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COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

An Integrated Maritime Policy for the European Union

IMPACT ASSESSMENT

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Executive summary

In June 2006 the Commission adopted a Green Paper on a future Maritime Policy for the EU. This Paper pointed out the strategic importance of the seas and oceans for the European economy. It highlighted the urgency of ensuring that future developments take account of the need to maintain this competitiveness while safeguarding the marine environment and protecting the well-being and livelihoods of those who depend on the maritime economy or live on the coast. This was then followed by a one-year consultation period, which saw some 230 events and over 490 written submissions. Many of these written contributions — from national governments, industrial groupings, and environmental NGOs — were themselves the outcome of extensive internal consultation processes.

The stakeholders overwhelmingly agreed that the EU could not continue to manage its policy towards the oceans and seas through a series of unconnected sectoral policies. Decision-making is slow, potential synergies are not exploited and no-one has a clear authority to resolve conflicts across sectors, to deal with cumulative effects or to look at the wider picture. EU trade and the competitiveness of EU ports are threatened by a planning process that proceeds at a glacial pace, the marine environment is endangered by intensive and accelerating growth in shore- and sea-based economic activities, Europeans are deserting the maritime professions, data collected on the state of the marine environment, human maritime activities and the health of the coastal economy are fragmented and largely inaccessible, and the different authorities entrusted with protecting our seas against pollution, illegal fishing and traffickers are independently developing similar systems to detect and identify anomalous behaviour.

Taking account of these reactions, the Commission has therefore proposed an overarching Maritime Policy with the following goals: (1) maximising the sustainable use of the oceans and seas; (2) building a knowledge and innovation base for the Maritime Policy; (3) delivering the highest quality of life in coastal regions; (4) promoting Europe's leadership in international maritime affairs; and (5) raising the visibility of Maritime Europe.

In the immediate term, the Commission aims to achieve these goals through first, introducing a governance framework that applies the integrated approach and, second, through horizontal and cross-cutting tools for integrated policy-making. The Commission will create an internal function to enhance coordination between the sector-specific policy initiatives related to maritime affairs. Moreover, an Action Plan lists a range of concrete initiatives that will be taken as first steps towards a more consistent, integrated EU Maritime Policy.

By the end of 2008, a number of benefits would accrue — greater mutual awareness among policies and sectors, early flagging of potential conflicts in sectoral initiatives, the exploitation of synergies, faster exchange of ideas for good practice between different regions, greater confidence that individual sectoral policies are based on best available knowledge about the maritime sector, and greater opportunities for individuals and interest groups to make their voices heard.

The particular benefits to be gained from the preparatory actions on marine data, spatial planning and maritime surveillance would not accrue immediately but only once further measures are implemented. However, the scale of these potential benefits justifies the modest spending. These longer-term benefits are: accelerated development of value-added

commercial services based on easily accessible data; improvement of the efficiency of public institutions, including European marine research laboratories and academic bodies; significant reduction in the current uncertainty surrounding global environmental change; integration of a number of currently fragmented, limited-duration data access initiatives into a consolidated effort; clearer rules for rights and restrictions in marine waters; easier resolution of trans-boundary planning issues; more effective use of existing reporting and surveillance resources; and the possibility to share future jointly-owned surveillance assets.

The short-term benefits from policy coordination and collective learning as well as the potential longer-term benefits of the preparatory actions will all have a positive impact on the main aims of the Maritime Policy — maximising the sustainable use of the oceans and seas, building a knowledge and innovation base for the Maritime Policy, improving the quality of life in coastal regions, promoting Europe's leadership in international maritime affairs, and raising the visibility of Maritime Europe.

1. INTRODUCTION

1.1. Modifications to this impact assessment

A preliminary version of this impact assessment was presented to the Impact Assessment Board on 29 August 2007.

Based on their opinion the document was revised in the following ways:

- The scope of the Impact Assessment is clarified at the beginning of the document in section 1.2.

- The background information in sections 2.1, 2.2 and 2.3 has been shortened to focus on the essential economic, social and environment elements.

- The quotations from stakeholder contributions were shortened (primarily section 2.3 and section 5).

- The link between the broad overall objectives, the specific objectives and the concrete steps to reach these are clarified in chapters 3, 4 and 6.

- As for the general approach to integrated policy, a third option (a centralised maritime policy function) is introduced and analysed in section 4.2.2.

- The criteria for the selection of certain themes to be further developed in maritime policy are set out in chapter 6. It is made clear that the activities presented there concern themes to be developed by the Commission and not yet precise actions. The form and content of future actions will depend on further substantive development and concretisation of the themes, in close cooperation with stakeholders, and using the tools of an integrated Maritime Policy, such as collective learning and preparatory actions. Any resulting action will be based on in-depth impact assessment work as necessary under the rules of the Commission on Impact Assessment, which will profit from the information and knowledge to be acquired through this preparatory work.

- The report indicates that it is intended to meet the requirements of the Financial Regulation for ex-ante evaluation, lists the elements for evaluation and provides more information on monitoring and evaluation arrangements (chapter 7).

The scope of the Impact Assessment is clarified, explaining that it focuses on the general approach to a new, integrated policy on Maritime Affairs and the horizontal tools of such a policy. At this stage, the impact of themes for future work set out in the Maritime Policy Action Plan cannot be assessed, as further work is necessary to define the precise content and form of actions to concretise these themes. The work necessary for this purpose, including preparatory projects, will serve as a basis for Impact Assessments for subsequent actions that require such assessments under Commission rules.

1.2. Steps towards a Maritime Policy

Defining the scope for action

When the current Commission took office, it declared in its strategic priorities that there was *"the particular need for an all-embracing maritime policy aimed a developing a thriving maritime economy, in an environmentally sustainable manner. Such a policy should be supported by excellence in marine scientific research, technology and innovation"*[1].

