiarity with the different elements of EU Policy Framework on Aquaculture was fairly similar. The survey shows that the MANPs are the most well-known policy instrument, as more than half of the respondents (26) rated their familiarity with them as 4 or 5. However, five of the nine respondents who worked for private enterprises were not familiar with MANPs or had only very limited knowledge of it. Half of the respondents indicated good familiarity with the Strategic Guidelines, while national good practices and the guidance documents on the application of relevant legislation were well known by slightly less than half of the respondents (20 and 19 respectively). The least well-known EU policy instrument was the OMC to support EU aquaculture, as most respondents (25) admitted to having little to no familiarity with it.

Question 2: Has your organisation participated in the development of or used any of the following OMC tools in its activities?

The survey shows that from the five OMC tools that were listed, MANPs and guidance documents on the application of relevant legislation were used most widely among the organisations responding to the survey. Seventeen respondents indicated that their organisation used these OMC tools. Thirteen respondents confirmed that their organisations used Strategic Guidelines. It is important to note that the profile of organisations that used OMC tools is highly varied. For example, the survey suggests that MANPs were not only used by national or regional authorities but also by academic institutions, non-governmental organisations, representatives of professions or crafts and private enterprises. The survey also shows that the available documents on best practices were used less frequently by the respondents’ organisations, with 13 respondents confirming their usage.

The number of organisations that participated in the development of OMC tools was lower. In total, 13 respondents indicated that their organisations participated in the development of MANPs – the highest figure among all OMC tools. In contrast, four respondents noted that their organisation participated in the development of Strategic Guidelines.

Question 3: Please provide your view on the usefulness of the [OMC] tools. Please indicate in the scale: 1 (not useful at all) to 5 (very useful).

The survey shows that MANPs, good practice events and dissemination of good practices were all seen as useful or very useful by the majority of respondents. The perceived usefulness of Strategic Guidelines and the guidance documents was lower, with less than half of the respondents rating these tools as useful (4) or very useful (5). In the comments section, few respondents noted the

limited use and application of these tools. One respondent specifically referred to the EU guidance documents, stressing that some of them are disregarded by national authorities. Another respondent highlighted the importance of having a sound monitoring system to track the implementation of MANPs.

Question 4: Please confirm whether you are aware of the following activities [happening at national level].

The majority of respondents confirmed that their Member State has a national strategic plan for aquaculture (36) and has set objectives for the development of sustainable aquaculture (32). Slightly fewer respondents were aware of the communication campaigns to improve the image of aquaculture products (25) and the guidance on EU legislation provided by their public authority (23). Less than half of the respondents (18) could confirm that their industry sector was consulted on the national aquaculture strategy.

In the comments sections, there were some comments that the communication campaigns were not aimed at increasing the consumption of aquaculture products and were focused on fisheries instead. The campaigns' limited effectiveness was another problem raised. There was one comment that there is potential for more support and awareness raising for a sustainable aquaculture sector with high animal welfare and fish health standards. There was also a comment that the development goals were not clearly communicated by the authorities.

Question 5: To what extent do the following affect the sustainable development of aquaculture in your country? Please indicate in the scale: 1 (no effect at all) to 5 (big effect).

Respondents were asked to rate⁷⁸ the five factors that were likely to have an effect on sustainable aquaculture development. The results indicate that the most significant factor (listed) was complicated and time-consuming administrative procedures, for example for licensing. Thirty-four out of 42 respondents indicated that the administrative procedures had a considerable effect⁷⁹. Competition from outside the EU was the second most significant factor (listed) affecting the development of sustainable aquaculture, according to the majority of respondents (26). A slightly lower number of respondents chose the response options 5 and 4 when assessing the importance of the amount of space available in waters and land (21), communication to consumers about aquaculture products (21) and the lack of innovation in the sector (20). Some respondents added further comments in relation to this question of the survey. For example, one respondent noted the low prices of sea fish as a factor that hinders the development of the aquaculture sector. There were a few respondents who emphasised the environmental aspects of sustainable aquaculture development. Another respondent highlighted the fact that the sustainable aquaculture sector depends on the protection of the environment and high animal welfare. It was also mentioned that high pollution has been a hindering factor for the development of shellfish farming areas.

Question 6: To what extent has there been any improvement over the last 3-4 years in those areas? Please indicate in the scale: 1 (no improvement) to 5 (big improvement).

The majority of survey respondents did not see clear improvements in any of the five listed areas. In each case, the majority of respondents considered that there either has been no or almost no improvements. The largest number of respondents chose response options 1 and 2 when assessing

⁷⁸ We note that the question in the OPC had both the terms 'affect' (in the formulation of the question) and 'effect' (in the rating).

⁷⁹ Twenty-three chose option '5' and 11 chose option '4'.

the improvements made in the areas of administrative procedures (29) and spatial planning (28). Lack of innovation was the factor most rated 3 by the respondents (14). Of the five listed areas, between one and four out of 42 respondents indicated that there had been improvements in each of the areas listed. Of these, four respondents indicated that these improvements had been in addressing complicated and time-consuming administrative procedures as well as lack of innovation and/or opportunities for business diversification.

Question 7: To what extent is there a need for the following [improvements] in your country? Please indicate in the scale from 1 (no need at all) to 5 (strong need).

The survey respondents considered that there was a need for each of the six improvements listed. The areas where respondents indicated the greatest need for improvement by rating with scores of 4 or 5 were: (1) simplified administrative procedures (33 respondents, of which 27 indicated a strong need (5 rating)); (2) improvements in terms of coordinated spatial planning for aquaculture activities (31 respondents, of which 15 indicated a strong need (5 rating)); and (3) improved communication campaigns on domestic aquaculture (28 respondents, of which 19 indicated a strong need (5 rating)). Some other improvements were also suggested by the survey respondents. The following needs were highlighted: (1) to reduce pollution by ensuring appropriate implementation of the Water Framework Directive; (2) to ensure the effective control of unregulated aquaculture production; (3) to increase the number of officials working with the promotion of aquaculture and its products; (4) to adopt the EU legislative act on freshwater/marine aquaculture, which would ensure the wide-scale simplification of the aquaculture business, including the simplifications in the areas of environment, biodiversity, Water Framework Directive/Marine Strategy Framework Directive and veterinary aspects.

Question 8: Do you have any other comments or recommendations that you would like to share in relation to the open method of coordination in aquaculture / issues affecting the management of aquaculture in your country?

