

# Blue Growth: sustainable growth from the oceans, seas and coasts

This questionnaire aims at gathering the views of public authorities, businesses, citizens and civil society involved in maritime and marine activities.

The marine and maritime economic sectors forming the EU's 'blue economy' represent roughly 5.6 million jobs and account for a Gross Value Added (GVA) of €495 billion.<sup>[1]</sup> The European Commission is seeking to identify and eventually counter bottlenecks and barriers to sustainable growth and to devise the most appropriate policy responses. This initiative will also provide a comprehensive picture of the economic size and employment of all the main marine and maritime sectors in Europe, including emerging sectors with potential high added value and growth perspectives. More importantly, it is tracing the most credible scenarios for a number of Europe's marine and maritime economic sectors in 5 to 15 years' time.

On the basis of this analysis, the Commission will consider policy options aimed at accompanying the potential economic growth and employment in these sectors, including requirements in terms of skills, training and qualifications, research, innovation, and integrated development strategies. In many instances, it will also be for Member States, regions, and the business sector to adjust their focus towards areas which hold the greatest potential growth in terms of profits, employment and added value. The result of this consultation will be made public and may contribute to this process.

The adoption of appropriate measures to tackle such challenges and achieve the best possible growth scenarios for the maritime economy will be an important contribution to Europe's overall economic recovery.

Your views on this topic are very important to us and will help us in the development of the Blue Growth initiative. We would appreciate if you could spare some minutes to respond to the following questionnaire. It relates to questions about the need for European regional statistics and about the quality of these statistics.

In order to provide a more comprehensive background to the initiative, we are also providing access to the Third Interim Report of the on-going Blue Growth study "Scenarios and Drivers for Sustainable Growth from the Oceans, Seas and Coasts":

[http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/blue\\_growth\\_third\\_interim\\_report\\_en.pdf](http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/blue_growth_third_interim_report_en.pdf)

Comments and examples to support your answers would be really welcome.

To ensure confidentiality, results of the survey will be made available in summary form only.

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<sup>[1]</sup> ECORYS, Working Document, Blue Growth: Scenarios and drivers for Sustainable Growth from the Oceans, Seas and Coasts, p. 9, 22 December 2011.

Questions marked with an asterisk \* require an answer to be given.

## I. General Questions

1) To what type of organisation/institution do you belong? \*

- Commission service
- European Institution (other than Commission service)
- International Organisation (OECD, etc.)
- Other national or regional government institution
- Banking and financial services
- University
- Research Institute
- Press, publishing company or other media
- Private business
- Private individual
- Other

2) In which country do you work? \*

3) How would you rate your expertise in marine and maritime affairs?  
(From 1 to 5, with 5 being expert and 1 being novice)

\*

- 1                       2                       3                       4                       5

## II. The blue economy

*The maritime economy consists of all the economic activities related to the oceans, seas and coasts. This includes the closest direct and indirect supporting activities necessary for the functioning of these economic sectors, which can be located anywhere, including in landlocked countries.*

4) Do you agree with this definition of the 'blue economy'?

\*

- yes                       no

You may wish to comment (maximum 700 characters)

5) In the context of the Blue Growth study, marine and maritime economic activities have been sub-divided into three main categories. Below are examples of 'blue growth' areas for each category:

- *Pre-development sectors:*

*(In this stage of development, technological inventions for these sectors have been made, but most promising outputs are still to be defined. Much R&D is required).*

Blue biotechnology; ocean renewable energy resources (wave, tidal, osmotic, ocean thermal energy conversion – OTEC); marine mineral resources (i.e. deep sea drilling for mineral resources).

- *Sectors that have seen strong recent growth:*

*(Growth sectors are considered as having strong economic and/or employment growth. In this stage, smaller sized companies can enter the market as prices are gradually going down).*

Offshore wind; marine aquatic products; cruise tourism; maritime monitoring and surveillance.

- *Economically mature sectors:*

*(In this stage, economic activities remain stable at a relatively big size. Market positions of main players are clear and competition is fierce).*

Coastal Tourism; offshore oil and gas; coastal protection; short-sea shipping.

Do you agree with the above sub-division?

\*

Yes

No

No opinion

You may wish to comment: (maximum 500 characters)

### III. Framework conditions for sustainable growth

## a) Education, training, and skills

*Skills mismatches concern all Member States but affect them in varying degrees. In many countries, national authorities have put in place national strategies and tools to try remedying the gaps/mismatches. At European level, a number of actions and instruments to anticipate skills' needs have been put in place, as initiated in the "Agenda for new skills and jobs", flagship initiative of the Europe 2020 strategy.*

6) When looking at the maritime activities listed below, what mismatches exist between the skills, education and training requirements of the sector as opposed to what is available on the market?