To elaborate concrete steps towards this objective, Commissioner Borg was entrusted with a new portfolio "Maritime Affairs". As a first step, Commissioner Borg presented his roadmap towards a Maritime Policy in his Communication of 2005[2], which emphasised the role of the oceans and seas in providing economic growth and jobs for many Europeans as well as the need for sustainable development and appropriate protection of the marine environment. He announced his initiative to propose a Green Paper on a future EU Maritime Policy. At the same time, he already invited stakeholders to provide input in preparing the Green Paper with a view to ensuring the right focus for the forthcoming Green Paper.

A Steering Group of Commissioners was created, initially comprising seven Commissioners: Commissioner Borg (Chair), Vice-Presidents Verheugen and Barrot and Commissioners Dimas, Hübner, Piebalgs and Potočnik. Upon adoption of the Green Paper in 2006, Vice-President Frattini and Commissioners Špidla and Ferrero-Waldner joined this Steering Group on Maritime Affairs.

A Maritime Policy Task Force (MPTF) was created within the Commission and attached to DG Fisheries, which was renamed DG Fisheries and Maritime Affairs. The MPTF engaged in extensive analyses of studies and reports and organised visits to third countries, including Canada, Australia, the US and Japan, and to Member States. The MPTF also met with a large number of stakeholders. During this pre-consultation phase, it received 72 written contributions from stakeholders.

An Interservice Coordination Group on Maritime Policy[3], including a broad range of DGs concerned with maritime affairs, was set up to jointly prepare the Green Paper. The Interservice Coordination Group met on a monthly basis to define the structure and overall orientation of the Green paper. Under this group, sub-groups, led by sectoral DGs prepared detailed proposals to be included in the Green Paper, which were published as Background Papers to the Green Paper[4].

The Commission also set up a group of Member State Experts with a view to gaining a better insight into Maritime Affairs at Member State level and to learn from their

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[1] "Strategic Objectives 2005-2009" - COM(2005) 12, 26.1.2005.
[2] "Towards a future Maritime Policy for the Union: A European vision for the oceans and seas" - SEC(2005) 290.
[3] Besides DG FISH, the following services were involved: AGRI, AIDCO, BUDG, COMP, DEV, EAC, ECFIN, ECHO, ELARG, EMPL, ENTR, ENV, ESTAT, IAS, INFSO, JLS, JRC, MARKT, OLAF, REGIO, RELEX, RTD, SANCO, AIDCO, SG, SJ, TAXUD, TRADE, TREN.
[4] See http://ec.europa.eu/maritimeaffairs/suppdoc_en.html

experience. Member States provided material on the basis of a questionnaire, the results of which were also attached as a Background Paper to the Green Paper[5].

Based on the inputs of the Commissioners Steering Group, the Interservice Coordination Group, the desk analyses, study visits and exchanges with Member States the MPTF distilled the key issues at stake. These formed the basis for the Commission's Green Paper "*Towards a future Maritime Policy for the Union: A European vision for the oceans and seas*", which was published on 6 June 2007[6].

An Impact Assessment Roadmap for the development of Maritime Policy was published as part of the Commission's strategic initiatives presented under its Annual Policy Strategy for 2007[7].

Public Consultation

In line with the Commission's rules for consultation[8], the Green Paper was followed by a broad and open consultation process over a period of one year. The main thrust of the contributions received will be published in a separate report and all contributions are posted on a dedicated website[9].

The consultation not only allowed stakeholders to submit responses to the Commission, but also aimed to encourage debate among different stakeholder groups. For the consultation process, a website was set up with the Green Paper and Background Papers, the contributions from stakeholders received prior to publishing the Green Paper, contact details and accompanying information materials. The website also contained a list of all the events organised on the Green Paper. A PR Company provided support for further promotion measures.

The consultation process itself has already demonstrated the added value of a holistic approach and, in fact, has been an important first step towards such an approach. This successful participatory process has continued after the publication of the Green Paper. Around 230 events have been organised by stakeholders themselves. In many cases, these events have succeeded in bringing together groups that had not communicated in the past and sometimes had different or diverging interests.

Over 490 written contributions have been received from a very representative audience, in terms of stakeholder categories and geographical spread. In addition to contributions from all European Institutions, a large number of Member States and regions submitted comments on the Green Paper. Among the stakeholders who furthermore responded were third-country governments, business representatives, non-governmental organisations, companies, representatives of science and academia and citizens. A significant number of networks or consortia active in the development of coastal and maritime projects have provided detailed comments, as well as cities and coastal regions with an interest in specific issues such as tourism.

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[5]   Background Paper No. 11 "National Approaches to Maritime Affairs"
[6]   "A Maritime Policy for the Union: Towards a future vision for the oceans and seas" - COM(2006) 275.
[7]   Commission Legislative Work Programme 2007 "Index of Strategic and Priority Initiative Roadmaps"
[8]   "Towards a reinforced culture of consultation and dialogue - General principles and minimum standards for consultation of interested parties by the Commission" - COM(2002) 704.
[9]   http://ec.europa.eu/maritimeaffairs/post_green_en.html

Many of these contributions represent the views of a much broader audience of stakeholders. Contributions from Member States were themselves largely the result of substantial national consultation efforts. Contributions from associations, regions or other groups present the views of their members or constituencies, often also based on intense prior consultation.

The consultation that followed the Green Paper showed support for a more holistic approach among an overwhelming majority of respondents. Stakeholders amply supported action to underpin the competitiveness of European maritime sectors in order to turn promising growth prospects into reality. They recognised the role of maritime clusters for the competitiveness of European maritime enterprises. Stakeholders also emphasized the potential benefits of voluntary schemes to reach certain policy objectives and encourage quality operations.

Others were explicit about the need to safeguard the oceans and seas and for sectors that contribute to the degradation of the marine environment or the loss of biodiversity to contribute to its recovery.

Many stakeholders emphasised the importance of the global dimension of maritime matters. The need to act against pollution or climate change has a clear global dimension. The regulatory framework should be regarded in the light of open global competition and regional regulatory action should be carefully assessed as to the impact on the competitive strength of European businesses. Stakeholders stressed the potential for raising maritime policy goals in multilateral fora, bilateral relations, trade and development policy.