Respondents' comments highlighted very different issues, reflecting the different profiles of those participating in the consultation. The following recommendations were made by the survey respondents: (1) to develop non-binding EU-level guidelines to support the involvement of stakeholders, especially local communities. According to the respondent, stakeholders' participation in the decision-making process could help avoid conflicts in the implementation phase; (2) to include more governmental departments (especially those specialising in environmental affairs) into the OMC process; (3) to ensure that private actors are better informed about the actions and documents adopted by the EC; (4) to make sure that the OMC tools address fish welfare as well as the impact of aquaculture on antimicrobial resistance; and (5) to set up a single, simplified and business-friendly licensing system that could operate at EU-level. One respondent emphasised that the existing tools were non-binding and thus lacked proper control mechanisms.

Contributions to the OPC

In addition to the open comments provided in the survey, two formal contributions were submitted as part of this public consultation. The first contribution confirms the importance of biosecurity and health for the aquaculture sector. The contribution notes that monitoring quality and health is key to integrated management plans of the sector and this must be accompanied by early and accurate diagnosis, including optimised therapeutic protocols. It also highlights the fact that biosecurity standards, if applied intelligently, can support and facilitate decision-making in aquaculture companies for sustainable activity.

The second contribution submitted is a report of the aquaculture study carried out in Sweden in 2017. The purpose of the study was to compile knowledge on the licensing and monitoring processes that were in place in Sweden, as well as to provide recommendations on how these processes can become more effective.

2) Targeted consultation of National Administrations

In June 2018, a survey of all 27 national administrations⁸⁰ was carried out by an external consultant⁸¹ with the aim of assessing the progress made in the field of EU aquaculture. The survey was sent to Member States between 30 April and 6 June 2018; all 27 Member States completed the survey by 1 July 2018. The survey aimed to complement the information that was provided by the Member States in the mid-term reviews of their MANPs. Therefore, each national administration received a tailored questionnaire that took into account the actions stated in the Member States' MANPs for the promotion of sustainable aquaculture as well as the information included in mid-term reviews. All 27 Member States that have developed MANPs participated in the national administrations' survey.

Key findings

The results from the survey of national administrations confirm the wide variety of measures and actions that have been taken by the Member States to implement MANPs. There are important differences between the Member States in terms of the number and types of actions implemented.

To simplify administrative procedures, most Member States have been trying to introduce changes to the public administration system; 15 of the 27 Member States have taken action to improve coordination within the public administration since 2014, while five other Member States are planning to take this kind of action by 2020. This was followed by 14 Member States that have implemented measures to streamline or reduce administrative procedures, with four others planning to do so by 2020; and 13 Member States providing a platform for dialogue between industry and the public administration.

In order to enhance coordinated spatial planning, the mapping of existing aquaculture facilities has been the most common type of action in the field of spatial planning. Twelve Member States indicated that they have made public up-to-date maps of existing aquaculture facilities since 2014, and four other Member States intend to do so by 2020. Eleven Member States shared best practices at regional / local level, with four Member States planning to do the same by 2020. Importantly, ten Member States have identified potential areas for new aquaculture sites since 2014, with seven Member States planning to achieve this by 2020. Out of 15 Member States, ten have reported at least a marginal increase in the surface area covered by maritime spatial planning since 2014. Belgium, France, Malta, Portugal and the UK all indicated that this area increased significantly.

Member States have implemented various measures to enhance the competitiveness of aquaculture, the most frequent among them being the provision of support for cooperation between research institutions and producer organisations (19 Member States), followed closely by: providing national research funding to support innovation in aquaculture (18); and promoting research and development in aquaculture (17).

The most frequent activity in the innovation field has been supporting cooperation between research institutions and producer organisations (19 Member States). Providing national research funding to

⁸⁰ The only EU Member State that did not participate in the EU survey was Luxembourg as it does not have a MANP.

⁸¹ See Annex 2: <https://publications.europa.eu/en/publication-detail/-/publication/83f2aed6-b33c-11e9-9d01-01aa75ed71a1/language-en>

support innovation in aquaculture (18 Member States) and promoting research and development in aquaculture (17 Member States) have also been widespread among the Member States since 2014.

3) Case studies⁸²

The five case studies (Ireland, France, Greece, Poland and Spain) that have been conducted as part of this interim evaluation aimed to provide detailed insights of the implementation and results of the OMC at national, regional and local levels, beyond the information gathered through the synthesis of MANPs mid-term review reports and the targeted consultation of the national administrations in 27 Member States.

Key findings

Ireland

Most elements of the OMC are highly relevant, especially administrative simplification and coordinated spatial planning. In terms of the former, the delays in licensing seem to be largely addressed. However, there are still potential barriers in the way, including the need to simplify and digitise application/renewal processes. MSP is also still highly relevant. The industry considered that measures to improve competitiveness are still relevant, but not really addressed by the OMC in Ireland to date. Development of a level-playing field was not part of the MANP, and stakeholder responses suggest that the concept itself is difficult to understand.

Whilst some progress has been made in implementing the MANP, it is recognised that most of the 24 Actions in the plan will have to be addressed over the longer term. Administrative simplification has occurred, mainly due to the changes in the EIA screening requirements, but aquaculture licensing has been highly impacted by the 2007 ECJ ruling, which has resulted in considerable administrative and cost impediments for the sector as a whole. The coordination of aquaculture with MSP is beginning to have some effect, although there is still a long way to go. Although less explicit in the MANP, there are measures to improve the competitiveness of Irish aquaculture. Much of this was to be funded under the EMFF, but the inability of farms with outdated licenses to access this funding has blunted its impact.

It was difficult to determine quantitative efficiency changes that can be attributed to the OMC. One event that has led to significantly less time being spent on aquaculture licensing administration was the reduction in EIA screening thresholds but this cannot be attributed directly to the OMC. The ECJ judgement has increased environmental compliance costs for industry. Most stakeholders consulted consider the OMC a flexible and adaptive system for providing common guidance across the EU.

The changes in the EIA Directive in 2014 have significantly benefited the sector, especially for the 85% of (mainly shellfish) farms that now come under the new thresholds. This has certainly contributed to lowering the administrative burden, as well as reducing the cost to businesses who no longer need to produce an EIA.

