National Ocean Strategy 2013-2020 (NOS)

Strategic monitoring framework in Portugal

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The NOS 2013-2020 proposes a sustainable development model that is based on the Ocean, in articulation with the coastal zone, grounded on knowledge, which guarantee that Portugal faces the challenges that promotion, growth and competitiveness of the ocean economy imposes.

This model is in parallel with:

- The *green growth* discussed in Rio + 20 (August 2012) and expressed in the respective Declaration *The Future We Want*. Aligned with the Sustainable Development Goals of the UN Pós-2015 Development Agenda.


And is being articulated with several financial instruments available (ESIF, Horizon 200, LIFE, COSME, EEA Grants, EIB funds, ...).
NOS 2013-2020: Strategic Monitoring Framework

Strategic Monitoring of the NOS 2013-2020

- Maritime Spatial Planning legislation, socioeconomic impacts
- MSFD, socioeconomic analysis of marine waters use in PT

Integrated System to Support Decision Making

- Articulation with EU Action Plan for Atlantic Area
- Articulation with ITI MAR
- NOS monitoring and appraisal
- Strategic communication
- Public sectorial policies
- Articulation with Ocean UN SDG Post2015 Process
Socio-economic analysis

**OSPAR**
*Strategic Support for the OSPAR Regional Economic and Social Analysis*

October 2011

**MSP Exercise**
Chapter 3 – Activities, Uses and Functions Characterization

October 2012 e 2014 (AR)

**OSPAR**
*Strategic Support for the OSPAR Regional Economic and Social Analysis*

2012-2013

**MSFD – Initial reports**
Chapter – Socioeconomic analysis

October 2012 e 2014 (AR)

**NOS 2013-2020: socio-economic analysis**

December 2012/March 2015

**NOS 2013 - 2020**
Report “Ocean Economy in Portugal” (Dec 2012)
Annex A of NOS (Nov 2013) and update (March 2015)

**NOS 2013-2020: socio-economic analysis**
Characterisation of the Blue Economy in Portugal

Structure of GVA and of the Employment, 2013

GVA - 2013
- TOURISM AND RECREATION: 47%
- MARITIME TRANSPORT AND PORT OPERATIONS: 31%
- FISHERIES, AQUACULTURE AND FISH PROCESSING INDUSTRY: 18%
- COASTAL DEFENSE: 1%
- SALT MINING: 0%

Employment - 2013
- TOURISM AND RECREATION: 53%
- FISHERIES, AQUACULTURE AND FISH PROCESSING INDUSTRY: 25%
- MARITIME TRANSPORT AND PORT OPERATIONS: 18%
- COASTAL DEFENSE: 1%
- SALT MINING: 0%

SALTPACK REPLACEMENT

Source: DGPM 2015 (based on Statistics Portugal, National Accounts)
The Project:

- DGPM and Statistics Portugal (INE) signed a Protocol in June 2013, for the elaboration of a Satellite Account for the Sea (SAS).
- A Satellite Account is an extension of the central system of accounts, with additional information, being the National Accounts (NA) the economic overview statistics, par excellence.
- The drawing up of a SAS is considered the most appropriate instrument to estimate the dimension and the importance of the Ocean Economy in the whole economy, as well as to provide information on the production structure of the economic activities related to the sea.

The Purpose:

i) to measure the relevance of the Ocean Economy;
ii) to support decision making regarding the coordination of public policies for the ocean;
iii) to monitor the National Ocean Strategy 2013-2020 (NOS) in its economic component, giving support to the Inter-Ministerial Commission for Maritime Affairs (ICMA).
iv) to provide reliable and adequate information for Portugal in the context of the Integrated Maritime Policy (IMP) and other processes where data for the Ocean Economy is decisive.
First draft concept of “Ocean Economy”

Ocean Economy

**SAS** – Satellite Account for the Sea

Non tradable marine ecosystem services

“Set of economic activities carried out in the sea and others, dependent upon the sea, including non tradable marine ecosystem services”

National Accounts
**Expected results:**

Country Portugal (Mainland and Islands)
- Output
- Intermediate Consumption
- **Gross Value Added**
- Gross Operating Surplus
- **Employment**
- Compensation of Employees
- Other Subsidies on Production
- Other Taxes on Production
- Gross Fixed Capital Formation
- Imports and Exports of Goods and Services.

**Direct contribution of the Sea Economy to the whole Economy (% GVA)**

**Advantages:**
- Coherent approach to compare all sectors
- Consistent with National Accounts and GDP
- Support long-term, macroeconomic and structural analysis
- Produce a supply and use table for the ocean economy

**Limitations:**
- Time lag - Results with 21 months lag
- Geographic disaggregation - May be NUT II, but not NUT III
- It doesn’t include environment dimension
OBJECTIVE
To implement a restricted number of relevant indicators to check the NOS 2013-2020 results, considering a sustainable development perspective.

Connection with NIPIM@R/enhanced CISE

Information sharing
Information visualisation in specific context

Partner in the NIPIM@R Project Model for information sharing/visualisation on Sustainable Development Pillars – Governance, Economy, Social and Environment
Levels of policy coordination

National


Regional

Regional Operational Programs Regional Research and Innovation Strategy (RIS) Ocean in Regional Strategies

Local

Ocean in local strategies (e.g. cities strategies)

Intersectoral approach

Horizontal integration

International level

National Level

Rio +20 – UN SDG Ocean Europe2020 IMP EU – Atlântic Strategy MSFD European Strategy for SD Horizon 2020, COSME, LIFE
Data Desagreguation and Geographic Scale Analysis

