

# Our marine sector in an independent Scotland



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# Summary

## Overview

Scotland's marine sector includes the marine, coastal and freshwater environment of Scotland, the industries and communities it sustains, and the legislation and science that support and manage it. The sector provides significant economic, social and environmental benefits for Scotland.

As an island and maritime nation, our seas, coasts and islands are also part of our national identity and way of life. Our marine industries play a critical role in creating and sustaining jobs in coastal and island locations, ensuring the long term viability of many communities.

Scotland's marine sector has significant further potential, but that potential can only be reached if we have the full powers to give the sector the support it needs and the prioritisation it deserves. This paper sets out how that could be achieved with independence.

## The value of the marine sector in Scotland

Scotland's marine sector is an area of significant size, strength and value. Our seas are nearly six times larger than the land area of Scotland and make up almost two-thirds of the area of sea controlled by the UK. Scotland's marine sector is also a key contributor to Scotland's success, generating £5 billion in gross value added in 2019 and accounting for 3.4% of the overall Scottish economy.

Within the UK, Scotland has the greatest share of marine assets. In 2022, for example, Scotland had 62% of the value and 67% of the weight of all seafood landed by UK fishing vessels and Scottish-farmed Atlantic salmon was the UK's biggest single food export. In addition to these established industries, Scotland also has emerging and growing sectors, including marine tourism and seaweed, which are of increasing importance in creating jobs in many coastal and island communities.

Scotland's seas also have significant wind energy potential, with developments such as ScotWind providing an unparalleled opportunity to support the transition from fossil fuels to renewables and ensure a clean and secure energy supply.

Our marine environment is also ecologically important and valuable, with huge marine diversity and populations of marine plants and animals of global significance, including seabirds, freshwater pearl mussels and kelp.

Scotland has a strong track record in protecting our marine environment through our Marine Protected Area network. It is clear, however, that further change is needed to tackle the twin crises of climate change and biodiversity loss. That is why we are also working with communities to explore ways to further enhance marine protection, and to taking action commensurate with the scale of the climate and nature challenges we face.

## The limits of the current constitution

The paper sets out how the approach of the current and previous UK governments has limited the marine sector's growth, and has included actions that are directly against Scotland's marine interests.

Scotland left the EU against the democratically expressed wishes of the majority of people in Scotland. As explained in the section titled 'The case for change', this had led to:

- a Trade and Cooperation Agreement with the EU that leaves Scotland with access to fewer fishing opportunities than it had under the Common Fisheries Policy (CFP) for some species
- the creation of major new barriers to seafood trade, significantly increasing certification, packaging and transport costs for seafood exporters to the EU
- the loss of freedom of movement, reducing access to labour throughout the seafood industry, and risking population decline in coastal and island communities.

Beyond Brexit, significant legislative powers – essential for achieving Scotland's full marine potential – also remain under exclusive Westminster control. That includes reserved competence over international relations, which constrains the pursuit of Scottish interests and limits the involvement of the Scottish Government.

Because of that, Scotland cannot negotiate for its own fisheries interests at an international level and priorities like salmon, which are significantly more important for Scotland than the rest of the UK, face an ongoing risk of being deprioritised in UK free trade negotiations compared to other UK interests.

Existing powers of the Scottish Parliament and Government are also being impacted by a UK Government that has repeatedly shown its willingness to intervene in devolved decision making in areas like marine funding, and which seeks to lower key marine environmental protections achieved during EU membership.

## Scotland's marine sector and independence

Independence would enable the key decisions about the future of Scotland's marine sector to be made by the Scottish Government and Parliament. Scotland could maintain existing approaches where it makes sense to do so, but also make fundamentally different choices that reflect Scotland's unique needs and circumstances.

With independence, Scotland would be able to apply to join the EU, giving Scottish seafood exporters unrestricted access to the biggest single market in the world. Our seafood businesses, coastal communities and marine science sector would benefit from freedom of movement within the EU.

As an EU member state, Scotland would be well-placed to make a constructive contribution to the development of current and future EU law such as reforms of the Common Fisheries Policy (CFP). We would use our marine expertise to maximise efficient and effective delivery of CFP outcomes and other EU strategic priorities, including the transition to renewable energy and growing the blue economy.

We would be able to prioritise our marine interests at the heart of Europe and negotiate a fair share of EU funding to invest in our seafood industry, our coastal communities and our marine science sector.

Scotland would also have a voice on the world stage. For the first time we would have the ability to negotiate at international level, join international bodies and work in partnership with other countries on global marine agendas in our own right.

Our marine potential is an unprecedented opportunity. We look forward to a constructive, open conversation on the best way forward for Scotland's marine sector.

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# Foreword from the Cabinet Secretary for Rural Affairs, Land Reform and Islands

In this paper we set out the opportunities that independence would provide for Scotland's marine sector – our marine environment, the industries and communities that depend upon it and the laws and science that support its management – building on the progress that has been achieved since devolution and the tangible economic and environmental benefits this has delivered across the country.

The sector's potential is vast. It can create new jobs and bring prosperity to coastal and island locations and to the wider supply chain. It can help communities to survive and thrive, contributing to stopping or reversing depopulation. It can be a source of clean, green energy to power Scotland's future.

But our marine environment and natural resources are also under pressure like never before, particularly from the twin threats of climate change and biodiversity loss. Bold and ambitious decision-making is needed. These are historic challenges that we simply have to meet for this and future generations.

Our seas are also under threat in a political sense. As this paper sets out, the UK Government has shown itself to be dismissive of Scotland's unique needs and willing to take actions that put our marine economy and environment at risk, reduce opportunities for partnership working and scientific collaboration, and diminish our influence in Europe and the world. Scotland deserves better than that.

We cannot afford to be bystanders and hope that others will take decisions in Scotland's interests or meet these challenges for us.

To meet those challenges, Scotland must have a voice on the issues and laws that affect us and must have the full powers that can only come with independence.

Other nations – including those that are of a similar size or smaller than Scotland – take responsibility for their marine interests and are also able to form partnerships as equals to tackle shared challenges. So why not Scotland?

There are important choices ahead for Scotland's seas and some of the decisions that will need to be made will not be easy.

**6 Building a New Scotland**  
Our marine sector in an independent Scotland

I believe, however, that those decisions should be made by those with the greatest stake in them and those who will be most affected by them – the people of Scotland – and with the outcomes of those decisions delivered by communities, industry and government in Scotland in partnership.

For Scotland as a nation, and for our marine sector, the opportunities are unprecedented. I look forward to constructive debate about the vital role independence will play in delivering those opportunities.



**Mairi Gougeon**  
**Cabinet Secretary for Rural Affairs, Land Reform and Islands**

# What our proposals mean for Scotland

In an independent Scotland, future Scottish Governments and the Scottish Parliament could use the full powers other independent nations currently have to protect Scotland's marine, coastal and freshwater environments and support the industries and communities that they sustain.

The proposals in this publication are designed to allow Scotland to:

- gain EU membership which would provide free access to the EU single market for Scottish seafood exporters. Our seafood businesses, coastal communities and marine science sector would benefit from the freedom of movement that would come with EU membership
- negotiate with the EU for an equitable share of funding to support our seafood industries, our coastal communities and our marine science sector, exceeding what the UK is currently offering Scotland
- make a proactive, positive and constructive contribution to the development of current and future EU law – such as reforms of the Common Fisheries Policy
- negotiate in our own right in fisheries and other international negotiations, without needing UK Government consent or Scottish priorities being diluted by other UK interests
- gain full legislative and financial decision making powers. We would no longer have decisions made for us by the UK Government or rely on its consent to support sectors such as offshore wind energy.

# What our proposals mean for you

Independence could bring opportunities and advantages to people in Scotland generally and to coastal communities and the individuals and families who live and work there. The proposals in this publication are designed to allow:

- Scotland's marine environment, seas, rivers and coasts to be protected to help tackle climate change and biodiversity loss, and to enable their sustainable use and enjoyment by current and future generations
- people across Scotland to benefit from the numerous economic, health and wellbeing benefits of a thriving marine sector, with stronger local economies and vibrant coastal communities
- the creation of new employment and career opportunities in cutting-edge technologies like offshore wind, the services which support it, and in the wider supply chain
- families and communities to benefit from secure, affordable and clean energy as Scotland transitions to net zero.

# Introduction

This paper – like others in the Building a New Scotland series – is intended to give people in Scotland the information they need to make an informed choice about independence. This paper focuses on the current value of Scotland’s seas and its “marine sector”, the economic and social benefits they provide, and sets out the case for the powers of independence so the sector can reach its full potential.

“Marine sector” is defined in this paper as the marine, coastal and freshwater environment of Scotland and marine industries it supports,<sup>1</sup> as well as the people connected to it. The definition includes the legislation, the policies and programmes, and the international commitments that determine its management. It also covers the underpinning scientific research that provides information and data for evidence-informed policy development and to evaluate success.

Independence would mean that Scotland’s Parliament and Government would – for the first time – have the powers they need to help our marine sector achieve its full potential.

This paper has five sections.

‘Scotland’s seas and our marine sector’ explains the size and value of Scotland’s marine sector and its contribution to the wider economy and job creation. It also considers the opportunities the sector provides to help meet our Net Zero commitments, and tackle climate change and biodiversity loss.