The current feeling in Ireland is that the OMC process needs to be refreshed, possibly through an update of the Strategic Guidelines. It needs to address emerging issues, such as the need for a more integrated approach to aquaculture development in coastal and inland economies, as well as a move to new systems that are both adaptive and resilient to climate change, as well as being responsive to changing consumer needs.

⁸² The full case study reports are available in Annex 4 of the study - <https://publications.europa.eu/en/publication-detail/-/publication/83f2aed6-b33c-11e9-9d01-01aa75ed71a1/language-en>

France

Some stakeholders were less aware about the OMC's tools and voiced concerns about the lack of their involvement in the OMC's approach.

Progress towards administrative simplification mainly concerns the establishment of a progress plan for freshwater fish farming, an approach based on continuous collaboration between administration and professionals.

Progress regarding spatial planning is also important but has experienced delays and overall dissatisfaction from producers. The identification of the best possible aquaculture locations in the framework of the regional schemes for the development of marine aquaculture has been delayed in most regions and producers are not satisfied with this tool as it is not a binding tool.

Enhancing the competitiveness of aquaculture was based on financial support provided by the EMFF to support "research and innovation" to address the most challenges issues (e.g. closed-containment fish farming, food, sanitary issues in shellfish farming, etc.) and to support developing the competitiveness of aquaculture companies.

It was not possible to gather specific quantitative information on the impact of the OMC at this stage. Most stakeholders consider that more detailed guidance on how to apply the European environmental regulations and directives is needed. Producers as well as their representative organisations recognise the importance of EU environmental directives for their current activities and for the future development of aquaculture. However, they expressed a number of concerns: (1) the lack of specific guidance on the consideration of aquaculture in the application of EU environmental legislation (particularly the WFD and the MSFD); (2) the required EIA is disproportionate in comparison to the projects' size; (3) Producers regret that the Shellfish Water Directive has been repealed; (4) Shellfish producers perceive environmental aspects to be more considered than the development of the aquaculture sector. They mentioned the example of the application of the Birds Directive 2009/147/EC, which has led to the development of the great cormorant population.

The added value of the OMC is that it allows Member States to compare their policies in the field of aquaculture, which creates an additional stimulus for them and enables them to exchange best practices and initiatives. Overall, stakeholders consider the OMC to be relevant (despite their limited awareness of the approach) and are willing to further assist in the development of aquaculture at the European level. However, they consider that its tools have to be reinforced and further promoted.

Spain

There is a general consensus in Spain concerning the relevance of having coordination tools at EU-level. Guidance on EU legislation is clearly necessary. Nevertheless, the tools elaborated by the European Commission have not been actively disseminated despite the fact that the topics are still very relevant. For some of the documents, the fact that they are only available in English is clearly a limitation for dissemination, but in general there is no clear explanation from the interviews about the limited dissemination and use of those documents. The Strategic Guidelines and the objectives set in those guidelines are still relevant. There is little tangible progress for the industry at this stage in terms of administrative simplification, spatial planning, competitiveness and level-playing field, although all the interviewees agreed on the relevance of the objectives. The relevance of having a MANPs is underlined in Spain by the administrative organisation and the fact that aquaculture is an exclusive competence of the ACs. Exchanges of good practice are considered very relevant both at national and EU-level.

In terms of administrative simplification, the main achievements include administrative re-organisations, the analysis and harmonisation of the procedures, and the setting-up of one-stop-

shops in some ACs. However, procedures are still long (21 months in average), and the uncertainty can be very high for the installation of new farms. The national administration has worked on harmonised criteria and parameters for spatial planning and has developed an online GIS tool showing aquaculture installations and their main characteristics as well as other relevant layers. The integration of aquaculture in spatial planning is underway in nine ACs, but only three ACs seem to have identified areas of interest or possible areas for aquaculture. More importantly, there is no guarantee that the spatial planning tools being developed will actually reduce the conflicts of use faced by the aquaculture sector. Achievements in terms of competitiveness and level-playing field are difficult to assess at this stage, as only very few actions have been completed largely because of the difficulties faced with the implementation of the EMFF. The link between the OMC tools and its achievements is thus difficult to establish.

The perceived EU added value mainly lies in the ability to promote a level-playing field at EU level and to contribute to implement a common strategy.

Poland

Many aquaculture producers undertake activities aimed at increasing the competitiveness of their entities. They finance such activities from aid funds or from their own funds.

OMC rules were effectively presented to the aquaculture producers during seminars organised by state and local administration. Breeders emphasised that comparison of administrative procedures in other countries was most beneficial for them and they would like to continue such visits to other countries and meetings with local administration. The mid-term evaluation has not been carried out so there are no figures available to gauge the effectiveness of the implementation of the MANP. Representatives of administration and science noted the development and adoption of the "Code of Good Fishing Practices" as a success in the domestic market.

There is no uniform document (for example, in the form of a license) conferring the right to engage in aquaculture. Presently, farmers must meet requirements related to water, environmental, construction and veterinary requirements. For obtaining each of such permits, farmers must visit different offices. In accordance with the OMC guidelines, the national administration tries to minimise administrative burdens associated with obtaining the necessary documents to run aquaculture farms. Some documents related to water management will be available at the newly established "Wody Polskie" institution, but currently there are no ready-made procedures. Digitalisation of the procedures did not fully cover all the processes related to acquiring documents. Efforts to digitalise procedures result in the digital exclusion of older people, who constitute a significant percentage of people running aquaculture farms. These two factors impede production activity in the aquaculture sector.

The need to introduce regulations related to predators (such as cormorants, herons, otters, and beavers) were raised. As indicated by stakeholders, the introduction of increased aid funds will increase production. Thanks to the OMC, breeders have the opportunity to effectively exchange knowledge and find solutions for important issues at the EU-level.

Greece

A key finding is that the level of knowledge of the OMC varies amongst aquaculture stakeholders. The most familiar with the OMC are people from administrative and policy-making bodies. This is followed by operators. All operators know the components of the OMC, but they do not know that they are part of a structured OMC policy.

The OMC is considered by all aquaculture stakeholders as a relevant tool and it is generally expected that it will develop the sector in a sustainable way. Furthermore, it was underlined that the managing authorities should better distribute the information concerning the OMC activities to the regional authorities and individual operators.