The contributions from maritime regions clearly showed that the stakes are highest in their areas. The coastal areas are home to a broad range of economic activities and critical infrastructure, such as the EU's ports. Yet they are also the most vulnerable to the growing pressure caused by the increased intensity of activities on the coast and at sea, the risk of incidents, pollution or the effects of climate change.

Stakeholders responded overwhelmingly positively to the Green Paper's suggestion to address the fragmentation in maritime and marine research efforts, and hence overcome the fragmented understanding of ocean-related challenges. The science community has in fact already taken initial steps to move towards the creation of a true marine science network[10].

The consultation identified a lack of awareness among citizens of the importance of maritime activities for Europe. Not only organisations directly engaged in promoting maritime heritage reacted enthusiastically to suggestions to promote Europe' maritime identity, but also others, such as representatives from maritime industries, endorsed such a need. For example, several stakeholders suggested that such promotion can contribute towards reversing the current lack of skilled labour.

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[10]   "The Aberdeen Declaration: A New Deal for Marine and Maritime Science", 22.6.2007.

The consultation report formed the basis for elaborating a vision for Maritime Policy and action proposals. This work involved the Interservice Group in much the same way as before the Green Paper. The group continued to hold monthly meetings and action proposals were prepared by working groups under the chairmanship of various sectoral DGs.

The "Blue Book" package to launch the EU Maritime Policy consists of two main components, namely a paper outlining the vision for the Oceans and Seas and an Action Plan[11]. The first document presents the integrated approach to maritime affairs within EU policy-making and its key elements and sets out the main goals for future action. The Action Plan then presents the first set of actions that will together form the first steps towards the Maritime Policy.

A time-line showing the procedural steps towards a Maritime Policy is shown below:

ID	Task Name	2005				2006				2007				2008				2009			
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
1	Barroso Commission																					
2	Task Force set-up		◆ 14/03																			
3	Green Paper issued						◆ 7/06															
4	Consultation Period																					
5	Blue Book and Action Plan													◆ 10/10								
6	European Council													◆ 13/12								
7	Actions																					

2. ISSUE AT STAKE: WHY A NEW APPROACH TO MARITIME AFFAIRS?

2.1. Importance of a strong and sustainable maritime economy

Provided that a conducive framework for development and growth is in place, the maritime economy, including shipping and ports, shipbuilding and marine equipment, offshore energy, dredging and extraction, fisheries, recreation and tourism, can deliver a significant contribution to the EU's Lisbon targets for more economic growth and more and better jobs.

The maritime economy accounts for 3 to 5% of GDP in Europe and some five million jobs. No more precise estimates can be made at this stage in the absence of comparable and comprehensive socio-economic data. However, some illustrative facts are provided below to demonstrate the importance and dynamic development of the maritime economy.

Maritime transport and logistics are the lifeblood of world trade. As 90% of EU external trade and close to 40% of EU internal trade is seaborne, the smooth functioning of the globalised economy depends on cost-efficient and reliable maritime transport and logistics.

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[11] See http://ec.europa.eu/maritimeaffairs.

The EU's maritime regions account for about 40% of Europe's GDP as well as 40% of the population. In those regions only a part of the economy is affected by or related to the seas. However, the more peripheral coastal regions or islands in particular greatly depend on a thriving maritime economy. It is also worthwhile noting that the maritime sectors are not confined to coastal areas. For example, there are as many marine suppliers in southern Germany as in the North on the coast. The Austrian marine equipment industry employs some 7000 people.

Europe is a strong player on the world market in a number of key sectors with an important maritime dimension. About 40% of the world fleet is owned or controlled by Europeans. There are no European data on the share of marine and coastal tourism, yet it is thought to be considerable. In the absence of recent or precise material, one indication, from the Eurobarometer survey of 1998, is that 63 % of European holidaymakers choose the sea as their holiday destination[12]. Overall, tourism accounts directly for over 4% of the EU's GDP and indirectly to over 11%[13].

European market share as a percentage of the world market[14]
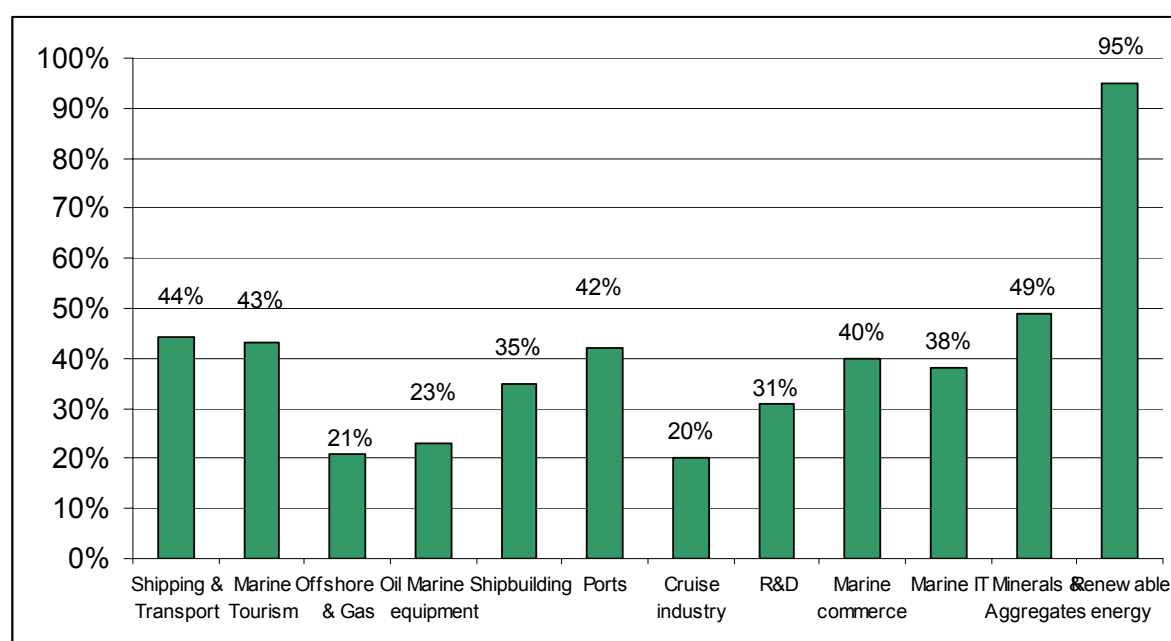
The economic use of the oceans and seas and their resources is growing steadily. For example, maritime transport and tourism have displayed above average growth rates. Between 1990 and 2005 the tonnage of the world fleet grew annually by 3.2% - while world GDP in constant prices at market exchange rates increased annually by 2.6% over this period. The turnover on tourism rose by just over a quarter between 1999 and 2002 – it was outperformed only by mining, electricity, gas and water supply, transport and communications[15]. Along with this growth in mature industries,