<table>
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<th>Marine waters</th>
<th>Terrestrial area</th>
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<td><strong>NOS 2013-2020</strong></td>
<td><strong>Ocean Economy Chain value</strong></td>
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<tr>
<td>MSFD in PT</td>
<td>Human and economic activities that occur in marine waters and terrestrial area</td>
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<td>MSP in PT</td>
<td>Economic data by:</td>
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<td>- NACE</td>
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<td>- NUT</td>
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<td>- Ports</td>
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<td>- Others</td>
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Extended Continental Platform | EEZ | Territorial waters |
## Calendar of monitoring reports

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<tr>
<td><strong>NOS 2013-2020</strong></td>
<td></td>
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<td>Annual report (DGPM)</td>
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<td><strong>MSFD</strong></td>
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<td><strong>Initial Assessment (MS)</strong></td>
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<td><strong>OAPR Initial Assessment 2017?</strong></td>
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<td><strong>MSP national legislation</strong></td>
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<td>Report each 3 years (Government)</td>
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<td><strong>SDG (Post-2015 UN Process)</strong></td>
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<td><strong>TBD</strong></td>
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<td><strong>Atlantic Action Plan (EU)</strong></td>
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<td>Mid-term review (Commission)</td>
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**NOS 2013-2020:** Annual report (DGPM)  
**MSFD:** Initial Assessment (MS)  
**OAPR Initial Assessment 2017?:** IA 2017  
**MSP national legislation:** Report each 3 years (Government)  
**SDG (Post-2015 UN Process):** TBD  
**National Compromise for Green Growth - Ocean Pilar:** Annual assessment  
**Atlantic Action Plan (EU):** Mid-term review (Commission)
Project cycle

Conceptual matrix

Broad strategic framework

Implementation

Tableau de Bord

Indicators selection

Radar

Indicators demand

Sectorial Plans/ National Plans and policies

Indicators supply

Who, which statistics/ surveys/ oceanographic campaigns

Indicators

Discussion of the indicators listed

Auscultation of stakeholders

Other important areas of interest of the stakeholders

Concepts

Methodology

Methodology test

Pilot test – Fishing, aquaculture and fishing industry

New clientes, Interests

International commitments (goals, objectives)
Deliverables

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<th>Strategic objectives</th>
<th>Objectives of Programatic Areas</th>
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</thead>
</table>

**Dash Board**

- **Radar**
- **Control Panel**

**Periodic reports**
ECONOMY

Fully maritime sectors:
Common indicators
Turnover, GVA, Labour (Structural Business Statistics/SBS)
Sectorial specific indicators

Other maritime activities, including emergente activities:
Sectorial specific indicators
Best examples

Complement of NA analysis:
- Trends analysis and support to projections
- Narrower time lag (n-1)
- NUT III and other sub-regional level

NACE Codes - fully maritime sectors:
Living resources
Fishing
Aquaculture
Processing and preserving of fish, crustaceans and molluscs
Retail sale of fish, crustaceans and molluscs

Ship and boat building
Building of ships, floating structures and pleasure and sporting boats
Repair and maintenance of ships and boats

Transport
Sea and coastal passenger water transport
Sea and coastal freight water transport
Inland passenger water transport
Inland freight water transport
Renting and leasing of water transport equipment
Fishing and aquaculture: Example of tendencies analysis

The GVA (SBS) could be a proxy to make the projections of GVA (NA) in current prices. The Turnover (SBS) could be a proxy to make the projections of Production (NA) in current prices.
Ports and logistics:

**Port Administration** is a fully maritime activity but... it is included in NACE Class 52.22 - Service activities incidental to water transportation, that includes non maritime activities.

**Port Community?** Includes also service companies such as pilotage, tows, concessionaires, navigation agents, brokers, shipowners, other suppliers, road and railway transporters and also public administration companies (customs, emigration services, sanitary and veterinarian services).

**NACE Codes (all partially)** Class 4291, Group 521, Class 5222, Class 5224, Class 5229, Class 7490, Subclasse 77340

**Sectorial specific indicators (proxys of economic activities in the ports):**
Analyzes of the seaborne traffic of the ports by calculating the volume of the cargo/passengers that is handled over a period of time.
Deliverables

Strategic objectives

Dimensions (domains identification and indicators available ongoing)

- Geography
- Macroeconomics and trade
- Employment
- Market labour
- Innovation
- International cooperation
- Marine ecosystems and biodiversity
- Marine resources/fishing resources
- Carbon and energy
- Marine waste
Monitoring information fluxes

ESIF

<table>
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<th>Thematic objectives</th>
<th>Investment Priorities</th>
<th>Specific Objectives</th>
<th>Outcome Indicators</th>
<th>Output Indicators</th>
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<tr>
<td>Regional Ops, Thematic OPs and Mar 2020 OP</td>
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"MAR" in ESIF

SEAMind / Satellite Account for the Sea

Transversal Strategies (e.g. RIS3)

National Ocean Strategy 2013-2020
NOS 2013-2020: Blue Integrated Territorial Investment (ITI-"Mar")

治理体系

- 开发一个初始框架
- 协作工作，由DGPM协调
- 包括监测机制

Decree-law n.º 200/2015, de 16 de September
SOME FINAL REMARKS ABOUT MONITORING OF BLUE ECONOMY:

- Articulation between long-term and structural analysis and short/medium-term and conjunctural analysis
- Ocean Economy analysis grounded on National Accounts (GVA and Employment), complemented with additional information on sectors
- Ocean Economy definition coherent with future works on coastal and marine ecosystem services valuation
- Sustainable development perspective, not only economic performance indicators
- Articulation with UN SDG Ocean Stand Alone indicators – Post 2015 Development Agenda/Universal implementation
- Coherent vertical and horizontal policy analysis, including in the Atlantic Area

COHERENT, REPRODUCTIVE AND SUSTAINABLE MONITORING FRAMEWORK
THANK YOU

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