The OMC performs well in Greece. It is expected that most of the objectives set in the MANP will be achieved. Most of the stakeholders interviewed appreciate the non-binding and flexible character of the OMC. The OMC provides a framework to address the four priority areas of the Greek Operational Programme. The application of the OMC has led to accelerated licensing. In the long-term, the trend is towards cost savings. Additionally, the acceleration of licensing procedures and the associated time gains could be translated into corporate profit. The Greek administration acknowledges the coherence among the OMC tools and between the different policies related to aquaculture and their support to implementing the Greek OP and MANP. Although not all stakeholders have a comprehensive and coherent picture of the OMC, they all consider the management of aquaculture through the OMC as successful.

4) Consultations with experts in technical seminars

Below is an overview of the technical seminars organised by the Commission between 2015 and 2018 with national administrations. The overview includes the focus of each seminar.

TECHNICAL SEMINAR	FOCUS OF SEMINAR
First Technical Seminar (November 2015)	Administrative procedures (defining quantitative indicators, streamlining procedures, access to the information) and spatial planning (e.g. identifying dedicated areas, governance issues)
Second Technical Seminar (May 2016)	Environmental Impact Assessment criteria, good practices for licensing procedures and integrated coastal management
Third Technical Seminar (October 2016)	Promotion (Farmed in the EU campaign), environmental issues (alien species, water discharges, escapes) and animal health
Fourth Technical Seminar (April 2017)	Governance (state of progress towards the achievement of the MANPs, EMFF implementation, mission of the AAC) technical standards in aquaculture and animal welfare
Fifth Technical Seminar (December 2017)	Governance (FLAGs), administrative procedures and strategic planning examples
Sixth Technical Seminar (May 2018)	Joint session with national administrations and members of the Aquaculture Advisory Council. Regulatory issues (labelling, animal welfare and health, MSP, WFD). Presentation of the AAC missions and the present interim evaluation
Seventh Technical Seminar (November 2018)	Administrative simplification, tools for assessment and planning of aquaculture sustainability (TAPAS), and European Aquaculture Innovation and Technology Platform (EATiP). Presentation of the present interim evaluation

5) Consultations with the [Aquaculture Advisory Council \(AAC\)](#)

The AAC was established in late 2016 in the framework of the Common Fisheries Policy. This stakeholder-led organization has as main objective to provide the European institutions and the Member States with recommendations and advice on issues related to the sustainable development of the sector. The AAC is composed of representatives from the industry and other stakeholders. Opinions and advice prepared by the Advisory Council can be found on their [website](#)⁸³. During the inception phase of the study the contractor conducted interviews with the Aquaculture Advisory Council to understand its working methods. During the second day of the sixth technical seminar on “Good practices and exchange of information on European aquaculture” (Brussels, 16 & 17 May 2018), the Commission and Member States exchanged views with the Aquaculture Advisory Council on the functioning of this stakeholder-led organisation and there was an update on the mid-term Evaluation of the OMC provided by a representative of the consortium of contractors undertaking the study.

⁸³ <https://www.aac-europe.org/en/>

Annex 3: Methods and analytical models

The analytical framework of the evaluation was developed on the intervention logic presented on page 10 and the following evaluation questions:

Effectiveness

- *Question 1:* Which objectives developed by the Member States in their MANPs were achieved and to what extent? Which objectives were not achieved and why? Which objectives are expected to be achieved as a result of adopted measures which are expected to be fully implemented within the next two years?
- *Question 2:* What were the results achieved through the OMC in the Member States which participated ?
- *Question 3:* What are the preliminary results/intermediate impact of the OMC at EU level? Is there a causal link between national achievements and the tools set up at EU level in the framework of the OMC ?
- *Question 4:* What factors influenced the achievements observed both at national level and EU level?
- *Question 5:* To what extent were the OMC objectives for aquaculture, as set out in the CFP Basic Regulation, achieved? What factors influenced/did not influence these achievements (both successes and failures)?
- *Question 6:* To what extent the OMC (specific objectives) contribute to the CFP Basic Regulation and its wider achievements?

Efficiency

- *Question 1:* To what extent can we find evidence of the reduction of administrative procedures in the Member States?
- *Question 2:* To what extent has administrative simplification resulted in cost savings for the sector?
- *Question 3:* To what extent will additional cost savings and reductions in administrative burdens result from measures to be implemented within the next two years?
- *Question 4 (i):* What are the costs for MS who engage with the OMC and do the MS consider that the benefits provided justify time and resources committed?
- *Question 4 (ii):* What are the costs to the EC of managing the OMC and do EC staff consider that the benefits provided justify the time and resources ?
- *Question 5:* What factors (difficulties/good practices) influenced the efficiency of the changes to the procedures ?
- *Question 6:* To what extent is there scope for further simplification of the current OMC put in place for the sustainable development of EU aquaculture?

Coherence

- *Question 1:* How coherent are the different tools of the OMC to reach the CFP strategic priorities?
- *Question 2:* How coherent and complementary is the EMFF Regulation with OMC objectives?
- *Question 3:* How coherent are EU policies affecting aquaculture (in particular environmental policy, namely the MSFD and WFD)?
- *Question 4:* How coherent and complementary are the actions developed at regional/local levels?

- *Question 5:* How coherent are Member States' aquaculture objectives with their environmental policy objectives, for example under WFD and MSFD

Relevance

- *Question 1:* To what extent is the OMC a relevant tool for the sustainable development of aquaculture?
- *Question 2:* To what extent do the objectives of the OMC still correspond to the current needs of the sector?
- *Question 3:* How could the OMC tools be better tailored to address the current needs of the sector?
- *Question 4:* How could the OMC reach regional authorities?

EU added value

- *Question 1:* What is the added value resulting from the OMC, compared to what could be achieved by Member States at national and/or regional level without any EU action?
- *Question 2:* To what extent do the underlying needs of the aquaculture sector addressed by the OMC still require action at EU level?
- *Question 3:* What would be the most likely consequences of stopping or withdrawing the OMC for the aquaculture development?