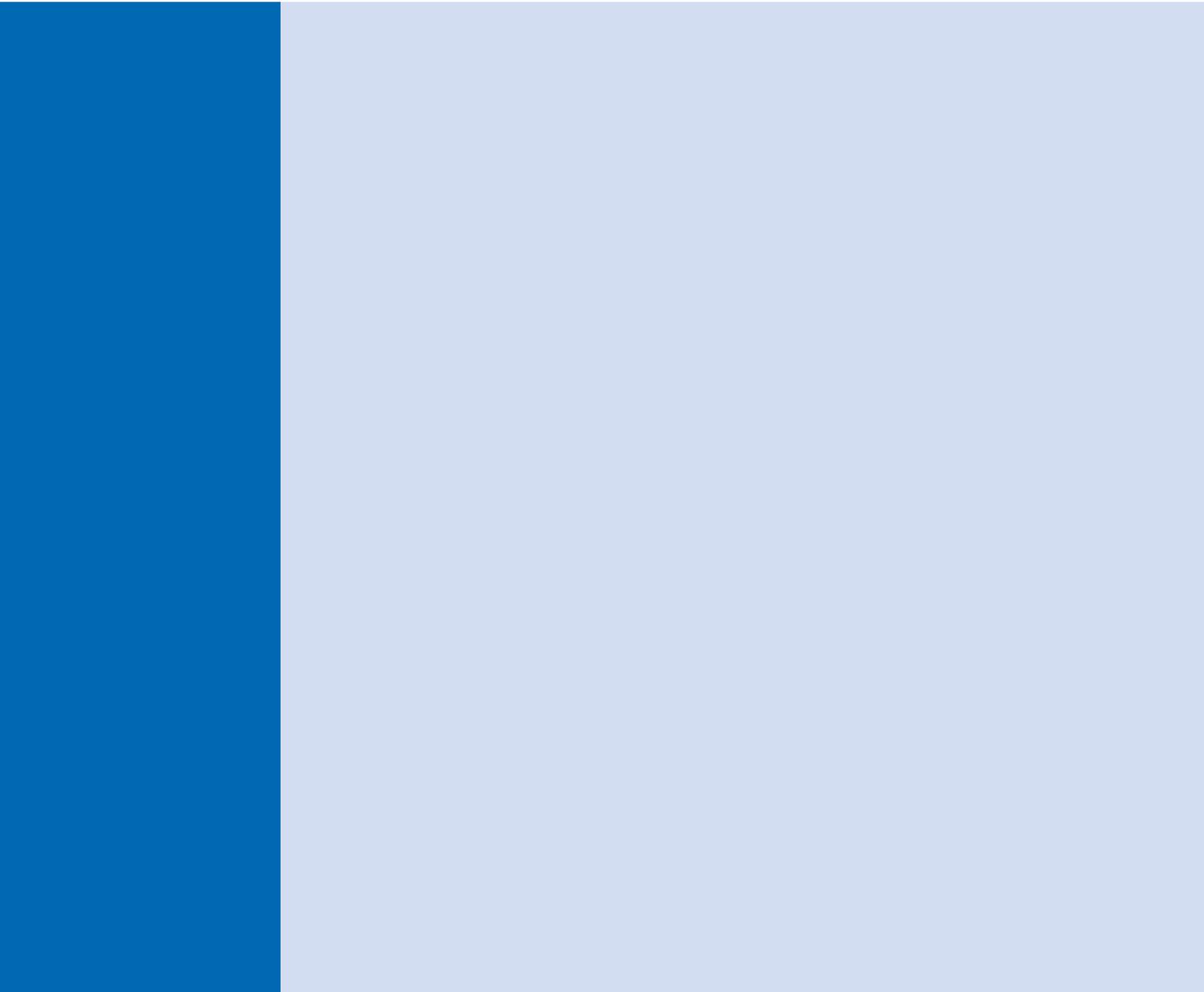
‘The case for change’ sets out the impacts of a Brexit taken forward against the wishes of the majority of people in Scotland expressed in the 2016 referendum, and the limitations of the UK-EU Trade and Cooperation Agreement. It also considers the constraints of the current constitutional settlement, and the impact of actions taken by successive UK Governments on Scottish marine interests.

‘Our vision for independence and approach to delivery’ sets out the Scottish Government’s approach to independence and the marine sector. It explores the range of benefits provided by EU membership – such as full and free access to the European Single Market for Scottish seafood exports and freedom of movement to provide access to labour and support inward migration to our coastal and island communities.

‘Future opportunities for our marine sector’ considers the influence that Scotland – based on our marine resources, expertise and values – could expect to wield in EU institutions. It discusses the ability we would have to negotiate an equitable share of EU funding programmes and help shape current and future EU law. Finally, it looks at the opportunities that Scotland would have to engage and negotiate with international partners and forums, including on emerging global agendas around the so-called ‘blue economy’ and biodiversity beyond national jurisdiction.

The final section offers conclusions and closing remarks.

# Scotland's seas and our marine sector



## Key points:

- Scotland's marine sector is an area of significant size, strength and value. Our seas are nearly six times larger than the land area of Scotland, and make up almost two-thirds of the UK's Exclusive Economic Zone
- Our marine sector provides opportunities for further sustainable economic growth – both in current sectors such as salmon aquaculture, which is already the third largest worldwide, and in growing sectors such as seaweed
- Scotland has a strong track record in protecting our marine environment – such as the 37% of our seas already designated as Marine Protected Areas (MPAs) and a global leadership role on blue carbon research and knowledge exchange – but further ambitious change is needed to tackle climate change and biodiversity loss
- The full powers of independence offer Scotland the opportunity to realise the full potential of the marine sector

## Introduction

Scotland is a maritime nation. Our seas, coasts and islands form an integral part of our national identity, our cultural heritage and our way of life. As we have shaped our marine landscape, so it has shaped us, our economy, our coastal communities and our outlook as a nation. With nowhere in Scotland being further than around 65 kilometres (40 miles) from a coast,<sup>2</sup> the sea is woven into the very fabric of life in Scotland and is a fundamental part of our national identity.

Our seas and coasts attract visitors from near and far. They offer spaces for people to enhance their health and wellbeing. They are the source of high quality seafood for markets at home and abroad. They provide communities with jobs and leisure activities. They are a source of income and employment, but also a source of inspiration and interest in sectors ranging from science to the arts.

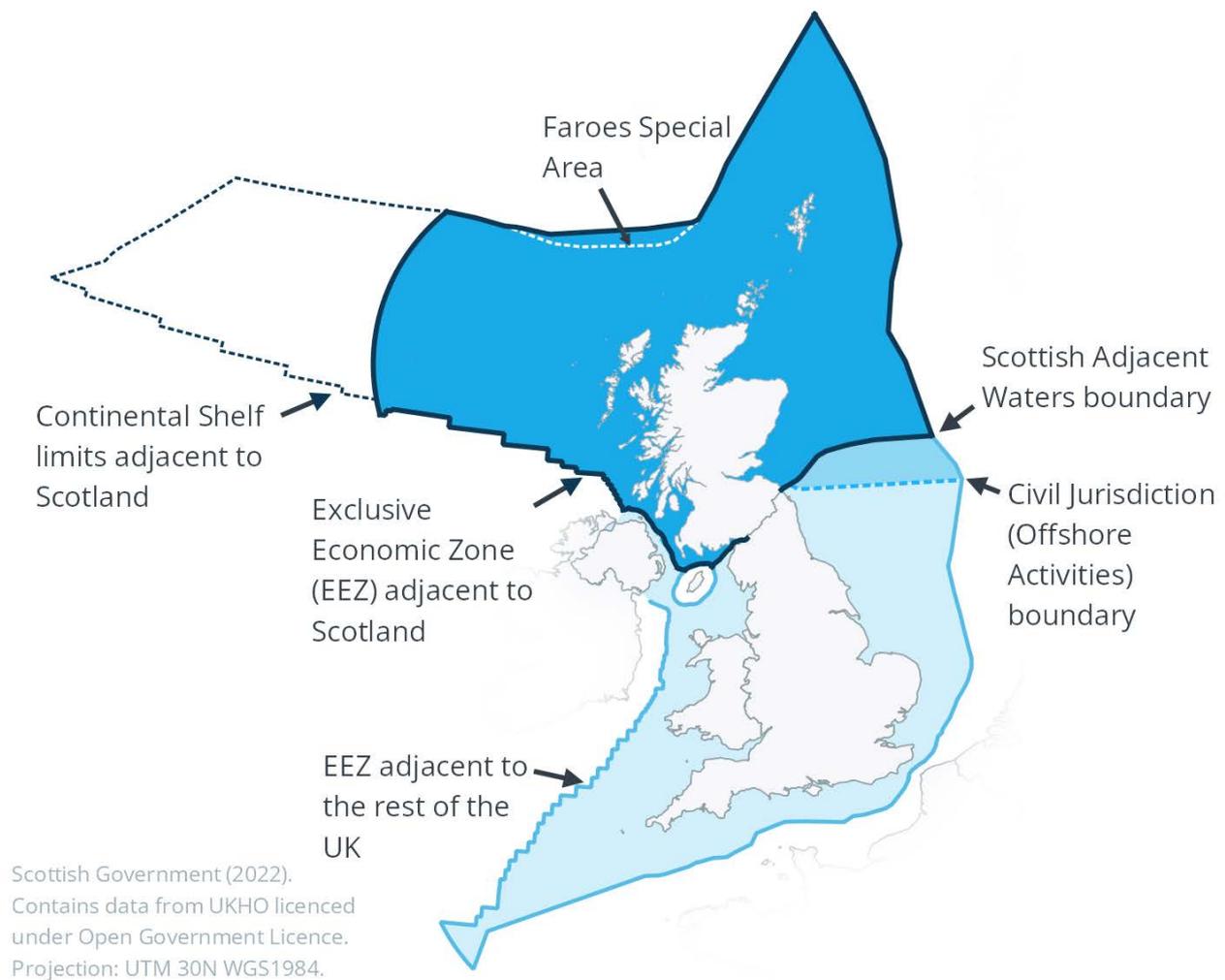
The marine sector is important for Scotland in part because of the size and scale of Scotland's seas. Figure 1, below, shows Scotland's share of the UK's current Exclusive Economic Zone (EEZ). EEZs are areas of the sea where coastal countries have exclusive sovereign rights and duties in relation to natural resources, such as fish and energy resources.<sup>3</sup> Scotland's 63% share of the UK's current EEZ is an estimated 462,315 square kilometres (178,500 square miles) and is nearly six times larger than the land area of Scotland, with 18,743 kilometres (11,646 miles) of coastline.<sup>4</sup>

Including its entire continental shelf (areas of seabed that can extend beyond the EEZ, where countries continue to have exclusive sovereign rights over natural resources such as oil, but not fish, for example),<sup>5</sup> Scotland's seas are an estimated 617,643 square kilometres (238,473 square miles) – an area around two and a half times the land area of the UK.<sup>6</sup>

If Scotland were to become independent and rejoin the EU, our EEZ would be the fourth largest of EU member states' core waters;<sup>7</sup> larger, for example, than those of Ireland, France or Portugal.<sup>8</sup>

And in addition to their size, Scotland's seas are also in a key geostrategic location between the North Atlantic Ocean, North Sea and Norwegian Sea, and in close proximity to the Arctic.