Table 1 - Main Functions and corresponding marine and maritime economic activities

	Lack of education	Lack of training	Lack of skills	No opinion
<u>Maritime transport and shipbuilding</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deepsea shipping *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shortsea shipping (incl. RoRo) *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Passenger ferry services *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inland waterway transport *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Food, nutrition, health, and ecosystems services</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Catching fish for human consumption *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Catching fish for animal feeding *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing aquatic products *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
High value use of marine resources (health, cosmetics, well-being, etc.) *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Agriculture on saline soils *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Energy and raw materials</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offshore oil & gas *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Offshore wind \*



Ocean renewable energy resources (wave, tidal, OTEC, biofuels, etc.) \*



Carbon capture and storage \*



Aggregates mining (sand, gravel, etc.) \*



Marine mineral resources (seabed mining) \*



Securing fresh water supply (desalination) \*



Leisure, working, and living



Coastline tourism \*



Yachting and marinas \*



Cruise including port cities \*



Coastal protection



Protection against flooding and erosion \*



Preventing salt water intrusion \*



Protection of habitats \*



Maritime monitoring and surveillance



Traceability and security of goods supply chains \*



Prevent and protect against illegal movement of people and goods \*



Environmental monitoring \*



7) How effective are the following initiatives for matching skills and qualifications with sector requirements?

EU initiatives	Not effective	Effective	Highly effective	No opinion
(a) Facilitate professional mobility between maritime sectors. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(b) Better links between maritime training institutes and employers' expectations: mapping skills shortages and economic potential. Adapt the curricula to the current needs of the maritime economy. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(c) Improve geographical mobility. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(d) Improve the European recognition of qualifications *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(e) Raising awareness of career possibilities in maritime sectors for young Europeans. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(f) Improve working conditions in order to retain people in maritime professions. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(g) Improve gender equality in maritime sectors. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(h) Anticipation and better management of economic restructuring. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(i) Promotion of life-long learning. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

(j) Development of employment and qualifications tools with specific application to the maritime economy.

\*

(k) Promoting an appealing image of sector.

\*

(l) Attract more women especially in technical professions.

\*

(m) Promoting changes in work organisation (e.g. flexible working arrangements).

\*

(n) other \*

8) Below are EU level initiatives addressing skills, qualifications, and overall education and employment. How familiar are you with the following initiatives:

EU initiatives

Not aware

Superficial knowledge

Familiar

No opinion

European Skills, Competences and Occupations taxonomy (ESCO)  
[http://www.european-retail-academy.org/media/download/ESCO\\_overview.pdf](http://www.european-retail-academy.org/media/download/ESCO_overview.pdf)

\*

European Skills Panorama

\*

European Sectoral Skills Councils

<http://ec.europa.eu/social/main.jsp?langId=en&catId=782&newsId=743&furtherNews=yes>

\*

Lifelong Learning Programme

[http://ec.europa.eu/education/lifelong-learning-programme/doc78\\_en.htm](http://ec.europa.eu/education/lifelong-learning-programme/doc78_en.htm)

\*

Youth on the Move

[http://ec.europa.eu/youthonthemove/move/study/index\\_en.htm](http://ec.europa.eu/youthonthemove/move/study/index_en.htm)

\*

The European Job mobility portal  
(EURES)

<http://ec.europa.eu/eures/home.jsp?lang=en>

\*

European Skills Passport

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The European Qualification Framework

[http://ec.europa.eu/education/lifelong-learning-policy/doc44\\_en.htm](http://ec.europa.eu/education/lifelong-learning-policy/doc44_en.htm)

\*

Skills for Green Jobs

<http://ec.europa.eu/social/main.jsp?catId=370&langId=en&featuresId=130&furtherFeatures=yes>

\*

Social and labour framework for fisheries

[http://europa.eu/legislation\\_summaries/employment\\_and\\_social\\_policy/employment\\_rights\\_and\\_work\\_organisation/c11800\\_en.htm](http://europa.eu/legislation_summaries/employment_and_social_policy/employment_rights_and_work_organisation/c11800_en.htm)

\*

Maritime Transport Social Agenda

[http://ec.europa.eu/transport/maritime/seafarers/seafarers\\_en.htm](http://ec.europa.eu/transport/maritime/seafarers/seafarers_en.htm)

