

# What Salmon Farming Licence Renewal Means to B.C.'s Coast

RIAS Inc.



**Coastal Communities**  
for Licence Renewal

# Summary

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**With a new government comes the opportunity for a restart; an opportunity to establish a meaningful, respectful process moving forward to develop a fundamentally different approach to how salmon aquaculture is managed in BC, with clear rules, meaningful engagement and sound and transparent decision making.**

- The BC Salmon Farmers Association (BCSFA) commissioned RIAS Inc. to work with their members to prepare this assessment of the current situation facing the BC salmon farming sector in BC, and to outline a constructive path forward.
- In the Fall of 2020, the BCSFA issued its “Raising Opportunity” report that showed the importance of the BC salmon farming sector as an economic driver in remote coastal communities in BC:
  - In 2019, BC’s salmon farming sector generated over \$1.6 billion in total economic output, \$577 million in total GDP, and employment for 6,370 workers in BC.
  - The report also detailed significant investments that BC salmon farmers were planning to make over the next 30 years that would add considerable additional economic stimulus to BC’s post-COVID economy: over \$44 billion in increased economic activity with over 9,400 new jobs for BC workers created by 2050.
  - The report also highlighted how BC salmon farmers contribute to BC’s environmental and social development objectives.
- The Discovery Island (DI) decision came with no warning and contradicted the clear, science-based advice from DFO officials and scientists. And now while salmon farmers, First Nations partners and local communities in BC struggle to deal with the severe hardship caused by the DI decision, an even greater challenge looms: all remaining federal farm site licences, and many provincial tenures, are scheduled to expire on June 30th, 2022. The licence renewal process in BC will determine the fate of the remaining 4,700 workers and \$1.2 billion in economic activity generated by our sector in BC, as well as the additional \$200 million in economic activity and 900 jobs across the country.
- As BC works to emerge from the COVID pandemic, salmon farming can play an important role in the post-COVID recovery process, a role that is unique amongst BC industries due to salmon farming’s significant involvement in remote coastal communities, its engagement with First Nations, and contribution to social and environmental objectives.
- What is needed now at this critical juncture is a restart – a plan to establish a meaningful, respectful process moving forward to develop equitable solutions for all. Key features of a new, constructive plan forward should include:
  - Immediate engagement on 2022 site licence renewals, and the 2025 transition plan, by senior government officials with industry leaders and Indigenous partners, with a clear timetable to address these issues.

- Meaningful, direct and respectful engagement of Indigenous partners/First Nations leadership (e.g., the Indigenous Partners Network), the salmon farming sector, local businesses and local community leaders.
- Financial incentives to support Indigenous participation and partnership/ownership opportunities, to invest in joint ventures and to assist with capacity building within Indigenous communities to obtain the skills, training, and expertise to be full partners in salmon farming, guardianship, and monitoring.
- Clear federal, provincial and Indigenous government decision-making processes that do not undermine existing opportunities/benefits agreements with First Nations, do not pre-determine or favour adoption of specific technologies, are science-based, support financially viable approaches that advance adoption of leading production technologies, and that address delays in processing tenure amendments and new tenure applications.
- Increased transparency in decision-making for the future – for example, obtaining a licence re-issuance is complex and closed. All three governments should consider a dashboard type platform that allows the public to see what information/data companies provide as part of the process.



# Situation Overview

Farm-raised salmon is BC's highest valued seafood product and the province's top agricultural export, generating over \$1.6 billion towards the BC economy, resulting in nearly 6,400 jobs. The BC Salmon Farmers Association (BCSFA) represents 70 businesses and organizations throughout the value chain of finfish aquaculture in BC. BCSFA members account for over 95% of the annual provincial harvest of farm-raised salmon in British Columbia.