Even within the limits of devolved competence, Scotland already makes an important contribution to maritime security – of which monitoring and surveillance, tackling illegal, unreported and unregulated fishing, and protecting the marine environment and marine assets are key aspects. With independence, however, Scotland could play an increased role in responding to strategic maritime security threats in partnership with UK, EU and NATO allies and build connections that can reinforce our role as a European gateway to the Arctic.

**Figure 1 – Various maritime limits around Scotland and the UK**

Source: [Continental Shelf \(CS\) \(Designation of Areas\) Order 2013 | Marine Scotland Information](#) © Marine Scotland. Limits and boundaries are explained at [Limits and Boundaries | Marine Scotland Information](#)<sup>9</sup>

## Our marine economy

Scotland's seas are rich, providing essential natural capital, ecosystems services delivering socio-economic benefits, and jobs, income and prosperity for communities around Scotland. The opportunities created as a result encourage population growth, incentivise young people and families to stay and build lives, and play a key role in ensuring vibrant and flourishing coastal and island communities and thriving ports and harbours.

The creation and maintenance of marine jobs is especially important in rural areas where, for example, the combined "agriculture, forestry and fisheries" sector – accounted for 15% of employment in 2020, compared to 12% of employment in accessible rural areas and 0.5% of employment in the rest of Scotland in the same year.<sup>10</sup> Aquaculture is similarly important, with the sector and its supply chain is estimated to have supported 11,700 jobs in the Scottish economy in 2018.<sup>11</sup>

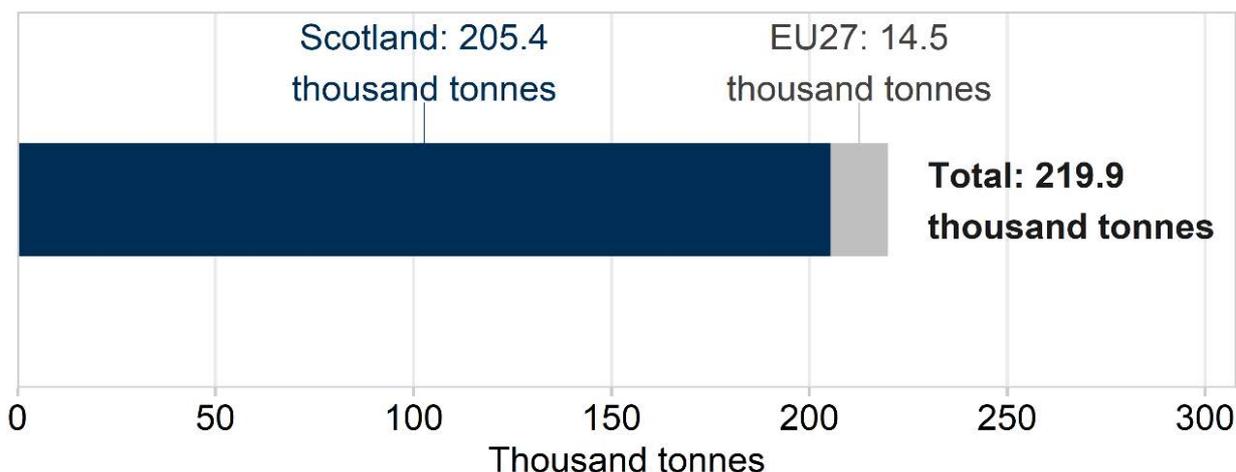
Additionally, seafood – caught and farmed – can contribute significantly to being a Good Food Nation. Seafood is a great source of protein, vitamins and minerals, and oily fish also contains omega-3 fatty acids which are believed to help reduce the risk of heart disease.<sup>12</sup>

Global production of seafood from aquaculture has increased substantially since the 1990s and fisheries and aquaculture are both recognised as essential to global food security and nutrition.<sup>13</sup> And there are vast opportunities for further sustainable and inclusive growth. The Scottish Government’s Blue Economy Vision sets out a broad overview of its value and significance and a set of ambitions for the long term.<sup>14</sup>

Scotland’s marine sector is a national asset and we have enjoyed considerable success in marine fields, including:

- a marine economy that generated £5 billion in Gross Value Added (GVA) in 2019 – of which £1.88 billion was generated by fishing, aquaculture, processing and marine tourism – accounting for 3.4% of the overall Scottish economy and providing employment for 75,490 people. The sector is particularly important for coastal and island communities where alternative forms of employment can be limited. This includes, for example, areas such as Shetland where the marine sector accounted for 19% of total GVA and 17% of employment in 2019<sup>15</sup>
- the third largest salmon aquaculture industry worldwide<sup>16</sup>, with Scottish-farmed Atlantic salmon being the UK’s biggest single food export<sup>17</sup> in 2022 and a sectoral turnover of £1.5 billion in 2018.<sup>18</sup> Scotland accounted for approximately 93% of EU plus UK (‘EU28’) Atlantic salmon production in 2021, as can be seen in Figure 2 below.

**Figure 2 – Atlantic salmon production from aquaculture in the UK and EU27, 2021**

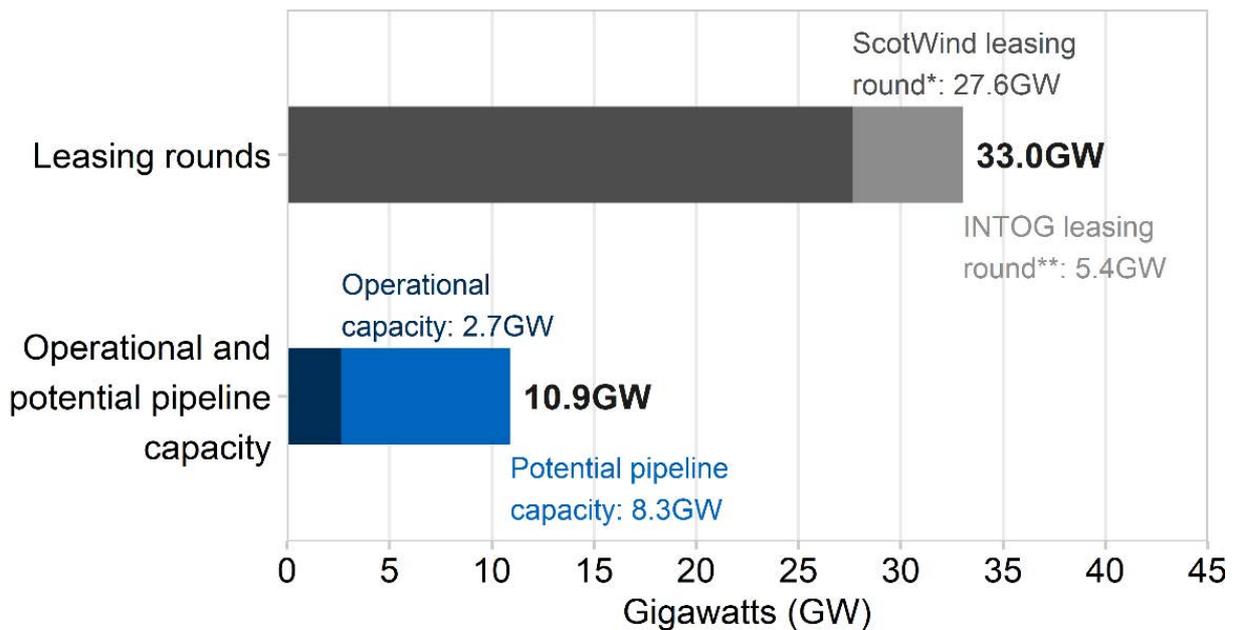


Source: Scottish production: [Fish Farm Production Survey 2021](#), Table 1, Marine Directorate, 2023; EU27 and rest of UK production (estimated): [Global Production by Production Source – Quantity \(1950-2021\)](#), Food and Agriculture Organization of the United Nations, 2023 (last accessed 6 November 2023); Marine Directorate calculations based on production dataset search of EU member states and UK<sup>19</sup>

- 62% of the value and 67% of the tonnage of all landings by UK fishing vessels<sup>20</sup> in 2022. Scotland also has three of the top five largest ports for seafood landings by tonnage in the UK with Peterhead accounting for just under ten times the tonnage of landings into the largest English port (Newlyn) and more than four times the value of the largest English port by value (Brixham) in 2022.<sup>21</sup> Prior to Brexit, the Scottish fleet landed 8% of the EU total – the fourth-most productive fleet in the EU.<sup>22, 23</sup>
- world-class, nutritious and low carbon seafood products enjoyed at home and abroad, with Scottish overseas seafood exports valued at over £1.0 billion in 2022 and the Scottish seafood sector contributing £1.3 billion to the Scottish economy in gross value added in 2019.<sup>24</sup> In 2021, our seafood sector accounted for 60% of Scotland’s food exports, compared to 4% for the rest of the UK<sup>25</sup>

- 43% of the UK’s seafood processing jobs, with 3,367 full time equivalent jobs in North East Scotland alone in 2021<sup>26</sup>
- ScotWind, is the world’s largest floating offshore leasing round and a project of national importance with – as can be seen in Figure 3 below – market ambitions to deliver up to 27.6 GW of capacity.<sup>27</sup> This is roughly double our renewable energy generation capacity currently in operation, and compares to peak electricity demand in Scotland of between 5-6 GW.<sup>28,29</sup> It is also in addition to 2.7 GW of existing operational offshore wind installations and an 8.3 GW pipeline of projects in planning, consented or under construction<sup>30,31</sup> ahead of ScotWind leasing results
- Innovation and Targeted Oil and Gas (INTOG) – a current planning and leasing process designed to enable opportunities for offshore wind projects to help decarbonise offshore oil and gas activity. It also allows for smaller innovative projects to gain access to seabed. If all projects come forward, the INTOG round could see an additional 5.4 GW subject to planning and consenting decisions and finding a route to market.<sup>32</sup>

**Figure 3 – Scottish offshore wind capacity (operational and potential pipeline as of Q2 2023)**



Source: [Scottish Energy Statistics Hub](#), Scottish Government, Q2 2023 (last accessed November 2023); [Crown Estate Scotland, ScotWind leasing round – Offshore Wind \(last accessed July 2023\)](#); and [INTOG | Innovation and Targeted Oil and Gas leasing round | HIE](#), Offshore Wind Scotland. \* Current reported potential; projects will only progress to a full seabed lease once various planning stages have been completed. \*\* subject to planning and consenting decisions and finding a route to market.

