



# Towards Blue Growth in the Baltic: Stakeholder Perspectives on the Benefits of MSP around the Baltic Sea

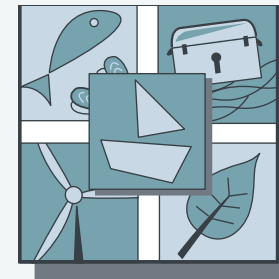
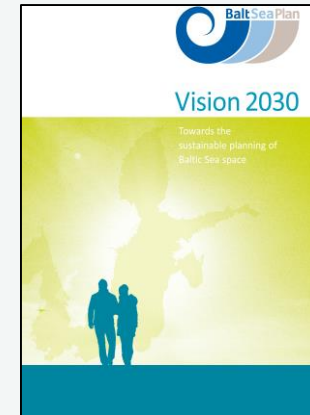
## *Introduction*

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MSP Forum, Riga, 17th June 2014

**A sustainable Blue Growth Agenda for the Baltic Sea region  
(Commission Staff Working Document:  
16<sup>th</sup> May 2014)**

**BaltSeaPlan Vision 2030 –  
The role of MSP to achieve sustainable  
sea use developments**

**Summary Results from PartiSEApate  
sector workshops & interviews with  
sector representatives**

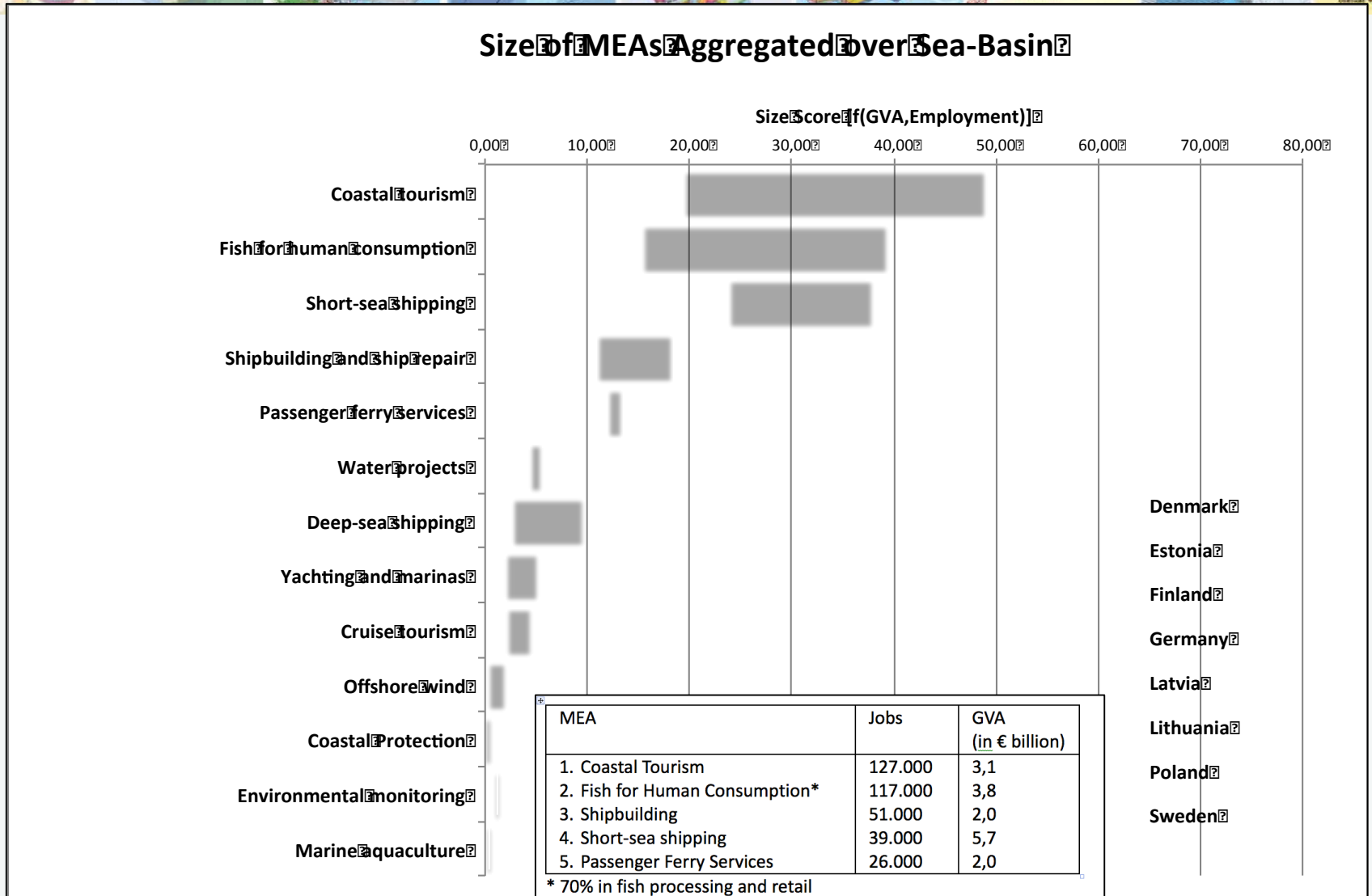




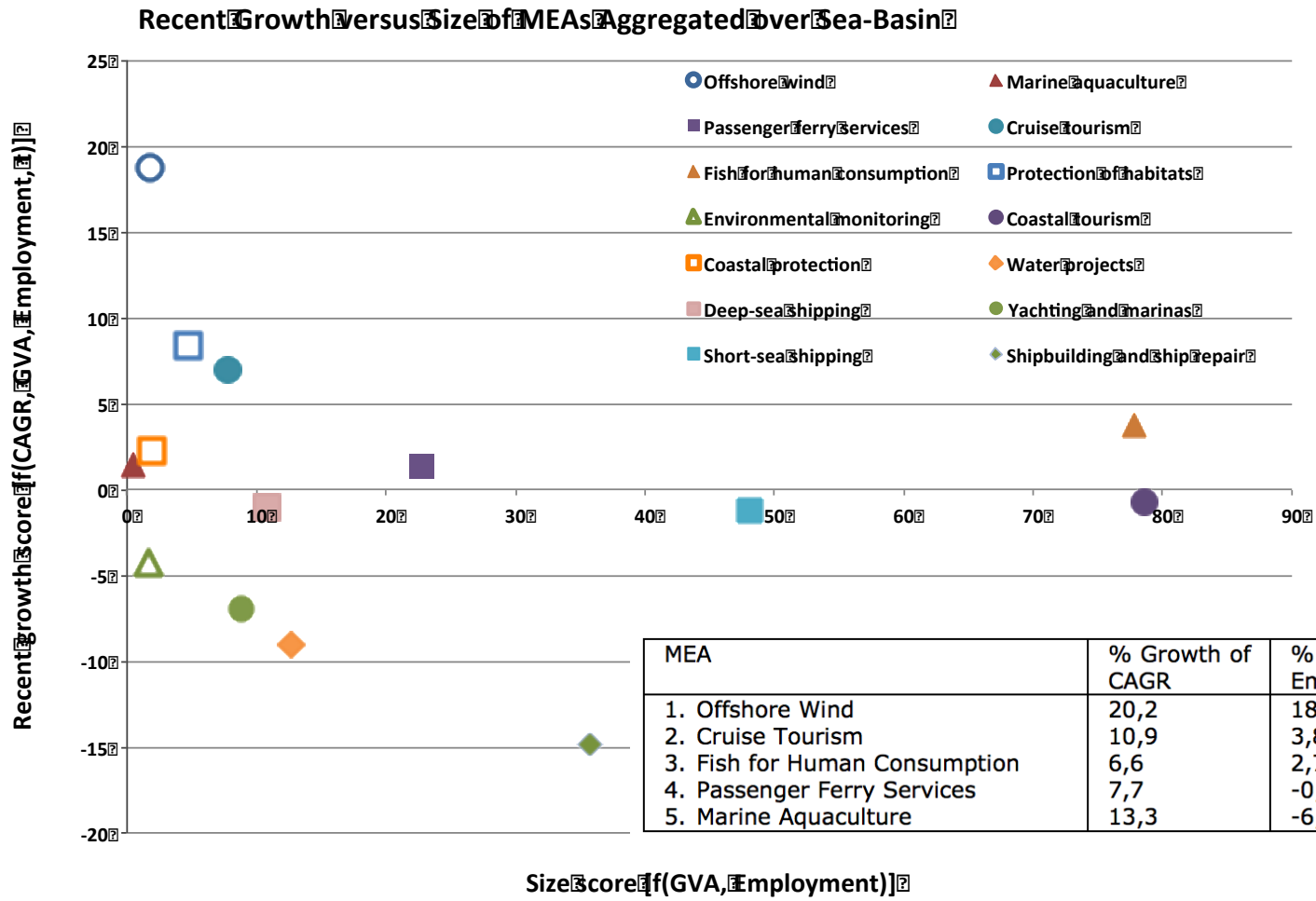
# The Baltic Blue Growth Study

## Different Perspectives – Different Ranking

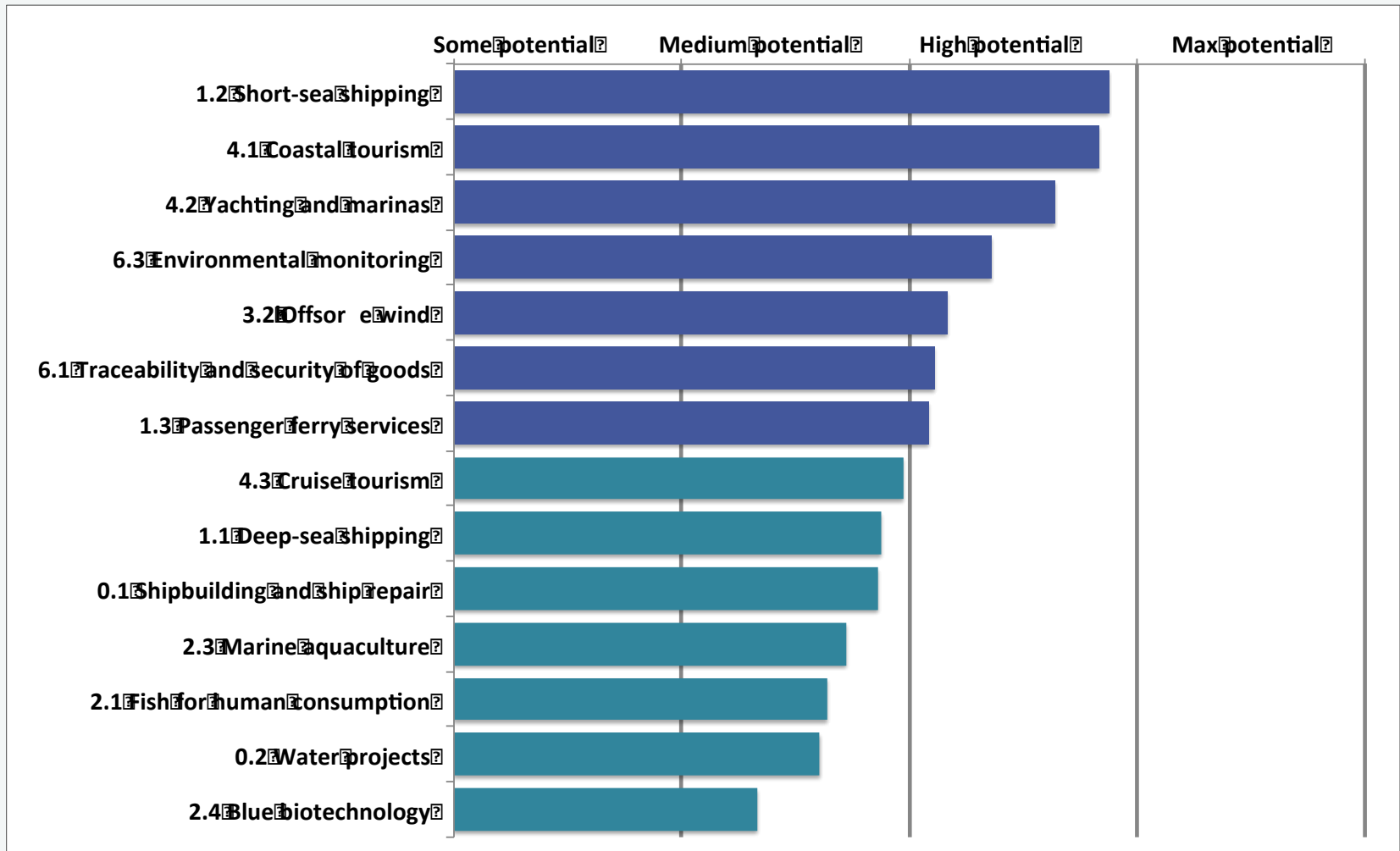
# Size of MEAs aggregated over Sea-Basin