In the Fall of 2020, BCSFA released a comprehensive report, "Raising Opportunity: How Farm-Raised Salmon Can Lead BC's Post-COVID Recovery", demonstrating the important role BC salmon farmers would play in BC's post COVID recovery. Table 1 below shows the economic benefits of the farm-raised salmon sector in BC in 2019.<sup>1</sup>

**Table 1: Economic Contribution of Salmon Farming in BC, 2019 (\$ millions)**

	OUTPUT	GDP	LABOUR INCOME	EMPLOYEES (FTES)
DIRECT	\$823.7	\$256.4	\$226.3	2,860
INDIRECT	\$643.6	\$226.3	\$207.2	2,620
INDUCED	\$147.8	\$94.1	\$70.8	890
<b>TOTAL</b>	<b>\$1,615.1</b>	<b>\$576.8</b>	<b>\$504.4</b>	<b>6,370</b>

Source: Raising Opportunity: How Farm-Raised Salmon Can Lead BC's Post-COVID Recovery.  
<https://ready.bcsalmonfarmers.ca/wp-content/uploads/2020/11/BCSFA-ECONOMIC-IMPACT-REPORT-FINAL.pdf>

In 2019, BC's salmon farming sector generated:

- \$1.6 billion in total economic output, including direct output of \$823.7 million, indirect output of \$643.6 million, and induced output of \$147.8 million.
- \$576.8 million in total GDP, including direct GDP of \$256.4 million, indirect GDP of \$226.3 million, and induced GDP of \$94.1 million.
- Employment for 6,370 workers in BC, including 2,860 direct employment, indirect employment of 2,620 FTEs, and induced employment of 890 FTEs.

At that time, BC salmon farmers were planning significant investments in new production technologies that would add considerable additional economic stimulus to BC's post-COVID economy. BC salmon farmers identified immediate investments (shovel-ready, 2021) of \$113 million, expected to generate an additional 13,580 tonnes of annual production capacity, an additional \$684 million in investments in the medium term (2022-2030), increasing production capacity by more than 65,000 tonnes, and the potential for even more investments in the longer term (2031-2050) of \$618 million, adding 54,000 tonnes of production.

The economic gains from these investments would be generated from construction/expansion of facilities and infrastructure, and purchases of new capital equipment (e.g., boats, barges, etc.), as well as from the resulting gains in production that were expected to be achieved from these investments. In summary, total additional economic stimulus that the salmon farming sector expected to deliver in BC amounted to:

- Over \$44 billion in increased economic activity over the 2020-2050 period (average annual \$1.4 billion increase in economic activity)
- More than \$16.5 billion in additional GDP (average \$533 million per year)
- \$13.2 billion in additional wages paid to BC workers (average \$426 million in salaries per year), with over 9,400 new jobs for BC workers created by 2050

<sup>1</sup> Economic impacts are calculated using input-output multipliers for BC salmon farming according to the following definitions:

- Direct impacts are changes that occur in all "front-end" salmon farming operations, which includes not only on-farm grow-out activities, but also broodstock farms, hatcheries, smolt farms and primary processing of farm-raised salmon.
- Indirect impacts arise from changes in activity for suppliers of the front-end businesses.
- Induced impacts arise from the spending on goods and services as a consequence of the payroll of the directly and indirectly affected businesses.

See BCSFA's "Raising Opportunity" report for more detail on how input-output multipliers were derived.

The report not only highlighted how BC salmon farmers can contribute to BC’s healthy economic recovery, but it also detailed their contribution to BC’s environmental and social development objectives. “The results of this report are very significant for the salmon farming community and for the province,” said John Paul Fraser, Executive Director of the BC Salmon Farmers Association, in November 2020 with the release of the report. “It means more jobs and higher economic benefits in BC which are especially needed now, as our province deals with unprecedented economic hardships.”

Then in December 2020, with no warning and despite clear advice to the contrary from DFO officials and scientists, former DFO Minister Jordan decided to close down salmon farms in the DI area. As shown in Table 2, the immediate impacts of this decision are devastating:

- More than 24% of BC’s farmed salmon production is being shut down.
- More than 1,500 people will lose their jobs in the near term. This includes at least 690 direct salmon farming jobs across the entire production cycle – broodstock farms, hatcheries, smolt farms, ocean farms, and primary processing; 630 jobs within BC businesses supplying goods and services to the salmon farming sector and more than 200 induced jobs in local businesses where workers in the BC salmon farming sector spend their income – as diverse as grocery stores and vehicle dealerships.
- In total, almost \$390 million in annual economic output in BC will be lost, with \$87 million less in annual salaries and benefits and 1,535 fewer jobs, mainly in remote coastal communities of BC where there are very few alternative employment opportunities or income sources for families.