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[12]   Source: "The Europeans on Holiday", Eurobarometer 48, 1998.
[13]   Source: "A renewed EU Tourism Policy: Towards a stronger partnership for European Tourism" - COM(2006) 134, 17.3.2006.
[14]   Source: "Marine industries global market analysis", March 2005, Douglas-Westwood Limited, Marine foresight. Series no 1, the Marine Institute, Ireland.
[15]   Sources: Eurostat and World Travel and Tourism Council.

new markets with considerable potential are emerging, such as offshore renewable energy or blue biotech.

The following table illustrates the expected growth rates for the second half of this decade.

Global growth prospects in marine markets 2005-2009[16]

Sector	Growth prospect 2005-2009
Renewable Energy	987%
Submarine Telecoms	97%
Cruise Industry	24%
Marine Biotechnology	24%
Ports	18%
Marine Aquaculture	17%
Marine Tourism	14%
Education & Training	14%
Seaweed	13%
Offshore Oil & Gas	12%
Minerals & Aggregates	11%
Ocean Survey	11%

Rapidly growing sectors can only reach their potential under the right conditions. For example, several stakeholders have pointed to constraints in port capacity, stating that to accommodate the increasingly large ships and the envisaged growth of the market, significant and urgent investment in port infrastructure around Europe will be required over the coming years.

The European Wind Energy Association notes that, at the end of 2006, less than 2 % of wind power capacity was generated from offshore, but the figure could be around 50 % in 2030. The European Ocean Energy Association points to the steady progress in exploiting energy from waves and tidal currents and predicts that 3 GW installed capacity could be available in the EU by 2020. Apart from the necessary technological development, expansion depends, in both cases, on public support and predictability, for example in planning the use of sea space for economic activity.

According to a study carried out by Ecotec on behalf of the Commission in 2006[17], about five million people are estimated to work in sea-related sectors, including traditional transport-related activities, fisheries, offshore energy, and marine and coastal tourism. This study brought together and processed existing data sources.

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[16]   "Marine industries global market analysis", March 2005, Douglas-Westwood Limited, Marine foresight. Series no 1, the Marine Institute, Ireland.
[17]   http://ec.europa.eu/maritimeaffairs/study_employment_en.html

Despite the lack of comparability or common definitions, the results give a first insight into the role of the maritime economy.

The following tables on the share of sea-related jobs in national employment highlight its role in coastal and island member states, but also show that sea-related jobs exist, albeit to a minor degree, even in land-locked countries. As the employment data for coastal tourism embody a high degree of uncertainty, the table distinguishes between traditional maritime (excluding coastal tourism) and overall sea-related jobs.

Share of maritime employment in the EU-15
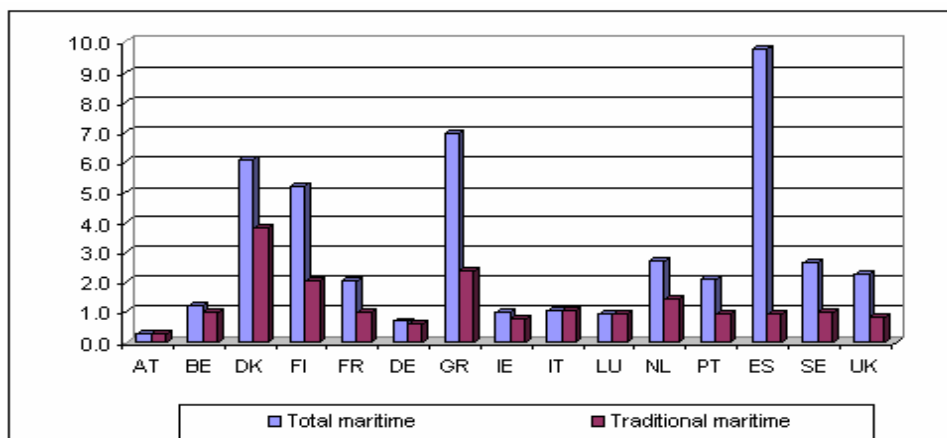
Share of maritime employment in the EU-10
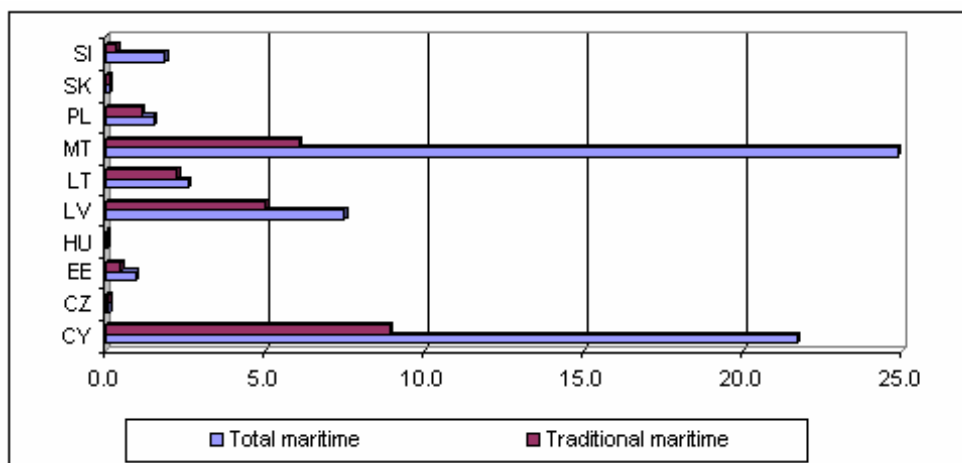
According to the Ecotec study, the growth prospects for employment are as follows:

