



MARITIME FORUM

Study on Blue Growth, Maritime Policy and the EU Strategy for the Baltic Sea Region

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The “Study on Blue Growth, Maritime Policy and the EU Strategy for the Baltic Sea Region” identified the potential for Blue Growth in each of the EU Member States (MS) of the Baltic Sea Region (BSR) and at sea basin level.

It also assesses the contribution and effectiveness of maritime actions as set out in the current EU Strategy for the Baltic Sea Region (EUSBSR) in implementing the EU Integrated Maritime Policy (EU IMP) in general and the Blue Growth potential identified in particular.

Based on these assessments and analyses recommendations are provided for how to support Blue Growth within each Baltic member state, across the sea-basin and within the context of the EUSBSR taking into account opportunities arising within the next programming period.

The methodology of analysis applied throughout the study follows the approach that was developed for all blue growth studies currently undertaken on behalf of DG Mare for all European sea basins. For this purpose seven maritime functions have been defined, each of them composed of several maritime economic activities (MEA), for a total of 29 MEAs.

Table Functions / MEAs[1]

0. Other sectors	1. Maritime Transport	2. Food, nutrition, health and ecosystem services	3. Energy and raw materials	4. Leisure, working and living	5. Coastal protection	6. Maritime monitoring and surveillance
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0.1 Shipbuilding and ship repair 0.2 Water projects	1.1 Deep-sea shipping 1.2 Short-sea shipping 1.3 Passenger Ferry services 1.4 Inland waterway transport	2.1 Fish for human consumption 2.2 Fish for animal feeding 2.3 Marine aquaculture 2.4 Blue biotechnology 2.5 Agriculture on saline soils	3.1 Offshore oil and gas 3.2 Offshore wind 3.3 Ocean renewable energy 3.4 Carbon capture and storage 3.5 Aggregates mining 3.6 Marine minerals mining 3.7 Securing fresh water supply	4.1 Coastal tourism 4.2 Yachting and marinas 4.3 Cruise tourism 4.4 Working 4.5 Living	5.1 Protection against flooding and erosion 5.2 Prevent salt water intrusion 5.3 Protection of habitats	6.1 Traceability and security of goods supply chains 6.2 Prevent and protect against illegal movement of people and goods 6.3 Environmental monitoring
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Data for each of the BSR EU Member States was drawn from Eurostat for the years 2008-2010 (latest available year) in order to perform a quantitative analysis of the size and recent growth of the MEAs. The qualitative assessment is based on six defined Blue Growth indicators, i.e. innovativeness, competitiveness, employment, policy relevance, spill-over effects and sustainability. The scoring takes into account recent trends, policy papers, strengths and weaknesses both at country as well as transnational / EU level.

For the analysis at sea-basin level this data was aggregated to show similarities and differences between the BSR countries and identify potential areas for sea basin cooperation.

This was matched with a systematic assessment of 84 actions and 174 flagship projects from the revised EUSBSR version (February 2013) in terms of their relevance for the various MEAs and Blue Growth in particular within the BSR. In addition, results from a survey carried out among the EUSBSR area / action coordinators and National Contact Points were taken into account as well as interviews carried out with selected stakeholders.

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[1] It should be noted that MEA 2.1. "Fish for human consumption" does not only include fish catching in

the given sea basin/country, but also fish processing and sale activities within the given country (incl. fish from other sea basins). On the other hand, MEA Marine aquaculture only relates to the farming of marine aquatic organisms and neither includes freshwater fish aquaculture nor the processing or sale of aquaculture products.

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