# Recent Growth vs Size aggregated over Sea Basin



# MEAs with 'Most Future Potential' Aggregated over Sea Basin





## Sea Use Sectors

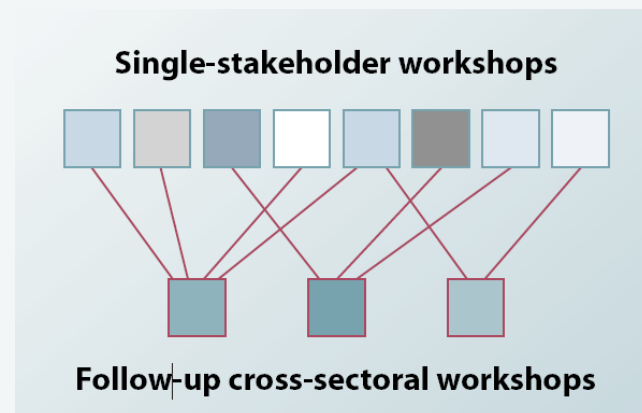
1. **Shipping/ports**
  2. **Fisheries**
  3. **Offshore wind energy**
  4. **Aquaculture**
- } Traditional Users
- } New Users

## Sectors setting conditions for MSP

5. **Underwater Cultural Heritage**
6. **Nature/ Environment**

## Sectors supporting MSP process

7. **Climate change**
8. **Research**
9. **Data network building**

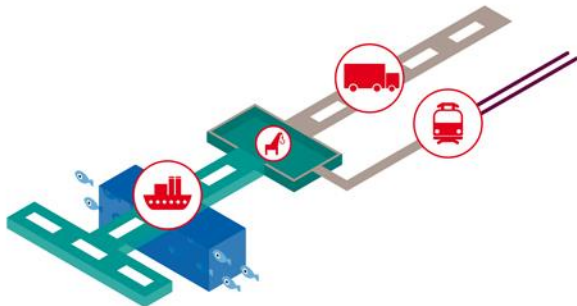




- > Sea transport an integral part of wider Baltic Sea Region transport policy with well-planned hinterland connections
- > Separation schemes in place:  
safe and efficient / faster shipping along designated routes
- > Ships use clean fuel and ports have adapted to this

## MSP Implications:

- Ports and shipping lanes based on integrated view
- Intelligent corridors / routes - not impeded by fixed installations
- Rearrangement of shipping lanes possible
- Areas
  - where shipping needs to be avoided
  - not possible
  - compulsory pilotage systems put in place
- Transnational contingency planning







## Shipping

- Increasing East-West trade
- Large sector resuming growth (cargo, container shipping)
- Leads to deeper and wider shipping lanes
- Environmental, safety requirements

## Ports

- Moving out of city centres into coastal sea areas
- Concentration to fewer, highly developed ports

## Sea-basin

Competitive sector, but:

- Network of LNG terminals
- Joint approaches, i.e. compliance checks
- Coherent safety standards / port procedures

## MSP

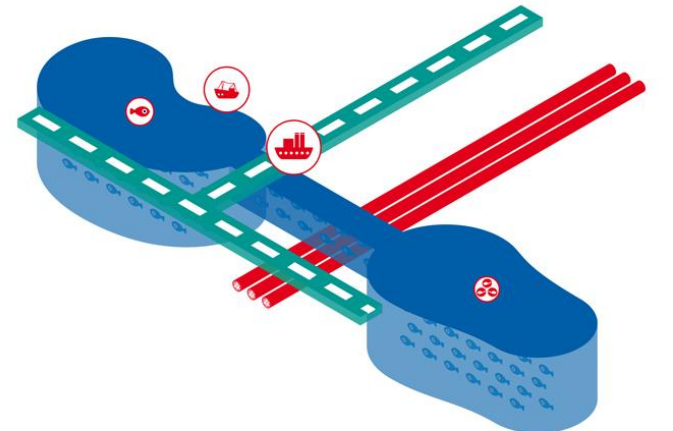
- Limited understanding of what MSP means for sector
- Early involvement of shipping authorities (long licencing procedures for ports)
- Competitive: one voice difficult
- But: Platforms exist (IMO, IALA, IHO, ICS)
- Future navigation structures & corridors need to take into account other installations



- > Baltic Sea fisheries (incl mariculture) deliver high quality food AND are managed in such way that sustainable stocks are secured AND integrity of ecosystems is preserved
- > Established fishing practices in the Baltic supplemented by sea ranching schemes
- > Marine aquaculture (incl. algae & mussels cultivation) has gained relevance but only allowed where environmentally sound