The table below describes the analytical framework, including evaluation questions, judgement criteria, indicators and methods used to answer the questions

UPDATED EVALUATION QUESTIONS MATRIX

EFFECTIVENESS			
Evaluation questions	Judgement criteria	Indicators	Methods
Progress achieved and anticipated in the Aquaculture sector to address the four main barriers to date			
<p>EQ1. i. Which objectives⁸⁴ developed by the Member States in their MANPs were achieved and to what extent?</p> <p>ii. Which objectives were not achieved and why?</p> <p>iii. Which objectives are expected to be achieved (as a result) of adopted measures <u>and</u> which are expected to be fully implemented within the next two years?</p>	<ul style="list-style-type: none"> Extent that MS have achieved the objectives they set under the 4 strategic priority areas. It is possible to identify and confirm objectives that were not achieved and the reasons for non-achievement. It is possible to identify objectives that are likely to be achieved in the next two years, the likelihood of their achievement and the factors that may influence this. 	<ul style="list-style-type: none"> Member States have MANPs which state the objectives set (including some quantified targets). There is documentary evidence / feedback from MS authorities to confirm objectives that have been met. Members States confirm objectives not yet achieved and they and other stakeholders confirm reasons for non-achievement. Member States confirm objectives that are most likely to be achieved over the next two years. 	<ul style="list-style-type: none"> Synthesis of mid-term reports of MANPs Targeted consultation of NAs Case studies in 5 MS
<p>EQ2. What were the (results) impacts achieved through the OMC in the MS which participated with regards to the 4 strategic priorities)?</p> <p>N.B. <i>Changed from results to impacts as results will be defined under EQ1</i></p>	<ul style="list-style-type: none"> Extent that it is possible to identify early impacts of achievements in the four priority areas in each participating MS. Extent that it is possible to identify likely impacts in the period up to 2020 in the four priority areas in each participating MS. 	<ul style="list-style-type: none"> MS authorities confirm actual and likely impacts. Stakeholders confirm the influence of specific changes. There is aggregated and accessible data to confirm impacts and effects achieved (re. targets in the Strategic Guidelines: no of new licenses granted, success rate of applications for licenses, average time to complete licensing procedures, number of public bodies involved in authorisation procedure, average costs of 	<ul style="list-style-type: none"> Desk research Targeted consultation of NAs Case studies in 5 MS

⁸⁴ This question relates to objectives set under the four strategic priorities: simplifying administrative procedures, securing sustainable development and growth of aquaculture through coordinated spatial planning; Enhancing the competitiveness; Promoting a level playing field for EU operators by exploiting their competitive advantages (high quality, health and environmental standards).

EFFECTIVENESS			
Evaluation questions	Judgement criteria	Indicators	Methods
		licensing procedures for new businesses, average duration of a license, progress in terms of coordinated spatial planning and securing allocation of space for sustainable aquaculture development, use of CMO and EMFF tools to support the aquaculture sector, development of producer and inter-branch organisations)	
EQ3i. What are the preliminary results / impacts (benefits) of the OMC at EU level?	<ul style="list-style-type: none"> • Extent to that it is possible to identify ‘EU’ level benefits through OMC coordination, for example: • Increased consistency of the approaches to addressing problems • Increased sharing of good practice and evidence of weaker MS taking up more advanced systems / methods. • Enhanced communication across the sector and between MS and the EC. 	<ul style="list-style-type: none"> • EU staff confirm enhanced communication, understanding and coordination of the sector through OMC. • Documentary evidence / data to confirm influence / support of the OMC at EU level. • Feedback from MS authorities and national stakeholders. 	<ul style="list-style-type: none"> • Interviews with DG MARE staff • Case studies • OPC
EQ3ii. Is there a causal link between national achievements and the OMC process and tools set up at EU level in the framework of the OMC?	<ul style="list-style-type: none"> • Extent that it is possible to identify improvements to strategic planning in the sector since the introduction of the OMC. • Extent that it is possible to identify the contribution of the OMC process and tools (Strategic Guidelines, Guidance on EU legislation, MANPs, Exchange of Good Practice to achievements in the four priority areas at national level and regional level. • Extent to which it is possible to define whether current / planned achievements would have been realized without the 	<ul style="list-style-type: none"> • There was a national strategy for aquaculture in place before the introduction of the OMC • National authorities / stakeholders confirm that industry contributed to national aquaculture planning before the OMC / Strategic Guidelines • There were quantified objectives before the OMC and data is available to confirm achievement quantitative targets in the Strategic Guidelines (no of licenses granted, etc.) before the OMC. • There is data and feedback at EU / national and regional level to confirm outputs and outcomes of specific OMC tools. 	<ul style="list-style-type: none"> • Targeted consultation of NAs • OPC • Case studies

EFFECTIVENESS			
Evaluation questions	Judgement criteria	Indicators	Methods
	OMC	<ul style="list-style-type: none"> • Strategic guidelines: <ul style="list-style-type: none"> • Level of awareness of objectives public admin /industry • Extent that targets have been adopted • Perceptions of usefulness of guidelines • Specific examples of contribution to 4 main barriers to growth. • Guidance on EU legislation: <ul style="list-style-type: none"> • Level of awareness of public admin • Stakeholders perceptions of usefulness • Specific examples of contribution to improved procedures, new legislation, legal clarifications related to 4 main barriers to growth. • MANPs /national actions: <ul style="list-style-type: none"> • Level of take up and use by MS / regional authorities • Involvement of key stakeholders in drafting objectives • MANPs' specific contribution to 4 growth areas. • Evidence of increased investments. • Extent that MANPs have led to definition and pursuit of national 	

EFFECTIVENESS			
Evaluation questions	Judgement criteria	Indicators	Methods
		<p>actions that would not have otherwise been included.</p> <ul style="list-style-type: none"> • Exchange of good practice <ul style="list-style-type: none"> • Numbers of ppts from different EU Member States • Feedback on usefulness of topics / speakers, etc. • Level of awareness of good practices shared national and regional authorities/ industry. • Involvement in events to share good practices • Creation of national / regional good practice sharing tools, factsheets, etc. • Evidence of specific improvements in four growth areas as a result of good practices. • National and regional authorities confirm that improvements identified would not have occurred without support of OMC tools and processes. 	
<p>EQ4. What factors influenced the achievements observed both at national level and EU level?</p>	<ul style="list-style-type: none"> • It is possible to identify the main factors driving or limiting improvements in the four specific priority areas for Aquaculture in the Member States. 	<ul style="list-style-type: none"> • There is documentary evidence, which confirms positive and negative influences on 4 specific growth areas of the Aquaculture sector in the MS. • MS and EU and national stakeholders confirm success factors and barriers 	<ul style="list-style-type: none"> • Synthesis of mid-term reports of MANPs • Targeted consultation of NAs • Case studies