\*

Maritime industry knowledge network (research project)

[http://ec.europa.eu/maritimeaffairs/policy/marine\\_knowledge\\_2020/index\\_en.htm](http://ec.europa.eu/maritimeaffairs/policy/marine_knowledge_2020/index_en.htm)

\*

COM (2003) 717 'LeaderSHIP 2015 - Defining the future of the European Shipbuilding and Repair Industry - Competitiveness through Excellence'

[http://eur-lex.europa.eu/smartapi/cgi/sga\\_doc?smartapi!celexplus!prod!DocNumber&lg=en&type\\_doc=COMfinal&an\\_doc=2003&nu\\_doc=717](http://eur-lex.europa.eu/smartapi/cgi/sga_doc?smartapi!celexplus!prod!DocNumber&lg=en&type_doc=COMfinal&an_doc=2003&nu_doc=717)

\*

Legislative proposal to modernise the Professional Qualifications  
Directive 2005/36/EC

[http://ec.europa.eu/malta/news/modernise\\_professional\\_qualifications\\_directive\\_en.htm](http://ec.europa.eu/malta/news/modernise_professional_qualifications_directive_en.htm)

\*



The European Labour Market Monitor

<http://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=1182&furtherNews=yes>

\*

Job search and matching portal for European researchers (EURAXESS)

<http://ec.europa.eu/euraxess/index.cfm>

\*

ESF training programmes

<http://ec.europa.eu/esf/main.jsp?catId=51&langId=en>

\*



9) Are you aware of any specific initiatives and partnerships currently underway in the Member States and regions to address these issues? \*

Yes

No



Please name these specific initiatives and express your views as to their effectiveness (maximum 500 characters)

## b) Access to finance

10) Access to finance is one of the major barriers hindering growth, particularly in emerging sectors. Restoring normal lending to the economy and promoting economic competitiveness is among the issues highlighted in the Annual Growth Survey 2012.<sup>[1]</sup> Multiple risks and economic uncertainty renders access to finance even more difficult in the case of emerging sectors or when activities are undertaken by small and medium companies (SMEs) relying on private capital. The European Commission has undertaken several initiatives to support and improve the business environment for SMEs such as the Europe 2020 flagship initiatives 'An industrial policy for the globalisation era'<sup>[2]</sup> and 'Innovation Union'.<sup>[3]</sup>

However, is it necessary to create specific instruments and initiatives directed at emerging marine and maritime economic activities (e.g. ocean renewable energy resources, blue biotechnology and marine aquatic products)?

<sup>[1]</sup> COM(2011) 815 final; [http://ec.europa.eu/europe2020/pdf/annual\\_growth\\_survey\\_en.pdf](http://ec.europa.eu/europe2020/pdf/annual_growth_survey_en.pdf)

<sup>[2]</sup> An Integrated Industrial Policy for the Globalisation Era - Putting Competitiveness and Sustainability at Centre Stage (COM(2010) 614).

[http://ec.europa.eu/enterprise/policies/industrial-competitiveness/industrial-policy/files/communication\\_on\\_industrial\\_policy\\_en.pdf](http://ec.europa.eu/enterprise/policies/industrial-competitiveness/industrial-policy/files/communication_on_industrial_policy_en.pdf)

<sup>[3]</sup> Innovation Union (COM(2010) 546). [http://europa.eu/legislation\\_summaries/research\\_innovation/general\\_framework/em0041\\_en.htm](http://europa.eu/legislation_summaries/research_innovation/general_framework/em0041_en.htm)

\*

Yes

No

11) In the affirmative, how promising are the following actions to facilitate the financing of innovative ideas:

EU actions	Not effective	Effective	Highly effective	No opinion
Promoting knowledge about the feasibility of 'blue growth' projects and sectors in order to increase the interest of venture capital*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More focused use of existing EU funding (e.g. structural funds) for marine and maritime projects*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoting access to risk capital through fiscally attractive incentives for private investment;*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supporting access to credit for SMEs involved in 'blue growth' innovation*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Facilitate access to finance for start-up firms, notably micro-finance, and provide financial support*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support the establishment of infrastructures (such as incubators) and the provision of business development services (offering information and advice, training, coaching and mentoring for business starters) that meet the needs of target groups, with the help of the ESF and ERDF*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support platforms and fora to exchange good practice and mutual learning between business starters*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### c) Research, development and innovation

The EU has strong marine and maritime scientific and academic competencies, but considerably less commercial spin-offs of such research.