In addition to these established industries, Scotland has exciting, emerging marine industries, which provide an increasing number of high quality jobs in rural and island areas. These include, for example, sea eagle tourism which is now estimated to support between 98 and 160 full time jobs on the Isle of Mull (population 2,800) alone<sup>33</sup> and a seaweed sector estimated to be capable of supporting up to 490 full time equivalent jobs directly, and in the wider supply chain, by 2040.<sup>34</sup>

## Our marine environment

Our seas and marine environments are not only valuable in economic terms, they are also immensely rich in an environmental sense.

They have an important role to play in Scotland's transition to a wellbeing economy – a strong, growing economy which is environmentally sustainable and resilient, which serves the collective wellbeing of people first and foremost and which takes a broader view of what it means to be a successful economy, society and country rather than focussing solely on traditional measures of prosperity.

Scotland's marine environment is productive, but also hugely diverse. It supports an estimated 8,000 species of plants and animals – and up to 40,000 species if microscopic organisms are included<sup>35</sup> – with new species still being discovered, particularly in deeper waters to the north and west.

Scotland's seabirds are of international importance, with 24 species regularly breeding here, and Scotland hosting 56% of the world's breeding population of great skua and 20% of the world's northern gannet.<sup>36</sup> We also have 37% of the world's population of grey seals, one of the largest kelp forests in Europe and – in our riverine marine environment – much of the world's population of freshwater pearl mussels.<sup>37</sup>

Scotland also has a range of important marine habitats such as salt marshes, kelp forests and seagrass meadows which – in addition to their economic and recreational benefits – provide significant environmental benefits such as carbon capture, natural coastal erosion defence, pollution control and water purification.<sup>38</sup>

However, our seas and marine resources are also under pressure from increasing spatial demands<sup>39</sup> and habitat loss.<sup>40</sup> It is vital that we protect and enhance our marine environment and biodiversity so that they can benefit current and future generations, and preserve the natural capital that our marine industries depend on.

Scotland already has a strong track record, with 37% of our seas designated as Marine Protected Areas (MPAs),<sup>41</sup> compared to the EU's Biodiversity Strategy target to establish protected areas for at least 30% of EU seas by 2030.<sup>42</sup>

Further bold and ambitious change is now needed, which is why we have also committed to other measures through the [Bute House Agreement](#)<sup>43</sup> such as:

- delivering fisheries management measures for existing MPAs where these are not already in place, as well as for Priority Marine Features at risk from bottom towed fishing gear outwith these sites
- taking specific, evidence-based measures to protect the inshore seabed in areas outwith MPAs, with consultation on a cap on inshore fishing activity at current levels up to three nautical miles as an interim measure

We are also developing a new pathway to enhancing marine protection, in broad alignment with the approach being taken by the EU, and in a way that is fair, just and which empowers communities and shares in the benefits of a green economy.

While our seas and marine environment face grave risks from the twin crises of climate change and biodiversity loss, they also provide important opportunities to address these challenges.

That includes, for example, Scotland's huge offshore wind and tidal energy potential – as outlined in our [Draft Energy Strategy and Just Transition Plan](#)<sup>44</sup> – which forms a critical component of our transition to net zero by 2045.

There is also a growing recognition of the role our seas can play in key mitigations such as carbon sequestration – with our marine and coastal environment already storing roughly the same amount of carbon as land-based ecosystems such as peatlands, forestry and soils.<sup>45</sup>

Scotland is already undertaking internationally recognised blue carbon research<sup>46</sup> to build an evidence base and inform policy development and – building on our leadership at COP26 – is supporting blue carbon knowledge exchange with international partners such as Australia. Through these, and other linked activities, there is a significant opportunity to maximise the potential of blue carbon nature-based solutions to benefit the climate, biodiversity and people – not only in Scotland, but also in the [Global South](#).<sup>47</sup>

## Our outlook

Scotland is not only a proud maritime nation, but also a firmly European nation – geographically, culturally and economically. We share the European commitment to working multilaterally to tackle shared challenges such as promoting sustainable fisheries, protecting our shared marine environment and harnessing our marine space to tackle climate change.

Scotland's marine expertise and approach to marine management and planning are widely respected. For example, the adoption of Scotland's National Marine Plan in 2015 came six years ahead of the relevant EU directive requirement<sup>48</sup> and we enjoy significant influence on the international stage, consistently punching above our weight – including hosting high profile international events such as COP26<sup>49</sup> and important international conventions such as the North Atlantic Salmon Conservation Organization.<sup>50</sup>

And far from being a barrier, or leaving us geographically isolated, Scotland's marine space is a bridge, connecting us to Europe and the wider world and binding our interests – creating shared challenges but also shared opportunities.

With the right support, our marine area can provide more high quality jobs, ensure a sustainable future for our coastal and island communities, be an even greater source of clean, green energy, and continue to provide a beautiful environment to share and enjoy; both now and for future generations to come.

With current powers, however, the Scottish Parliament and Government simply do not have all those tools at their disposal, or the ability to make relevant decisions and choices in Scotland's best interests.

# The case for change

## Key points:

- Key promises made during the Brexit referendum have not been delivered. Scotland now faces, for example, a risk of retaliatory trade measures being imposed if the UK Government seeks to reduce or deny access to UK waters
- Brexit has created major new barriers to seafood trade, significantly increasing certification, packaging and transport costs for seafood exporters to the EU. For the Scottish salmon sector alone, these additional costs are estimated to be £3 million per annum
- Leaving the EU has ended freedom of movement, contributing to an estimated 20-25% of vacancies being unfilled throughout the seafood industry and potentially worsening population decline in coastal and island communities
- Constitutional limitations – such as international relations being a reserved matter under the Scotland Act 1998 – significantly constrain Scotland’s marine interests, and UK Government driven legislation, such as the Internal Market Act and Retained EU Law Act, risks impacting on environmental protections and the powers of the Scottish Parliament and Scottish Government to develop policies and legislation for Scotland

## Introduction

Although the Scottish marine sector has had many successes, the full powers of independence could provide the opportunity to support it to reach its full potential. UK constitutional arrangements and current and historic approaches of UK Governments have – as will be shown in this paper – consistently not prioritised Scotland’s marine interests to the same extent that an independent Scotland could.

During European Community accession negotiations in the 1970s, the UK Government said of Scottish and other UK fishing interests that: “*In the wider UK context they...must be regarded as expendable*”.<sup>51</sup> More recently Scotland was removed from the EU against the wishes of a majority of voters in Scotland in the 2016 referendum.

Both of these, and the Trade and Cooperation Agreement (TCA) the UK reached with the EU following Brexit, have had significant impacts for our marine sector, coastal and island communities, and our wider economy and society.<sup>52,53</sup>

## The costs of Brexit and the TCA

Former Prime Minister Boris Johnson portrayed Brexit as making the UK “an independent coastal state with full control of our waters”<sup>54,55</sup> while former Foreign Secretary Dominic Raab characterised the TCA as a “great deal for the fishing industry”.<sup>56</sup> The actual situation has been very different.

As shown in Table 1 below, there has been a difference between commitments made by UK Government Ministers regarding the benefits of Brexit and what then transpired.

**Table 1 – Comparison of Brexit commitments by UK ministers and actual outcomes**

What UK Ministers said	What has happened
<p>“For the first time since 1973 we will be an independent coastal state with full control of our waters.”<sup>57, 58</sup></p> <p><b>Former Prime Minister Boris Johnson</b> (24 Dec 2021)</p>	<p>Joining the EU was a pooling and sharing of sovereignty for mutual benefit; in much the same way that the UK signing free trade agreements necessitates the pooling and sharing of sovereignty and the loss of full regulatory autonomy. By committing to access and quota arrangements in the TCA, the UK has given up some of its powers as an independent coastal state in terms of its relationship with the EU.<sup>59</sup></p>
<p>“Access to UK waters will be on our terms, under our control and for the benefit of UK fishermen.”<sup>60</sup></p> <p><b>Former Defra Secretary of State Michael Gove</b> (4 Jul 2018)</p>	<p>Under Annex 38 of the TCA, access to UK waters for EU vessels is guaranteed until at least 30 June 2026, with the ability to unilaterally prevent or restrict access thereafter constrained by Article 500, and subject to retaliatory trade measures under Article 506.</p>
<p>“There’s an absolute commitment from the prime minister and from all of us in cabinet that when it comes to shaping new migration policy the economy comes first.”<sup>61</sup></p> <p><b>Former Defra Secretary of State Michael Gove</b> (22 Jun 2017)</p>	<p>By ending freedom of movement from the EU and imposing new visa requirements for qualifications and salary thresholds, the UK Government has made it significantly more difficult to access labour and attract people to Scotland.<sup>62</sup> This has directly contributed to an average of 20-25% of vacancies being unfilled throughout the seafood industry.<sup>63</sup></p>
<p>“We will negotiate with the EU for access to their markets for trade, but we will have completely separate negotiations about access to our territorial waters.”<sup>64</sup></p> <p><b>Former Defra Secretary of State Michael Gove</b> (2 Dec 2019)</p>	<p>Article 506 of the TCA specifically provides for retaliatory trade measures in the event of restriction or denial of access to waters or failure to meet other TCA fisheries obligations, making a clear and unambiguous link between access to waters and access to markets; and with potential for tariffs to be applied to other economic sectors, or suspension of parts of the TCA as a whole, in some cases.</p>
<p>“This government opposes erecting barriers to trade where none yet exist, or disrupting the commercial relationships that exist between this country and our continental partners.”<sup>65</sup></p> <p><b>Former Secretary of State for International Trade Liam Fox</b> (21 Feb 2018)</p>	<p>Due to the UK Government’s decision not to maintain alignment with EU regulations, seafood exports to the EU must go through a range of sanitary and phyto-sanitary checks, with exporters paying for any licences or certificate required. This has not been implemented in parallel for imports, causing disparity in costs and an un-level playing field for our seafood exporters.<sup>66, 67</sup></p>