Moderate growth	Strong growth
Marine equipment	Coastal and, in particular, offshore wind energy
Port sector employment in peripheral regions	Cruise tourism
Offshore supply; manufacturing of tools for installation and extraction.	Maritime works (dredging and environmental protection in particular)
Maritime R&D	Coastal tourism
Ship brokerage	Recreational boating

Economic growth does not always translate automatically into equally high employment growth. For example, despite the global growth forecasts in the port sector, employment in ports is expected to remain stable. This is due to a combination of factors including expected efficiency gains due to the replacement of labour by capital following technological investments. Job creation may also only take place in a later phase, e.g. despite steady growth in wind energy, employment is expected to fall up to 2010 and only then is predicted to expand considerably.

Conversely, growth is hindered by a lack of skilled labour for the maritime professions, as also noted by several stakeholders during the consultation. This concerns both seafaring and onshore jobs, notably in sectors relying on hi-tech engineering skills.

More than 80% of the members of the International Shipping Federation (ISF) reported a shortage of officers in 2002. The 2005 UK Seafarers Analysis[18] noted a drop of 15% in the number of active seafarers over the last five years. In the UK, cadet recruitment has consistently failed over the past two decades to approach even half the figure estimated as necessary to meet future seagoing and shore-based needs. In France and Greece retired officers have been called back because of shortages. Studies from the OECD and the ISF/BIMCO have suggested that the ideal training level should be one cadet for every seven officers, or between 1 to 1.5 trainees per ship. There is extensive evidence to show that this target is not being met at present — even by some of the best EU owners and operators.

According to the Ecotec study and the public consultation this lack is caused by a combination of factors including the growing technology-intensity, an ageing population retiring from the maritime sectors and a lack of awareness among new entrants to the labour market about the possibilities of a maritime career. There may also be a need to review social conditions: at present, a number of EU Directives regulating social rights have exemptions for seafarers[19]. As regards safety at work, fisheries is a high-risk sector with about 24000 fatalities each year[20], which is thought to reduce its attractiveness.

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[18] Source: London Metropolitan University's Centre for International Transport Management.
[19] Background paper 2 "Employment in Maritime Sectors" provides a list of exemptions.
[20] Source: International Labour Organisation, 1999.

## 2.2. The need to protect the marine environment

The Impact Assessment report prepared on the EU's strategy for the marine environment[21] attempted to assess the value of the marine environment. It found several widely varying estimates and noted that many ecological services provided by oceans and seas are not readily apparent and are not marketed directly.

The marine environment is under pressure, with loss or degradation of biodiversity, changes in its structures and functioning, loss of habitats, pollution, introduction of non-indigenous species, eutrophication and degradation of the coastal areas. During 1988-2000, it is estimated that European waters saw the introduction of one non-indigenous species every week. This can further destabilise ecosystems[22].

Detailed fish stock assessments regularly provided by the International Council on the Exploration of the Seas[23] indicate that the majority of the most valuable ground fish stocks in EC waters are outside safe biological limits.

Along with the main land-based activities, maritime economic activities have contributed to the degradation of the marine environment.

Causes of marine pollution[24]
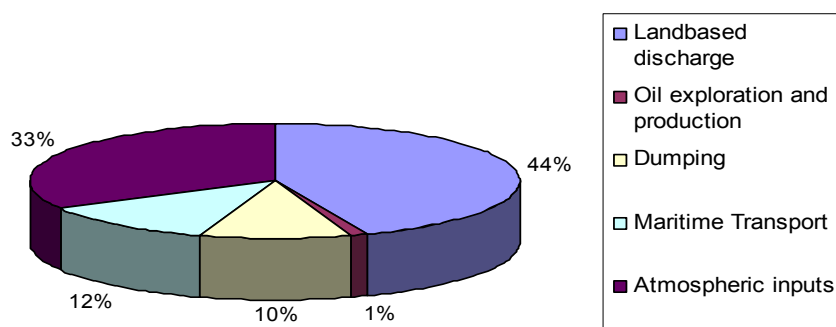
Yet the contribution of shipping to marine pollution has to be offset against its relatively good performance when it comes to CO_2 emissions and energy efficiency.

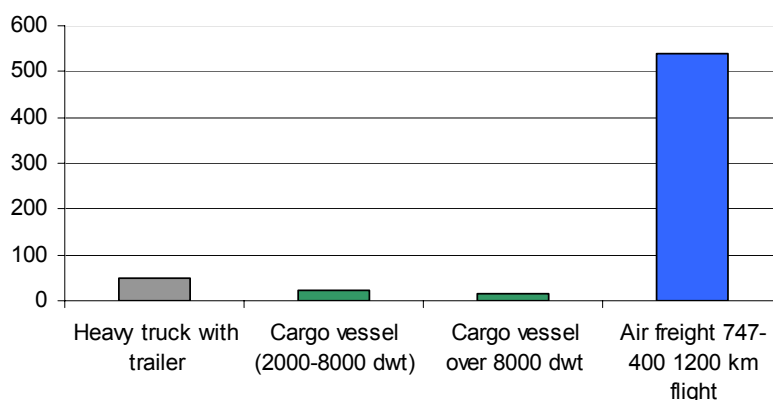
[21]   Impact Assessment regarding the Marine Environmental Strategy - SEC(2005) 1290.
[22]   Vector Pathways and the Spread of Exotic Species in the Sea, ICES Cooperative Research Report No 271, March 2005, p. 2.
[23]   Stock assessments are available at http://www.ices.dk.
[24]   Source: Group of experts on the scientific aspects of marine pollution (GESAMP) on http://www.shippingfacts.com.