12) Which of the following initiatives can bridge this knowledge-transfer gap in the following pre-development sectors?

Initiatives	Blue biotechnology and marine aquatic products	Ocean renewable energies (tidal, wave, OTEC, thermal)	Marine mineral resources (deep sea drilling)
Increase investments in demonstration projects to prove the commercial feasibility of large prototypes and infrastructures to prepare the commercial growth of this new sector	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve access to risk capital or loans for start-up SMEs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve intellectual property management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Launch large public-private partnership initiatives to gather the critical mass necessary to overcome technological obstacles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bridge gaps between science / industries and education, like in EIT / KICs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please provide further explanation: (maximum 700 characters)

13) Which of the following initiatives can bridge this knowledge-transfer gap in the following growth sectors?

Initiatives	Offshore wind	Cruise tourism	Maritime monitoring and surveillance
Increase investments in infrastructures to facilitate the commercial growth of this new sector	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve access to risk capital or loans	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Launch large public-private partnership initiatives to gather the critical mass necessary to overcome technological obstacles	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Improve intellectual property management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Bridge gaps between science / industries and education, like in EIT / KICs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please provide further explanation: (maximum 700 characters)

#### d) Clusters and synergies

*A cluster can be broadly defined as a group of firms, related economic actors, and institutions that are located near each other and have reached a sufficient scale to develop specialised expertise, services, resources, suppliers and skills. Therefore, clusters can help developing new business concepts and deliver growth and jobs, but synergies between economic actors may also be achieved in a more informal manner.*

14) To achieve these results, which initiatives listed below are most relevant?

Initiatives	Highly relevant	Moderately relevant	Not relevant	No opinion
Strengthening European networks of maritime clusters with common definitions *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A series of thematic events at regional level where promising business cases can be explored with economic actors *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A set of case studies outlining integrated investment strategies for clearly identified potential business cases *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An observatory on business diversification and new products from maritime sectors *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

15) To what extent can and do maritime clusters deliver on:

(please indicate your choice ranking the options from 1 to 4; 1 as the less efficient and 4 the most efficient)

	1	2	3	4
Developing new business concepts *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Innovation *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Transparency and mobility of the workforce *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Matching of skills and qualifications requirements *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

*European strategies for macro-regions, sea-basins (Atlantic, North Sea, Baltic, Arctic, Mediterranean and Black Sea) and for sub-sea basins (e.g. the Adriatic-Ionian) aim to foster synergies and align EU and national funding to specific growth objectives in relation to a specific geographical area.*

16) Do you think the further development of the sea-basin approach, including cooperation with non-EU neighbouring countries, would benefit the maritime economy?

\*

Yes

No

No opinion

Please provide a brief explanation: (maximum 1000 characters)

17) In the context of sea basins, please indicate the relevance of the following instruments to complement these strategies and make them more operational in terms of delivering growth and jobs in the maritime economy?

EU Initiatives	Highly relevant	Moderately relevant	Not relevant	No opinion
Sea-basin specific study work on future maritime economic activities *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Targeted communication to regional stakeholders through media etc. *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Regional forum bringing together public authorities, private companies, NGOs and Regional Seas Conventions *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sea basin specific events *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cluster development focused on sea-basin level *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
An EU scoreboard to monitor progress in the implementation of job creation and labour market tools by Member States *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A new EU agenda for removing legal and practical obstacles to free movement of workers *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### e) Regulatory bottlenecks

18) There can be multiple barriers to sustainable growth on different levels for marine and maritime economic sectors, such as lengthy authorisation procedures, legal complexities, internal market barriers, etc. Which level of governance do you consider most problematic in this respect?

\*

Local
  Regional
  National
  European
  No opinion



19) In your opinion, which are the main regulatory barriers to sustainable growth in marine and maritime economic activities? Please provide examples.

(maximum 750 characters)

## **f) Specific Integrated Maritime Policy initiatives**

*Europe's sea and oceans are a rich source of innovation, growth and employment. The Integrated Maritime Policy aims to facilitate the cooperation of all maritime players, across sectors and across borders, so that this potential is used fully, effectively and sustainably. It is implementing specific policy tools for the development of the European maritime economy based on greater legal certainty for businesses to invest, better knowledge about the oceans and seas so that business and public authorities can operate more effectively and an enhanced safety and security network.*