**Table 2: Annual Economic Losses from Shutting Down Salmon Farming in the Discovery Islands**

	OUTPUT (\$ MILLIONS)	GDP (\$ MILLIONS)	LABOUR INCOME (MILLIONS)	EMPLOYEES (FTES)
<b>DIRECT</b>	-\$198.7	-\$61.9	-\$50.8	-222 (salmon farming) -468 (other front-end)
<b>INDIRECT</b>	-\$155.2	-\$54.9	-\$28.1	-630
<b>INDUCED</b>	-\$35.6	-\$22.7	-\$7.9	-215
<b>TOTAL</b>	-\$389.6	-\$139.1	-\$86.8	-1,535

Source: RIAS Inc. calculations. Estimated loss in output (\$198.7 million) was calculated using an expected average price in 2021 of \$9.25/kg x the average annual production from sites in the Discovery Islands. Annual economic losses for BC were estimated by applying input-output multipliers from BCSFA’s “Raising Opportunity” report to the estimated revenues from salmon farming operations in the DI.

It is important to note that the estimates in Table 2 are lower bound estimates of the likely impacts on BC’s economy over time. Input-output models used in economics are constrained in their ability to accurately reflect the full effects across an industry value-chain when the “exogenous shock” to an industry is large enough to alter the underlying structure of dependencies between sectors, and the survival of suppliers in non-diversified markets. Shutting down 24% of an industry’s production likely exceeds this threshold, particularly when it takes place in a predominately rural economy where businesses within the supply chain have very limited opportunities to pivot their operations to other sectors or markets. Some businesses may fall below economic viability and be forced to cease operations. Businesses operating in fish processing, high-tech equipment supply, and fish net supply have expressed concerns that the impact of this decision is significant enough it could make them economically unviable and force them to go out of business entirely, even though salmon farming is not their only line of business. In such instances, the indirect impacts shown in Table 2 would likely be larger than shown. This would have cascading forward effects (on induced impact estimates) and backwards effects (on direct impact estimates).

Minister Jordan's decision has ramifications that are still playing out over multiple cycles of fish in the production process and continues to sow uncertainty for a broad range of in sectors across the BC economy. Further ripple effects of former DFO Minister Jordan's decision include:

- Agreements that were in the process of being negotiated with First Nations have collapsed and didn't go forward.
- It is estimated that more than 10.7 million young salmon and fertilized eggs in hatcheries and other facilities and which were designated to be raised in the impacted farms will have to be euthanized. This is equivalent to over 210 million meals worth of fish or about two years' worth of the province's total harvest of wild salmon.
- Planned investments by the salmon farming sector are now in jeopardy, which will have direct implications for BC's economic recovery, particularly in remote coastal communities.
- First Nations partners will lose lease revenue companies pay on a quarterly or annual basis, donations to local food banks from salmon farming companies are at risk, as is the sector's support of hatchery and wild salmon restoration programs.

No other federally regulated sector in BC is facing such upheaval. Salmon farmers, their Indigenous partners and their suppliers across BC are currently struggling to adjust, create stability, and understand how best to move forward. Yet, on the horizon, more uncertainty is in sight – all remaining federal licences, and many provincial tenures, are scheduled to expire on June 30th, 2022. The Discovery Islands ministerial decision made one thing very clear: licences that are in full compliance, where environmental performance is sterling and the science is certain, can be denied renewal, despite sound advice from DFO officials.



# What is at Stake in June 2022?

BCSFA members will have an estimated 79 site licences remaining (after closure of the DI and sites in the Broughton Archipelago Region) that will be up for renewal in June 2022. Below is a summary of what is at risk if all licences are not renewed:

## 1. ECONOMIC BENEFITS TO HELP BC'S RECOVERY

Table 3 shows the total economic benefits (direct, indirect and induced impacts) that these sites generate across BC that are an important part of the province's post-COVID recovery, particularly in remote coastal communities.