Comparative CO₂ emissions[25] (grams per tonne-kilometre)

Heavy truck with trailer	Cargo vessel (2000-8000 dwt)	Cargo vessel over 8000 dwt	Air freight 747-400 1200 km flight

Technology increasingly provides the means to reduce the negative impact of shipping on the marine environment, for example podded electric drives for marine propulsion or sails are viable alternatives to traditional engines. In addition, ICTs can improve our abilities to monitor ocean phenomena or ship movements in order to i.a. tackle sub-standard or illegal activities or improve safety at sea.

The maritime industries are furthermore demonstrating a growing awareness of their responsibility for sustainable development through voluntary commitments. Good examples are the Green Award (a certificate for oil tankers), the Eco-ports initiative to share environmental experience or the Green Key and Blue Flag certificates to promote sustainable tourism[26].

In the face of the above environmental challenges, real change can be brought about if environmental, transport, research and industrial policies are better aligned.

Climate change however puts the outlook for the future into a new perspective. The International Panel on Climate Change (IPCC)[27] has observed unequivocal signals of global warming, including increases in ocean temperatures and melting of ice packs in arctic regions. The global average sea level has risen by an estimated 17 centimetres during the 20th century and is projected to continue to rise further. IPCC suggests it will rise between 18 and 59 centimetres by the end of the 21st century. If the linear relation between the rate of sea-level rise and temperature as observed in the 20th century continues to hold throughout the 21st century, then a rise of over 1 metre by 2100 in strong warming scenarios cannot be ruled out[28].

The negative impacts of climate change for Europe are projected to include more frequent coastal flooding and increased erosion due to storms and sea-level rise. Climate change may lead to increased acidification of the marine environment and to the alteration of the carbon dioxide absorption function of the oceans. Even with

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[25] Source: Swedish Network for Transport and the Environment on http://www.shippingfacts.com.
[26] http://greenaward.org; http://www.ecoports.com; http://www.green-key.org; http://www.blueflag.org
[27] http://www.ipcc.ch/
[28] "A Semi-Empirical Approach to Projecting Future Sea-Level Rise" Stefan Rahmstorf Science, 19.1.2007.

modest scenarios for greenhouse gas emissions, the impact of climate change will be increasingly felt. Solutions are thus urgently needed for the sustainable development of economic activities in order to preserve the oceans and seas.

Preserving the future of the oceans and seas is not something that individual regions, countries or even a continent can achieve by themselves: a concerted effort by the international community is the only way forward. The Impact Assessment regarding the strategy for the Marine Environment noted a piecemeal approach to policy making, not only at EU but also at international level. The shortcomings found include a lack of articulation between international conventions, poor implementation and enforcement and lack of a coherent system for assessment and monitoring among relevant international instruments at UN level e.g. under the UN Convention on the Law of the Seas (UNCLOS), the United Nations Environment Programme (UNEP), the United Nations Food and Agricultural Organisation (FAO), the Convention on Biological Diversity (CBD) and the International Maritime Organisation (IMO).

2.3. Difficulties with Current Situation

The multiple uses of the oceans and seas are managed, regulated and controlled through a range of sectoral policies e.g. maritime transport, fisheries, industry, regional development, employment, environment, energy, research, external relations and are of freedom, security and justice. In addition, all levels of governance – regional, national, European or global – are involved in policy-making for maritime affairs.

However, the parameters for addressing maritime affairs have radically changed in recent years. The unprecedented growth in traditional maritime activities at sea and the emergence of new activities, especially those, like wind farms, which require the placing fixed of installations in the sea, call for a thorough overview of economic developments, how they interact and how they affect the oceans and seas.

This growth is taking place against the backdrop of increasing pressure on the marine environment and the effects of climate change on the oceans, seas and coastal regions. Intentional or grossly negligent pollution of the sea can cause major costs or loss of revenue, e.g. for tourism, and must be prevented and prosecuted.

The combination of higher economic growth, increasing pressure on the environment, climate change and security considerations makes a strong case for careful consideration of the links between economic and environmental developments. The current challenges posed by illegal immigration across the sea, terrorism, drug trafficking or illegal fishing furthermore have to be considered within this picture. Answers to these questions are increasingly being found through research, technological development and innovation.

In view of the increased relevance of inter-connections between policy issues, today's sector-based approach appears insufficient to address the challenges of maritime affairs in the future. The objectives of separate sectoral actions in the maritime sector – promoting innovative technologies, increasing safety, safeguarding jobs, protecting the environment – can be compromised by a limited awareness of the objectives of other sectors. To seek confirmation of this assumption, the Green Paper

asked stakeholders to comment on the degree of consistency between various EU policies concerned with maritime affairs.

Stakeholders indeed indicated conflicts between different sectors, a failure to exploit potential synergies between different sectors or insufficient information to arrive at an effective approach to governance or to deal with the impact of climate change. A number of these issues indicate potential bottlenecks that, if not dealt with, could seriously hamper Europe's ambitions to achieve sustainable growth. Some illustrative examples of relevant contributions are given below:

For instance the chairman of the European Sea Ports Organisation (ESPO) reported:

> *all major port investment projects currently suffer from unacceptable delays because of environmental pressure and NIMBY (Not in My Back Yard) attitudes. Between the conception of a project and the actual start of the construction works can easily elapse between five to ten years and even more. This puts us in a most unfavourable position on global level. (...) This would be contrary to the objectives of the Lisbon Agenda.*

The Andalusian Government expressed the difficulties in balancing the different objectives:

> *The coast of this region has beaches and coves with water suitable for bathing, which, combined with very mild climate, make Andalusia one of the most important sun and beach tourist destinations in Europe. The Andalusian coast is also the edge, the interchanger and filter of a population in the search for social welfare and quality of life coming from the South, with which culture and history is shared; it is also the reception area of the population coming from the North in the search for temporary or permanent relaxation; at the same time as being the Northern edge or bank of one of the most important, dangerous and vulnerable navigation routes in the world. The difficulty in the management of the marine and coastal environments is especially evident if it is taken into account the presence and distribution of responsibilities, both from within the countries and between the coastal countries.*

Indeed more than 100 regional authorities or consortia of regional authorities expressed similar views. The need to develop mechanisms to find a balance between the benefits of jobs in the aquaculture industry and those in the tourist sector is clear from the contributions from the Scottish Salmon Producers Association (first quote) and the Irish Western Regional Fisheries Board (second):

> *Salmon farming has enormous potential within Europe to maintain remote coastal communities, promote stewardship of the marine environment and contribute to the quality seafood market. Europe leads the world in technical expertise in this sector, yet the industry is enormously restricted in what it is able to achieve, and much of this is due to environmental (and other) policies which incorporate the Precautionary Principle in areas where there are knowledge gaps.*

> *The advent of aquaculture, heavily State funded and subsidised, did not compensate for the loss of the wild fisheries. The number of jobs created by*

finfish aquaculture is negligible compared to the previous employment levels in the tourist angling business, which were lost as a direct result of lice from marine salmon farms.