In contrast to statements from current Prime Minister Rishi Sunak that “*I voted for Brexit, I believe in Brexit. I know that Brexit can deliver, and is already delivering, enormous benefits and opportunities for the country*”<sup>68</sup> recent analysis for the Resolution Foundation and the London School of Economics has estimated that Brexit will lead to a 30% negative output shock in the fishing industry. This will mean “*a painful adjustment*” and “*increased job uncertainty and potentially big hits to livelihoods*”; with fishing one of the hardest hit sectors in the UK.<sup>69</sup>

## Brexit's impact on fishing quotas

Under the TCA, and for some species, Scotland has effectively lost quota share and has access to fewer fishing opportunities than it had under the [Common Fisheries Policy](#) (CFP).<sup>70</sup>

In relation to North Sea whiting, for example, the maximum percentage of total EU and UK quota available to the UK under the TCA is 73.5%, compared to average UK landings of total UK and EU quota from 2015-2019 of 82.7%. There are similar reductions in North Sea cod, haddock and saithe quotas.<sup>71</sup>

While the TCA has led to quota increases in some cases, these increases have predominantly been for a small number of species – mackerel, herring and sole, in particular. Many of the other quota gains made – particularly in the case of sole – are, however, ‘paper fish’ where quota has never been fully utilised previously, and where additional quota is not needed or wanted. This unneeded and unwanted quota is estimated by industry to have a notional value of £58 million. The fact that it cannot be used in practice substantially reduces the overall benefits of the TCA claimed by the UK Government.<sup>72</sup>

Despite UK Government promises of annual quota negotiations,<sup>73</sup> quota shares are – to some degree – fixed, even beyond the end of the adjustment period from 2026 onwards. This includes, for example, a 49% share of West of Scotland saithe, a 46% share of North Sea hake, a 34% share of West of Scotland herring, and a 15% share of Rockall haddock for EU vessels.<sup>74</sup>

In contrast to the UK Government's stated aim of delivering quota shares based on the principle of zonal attachment (i.e. fishing opportunities based on the shares of stocks physically located within the respective EEZs of coastal states), the outcomes in the TCA represent an estimated 229,000 tonne, or £281 million, shortfall compared to that aim.<sup>75</sup>

Overall, rather than the net gain of £148 million by 2026 quoted by former Prime Minister Boris Johnson, a report produced on behalf of the National Federation of Fishermen's Organisations indicates that, as a result of a range of factors such as new non-tariff barriers to trade, the UK fishing industry stands to lose £64 million per year as a result of the TCA, with total losses in excess of £300 million by 2026.<sup>76</sup>

## Additional trading and logistical costs

Even where modest quota gains have been made, these have been significantly outweighed by the huge new trading and logistical costs that have been incurred for our seafood sector. Many of these have been particularly harmful for our aquaculture sector and inshore fleet (with the latter constituting approximately 82% of Scottish-registered fishing vessels,<sup>77</sup> and which are mostly classified as micro businesses) which derive no benefit from quota changes but still face the costs of new barriers to trade with the EU and wider disruption caused by Brexit.

Seafood industry representatives estimate, for example, that Brexit has led to a 30% increase in the cost of transporting products and a 50% increase in the cost of packaging.<sup>78</sup>

Similarly, Export Health Certificates (EHCs) are estimated to have cost UK food businesses £60 million in 2021;<sup>79</sup> alongside the cost of, and frequent delays in receiving, other necessary licences and certification.

For the Scottish salmon sector alone, EHCs are estimated to cost an additional £1.3 million per year,<sup>80</sup> with overall additional costs for the sector as a direct result of Brexit estimated by industry to be £3 million per year.<sup>81</sup>

Although the TCA avoided the imposition of tariffs, some shellfish exporters have estimated that the new barriers to trade with the EU have resulted in additional costs of £500-600 per consignment (regardless of size), making some exports unviable.<sup>82</sup> As acutely time-sensitive products, seafood – particularly fresh and live produce – also risks losing significant value where customs inspections or certification checks are required to enter the EU, or where there is insufficient capacity or delays at UK ports such as Dover.

In some cases, Scotland's ability to export some goods – such as shellfish from undesignated and class B and C waters<sup>83</sup> – ceased overnight when the UK became a third country to the EU.<sup>84, 85</sup> Even where the export of some Scottish goods, such as fish feed, is possible, the need for new certification and checks at Border Control Posts in the EU has made exporting significantly more difficult and costly.<sup>86</sup>

## Other impacts of Brexit

In addition to the impact of the end of freedom of movement on businesses, Brexit threatens to exacerbate demographic challenges that Scotland – like most Western countries – is facing, such as an ageing population, a declining birth rate and rural depopulation.<sup>87</sup>

Ending freedom of movement from the EU has reduced the labour supply into Scotland's economy, including our Marine sector, and has compounded the risks of de-population in Scotland's rural, coastal and island communities, as previously outlined in *Building a New Scotland: A stronger economy with independence*.<sup>88</sup> This is a particular concern for areas such as Na h-Eileanan Siar where the population is already projected to decline by 16% between 2018 and 2043,<sup>89</sup> and which depends on inward migration.

As a result of Brexit, Scotland now has fewer opportunities for collaborative research for our marine scientists due to the loss of freedom of movement and less funding available for scientific and environmental innovation. Scotland has, for example, lost out on access to almost three years of the European Research & Innovation Framework programme, Horizon Europe, damaging the reputation and competitiveness of our colleges and universities<sup>90</sup> – including on research and innovation on areas of importance to our marine sector.

The scope, scale and prestige of Horizon Europe is globally unparalleled yet the Westminster government has taken two and half years to recognise the value of participation.<sup>91</sup> Rather than the peripheral role in decision making that comes with the UK's associate membership, EU membership would give Scotland the opportunity to be directly represented and actively participate in the European Council and European Parliament meetings which decide the overarching rules for Horizon Europe and have a formal vote in the Horizon Europe programme committees which decide the priorities for the calls for proposals – including those relating to the marine sector where appropriate.

By losing membership of bodies such as the Scientific, Technical and Economic Committee for Fisheries<sup>92</sup> we will find it harder to influence key legislative, regulatory, technical and scientific arrangements relating to the marine space we share with other countries and which are critical to the success of our marine sector.

## The current constitution and its limitations

Beyond Brexit, the wider UK constitutional settlement – and current and historic UK Government policy – has hindered rather than helped Scotland's marine sector to reach its full potential.

Significant legislative powers essential for achieving Scotland's full marine potential are either reserved to Westminster or are only executively devolved, with the latter meaning that Scottish Ministers may have certain duties and powers but cannot draft or amend legislation. Even where limited powers allow for the delivery of positive outcomes in areas such as our blue economy, it makes that delivery – at best – inefficient.

Due to reserved competence over international relations and international agreements, for example, the pursuit of Scottish interests and involvement of the Scottish Government is severely restricted and dependent, in many cases, on UK Government agreement. That includes involvement in international marine forums, trade and fisheries negotiations or, during the UK's EU membership, access to EU institutions to influence marine decision-making.

Those imbalanced constitutional arrangements have led to outcomes such as, during the UK's EU membership, nations of Scotland's size – and smaller, or with smaller marine sectors – having a greater ability than Scotland to attend and influence December Fisheries Council meetings at which fishing opportunities were set.

While the Scottish Government has sought to offer Scottish expertise and maximise our influence wherever possible, the reality is that our attendance and participation in the international arena is still largely subject to UK Government consent, and with the potential for that consent to be withdrawn.

In a fisheries context, that control – coupled with the UK Government's role as the fisheries administration for England – creates a clear tension between the UK Government's duty to negotiate on behalf of the whole UK and its responsibility for English functions and interests. That dual role and the lack of a fully impartial arbiter means that there will always be a risk of the UK Government putting England's fishing needs first, and using Scottish interests as a negotiation 'currency'.

That same dynamic also applies to the negotiation of free trade agreements where the lack of UK Government agreement to full scrutiny of, and engagement and participation in, trade negotiations by the devolved nations has limited the ability of the Scottish Government and Scottish Parliament to protect and promote key Scottish interests such as the recognition of Geographical Indicators (GIs) for products like Scottish Farmed Salmon in new free trade agreements.<sup>93</sup>

It has also meant that the Scottish Government was denied a full role in decision-making on the UK's free trade agreement with Australia, despite the agreement making significant changes to seafood tariffs.<sup>94, 95</sup>

Similarly, whilst Scottish Ministers currently have executively devolved powers over marine protection in the offshore region, the Scottish Parliament does not have legislative competence over marine environmental matters in the offshore region.

Given Scotland's expertise in marine policy, science and compliance and the fact that the offshore region comprises part of Scotland's marine zone, there is no clear reason for Scotland to be refused powers over marine environmental protection within these waters, and yet that is the reality of the current constitutional settlement.