**Table 3: Potential Economic Losses within BC if Licences Are Not Reissued, by region (\$ millions)**

REGION	OUTPUT	GDP	LABOUR INCOME	EMPLOYEMENT
COURTENAY/COMOX/CUMBERLAND	\$48	\$17	\$14	193
PORT HARDY/PORT MCNEIL	\$135	\$47	\$38	512
PORT ALBERNI/TOFINO/UCLUELET	\$55	\$20	\$16	215
WEST COAST NVI	\$47	\$16	\$13	181
SUNSHINE COAST/METRO VANCOUVER	\$326	\$122	\$101	1,373
OTHER*	\$585	\$205	\$84	2,244
<b>TOTAL</b>	<b>\$1,196</b>	<b>\$427</b>	<b>\$267</b>	<b>4,718</b>
<b>ESTIMATED LOSSES ALREADY TAKING PLACE IN THE BROUGHTON AND DISCOVERY ISLANDS</b>	<b>\$419</b>	<b>\$150</b>	<b>\$238</b>	<b>1,652</b>

Source: RIAS Inc. calculations. Lost revenues were calculated using an average price of \$9.25/kg x the estimated annual production (tonnes) for all remaining sites up for licence reissuance in June 2022 (adjusted in a few instances based on feedback from companies). Economic losses for BC were estimated by applying input-output multipliers (total economic impacts = direct + indirect + induced) from BCSFA's "Raising Opportunity" report to the estimated annual revenues for sites within each production zone. \* Other includes impacts in other regions of BC, as well as impacts that were not allocated to any particular region within BC.

In total, the June 2022 licence renewal process will have an effect on \$1.2 billion in economic activity in BC, \$427 million in GDP and over 4,700 BC workers. This economic activity helps to offset economic damages and financial strains that BC families have had to endure throughout the COVID pandemic. As an essential service, salmon farmers in BC played their part by not only keeping existing staff employed, but by hiring additional staff to help them manage the COVID situation. By continuing their operations, BC salmon farmers helped to cushion the negative impacts of the pandemic for more than 1,700 local vendors across BC that serve the sector, like fish processors, transporters, technology suppliers, boat operators, as well as local restaurants, hotels and businesses.

As BC works to emerge from the COVID pandemic, the salmon farming industry remains uniquely positioned to play a critical role in BC's recovery strategy – particularly in remote, coastal and Indigenous communities that are most in need at this time. BC salmon farmers have built a strong employee base in the coastal communities they operate in, with year-round full-time jobs paying approximately 30% more than the median employment income in BC.

## 2. MOVING FORWARD ON RECONCILIATION WITH INDIGENOUS PEOPLES

In the true spirit of UNDRIP, BC salmon farmers continue to nurture established partnerships with First Nations, as well as build new relationships. Over the last decade, every new farm proposed has been in partnership with a First Nation. Seventeen BC First Nations now have partnership agreements for farming salmon in their territory, with 80% of all BC salmon harvested from areas covered by First Nation partnerships. Not only have these agreements offered significant support

to the establishment of sustainable economies and improved living standards in the communities of First Nations partners, but each agreement has also expressed a commitment to respect First Nations rights, including the right to exercise jurisdiction over the land, resources and waters within their territories.

### **3. SUPPORTING YOUNG CANADIANS**

The BC salmon farming industry has a younger-than-average workforce with approximately two-thirds of all employees under the age of 35. The industry creates a diverse array of careers and occupations for young people, ranging from on-farm jobs to careers in academia and government. Farm sector occupations are year-round, well-paying, and include numerous benefits. Since salmon farming largely takes place in Indigenous and rural coastal communities, the industry creates the opportunity for Indigenous and rural youth to find employment within their home communities. BC salmon farming also provides an excellent opportunity for young people to build careers in a sustainable, low carbon, technologically advanced industry.