EFFECTIVENESS			
Evaluation questions	Judgement criteria	Indicators	Methods
		<ul style="list-style-type: none"> There are actions taken or planned at MS level to counter the barriers (if any) 	
EQ5i. To what extent were the OMC objectives for aquaculture, as set out in the CFP Basic Regulation, achieved?	<ul style="list-style-type: none"> Extent that MS specific objectives (as described in MANPs) were achieved. Extent that operational objectives were achieved in each country. 	<ul style="list-style-type: none"> Evidence of achievement of specific objectives / indicators set (as described in MANPs). Evidence that operational objectives were achieved. 	<ul style="list-style-type: none"> Desk research Targeted consultation of NAs Case studies
EQ5ii. What factors influenced/did not influence these achievements (both successes and failures)	<ul style="list-style-type: none"> Covered under EQ4 	<ul style="list-style-type: none"> Covered under EQ4 	<ul style="list-style-type: none"> Covered under EQ4
EQ6. To what extent the OMC (specific objectives) contribute to the CFP Basic Regulation and its wider achievements?	<ul style="list-style-type: none"> Extent that it is possible to identify measures at national level which have enhanced sustainability, food security, growth and employment in Aquaculture. Extent that the identified measures relate to the specific or general objectives of the OMC 	<ul style="list-style-type: none"> Feedback from MS authorities and stakeholders confirms improvements relating to sustainability, etc. Feedback from MS authorities confirms the impact or influence of the OMC on these measures. 	<ul style="list-style-type: none"> Desk research Case studies

EFFICIENCY			
Evaluation questions	Judgement criteria	Indicators	Methods

EFFICIENCY

Evaluation questions	Judgement criteria	Indicators	Methods
<p>EQ1. To what extent can we find evidence of the reduction of administrative procedures in the Member States?</p>	<ul style="list-style-type: none"> • Extent that it is possible to identify that key administrative procedures have been simplified during the timeframe under examination. • Extent that stakeholders confirm that procedures and processes are easier to use. 	<ul style="list-style-type: none"> • There is existing documentary evidence to confirm administrative simplifications, such as: <ul style="list-style-type: none"> ○ Coordination within the public administration ○ Prolonging license duration ○ Establishing a mandatory timeframe for procedural steps ○ Providing an industry / public admin platform ○ Setting up a one-top-shop ○ Streamlining assessment procedures ○ Aligning procedures in different regions ○ Other simplifications to be identified • MS authorities confirm which key administrative procedures (above or other) have been simplified and / or are likely to be simplified in the future. • National level stakeholders identify that key procedures are quicker and / or easier to use in comparison to 2014, for example: <ul style="list-style-type: none"> ○ There is an increase in the no of new licenses granted per year. ○ There is a higher success rate for applications for licenses ○ The average time to complete licensing procedures is shorter (months) ○ Few public bodies / contact points are involved in the authorisation process 	<ul style="list-style-type: none"> • Case studies • Targeted consultation of NAs

EFFICIENCY

Evaluation questions	Judgement criteria	Indicators	Methods
<p>EQ2. To what extent has administrative simplification resulted in cost savings for the sector?</p>	<ul style="list-style-type: none"> • Extent that it is possible to identify links between simplification of administrative procedures and cost savings achieved by MS authorities and other aquaculture stakeholders • Extent that improvements have been measured in terms of costs and time saved by the administrations and the operators • Extent to which coordinated spatial planning helped facilitating access to space and reducing administrative procedures 	<ul style="list-style-type: none"> • MS authorities confirm that administrative simplification: has achieved cost savings: <ul style="list-style-type: none"> ○ cost savings have been achieved at national / regional level; ○ average costs of licensing procedures for new business have gone down. • There is data available to confirm that cost savings have been achieved. • National and regional stakeholders (public and private) confirm that cost savings have been made. 	<ul style="list-style-type: none"> ○ Case studies ○ Targeted consultation of NAs
<p>EQ3. To what extent will additional cost savings and reductions in administrative burdens result from measures to be implemented within the next two years?</p>	<ul style="list-style-type: none"> • Extent that it is possible to identify further savings that can expected as a result of improvements planned in the next 2 years. 	<ul style="list-style-type: none"> • MS authorities have or are able to calculate the potential cost savings that will be achieved through further planned simplification measures. • Future cost savings at national level have already been documented. 	<ul style="list-style-type: none"> • Case studies • Targeted consultation of NAs

EFFICIENCY			
Evaluation questions	Judgement criteria	Indicators	Methods
<p>EQ4i What are the costs for MS who engage with the OMC and do the MS consider that the benefits provided justify time and resources committed?</p> <p>EQ4ii. What are the costs to the EC of managing the OMC and do EC staff consider that the benefits provided justify the time and resources committed / there are other more efficient management approaches that should be considered?</p>	<ul style="list-style-type: none"> • Extent that it is possible to identify costs in terms of time and resources at MS level. • Extent that there is evidence to confirm that the costs of engaging with the OMC are recompensed by the benefits that generated at MS and EU level. • Extent that there is evidence to confirm resource allocation to managing the OMC. • Extent that there is consensus that the OMC represents an efficient approach / justifies the resources allocated 	<ul style="list-style-type: none"> • MS estimate the amount of time and resources committed to date per annum. • MS and other stakeholders confirm that the benefits of the OMC outweigh the costs of involvement. • EC staff estimate the amount of time and resources committed to date per annum. • EC staff agree that the costs are justified by the benefits / do not identify other more efficient coordination / management approaches. 	<ul style="list-style-type: none"> • Targeted consultation of NAs • Case studies • Interviews with DG MARE staff
<p>EQ5. What factors (difficulties / good practices) influenced the efficiency of the changes to the procedures?</p>	<ul style="list-style-type: none"> • Extent to which MS authorities and regional authorities are able to define positive and negative factors that influenced the simplification of procedures. 	<ul style="list-style-type: none"> • MS authorities confirm key factors that have supported or limited increased administrative simplification • Stakeholders confirm key factors that have supported or limited increased administrative simplification. 	<ul style="list-style-type: none"> • Targeted consultation of NAs • Case studies • Conference with regional and local authorities.
<p>EQ6. To what extent is there scope for further simplification of the current OMC put in place for the sustainable development of EU aquaculture?</p>	<ul style="list-style-type: none"> • EC officials have identified possible options for simplification of the OMC. • MS authorities consider that certain aspects of the OMC could be simplified. • MS authorities agree with suggestions from EC official re. simplification options. 	<ul style="list-style-type: none"> • It is possible to identify options for simplification. • There is consensus among MS authorities that possible options are workable / desirable. 	<ul style="list-style-type: none"> • Interviews with DG MARE, EMPL and EAC • OPC • Case studies