Even where relevant powers are fully devolved, the UK Government has been willing to intervene in these devolved areas. This includes, for example, the [UK Seafood Fund](#)<sup>96</sup> – announced by former Prime Minister Boris Johnson to help the fishing industry manage the impacts of Brexit.<sup>97</sup> This Fund was not only inefficient in financial and administrative terms by duplicating Scottish Government funding programmes and approaches but neither did it take account of devolved competence.<sup>98</sup> It also did not reflect the full cost of Brexit to the marine sector.

Devolved competence has also been affected by the UK Government approach to post-Brexit legislation. For example, the UK Government sought to establish a UK fisheries policy through the Fisheries Act<sup>99,100</sup> – a move successfully resisted by the Scottish Government. Similarly the UK Government has persistently refused to devolve control over the Seafish Levy<sup>101</sup> to ensure that the Scottish seafood sector is receiving value for money and support tailored to its unique needs.<sup>102</sup>

The likelihood of further UK Government action in devolved areas has also grown through the passing of the United Kingdom Internal Market Act 2020, which seeks to prevent legislative and regulatory divergence within the UK. As the Scottish Government has set out in detail,<sup>103</sup> this legislation risks constraining Scottish Ministers' ability to exercise devolved marine competence appropriately, including retaining alignment with EU standards. It could also lead to the imposition of deregulatory or otherwise damaging measures arising from current free trade agreements and the potential lowering of environmental protections.

That risk to our legal and regulatory protections is also significantly magnified by the UK Government's approach to downgrading or revoking important aspects of EU law that were retained in domestic law after Brexit.<sup>104</sup>

# Our vision for independence and approach to delivery

## Key points:

- Joining the EU would enable Scottish seafood exporters to enjoy free access to the European Single Market. Our seafood businesses, coastal communities and marine science sector would benefit from freedom of movement within the EU
- As an EU member state, Scotland would be well-placed to make a proactive, positive and constructive contribution to the development of current and future EU law – such as reforms of the Common Fisheries Policy – and would be able to prioritise our interests and negotiate for ourselves at the heart of the EU
- Inside the EU, Scotland would be able to negotiate an equitable share of EU funding programmes to invest in our seafood industry, our coastal communities and our marine science sector, likely exceeding what the UK is currently providing

## Introduction

Independence would offer Scotland the opportunity to do things differently and achieve more for our marine sector.

By placing responsibility for our long term marine potential in Scotland's hands, the Scottish marine sector would have more influence. Future Scottish governments would work for all parts of our marine sector and our coastal communities in the round.

At a fundamental level, independence would mean that we would gain the ability to make decisions and choices about the future of our own marine sector and our country as a whole. We could maintain existing approaches where it makes sense to do so and make different choices where that is in Scotland's national interest.

## The benefits of EU membership and the Single Market

The EU is one of the world's largest importers and consumers of seafood products,<sup>105, 106</sup> with many Scottish seafood products prized for their quality. Between 2016 and 2019, on average three-quarters (77%) of all overseas seafood exports from Scotland went to the EU, worth an average of £703 million per year.<sup>107</sup>

In the case of Scottish salmon – the UK's biggest food export – 64% (by volume) of exports in 2022 were to the EU (with 12% of total overseas exports achieving the Label Rouge mark in recognition of their superior quality); with France the largest market, and EU member states as three of the top five export markets.<sup>108, 109</sup>

To maximise the economic benefits, it should be as easy as possible for Scottish seafood producers and exporters to trade within that market. That is why the Scottish Government is clear that EU membership is in Scotland's national interest and that no trade deals or agreements can be reached with the EU that would be as favourable for our marine sector in the round as full EU membership.

Some of the benefits of EU membership could be achieved through other means – such as membership of the Agreement on the European Economic Area (EEA), the bilateral agreements that Switzerland has with the EU or, to a much lesser extent, the trade agreements that the UK, Canada and others have reached with the EU. However, none of these provide the full suite of benefits that Scotland could enjoy inside the EU.

For example, while Norway, an EEA member, is not covered by the CFP, it has nevertheless been required to implement around three quarters of EU law but with little or no involvement in how those laws are made.<sup>110</sup> This includes 99% of environmental and sanitary and phytosanitary regulations, and full harmonisation with veterinary regulations on feed/input products, fish health and fish welfare, by-products and food safety.<sup>111</sup>

Similarly, while the EEA Agreement and other bilateral agreements allow duty free trade in most whitefish products, and reduced tariffs on other products, a range of tariffs apply to other seafood products, usually based on the level of processing involved; such as a 2% tariff on whole, fresh salmon, but a 13% tariff on smoked salmon.<sup>112</sup>

Following the EEA model would not only fail to deliver the full benefit of the Single Market, it would also mean a significant and unacceptable loss of potential influence for Scotland with the EU.

Securing free access to so vital a market for our seafood products is critical to delivering the full growth potential of Scottish seafood; and can also play an important role in enhancing overall European food security. And as other EU members have shown successfully, membership of the EU is not an impediment to increasing trade with the rest of the world.

When the UK was an EU member, our seafood industries traded with overseas markets like the USA and China – our second and third largest overseas markets for salmon exports<sup>113</sup> – and increasing that trade did not come at the expense of the access and benefits enjoyed through EU membership. There is no reason why Scotland could not do likewise after independence. Membership of the EU and trade with others needs does not need to be a binary choice.

## Our opportunities to influence in the EU

The benefits of EU membership extend significantly beyond market access. As an independent EU member, Scotland would for the first time be able to negotiate directly for Scottish priorities without them being influenced by, or subject to, wider UK objectives. We would have complete and direct access to EU institutions and votes in the EU Council. Given the relative size and strength of our marine sector, we could expect to wield significant influence in this regard.

Scotland would also gain the right to a European Commissioner, with potential to seek the role of Commissioner for Environment, Oceans and Fisheries. While Commissioners act independently in the interests of the EU, and not their own Member State, such a role would still be an attractive proposition given Scotland's importance to European marine and fisheries interests. It would build on the experience of member states such as Lithuania, which currently holds the Commissionership, and Malta, which has held the role, or previous equivalents, twice since 2004.

During its presidency of the Council of the European Union – which every EU member state, regardless of size, has the opportunity to hold – Scotland could also choose to make fisheries a priority, similar to the approach of the recent Czech Presidency.<sup>114</sup>

Equally importantly, Scotland could join and influence key groups such as the Scientific, Technical and Economic Committee for Fisheries (STECF), which has played a key role in formulating science based advice for application in fisheries management, with a bigger and more influential role for Scottish scientists.

That is not to say that Scotland would always promote its own interests in isolation. We would form partnerships and alliances with other like-minded states where beneficial. Scotland has a strong track record in building multi-national partnerships – such as leading UK involvement in the European Marine Biological Resource Centre – European Research Infrastructure Consortium (EMBRIC-ERIC) partnership prior to Brexit. That collaborative, mutually-beneficial approach within the EU and other international bodies is one we will seek to re-establish and enhance.

The crucial point, however, is that Scotland would be able, for the first time, to prioritise our own interests and truly champion the Scottish marine sector. Existing member states have successfully done this – for example, Denmark and Sweden working together to secure priority fishing interests relating to herring in the Skagerrak, where they seek access to catch 50% of those opportunities in the North Sea<sup>115</sup> and ensure the EU Commission has this as a priority objective as part of their overall negotiating priorities in the annual UK-EU bilateral.<sup>116</sup> Scotland would be able to do the same, as a full member state.

## **The Common Fisheries Policy (CFP)**

Delivering Scottish interests and priorities need not be in conflict with the delivery of overarching EU priorities and mutually beneficial outcomes, including in the case of the CFP.

The CFP is a mechanism and set of rules designed to ensure the long-term environmental, economic and social sustainability of fishing and aquaculture activities in the EU.

The original aims of the CFP included increasing productivity, stabilising markets, providing a source of healthy food and ensuring reasonable prices for consumers. Since its establishment, however, the CFP has undergone significant reform to encompass:

- management measures to move fishing activity towards maximum sustainable yield levels, regulate methods and locations of fishing activity, and to reduce the risk of illegal, unreported and unregulated fishing
- the EU's approach to international relations and cooperation in relation to the management of shared fish stocks and other marine interests
- measures to regulate seafood market standards and competition within the EU and protect consumers and human health
- financial assistance to help the transition to more sustainable fisheries and support coastal communities to diversify their economies.

Under the CFP, all member states have equal access to waters in the entire EU, although member states can also restrict or limit access in the 0-12 nautical mile area in certain circumstances. Quotas are set annually by the Agriculture and Fisheries Council on the basis of scientific advice and once overall EU quotas are set, member states are given a percentage share based on historical catch data and other factors, known as 'relative stability'.

As an integral part of the EU law, it is well-established that being an EU member state means implementing the CFP from the point of accession.

The overarching aims of the CFP are goals that the Scottish Government strongly supports and has much to contribute to. The CFP also implements international agreements that an independent Scotland would be bound by, and committed to achieving.

Although some parts of the CFP have been historically challenging for Scottish fishing interests – particularly in relation to ‘relative stability’<sup>117</sup> and in relation to discarding – it could be argued that the CFP has been unfairly blamed for domestic UK policy choices. For example, the significant foreign ownership of English and Welsh quota arises from domestic policy choices around licence transfers and the commodification and sale of such quota<sup>118</sup> by domestic fishers rather than flaws in the CFP. This is in contrast to the predominantly local and family-owned fishing industry in Scotland, arguably showing a difference in the importance attached to fisheries in Scotland that is not replicated elsewhere in the UK.<sup>119</sup>

As a member state, the UK Government could have made different decisions, and prioritised constructive, positive and pragmatic reforms at EU level to better deliver Scottish and UK marine interests in the same way that other member states do,<sup>120, 121</sup> but it did not do so.

In contrast, if Scotland becomes an independent member state, we could use our influence and expertise to proactively and positively support current and future reforms of the CFP led by the European Commission to maximise efficient and effective delivery of CFP outcomes. The Scottish Government is already well respected internationally for our management approach to the marine environment, and could use our experience, expertise and influence to help shape policies and the future direction.