### **4. FOOD SECURITY**

BC salmon farmers play a significant role in bringing greater strength and resilience to the province's supply chain. The 87,000 tonnes of farmed salmon that BC has produced in previous years represents over 350 million meals of high-quality protein. Since farmed salmon production does not show seasonal variations, this means that BC salmon farmers provide 6.8 million meals each week, 52 weeks a year. Some major grocers saw a 300% increase in demand for fresh salmon during COVID, also new direct-to-consumer marketing has been very successful. This resurgence of cooking at home speaks to the growing trend to buy and prepare local, fresh foods. BC salmon farmers have the ability to supply British Columbians/Canadians with fresh salmon rather than rely on imported seafood of lesser quality. Moreover, with greater industry certainty, BC salmon farmers are prepared to invest in technologies and innovations that would facilitate responsible growth, thereby allowing them to take an even larger role in strengthening BC's food system.

### **5. ENVIRONMENTAL SUSTAINABILITY**

Farmed salmon is recognized as part of the solution to combat climate change through low carbon footprint proteins. With a low carbon footprint, low land use, low water consumption, and efficient feed conversion ratio, farmed salmon contributes a healthy and climate-friendly protein source to the world's food needs. According to the High-Level Panel for A Sustainable Ocean Economy: "The largest potential gains for food production lie in the sustainable expansion of marine aquaculture."<sup>2</sup> BC salmon farmers align with several UN Sustainability Goals (Zero Hunger, Responsible Production & Consumption, Climate Change and Life Below Water), and are a key part of the Blue Economy, a high priority of the Government of Canada.

### **6. WILD SALMON ENHANCEMENT AND PROTECTION**

Farmed salmon accounts for more than 75 per cent of all the salmon harvested in British Columbia every year, helping to alleviate pressure on harvesting of critically endangered wild stocks. BC salmon farmers also actively support the federal Pacific Salmon Strategy Initiative and the British Columbia Salmon Restoration and Innovation Fund, using their salmon rearing expertise to assist in restoration and enhancement of wild salmon stocks in rural coastal communities. BC salmon farmers also fund dozens of projects annually, volunteer their time, share expertise, collaborate within existing First Nations partnerships, and donate equipment for enhancement initiatives.

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<sup>2</sup> High Level Panel for a Sustainable Ocean Economy. "Ocean could be key to future food security" Press Release. November 19, 2019. [https://oceanpanel.org/sites/default/files/2020-07/2019\\_Blue%20Paper%20Food%20from%20the%20Sea\\_Press%20Release.pdf](https://oceanpanel.org/sites/default/files/2020-07/2019_Blue%20Paper%20Food%20from%20the%20Sea_Press%20Release.pdf)



# Consequences If Licences Are Not Renewed in 2022

BC salmon farmers are still trying to survive the loss of production in the Broughton and the Discovery Islands, and weather the additional costs to euthanize fish and decommission the DI sites over the coming months. **The reality is quite stark: any further loss of production in BC could spell the end of the entire sector.**

The Minister’s licence renewal decisions at the end of June 2022 will be an inflection point in the very survival of the sector in BC. If all remaining licences aren’t renewed or if “temporary” licences are issued (i.e., a return to 1-year licences), then investment in the sector will likely come to an end, and operations will have to wind down. While this may be welcome news for the small number of vocal anti-salmon farming activists in BC, it will exact a cruel toll on many workers, families and coastal and Indigenous communities across BC. Table 4 summarizes the full economic ripple effects across BC and the entire Canadian economy.

**Table 4: Potential Economic Losses within BC and Across Canada if Licences Are Not Renewed (\$ millions)**

	IMPACTS WITHIN BC				IMPACTS FOR ALL CANADA			
	REVENUE	GDP	LABOUR INCOME	EMPLOYEES (FTES)	REVENUE	GDP	LABOUR INCOME	EMPLOYEES (FTES)
<b>DIRECT</b>	\$610	\$190	\$156	2,118	\$610	\$190	\$156	2,118
<b>INDIRECT</b>	\$477	\$168	\$86	1,940	\$661	\$244	\$123	2,543
<b>INDUCED</b>	\$109	\$70	\$24	659	\$167	\$100	\$39	937
<b>TOTAL</b>	\$1,196	\$427	\$267	4,718	\$1,438	\$371	\$317	5,598

Source: Estimated loss in output (\$610 million) was calculated using an average price of \$9.25/kg x the estimated annual production (tonnes) for all remaining sites up for licence reissuance in June 2022. Annual economic losses for BC were estimated by applying input-output multipliers from BCSFAs “Raising Opportunity” report to the estimated revenues from salmon farming operations in the DI.