### MSP Implications:

- Blue Corridors for fish are guaranteed
  - Spawning & nursery areas are protected
  - No-takes rules and management practices have been implemented
  - Area for marine aquaculture have been carefully selected
- Fisheries management legislation has been revised according to MSP needs





One of the oldest sea use sectors

- Traditionally important
- Everywhere
- So far little restrictions with regard to fishing grounds

- ⇒ Eager to keep this position
- ⇒ “no concessions”

Well-organised sector:  
“BaltFish” / “BS RAC”

MSP

- Improved communication with sector
  - Independent funding
  - Pilot projects
  - Better data crucial
  - Essential fish habitats should be treated as priority areas
- ⇒ 1<sup>st</sup> MSP case in Germany



## New sector

MSP a chance to gain greater recognition

Small but growing (DK)

(+) Innovation (new opportunities)

(-) Environmental Regulations

=> Zero Nutrient

(-) Licensing

(-) Access to finance

## Sea basin:

- Joint R & D
- Coherent approach to legal regulation
- Sector promotion

## MSP

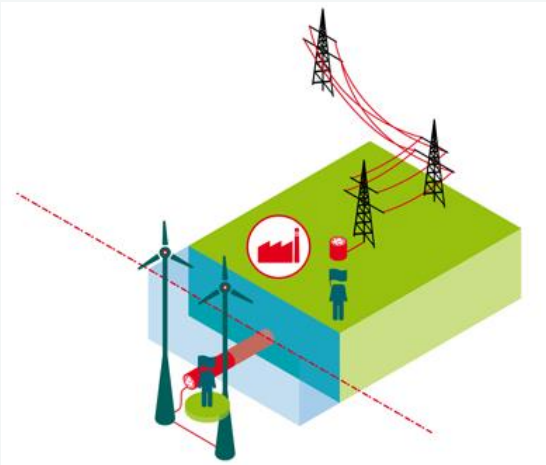
- Current sites not allocated on basis of optimal criteria
- Larger areas
- More offshore } **More sustainable**
- Siting criteria / more research on optimal sites
- Aquaculture sites not “permanent”
- Algae/seaweed & mussel cultivation =>
  - nutrient removal
  - but need more space

# A coherent pan-Baltic energy policy

## BaltSeaPlan Vision 2030



- > The Baltic Sea Region relies on as much renewable energy as possible
- > An allocation has been achieved between BSR countries in terms of which renewables are to be realised where depending on specific conditions
- > Some countries will be net importers / others net exporters of renewable energy
- > Offshore windfarming has been realised in suitable areas



### MSP Implications:

- A pan-Baltic energy infrastructure (SuperGRID) is in place
- Land- / sea-based grids well integrated
- Cable connections / oil & gas pipelines bundled in corridors
- Space set aside for renewable energy aims
- Co-uses promoted

# Blue Energy: Offshore Wind



## Size and characteristics

- Highest growth of all maritime sectors
- Only in country triangle of DK, DE, SE
- Important spill over effects
- Dependence on national energy policy: feed-in remuneration, planning and licensing policies, smart-grid solutions

## Sea-basin

- Smart-grid solutions
- More than one market
- Import & export energy => transnational energy mix ?
- So far limited political will

## MSP

- MSP and offshore wind may accelerate each other
- Potential sector to push for a real pan-Baltic cooperation between political & economic sectors => coordinated offshore energy & grid development
- Land & Sea coherence crucial



- Coastal tourism is everywhere, largest MEA
- Yachting and marinas is emerging
- Cruise tourism: recent growth

- Baltic Sea is covered with wrecks & other artefacts, submerged sites, relict cultural landscapes
- Percentage unclear

## Cooperation platform at BSR level

- CBSS Working Group

## MSP

- Underwater cultural heritage so far not considered in MSP
- Problems to identify spatial solutions (zoning? / site designation?)
- Precautionary Principle
- MSP seen as way to foster cooperation with other sectors



Management of climate change  
adaptation processes in BSR:  
nascent phase

- Climate change **SIGNIFICANT** impact on many sectors
- So far only consequences from sea level rise taken into account
- Value of maintaining & strengthening of ecosystem services should receive greater attention: i.e. fishery, tourism, energy production

Cooperation platform at BSR level

- CBSS Working Group

MSP

- Appropriate communication & information strategies for planners
- Support needed for planners at local level to down-scale global & regional trends to their area / situation => some examples exist !
- MSP legislation to become more flexible “adaptive licensing”
- Better collaboration required between climate change & MSP experts both at practical & policy level





# And now to the real experts !