And the European harbour masters point out inconsistencies between the different sectoral regulations:

One example is conflicting environmental and health regulations in the field of 'gassing' of containers. Another example is the need to harmonise ballast regulation. Furthermore, quarantine rules that apply to meat products conflict with regulations for depositing waste in ports that has been generated by ships.

As well as conflicting objectives, there are numerous examples where a failure to exploit synergies results in inefficient governance and an inability to reap the benefits of emerging technologies. For example, the European Ocean Energy Association notes that:

A recent announcement indicated that government funding on ocean energy in the USA (in both the energy and military sectors) could soon surpass that within the EU.

The need for better coordination between the various efforts aiming to improve knowledge of the marine environment and the human impact on it was the theme of many contributions. According to the EuroGOOS (European Association for Global Ocean Observing System) consortium:

The marine research community has made major progress in both the capture of data and information and the advancement of knowledge during recent years. (...)However, the implications of the results of these programmes for European policy making and assessment have not been exploited.

The Commission agrees with this assessment. The Conference of Peripheral Maritime Regions of Europe pointed to the difficulty of implementing and monitoring a marine strategy:

The system of information used to support the implementation and monitoring of a maritime strategy remains fairly incomplete, heterogeneous and sector-based. Moreover, the level of territorial and sectoral division of information is not sufficient on a regional level – often the data is only available on a national level. Databases on the state of coastal zones are yet to be completed and linked to economic data.

It is not only research organisations and those concerned with advising on policy issues that need better access to data. The international Association for Oil and Gas Production indicated that they need data not only for exploration and exploitation but also for assessing impacts:

Information on the seabed that is useful for the offshore oil and gas industry includes information on seabed morphology, chemistry and biology, seabed topography, seabed depth and geological sub-seabed profile as well as seabed geotechnical conditions. Moreover, as OSPAR and the EU move towards the

establishment of Marine Protected Areas and Marine Special Areas of Conservation, habitat and biological data are needed. Sea-bed data are available for the most interesting areas for oil and gas production. Depending on the country there are less data and information available for other areas. The United Kingdom Continental Shelf (UKCS), for example, has been mapped bathymetrically for the purposes of general navigation. In contrast, only a small proportion has been mapped for the purposes of habitat identification.

The Aerospace and Defence Industries Association confirmed the Green Paper's statements regarding the lack of integration of sectoral maritime reporting and surveillance systems:

Policy/procedure restrictions on sharing information in a multi-level security environment have also significantly reduced effectiveness of multi-national operations.

The capabilities for processing and distributing information are confined within existing organizations. Users outside these organizations are often neither aware nor benefiting of such capabilities.

Redundant data across multiple systems can be inconsistent or inaccurate, disrupting a common maritime picture.

The Commission shares this point. Given the strategic importance of shipping to Europe's trade and supplies of food and energy, the retention of a skilled European seafaring workforce is a strategic necessity. However, according to the Greek Government:

recent data indicate that many Europeans today leave the maritime profession or are reluctant to choose it, due to a variety at reasons, such as: (a) the poor image of seafaring, (b) the poor working conditions and (c) the criminalization of the seafarers' profession.

The Commission is aware of the grave shortage of ship officers. It is clear that action to understand and reverse this decline requires coordination across a large number of policy domains – employment, education, fisheries etc.

2.4.   Effects of non-action

The sector-based fragmented approach has implications for the whole of Europe's maritime community, including its coastal Member States and notably its maritime regions, the maritime sectors and their employees and other stakeholders.

The lack of a single vision and the ambiguity surrounding the interplay between policies causes uncertainty. Stakeholders can only acquire a full understanding of the EU position regarding ocean- and sea-related issues by analysing the whole range of sectoral policy initiatives with a maritime dimension. This totality represents a complex compilation of regulation, policy measures and finance programmes, for which no guidance is available as to how the various elements fit together.

A lack of clarity about these connections between EU policies may lead to differences in interpretation in the Member States, late or erroneous implementation

or controversy. This hampers the pursuit of sectoral EU policy goals in maritime fields. Moreover, an unclear or inconsistent legal and policy framework in the EU will have an impact on the position of European enterprises in the world market. Economic actors engaged in maritime sectors may miss out in terms of growth or even face loss of competitive position. Maritime professionals may face more limited career perspectives. Bottlenecks in the transport and logistics chain would be felt on a broader scale, by raising the costs of materials and products traded internationally.

A lack of connection between sources of knowledge, research and innovation leads to sub-optimal responses to promote sustainable development. Failure to exploit such synergies could result in missed growth opportunities with consequent effects on employment. It could reinforce the pressures on the marine environment. There may be adverse impacts on the ability of the marine environment to support important functions such as nutrient recycling; gas and climate regulation; waste assimilation; food provision; habitat mediation; and other biological and chemical functions.

The fragmented treatment of marine research and ocean data will do little to reduce the existing uncertainty about the state of the environment or the exact effects of climate change, such as the expected rise in sea level. This may seriously hamper the ability of the maritime economy to attract investment and grow. This would mostly affect coastal regions, particularly activities that rely on proximity to the sea, such as various forms of recreation and tourism, fisheries and aquaculture.