20) The growing number and variety of activities at sea makes securing safety, security and sustainability a bigger challenge. The EU is currently studying the possibilities of integrating maritime surveillance across borders and sectors, aiming cost-effectiveness and efficiency of maritime surveillance due to exchange of data and information currently collected individually by its users (e.g. border control, safety and security, fisheries control, customs, environment or defence). Sharing maritime knowledge can ensure the development of better policies and allows public authorities to better apply and enforce such policies.

a) In your opinion, what are the benefits to the economy of such data exchange? This in particular as regards:

- Preserving fish stocks
- Preserving the marine environment
- Preventing marine pollution (both land and sea borne)
- Better understanding of sea level rise due to global warming and effects on coastal zones
- Better safety at sea given that 90% of the EU's external trade is sea borne
- Enhanced security for the EU and its citizens (from any type of sea borne criminal and terrorist threats)
- Creating the framework conditions for business to safely exploit new opportunities of the maritime/marine domain in a sustainable manner
- Less evasion of custom duties
- Less illegal immigration
- Others?

(maximum 1500 characters)

b) How would you measure such benefits?

(maximum 1000 characters)

c) How would you measure the economic benefits of improved maritime awareness, safety and border control?

(maximum 1000 characters)

21) According to a study on the economic effects of Maritime Spatial Planning<sup>[1]</sup>, it was found that, if its implementation is managed properly, the economic benefits are fourfold (see table below). Please rank the following four economic effects according to the level of importance for sustainable economic growth and employment in the sea basin you are most familiar with: (1 as the less important to 4 as the most important)

[1 [http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/economic\\_effects\\_maritime\\_spatial\\_planning\\_en.pdf](http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/economic_effects_maritime_spatial_planning_en.pdf)

	1	2	3	4
Enhanced coordination and simplified decision processes *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhanced legal certainty for all stakeholders in the maritime arena *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhanced cross border cooperation *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enhanced coherence with other planning systems *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

22) How important is it for cross border investments in coastal regions and maritime areas that Member states co-operate across borders on maritime spatial planning issues?

\*

Very important     Relatively important     Not important     No opinion

Please motivate your answer: (maximum 700 characters)

23) In order to stimulate sustainable economic growth and jobs, how important is it for public authorities and enterprise to gain a comprehensive scientific knowledge of our seas through seabed mapping<sup>[1]</sup> for the sustainable exploitation of marine resources:

<sup>[1]</sup>[http://ec.europa.eu/maritimeaffairs/policy/marine\\_knowledge\\_2020/index\\_en.htm](http://ec.europa.eu/maritimeaffairs/policy/marine_knowledge_2020/index_en.htm)

\*

Not important       Relevant       Crucially important       No opinion

24) How important is it for the maximization of sustainable growth of marine and maritime economic activities that Member states cooperate with their neighbouring countries on the Integrated Maritime Policy cross-cutting tools (maritime spatial planning, marine knowledge, and the integration of maritime surveillance?) \*

Very important       Relatively important       Not Important       No opinion

#### IV. Sustainability - environmental challenges and opportunities

An increase in marine and maritime activities may trigger adverse environmental impacts, whether through high energy requirements, marine pollution (e.g. through oil spills or atmospheric emissions), habitat destruction and biodiversity loss, coastal erosion, negative impact on coastal zones, negative effects on eco-systems or water, including bathing water, and quality issues. The Europe 2020 strategy recognises this challenge – to connect economic performance of the European economy to its environmental performance. In particular, the Europe 2020 Flagship on a Resource Efficient Europe supports the shift towards a resource-efficient, low-carbon economy to secure growth and jobs in Europe. [1] The Roadmap to a Resource Efficient Europe[2] builds upon the initiatives of this Flagship and recommends, inter alia, actions for the sustainable management of marine resources. Preservation and sustainable use of the resources of the oceans can be one of the pillars of green economy, one of the main topics of the forthcoming UN Conference on Sustainable development (Rio+20).

[1] COM (2011)21, p. 2

[2] <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2011:0571:FIN:EN:PDF>

25) Which of the marine and maritime economic activities indicated do you consider to be at a low/medium/high risk in relation to sustainability?