COHERENCE			
Evaluation questions	Judgement criteria	Indicators	Methods
EQ 1. How coherent with each other are the different tools of the OMC to reach the CFP strategic priorities?	<ul style="list-style-type: none"> • There is consensus among EC staff that the tools are coherent. • It is not possible to detect overlaps / incoherence between tools (guidelines, MANPs and exchange of good practices) • There are synergies between the tools • It is not possible to detect incoherence with CFP. 	<ul style="list-style-type: none"> • EC staff confirm coherence • Documentary evidence does not show overlaps or inconsistencies. • Member State administrations consider that tools complement each other 	<ul style="list-style-type: none"> • Interviews with DG MARE staff • Desk research • Case studies
EQ2. How coherent and complementary is the EMFF Regulation with OMC objectives?	<ul style="list-style-type: none"> • There is consensus among EC staff that the objectives are coherent with the EMFF Regulation • It is not possible to detect inconsistencies between the OMC objectives and the EMFF Regulation 	<ul style="list-style-type: none"> • EC staff confirm coherence • Documentary evidence does not show overlaps or inconsistencies 	<ul style="list-style-type: none"> • Interviews with DG MARE staff • Desk research
EQ 3. How coherent with each other are EU policies affecting aquaculture (in particular environmental policy namely MSFD and WFD)?	<ul style="list-style-type: none"> • There is consensus among EC staff that policies affecting aquaculture are coherent • It is not possible to detect inconsistencies in policy texts concerning: <ul style="list-style-type: none"> ○ environment, ○ food safety, ○ animal safety and welfare, ○ research and innovation 	<ul style="list-style-type: none"> • EC staff confirm coherence • There are no inconsistencies in the wording of relevant policy texts. 	<ul style="list-style-type: none"> • Interviews with EC staff (DG MARE, SANTE, ENV) • Desk research
EQ 4. How coherent and complementary are the actions developed by MS at regional/local levels (in terms of communication for example)?	<ul style="list-style-type: none"> • Extent that communication materials and messages about MS actions at regional and local level are similar. • Extent that communication materials and messages about MS actions at regional and local level are 	<ul style="list-style-type: none"> • Evidence of specific materials and messages collected via the case studies. • Good practice guidelines on communication at regional and 	<ul style="list-style-type: none"> • Case studies • Conference targeting regional and local authorities.

COHERENCE			
Evaluation questions	Judgement criteria	Indicators	Methods
	<p>different.</p> <ul style="list-style-type: none"> Consistency with good practice guidelines on communication where these have been shared. 	<p>local level.</p>	
<p>EQ 5. How coherent are Member States' aquaculture objectives with their environmental policy objectives, for example under WFD and MSFD?</p>	<ul style="list-style-type: none"> Extent of alignment between EU environmental policy objectives (WFD and MSFD) and national aquaculture objectives. Extent that environmental considerations were considered when national aquaculture objectives were set. Extent that aquaculture objectives may lead to results / outcomes that contradict or compromise environmental objectives. 	<ul style="list-style-type: none"> There are no obvious contradictions between EU environmental objectives and aquaculture objectives. National authorities confirm that: <ul style="list-style-type: none"> account was taken of environmental objectives when aquaculture objectives were set there is coherence between aquaculture objectives and national environmental objectives. National stakeholders confirm coherence between national aquaculture objectives and national environmental objectives 	<ul style="list-style-type: none"> Desk research Consultation of national authorities Case studies.

RELEVANCE

Evaluation questions	Judgement criteria	Indicators	Methods
<p>EQ1. To what extent is the OMC a relevant tool for the sustainable development of aquaculture?</p>	<ul style="list-style-type: none"> • Member State authorities consider that the OMC is helping to support the sustainable aquaculture development. • EC officials confirm that there are other EU tools / processes / options available, which would better address barriers to sustainable aquaculture across the EU. 	<ul style="list-style-type: none"> • EC officials consider that the OMC is the most appropriate tool available given that the EU has no competence vis-à-vis the MS in the area of aquaculture. • There is consensus among MS authorities that the OMC corresponds to their needs in the face of barriers to sustainable development. • MS authorities think other options (if they exist) would better suit their needs. 	<ul style="list-style-type: none"> • Interviews with DG MARE officials • Case studies
<p>EQ2 To what extent do the objectives of the OMC still correspond to the current needs of the sector?</p>	<ul style="list-style-type: none"> • Extent that the OMC’s specific objectives still reflect the main needs in the sector. • Extent that there are no other needs that should be reflected in the specific objectives? • Extent that the operational objectives (development of mutual learning, changes in national legislation creation of guidance docs, realistic and sustainable investments at EU and national level) still support specific aquaculture needs? • Extent that MS authorities agree that other possible OMC operational objectives (identified in discussions with other DGs / MARE) would be more useful / should be added. 	<ul style="list-style-type: none"> • MS authorities confirm that specific objectives (4 barriers to growth) are targeted on the right needs • MS authorities identify other objectives / issues that should be included as specific objectives. • MS authorities confirm that the general objectives are appropriate to meet needs / support sustainable development. • MS authorities identify other tools (codes of practice, toolboxes) that could be included as general objectives. 	<ul style="list-style-type: none"> • OPC • Case studies • Meeting with stakeholder groups in the AAC • Conference with regional and local authorities

<p>EQ3. How could the OMC tools be better tailored to address the current needs of the sector?</p>	<ul style="list-style-type: none"> • Member State authorities have views on how existing tools⁸⁵ could be better tailored: <ul style="list-style-type: none"> ○ high level events on aquaculture ○ seminars for national administrations ○ regional cooperation (platform for regions) ○ communication with citizens via national and EU events and websites • Stakeholders have views on how existing tools could be better tailored to suit aquaculture needs 	<ul style="list-style-type: none"> • Feedback from MS authorities regarding the suitability of tools to meet their needs • Evidence of other modalities (e.g. Codes of Practice; toolboxes) offering more tailored approach 	<ul style="list-style-type: none"> • Interviews with DG MARE • Case studies • OPC • Conference with regional and local authorities.
<p>EQ4. How could the OMC reach regional authorities?</p>	<ul style="list-style-type: none"> • Extent to which regional authorities have been informed of the OMC and its initiatives (actions/ events) • Extent that MS authorities identify ways to extend reach of the OMC to the regions. • Extent to which the regional authorities would be receptive to increased outreach 	<ul style="list-style-type: none"> • Level of regional authority participation in MS events and or EU level events and activities • MS authorities confirm sharing / joint responsibility for OMC objectives with regional authorities. • MS authorities and when consulted regional authorities confirm how to improve the outreach to regional stakeholders, including preferred methods of: <ul style="list-style-type: none"> ○ Contact ○ Engagement ○ Benefits and limitations of each of the methods 	<ul style="list-style-type: none"> • Case studies • Conference with regional and local authorities

⁸⁵ Use of the word tools could relate to the operational objectives of these specific tools listed. In EQ3 we focus on events, seminars, etc. whilst relevance to operational objectives is assessed under EQ2.