In addition to the potential losses cited in Table 4, BC will also lose-out on the planned investments by BC salmon farmers over the next 30 years that would have added considerable additional economic stimulus to BC’s post-COVID economy. The opportunity costs of these foregone investments amount over \$44 billion in lost economic activity over the 2020-2050 period, \$16.5 billion in lost GDP, \$13.2 billion in lost wages, and 9,400 fewer new jobs for BC workers by 2050.

There will also be lost opportunity for meaningful Indigenous reconciliation in alignment with UNDRIP. As noted above, BC salmon farmers have worked closely with Indigenous communities for years and have negotiated mutually beneficial partnership agreements that not only support sustainable economies and improved living standards in the communities of First Nations partners, but also express a commitment to respect First Nations rights, including the right to exercise jurisdiction over the land, resources and waters within their territories. While each partnership agreement between a salmon farming company and a First Nation reflects the unique challenges and aspirations of the First Nation, the agreements usually include:

- **Financial remuneration.**  
Remuneration paid to First Nations partners may include fixed payments and/or payments based on the number of farms or farm productivity.
- **Employment opportunities.**  
In 2011, the BC salmon farming/processing sector employed over 275 Indigenous people in management, production, and administrative positions; these employees earned \$11 million in wages annually.

- **Supply and service opportunities.**

Salmon farmers often rely on First Nations businesses to meet their local supply and service requirements (e.g., processors, harvesters, trucking, diving, vessel maintenance and repairs, fuel suppliers, ship chandlers, salmon farm equipment suppliers, feed suppliers, etc.).

- **Social responsibility commitments.**

BC salmon farmers demonstrate their commitment to social responsibility by providing scholarships, sponsorships, and donations to community service groups and sports teams. They also support capacity-building initiatives (e.g., technical or professional training programs), as well as health and social services that further contribute to the well-being of the community.

- **Environmental sustainability commitments.**

BC salmon farming companies and their First Nations partners share a common commitment to sustainability and environmental stewardship. Salmon farmers understand and support First Nations' desire to conserve healthy ecosystems within their territories. To achieve this goal, the partners collaborate in environmental protection initiatives, including Indigenous guardian and stewardship programs. A key element of many partnership agreements is recognition of the paramount importance of wild salmon in the daily lives and worldviews of First Nations.

Existing partnership and service agreements will end if licences are not renewed, and no new future agreements with Indigenous partners and contractors would take place. This will result in significant lost economic opportunities for First Nations involved in or interested in pursuing aquaculture development or other economic development supported by current agreements.



# Building a Better Path Forward

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Salmon farming can play an important role in BC's post-COVID recovery process, a role that is unique amongst BC industries due to salmon farming's significant involvement in remote coastal communities, its engagement with First Nations, and contribution to social and environmental objectives. BC salmon farmers can help BC and Canada move forward in:

## 1. BUILDING A MORE RESILIENT ECONOMY:

- Responsible growth of salmon farming in BC can make a significant contribution to BC's post-COVID economic recovery, delivering economic and social benefits to Indigenous and non-Indigenous rural coastal communities.
- With greater certainty and a secure future, BC salmon farmers could invest an additional \$1.4 billion in innovative new production technologies, generating over \$44 billion in increased economic activity over the next 30 years, and creating over 9,400 new, well-paying, year-round jobs in BC by 2050.
- BC salmon farming can also play a principal role in the success of Canada's Blue Economy Strategy by generating the magnitude of economic benefits, jobs, investment, and regional growth that will help to advance BC's economy on a low-carbon, climate-resilient, sustainable, and competitive pathway.
- BC salmon farmers can play an increasingly significant role in assuring long-term food security by bringing greater resilience and strength to global, national, and provincial food supply chains.