Table 1: Main functions and the corresponding marine and maritime economic activities

	Low negative impact	Medium negative impact	High negative impact	No opinion
<u>Maritime Transport and Shipbuilding</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Deepsea shipping *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shortsea shipping (incl. RoRo) *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Passenger ferry services *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inland waterway transport *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<u>Food, nutrition, health, and eco-systems services</u>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Catching fish for human consumption *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Catching fish for animal feeding *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growing aquatic products *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

High value use of marine resources (health, cosmetics, well-being, etc.)  
\*

Agriculture on saline soils \*

Energy and raw materials

Offshore oil & gas \*

Offshore wind energy \*

Ocean renewable energy resources  
(wave, tidal, OTEC, biofuels, etc.) \*

Carbon capture and storage \*

Aggregates mining (sand, gravel, etc.)  
\*

Marine mineral resources (seabed mining) \*

Securing fresh water supply  
(desalination) \*

Leisure, working, and living

Coastline tourism \*

Yachting and marinas \*

Cruise including port cities \*

Coastal protection

Protection against flooding and erosion  
\*

Preventing salt water intrusion \*

Protection of habitats \*

Maritime monitoring and surveillance

Traceability and security of goods

supply chains \*



Prevent and protect against illegal

movement of people and goods \*



Environmental monitoring \*



26) In your opinion, are there any specific opportunities arising from marine and maritime activities (such as the development of ocean renewable energy) that could enhance both the EU's security of energy supply and environmental protection?

\*

Yes

No

No opinion

In order to ensure the sustainability of marine and maritime activities, the Commission promotes environmental accountability at an early stage of economic development such as, for instance, in the EU strategy for better ship dismantling[1], Maritime Safety Legislative Package[2], new safety standards for offshore oil and gas operations[3] or the reform of the Common Fisheries Policy[4] to name just a few. Overall, the Marine Strategy Framework Directive[5] aims to protect more effectively the marine environment across Europe and achieve good environmental status of the EU's marine waters by 2020; the Water Framework directive[6] is relevant for coastal and transitional waters.

[1] <http://ec.europa.eu/environment/waste/ships/index.htm>

[2] [http://ec.europa.eu/transport/maritime/safety/safety\\_en.htm](http://ec.europa.eu/transport/maritime/safety/safety_en.htm)

[3] [http://ec.europa.eu/energy/oil/offshore/standards\\_en.htm](http://ec.europa.eu/energy/oil/offshore/standards_en.htm)

[4] <http://ec.europa.eu/fisheries/reform/>

[5] [http://ec.europa.eu/environment/water/marine/directive\\_en.htm](http://ec.europa.eu/environment/water/marine/directive_en.htm)

[6] <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2000:327:0001:0072:EN:PDF>

27) Does the current regulatory framework strike the right balance between protection of the environment and promotion of economic activity in the oceans, seas and coasts?

EU's directives/regulations/strategy	Environmentally focused	Fairly balanced	Business focused	No opinion
Water framework directive *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
EU strategy for better ship dismantling *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maritime Safety Legislative Package *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
New safety standards for offshore oil and gas operations *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reform of the Common Fisheries Policy *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Marine Strategy Framework Directive *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



28) Our oceans, seas and coasts are valuable ecological assets. Healthy ecosystems are important for the growth of marine and maritime economic sectors as well as for the well-being of people living in coastal areas. However, the economic value of these "ecosystem services" and the cost of their loss are not fully taken into account when analysing overall economic benefits. Should policies also take into account the monetary value of ecosystems?

\*

Yes

No

No opinion

You may wish to comment: (maximum 500 characters)

*There can be a number of environmental benefits that derive from the development of a number of marine and maritime coastal activities. One such example is the creation of new habitats through the expansion of offshore wind farms. Another is the reduction of CO<sub>2</sub> emissions through the development of ocean renewable energy resources and algae aquaculture.*

29) Are you aware of any specific environmental challenges which could be transformed into business and environment opportunities (e.g. multi-purpose platforms combining several activities such as integrated multi-trophic aquaculture with offshore wind installations and coastal protection measures)?

\*

Yes

No

 Please provide examples (maximum 750 characters)

30) Do you believe that cooperation with non-EU neighbouring countries could contribute to address environmental challenges? \*

Yes

No

No opinion

## IV. Policy focus

31) Which of the following framework conditions needs to be addressed most urgently for the sustainable development of emerging maritime activities?

	Not urgent	Urgent	Highly urgent	No opinion
Skills *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Research and development and innovation *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access to finance *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental challenges and opportunities *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Public acceptance *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clusters and standardisation *	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please motivate your answer: (maximum 700 characters)

32) In your opinion, should the EU Integrated Maritime Policy give special attention to the sustainable development of emerging maritime activities? \*

- Yes                       No                       No opinion



Please provide examples of specific actions do you consider most urgent to be initiated:

(maximum 700 characters)

33) Do you think that there is a need by policy makers to focus on and develop a specific marine and maritime industrial policy?

\*

Yes

No

No opinion

Please motivate your answer: (maximum 700 characters)