EU ADDED VALUE			
Evaluation questions	Judgement criteria	Indicators	Methods
EQ 1. What is the added value resulting from the OMC, compared to what could be achieved by Member States at national and/or regional level without any EU action?	<ul style="list-style-type: none"> • Extent that the OMC has provided additional impetus / support to address the four main barriers to growth. • Extent that it is possible to isolate results and outcomes that could or would not have been otherwise achieved without the OMC contribution. 	<ul style="list-style-type: none"> • There is consensus among MS authorities that the OMC has provided a significant boost to addressing barriers to growth. • It is possible to identify results / outcomes that can be directly attributed to the OMC (see effectiveness question on causality). • There is consensus among MS authorities and stakeholders that the identified results / outcomes would not have been achieved without the OMC. 	<ul style="list-style-type: none"> • Targeted consultation of NAs • Case studies
EQ2. To what extent do the underlying needs of the aquaculture sector addressed by the OMC still require action at EU level ?	<ul style="list-style-type: none"> • Extent that MS authorities confirm that EU level support will continue to add value / is still necessary to meet each of the specific needs of the sector. • Extent that there continue to be significant disparities between MS in the evolution of the sector that can be addressed through planning, coordination and sharing of plans / practices at EU level. 	<ul style="list-style-type: none"> • Summative stakeholder's feedback on their needs and expectations (as per EQ2) • Strengths and weaknesses of national governance structures to support aquaculture development 	<ul style="list-style-type: none"> • Interview with AAC chair and meetings with members • Targeted consultation of NAs • Case studies • Conference with regional and local authorities
EQ 3. What would be the most likely consequences of stopping or withdrawing the OMC for the aquaculture development?	<ul style="list-style-type: none"> • Extent that MS authorities are able to identify positive and negative implications of stopping or withdrawing from the OMC 	<ul style="list-style-type: none"> • MS authorities identify main positive and negative implications. 	<ul style="list-style-type: none"> • OPC • Targeted consultation of NAs • Case studies

Annex 4:
"Strategic Guidelines for the sustainable development of EU aquaculture"⁸⁶:
targets

Simplifying the administrative procedures.

- Target for the Member States: With the objective to identify possibilities to improve procedures and to reduce administrative burdens, Member States are encouraged to collect information by the end of 2013, on: (1) Number of new licences granted in the period 2007-2013 (n), (2) Success rate of applications for licences (%) (3) Number of applications currently being processed (n.) (4) Average time to complete licencing procedures (months) (5) Number of public bodies involved in authorisation procedure (n.) (6) Average costs of licencing procedures for new business (€) (7) Average duration of a licence (years).
- Targets for the Commission: On the basis of the data collected by the Member States, to work with relevant authorities to identify by summer 2014 best practices and margins for improvement including through the support of the Commission High Level Group on Administrative Burdens, whose mandate is to help Member States' public administrations to implement EU legislation in a way that is more efficient and responsive to the needs of stakeholders. To prepare by second quarter 2014 guidance documents addressing the requirements of the WFD and the MSFD in relation to aquaculture, in order to assist Member States and the industry in the implementation of EU law and illustrate how environmental protection can be compatible with sustainable aquaculture.
- Target for Aquaculture Advisory Council: to perform by April 2014 a screening of administrative procedures and a mapping exercise of the main administrative burdens in terms of time and costs in different types of aquaculture in the Member States.

Securing sustainable development and growth of aquaculture through coordinated spatial planning

- Target for the Member States: to put in place coordinated spatial planning, including maritime spatial planning at sea basin level, to ensure that aquaculture's potential and needs are taken into account and to secure an adequate allocation of space in waters and land for sustainable aquaculture development.
- Target for the Commission: to monitor the implementation of coordinated maritime planning, to disseminate studies and experiences to help Member States in their planning. To organise a best practice exchange seminar in summer 2014.

Enhancing the competitiveness of EU aquaculture

- Target for the Member States: To make full use of the proposed CMO and EMFF to support business growth through adequate allocation of funds to aquaculture including for production and marketing plans and to improve the links between

⁸⁶ Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on Strategic Guidelines for the sustainable development of EU aquaculture (COM(2013)229 final)

R&D and the industry (especially SMEs). To support educational & vocational programmes covering the needs of the aquaculture sector.

- Target for the Commission: To coordinate and support research and innovation for aquaculture through all the relevant EU programmes and funds. To promote the transfer of knowledge, best practices and innovation, including EU research project findings. To deliver a user friendly EU market Observatory to provide market intelligence.

Promoting a level playing field for EU operators by exploiting their competitive advantages.

- Target for the Member States: To support the development of producer and interbranch organisations including at transnational level. This would facilitate collective management and/or self-regulatory initiatives between producers, processors, retailers, in cooperation with consumer associations and NGOs where appropriate. To support, implement and control labelling requirements and provisions.
- Target for the Commission: To ensure that labelling rules, in particular as regards freshness, provenance and commercial name are fully implemented. To improve markets transparency and disseminate markets information on trends at local, EU and international levels. To launch by the end of 2013 a Communication campaign on the strengths of EU aquaculture.
- Target for Aquaculture Advisory Council: To support structuring of the aquaculture production and marketing including certification and labelling. To contribute to improved market intelligence of the sector. To facilitate self regulatory initiatives⁸⁷ and help communicating these characteristics to the consumer.

⁸⁷ Self-regulatory initiatives are controlled by the people involved in them, rather than by outside organizations or rules.