## 2. CREATING A CLEANER, GREENER FUTURE:

- Salmon farming's high standard of environmental integrity has been recognized by multiple independent, global environmental certification systems. BC salmon farmers have a proven track record of investing in clean technology innovations to further reduce impacts on the ocean environment and to meet the most rigorous standards of environmental responsibility and integrity.
- BC farm-raised salmon is one of the most carbon friendly animal proteins on the planet, with a low feed conversion ratio and freshwater usage, and can help Canada reach its climate targets. Farm-raised salmon is also a reliable source of healthy protein that can take the pressure off wild stocks while contributing to Canada's food security.
- Numerous formal review processes and multiple scientific investigations have concluded that BC salmon farming poses a minimal risk to wild Pacific salmon populations. Most recently, the Canadian Science Advisory Secretariat (CSAS), which coordinates the scientific peer review and science advice for Fisheries and Oceans Canada (DFO), has determined that fish farming in BC poses "minimal risk" to wild populations.

### 3. RECONCILIATION WITH INDIGENOUS PEOPLES:

- BC salmon farmers hold partnership agreements with 17 BC First Nations. Each of these agreements has been founded upon the recognition of First Nations rights. Salmon farming partnerships bring significant direct economic benefits, business opportunities, and jobs to Indigenous communities.
- Greater certainty for the salmon farming sector in BC would provide even greater opportunities for Indigenous involvement in the sector. Under the new 2022 BC tenure requirements, benefits of salmon farming partnerships could involve as many as 55 additional First Nations as tenures are renewed in the future.

But without licence renewals in 2022, the salmon farming sector can't deliver these economic, environmental, social/reconciliation benefits in BC. And there can be no federal 2025 transition plan in BC if there is no industry.



# A Plan to Move Forward

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With a new government comes the opportunity for a restart; an opportunity to establish a meaningful, respectful process moving forward to develop equitable solutions for all. BC salmon farmers are eager to work with federal, provincial and Indigenous governments to develop a fundamentally different approach to how salmon aquaculture is managed in BC, with clear rules, meaningful engagement and sound and transparent decision making.

Key features of a new plan to move forward should include:

- Immediate engagement on 2022 tenure and site licence renewals, and the 2025 transition plan. Decisions on future investment by this sector are taking place now. 2022 provincial tenure and federal site licence renewal requirements need to be defined and unified with requirements under any 2025 federal transition plan. A process for engagement by senior government officials with industry leaders and Indigenous partners, with a clear timetable to address these issues, needs to happen now.
- Meaningful, direct and respectful engagement of Indigenous partners/First Nations leadership (e.g., the Indigenous Partners Network), the salmon farming sector, local businesses and local community leaders.
- Support for Indigenous participation and partnership/ownership opportunities. Financial incentives are needed for Indigenous communities to invest in joint ventures and to assist with capacity building within Indigenous communities to obtain the skills, training, and expertise to be full partners in salmon farming, guardianship, and monitoring.
- Clear federal, provincial and Indigenous government decision-making processes that:
  - Do not undermine existing opportunities/benefits agreements with First Nations. Further, the path forward should endeavour to ensure there are no net job losses for British Columbians or any First Nations, particularly for workers in remote coastal communities.
  - Enable continued improvement as an environmentally responsible food production system.
  - Do not pre-determine or favour adoption of specific technologies. Instead, the focus should be on enabling innovation in the sector. For example, Norway, the world's leading salmon farming nation, has an enabling environment for salmon farming with innovation sites to trial new technologies.
  - Are science-based, supporting financially viable approaches that advance adoption of leading production technologies.
  - Address delays in processing tenure amendments and new tenure applications. Salmon farmers are experiencing significant delays in the processing of expired tenures, tenure amendments, and/or new tenure applications. The delays result in slow or delayed production, greatly increase business uncertainty, and impact First Nations partners, putting the business and economic aspirations of participating First Nations in jeopardy.

- Increase transparency in decision-making for the future – for example, obtaining a licence re-issuance is complex and closed. All three governments should consider a dashboard type platform that allows the public to see what information/data companies provide as part of the process.
- Other supports to advance the Blue Economy Strategy in BC
  - Support and incentivize trialing of new salmon farming technologies.
  - Invest in critical infrastructure required in rural coastal BC communities.
  - Increase funding for post-secondary youth skills training in rural coastal BC.
  - Enhance funding for ocean-based research regarding wild salmon.