Scotland would continue – as was the case when the UK was an EU member state – to be a champion of regionalisation. This would mean working in partnership with other member states to implement bespoke management measures on a delegated basis, rather than a ‘one size fits all’ model, and in recognition of the different needs of different marine ecosystems.

That may include, for example, directly influencing the shape and nature of multiannual plans, recovery plans and conservation measures in relation to Scottish waters or the stocks or marine features within them.

## EU funding

In addition to the influence we could wield, membership of the EU would also enable Scotland to access a significant range of EU funding programmes to benefit our marine sector. Current EU funding programmes include:

- the €6.108 billion (approximately £5.2 billion) [European Maritime Fisheries and Aquaculture Fund](#) (EMFAF)<sup>122</sup>, the replacement for the previous European Maritime and Fisheries Fund (EMFF) to which the UK had access when it was an EU member state
- the €95.5 billion (approximately £85.6 billion) [Horizon Europe](#)<sup>123</sup> research and innovation fund
- the €5.43 billion (approximately £4.6 billion) [LIFE Programme](#)<sup>124</sup> dedicated to environmental, climate and energy objectives

Scotland’s share of programmes such as EMFAF would be a matter for negotiation following EU accession. What is clear, however, is that Scotland could place greater weight on funding negotiations in this area than the UK did previously.

Under EMFF – the predecessor fund to EMFAF – the UK had €243 million (approximately £207.6 million) for the duration of the programme, of which Scotland received 46% (€107.7 million, or approximately £92 million).<sup>125</sup> Together with associated indirect assistance, this equated to £150 million for Scotland between 2014 and 2020. This, however, represented less than 2% of the available funding, despite Scotland having 13% of EU aquaculture production (including 94% of total EU salmon production),<sup>126</sup> 9% of the sea fisheries landings and the fourth largest EU sea area to manage. Despite having the largest share of the UK nations, Scotland’s funding was, in essence, a large share of a small UK pot.

By way of comparison<sup>127</sup>:

- France received €588 million (approximately £502 million) in EMFF funding between 2014 and 2020, despite having a smaller core sea area than Scotland<sup>128, 129</sup>
- Estonia, Latvia and Lithuania (whose combined population<sup>130</sup> is slightly larger than Scotland's<sup>131</sup>, but whose combined sea area is less than a sixth of the size of Scotland's)<sup>132, 133</sup> received €304.2 million (approximately £260 million).

That is a direct consequence of successive UK Governments that chose to prioritise freezes or cuts to the overall EU budget,<sup>134, 135</sup> and deprioritise individual programme negotiations and the pursuit of funding to invest in the Scottish marine sector. That historic pattern of deprioritisation and underinvestment is now being repeated post-Brexit, with only £14 million in marine funding<sup>136</sup> being made available to Scotland by the UK Government for 2021-22 and 2022-23,<sup>137</sup> with much less certainty on funding in subsequent years compared to that offered by the EU.

In contrast, EU member states will enjoy the stability and certainty of a seven year funding programme through EMFAF, enabling long term investment decisions to be made. As can be seen in Table 2 below, they will also be able to access a far higher level of funding than Scotland will receive within the UK.

**Table 2 – EMFAF funding for selected EU member states<sup>138</sup>**

Member State	EMFAF Share 2022	Average Annual EMFAF Funding 2021-27
France	€92.66 million (approximately (£79.2 million))	€81.02 million (approximately (£69.2 million))
Denmark	€32.8 million (approximately £28 million)	€28.7 million (approximately £24.5 million)
Latvia	€22.0 million (approximately £18.8 million)	€19.3 million (approximately £16.5 million)

With independence and membership of the EU, Scotland would be able to prioritise our marine interests and push for a truly equitable share of marine funding that reflects our position as one of the key marine players in Europe, as well as influencing the shape and coverage of future funds and any future reforms of state aid rules.

Such funding could be used to deliver vital investment in infrastructure like ports and harbours, important scientific research and monitoring programmes to ensure sustainable fisheries and protect our marine environment, and support for growth and innovation in the seafood sector.

Although Scotland, as a relatively wealthy state, could expect to be a net contributor to the EU budget after accession, it is also important to note that net budgetary contributions do not reflect the overall economic costs and benefits of EU membership – including those set out elsewhere in this paper.

Our participation in EU programmes is also about more than just access to funding. It is an indicator of the type of nation Scotland aspires to be – building bridges and with scientific collaboration across borders being celebrated.<sup>139</sup>

## Migration

Alongside that programme participation, and with the benefits of freedom of movement restored and control over migration more broadly, Scotland would – for the first time – have the right levers to attract the people we need.

Scotland is a welcoming and inclusive nation and we want to make Scotland as attractive as possible to encourage people to live, work, study, raise their families and build their lives here – helping to ensure thriving coastal and island communities and stronger local economies.<sup>140</sup> And of course we want people to visit to enjoy our beautiful marine and coastal environments, the fantastic marine leisure activities Scotland offers and our world class seafood.

In a marine context, EU membership would allow our seafood businesses to access the labour they need to grow sustainably without discouraging new domestic entrants. Our marine science sector could attract students and academics from an EU-wide pool. Our coastal and island communities could continue to benefit from inward migration and tourism.

And the levers that independence would bring could also be used to make decisions about migration that are in the best interests of businesses and communities in Scotland, and ensure all marine businesses can access labour equitably – especially smaller and inshore fishing vessels who have been disproportionately affected by UK immigration policy.<sup>141, 142</sup>

Given the importance of non-EU labour for the fishing industry, this could include, for instance, reducing the cost and complexity of the immigration system in terms of recruiting non-EU nationals, as well as being able to recognise the value of fishing and seafood processing roles and ensure salary thresholds to obtain visas are proportionate.

We would also seek to ensure our immigration system helps encourage migration to rural, coastal and island communities rather than acting as a barrier to it – using the Rural Visa Pilot proposal previously made by the Scottish Government, and rejected by the UK Government,<sup>143</sup> as a possible basis.

Our wider proposals on migration can be found in the sixth paper in the Building a New Scotland series – [Migration to Scotland after independence](#).<sup>144</sup>

Following accession, our environment would also benefit from the critical role EU institutions play in setting, monitoring and enforcing common environmental standards, driving improvements, and the coordinated approach to trans-boundary environmental challenges and the level playing field this provides across multiple jurisdictions.

That includes the important role that the European Commission and Court of Justice of the European Union play in ensuring accountability and providing access to justice on the fulfilment of environmental and other obligations across member states.

## Our pre-EU accession approach

The Scottish Government acknowledges that accession to the EU would not be immediate or automatic after independence and that an application and accession process must be undergone.

Until we are able to join the EU as a full member, and to support that accession process, Scotland will remain firmly committed to respecting and promoting EU values and the principles of EU law – including those of the CFP. There will be broad alignment with the EU wherever possible, having due regard to EU environmental principles to make the accession process as quick and streamlined as possible. The powers of the UK Withdrawal from the European Union (Continuity) Scotland Act 2021 and other legislative powers will be used to achieve this.

Scotland aspires to be a proactive, positive and constructive contributor to the effective and efficient delivery of EU strategic priorities – we would be able to use the pre-accession period to demonstrate that to the EU and the world. However, we are not simply content to match existing EU standards.

As innovators, this Scottish Government would also seek to drive up standards and encourage a ‘race to the top’ approach, and that will be our approach prior to and after EU accession.

In a marine context, that would mean:

- using our powers as a coastal state collaboratively and responsibly to achieve mutually beneficial outcomes with other nations, and in recognition of the fact that fisheries and environmental issues do not respect international boundaries
- delivering bold and ambitious change in our marine sector to meet the needs of current and future generations, and tackle the twin biodiversity and climate crises, coupled with support for a just transition to green jobs of the future where that is needed
- building on our [Future Fisheries Management Strategy](#),<sup>145</sup> our [Future Catching Policy](#),<sup>146</sup> and other strategic plans to continue to develop progressive, innovative and viable models to deliver and exceed EU standards and outcomes, and avoid ‘one size fits all’ approaches (including continuing to champion vessel tracking and monitoring systems and developing technologies such as Remote Electronic Monitoring to enhance accountability and sustainability)
- continuing to show leadership on the designation of Marine Protected Areas, with Scotland already exceeding EU and global targets on this, and developing – in partnership with communities – a new pathway to deliver enhanced marine protection commensurate with the scale of the climate and nature crisis we face
- championing the management of fisheries in a way that protects biological diversity and which ensures that marine ecosystems continue to provide economic, environmental, social and wider benefits based on best available scientific advice
- taking an effective, proportionate and risk-based approach to marine management, monitoring and enforcement to detect and deter illegal, unreported and unregulated fishing and uphold the rule of law.

Scotland wants a constructive, positive and mutually beneficial relationship with the EU and the same kind of relationship with the UK. We want to work on a true ‘partnership of equals’ basis, recognising our shared geographic, economic and political interests where appropriate.

The detail of any post-independence negotiations and possible transitional approaches will be determined at a later date. However, the commitment set out here to the people and governments of the UK, Wales and Northern Ireland is to undertake those negotiations in a spirit of friendship, with a view to delivering an equitable settlement and a basis for a strong and mutually beneficial future relationship.

In line with that, key priorities will be to:

- recognise mutual obligations under international law and other international commitments, including the mutual rights and obligations of independent coastal states
- seek to agree an equitable division of quota shares, and mutually agreeable access rights, that recognise the complexity and mobility of fish stocks in the North Sea and North East Atlantic and which take account of fishing activity and the geographic distribution of fish stocks
- aim to minimise barriers to trade to, and the movement of, seafood products across our islands as far as possible, whilst respecting national sovereignty and regulatory independence
- maintain the Common Travel Area and protect the rights of UK and Irish nationals to live in Scotland and work in our marine and other industries.

# Future opportunities for our marine sector

## Key points:

- The blue economy is growing in value and importance globally, with the underwater industry estimated to be worth £45 billion by 2035 across the nations of the UK. Scotland would be entitled to a major share of that industry after independence
- After independence, Scotland would – for the first time – have the ability to negotiate at international level, and join international bodies, in our own right. We would also, after accession, be able to influence the overall approach of the EU where it has competence
- Independence would provide the Scottish Parliament and Government with the powers and tools to make our own decisions – rather than either having decisions made by the UK Government or being reliant on its consent – to support sectors such as offshore wind energy

Restoring our place at the heart of the EU and reversing the impact of Brexit is vital, but our ambitions for Scotland are not just about recovering lost ground from the recent past. Scotland has vast sustainable development potential waiting to be unlocked to benefit our people, communities and economy. Independence has the opportunity to deliver this potential, making sure that it is the people of Scotland who benefit.

## The blue economy

The global blue economy<sup>147</sup> is of huge value. It is expected to be worth \$3 trillion in gross value added by 2030,<sup>148</sup> with the subsea element forecast to nearly triple in the coming years, from £50 billion today to £140 billion by 2035.<sup>149,150</sup>

The UK's underwater industry, currently valued at almost £8 billion and with a third of the global market share in underwater skills, expertise and technology, has the potential to grow to £45 billion by 2035. This could create an estimated 180,000 new jobs and around £20 billion or more in exports for the nations of the current UK.<sup>151</sup>

An independent Scotland could and should expect to hold a significant share of this and be a major beneficiary.

## Our offshore renewables sector

Scotland's seas are rich in renewable energy resource and potential.<sup>152,153</sup> The sustainable development of those resources through projects like ScotWind, and the shift from fossil fuels to renewable energy more generally, provides an unparalleled opportunity, including:

- the potential investment of many billions of pounds over a 20-30 year timeline and significant revenues for the Scottish Exchequer, subject to relevant auction and market considerations<sup>154</sup>
- the potential to support thousands of jobs throughout the offshore wind supply chain – including a commitment from developers to invest an average of £1.4 billion in the Scottish supply chain across the 20 ScotWind projects<sup>155</sup> – over the 20-30 year project lifetime of ScotWind, including skilled, technical jobs such as manufacturing, installation and maintenance, as well as services roles supporting the industry such as legal, environmental management, logistics and planning<sup>156</sup>
- a direct contribution to Scotland's goal of reaching net zero by 2045, and tackling the twin crises of climate change and biodiversity loss
- the ability to generate enough cheap, green electricity to power Scotland's economy, as well as a surplus to open up new economic opportunities for export<sup>157</sup>
- an opportunity to enhance Scotland's global reputation

The strengths of Scotland's offshore wind sector, along with our marine energy and green hydrogen potential and extensive and highly regarded marine planning expertise are significant. We are ideally placed to make a direct and significant contribution across a range of both domestic and European strategic agendas; including the [European Green Deal](#),<sup>158</sup> the [EU Biodiversity Strategy for 2030](#),<sup>159</sup> and the sustainable growth of the blue economy.

It can also make a vital contribution to delivery of the [REPowerEU Plan](#)<sup>160</sup> and boosting long term European energy security and independence by providing a clean, stable and reliable energy source.

Full control over the legislative and regulatory framework in relation to consenting could provide Scotland the opportunity to reach its full potential. For example, the Scottish Government should be able to prioritise consents for key renewables projects where appropriate while taking due account of the impact on the environment and other users, thus aiding delivery of Scotland's Net Zero commitments, and our energy security and supply chain ambitions.

Moreover, we need the ability to make different choices.

That includes developing policy choices that are responsive to Scotland's distinct needs and aspirations that maximise the benefits of the abundant wind energy resources in Scottish waters. For example, the UK transmission charging regime can be a challenge to delivering renewables development in Scotland that can serve the needs of Europe far beyond Scotland's borders. In the future we could develop regulatory approaches that work more closely with the energy opportunities and the physical and market geographies in Scotland. Proposals on energy will be set out in more detail later in the Building a New Scotland series.

## **Scotland's influence on the world stage**

As a nation with some of Europe's greatest marine potential, Scotland would benefit greatly from having direct influence on the world stage when global policy, legal frameworks and practice are being debated.

The global legal framework for marine matters is also undergoing significant development. This includes, for example, the United Nations agreeing a new international legally-binding treaty for the conservation and sustainable use of marine biodiversity in the area beyond national jurisdiction (the "BBNJ Agreement") to complement the UN Convention on the Law of the Sea.<sup>161</sup>

The agreement of this treaty is in recognition of the fact that the area beyond national jurisdiction (which includes much of the high seas) comprises nearly half the planet's surface, 64% of the global ocean surface and 95% of the Earth's total habitat by volume,<sup>162</sup> and not only provide invaluable ecological, economic, social and food security benefits to humanity, but is also in need of urgent protection.

Key features of the BBNJ Agreement include procedures to identify, establish and manage MPAs in the high seas – with a commitment to establish 30% of the world's oceans as protected areas by 2030, rules for conducting environmental impact assessments in the high seas, agreement on the collection, use and equitable distribution of marine genetic resources, support for developing countries to build and develop their capacity, and necessary institutional arrangements. This agenda is particularly important given the growing global interest in deep seabed mining, and the challenges that this brings.

At COP26 in Glasgow, Scotland showcased our ambition and leadership on marine interests, including the launch of the [Blue Carbon International Policy Challenge](#)<sup>163</sup> to maximise the potential of blue carbon as a nature-based solution for climate change and promote the benefits of working together and sharing best practice and expertise across nations.

Despite hosting COP26, Scotland – as a non-party government – was only able to participate in COP26 negotiations as part of the UK Government. This means that Scotland cannot be a signatory to the [climate pact](#)<sup>164</sup> that arose as a result of the negotiations held in Scotland and which bears the name of our largest city.

Scotland wants to be, and should be, at the forefront of these global agendas and able to share our ideas and experiences as we strive to meet our international obligations, including progress towards the [UN sustainability goals](#),<sup>165</sup> as well as helping to influence solutions to current and emerging challenges; without interference from, or requiring the consent of, the UK Government to undertake such international engagement.

In some cases, such as in relation to the [Convention for the Protection of the Marine Environment of the North East Atlantic](#) (OSPAR)<sup>166</sup> we will be able to accede in our own right and will be able to use our significant marine influence directly, and we will seek to do so at the earliest opportunity. And, as an EU member state, in addition to maintaining direct participation in conventions such as OSPAR, we will also be in a position to influence the overall approach of the EU in other forums in which it has competence.

In the [Programme for Government 2021-22](#),<sup>167</sup> the Scottish Government committed to developing a Blue Economy Strategy and delivery plan to set out a holistic approach to the management of Scotland's marine resources; recognising the mutually beneficial nature of, and connectivity between, sustainable economic growth, inclusiveness and wellbeing and the protection of the environment and biodiversity.

The [Blue Economy Vision](#)<sup>168</sup> published in March 2022 is the first step in delivering the overall strategy, and sets out our approach up to 2045 that will deliver our long term aspirations for the marine environment.

Independent countries around the world – from Canada to Croatia, Seychelles to Samoa – are already recognising the benefits of a blue economy approach and are thinking and innovating to unlock those benefits. As long as we are part of the UK, however, and limited by UK Government control over international relations, Scotland cannot fully participate in these cross-border efforts, collaborate and reach agreements, and reap the benefits from doing so, in our own right.

With independence, Scotland would have a voice on the world stage and take its place alongside those other nations to drive that innovation and influence a truly global agenda.

We would also have full powers to legislate and regulate our own marine area and make our own choices rather than being reliant on UK Government agreement; as is currently the case with marine environmental matters, and decision-making around potential “strict protection” measures, in the offshore region.

# Conclusion

The Scottish Government believes that Scotland – with the size and strength of our marine sector – can be a successful, wealthy and influential independent country.

Our marine achievements are a national success story. Brexit, and in particular the type of Brexit established through the TCA, represents a risk to that success.

Independence would bring new opportunities, allow Scotland to join the EU, and have:

- full and free access to the European Single Market – the world’s largest market for seafood products – and access to current and future trade deals negotiated by the EU
- a government that can champion the interests of Scottish seafood, our coastal and island communities, and Scotland’s environment at the heart of Europe, including making the case for equitable funding for marine investment, environmental protection and research and innovation
- the ability to influence and vote on future EU legislation, and play a positive and constructive role in supporting the efficient and effective advancement of the CFP and other parts of EU law.
- full legislative and regulatory responsibility for our marine sector, with all domestic marine decisions taken by the Scottish Parliament and Scottish Government
- the powers and levers we need to implement a migration policy tailored to the specific needs of our marine sector, as well as Scotland’s unique economic and demographic needs more generally
- direct representation in international forums, and a distinct Scottish voice on the negotiation of current and future reforms to international marine law
- the ability to strengthen ties with other maritime and fish-farming nations outwith the EU, such as Norway, Iceland and the Faroe Islands
- a full suite of legislative, regulatory and financial powers to better support the sustainable development of our offshore renewable energy sector and deliver our net zero commitments.

Independence would mean giving the people of Scotland options and choices; including on matters on which the current constitutional settlement denies them a voice and where their interests can be ignored.

Putting Scotland’s future in Scotland’s hands will mean that the Scottish Parliament and Scottish Government can take the right decisions for Scotland, based on local knowledge and tailored to our own needs and circumstances.

The potential of our marine sector – whether in terms of sustainable and inclusive economic growth, the fight against climate change and biodiversity loss or Scotland’s influence and voice on the world stage – is vast. That potential can only be fully realised if we have the tools, the power and the ability to give the sector the support it needs and the prioritisation it deserves.

That marine potential is an unprecedented opportunity. The Scottish Government looks forward to a constructive and open conversation on the best way forward for Scotland’s marine sector.

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Any enquiries regarding this publication should be sent to us at  
The Scottish Government  
St Andrew's House  
Edinburgh  
EH1 3DG

ISBN: 978-1-83521-316-2 (web only)

Published by The Scottish Government, November 2023

Produced for The Scottish Government by APS Group Scotland, 21 Tennant Street, Edinburgh EH6 5NA  
PPDAS1351122 (11/23)

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