The absence of a strong EU strategy to mitigate the effects of climate change on coastal areas may have a considerable societal cost. Citizens would no longer be able to enjoy the oceans and seas and their coasts to live, earn their living or spend holidays in the same way as today. Storms or floods can severely damage critical coastal infrastructure, tourist accommodation, villages and cities situated close to the shore as well as ports. Industrial investments may be at risk. The UK Office of Climate Change estimates a possible loss of income of 5 % GDP if no action were to be taken against climate change[29]. A Dutch study estimated the adaptation costs to maintain the current level of coastal protection at €8.3 billion in case of a 60-centimetre sea level rise and at €16.6 billion in the event of an 85-centimetre sea level rise in combination with 10 % extra storms and increased river runoff[30].

The competitiveness of maritime sectors, notably those involved in international trade, the protection of the marine environment, the fight against climate change and safety and security all are issues with an important global dimension and cannot be addressed without action at international level. Fragmentation of the EU's maritime agenda's reduces its ability to realise its objectives within international fora as well as in bilateral relations (India, China) or relations with neighbouring countries.

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[29] "Draft Climate Change Bill – A brief summary of the scientific case for action, Office of Climate Change", UK, 2007.

[30] "Assessing dangerous climate impacts for the Netherlands", VU Amsterdam, International Centre for Integrated Assessment and Sustainable Development, KNMI, RIZA, UNESCO-IHE and Universiteit Wageningen, November 2006.

2.5. Trends in maritime policy approaches

Learning from experience around the globe

In the preparatory process leading up to the Green Paper, the MPTF examined approaches to maritime affairs in an international context, including the vision adopted by the UN, the policies of third countries and the approach by EU Member States. Besides analysis of policy documents, members of the Task Force organised an extensive programme of meetings with the governments in charge, stakeholders and scientists during study trips. This provided not only an understanding of the approaches and ambitions, but also an in-depth assessment of their successes or failures and delays by those directly concerned.

A holistic vision for the oceans and seas has been advocated at international level. The Preamble to the United Nations Convention on the Law of the Sea of 1982 stated that "*the problems of ocean space are closely inter-related and need to be considered as a whole*". In 2002, the Johannesburg Plan of Implementation of the World Summit on Sustainable Development concluded that "*ensuring the sustainable development of the oceans requires effective coordination and cooperation*".

Australia, Canada, Japan, the US and Norway all are moving towards an integrated policy approach, albeit at different rates.

- Australia pursues an oceans policy to improve the quality of life in a way that respects ecological processes. In terms of governance, a mechanism provides sectoral agencies with guidance about the way in which they should deal with multiple-use issues.

- Canada's Oceans Act, Strategy and Action Plan provide the strategic framework guiding the work of all ocean-related programmes and policies. It is based on the principles of sustainable development, integrated management and the precautionary approach. Its management is based on a participatory approach involving government bodies at all levels, NGOs and citizens.

- The US has been pursuing a maritime policy since 2004. Its components are better coordination of policies, advancing the understanding of the oceans, management of the coastal areas, transport and international affairs. Activities include for example developing the structure for coordination, the definition of research priorities and a national conference on ocean literacy. Early 2007, a report on progress with the 88 actions was published.

- Japan adopted a "Maritime Basic Law", in April 2007, which provides a structure and legal means to approach maritime affairs in a cross-sectoral manner. This law provides for a new "Maritime Policy Headquarters" under the responsibility of the Prime Minister's and a minister for maritime policy. A second law sets out a framework for exploration and other activities in the Japanese Exclusive Economic Zone (EEZ).

- Norway has put in place a model for managing development in the Barents Sea, which provides a spatial framework for the sustainable use of natural resources and goods derived from the sea. Research and monitoring programmes are

guiding its implementation. The process is led by a steering committee of Ministers. Impact assessments are drawn up for all relevant sectors and activities and procedures are in place to ensure the involvement of advisory groups and stakeholders. The plans are followed up systematically, so that they can be adjusted according to new insights or to react to changes.

From these visits, the following conclusions can be drawn:

- The coordination of maritime work among existing departments and agencies is generally preferred to centralisation, yet it is very important to ensure that everyone involved signs up to the process and there is a "champion" furthering coordination and a holistic approach;

- Pooling science and data resources is essential to ensure a basis for strategic and forward-looking decision making;

- Clear communication about the policy and dialogue with stakeholders is essential;

- The main problems, commonly identified in the various countries, which slow down implementation, are a lack of involvement among the actors concerned or the failure to mobilise the necessary funds to match the evolving needs. Also noted is the long time it takes for stakeholders to familiarise themselves with integrated policy thinking. In all cases, it has been observed that the introduction of an integrated maritime policy requires a culture change among actors, and thus patience and continuous dialogue.

Trends within Member States

The MPTF also examined the various approaches pursued within the EU. The report on Member State' approaches to maritime affairs covered aspects of governance, the organisation of government activities at sea and coastal management. It also looked at the value of the oceans and seas in the EU in terms of both economic and cultural importance.

The findings reveal that overall within the EU, the trend towards integrative coordination mechanisms has until recently not been especially pronounced. Some Member States, such as the Netherlands, have already developed structures for inter-departmental coordination and in France the Secretariat Général de la Mer coordinates sea-related matters. In Germany, the Ministry for Economics has a Maritime Coordinator is placed in at the level of the State Secretary. It may be noted that the Poseidon group, which gathered together public and private experts in maritime affairs recommended in its report of December 2006 that national ambitions should be implemented within the wider EU framework.

After launching a Strategic Commission on Oceans in 2003, Portugal adopted in November 2006 a National Strategy for the Oceans, which aims to make better use of ocean and coastal resources, to promote sustainable development through efficient, responsible and committed coordination and to actively contribute to the international oceans agenda. Ireland's Sea Change Strategy, launched in February 2007, aims to boost research and innovation.

The UK released a Marine Bill White Paper in March 2007. Its Impact Assessment stated that a more strategic approach is needed in the marine area that moves away from considering individual projects or sectors. Otherwise there is the risk that management arrangements will be unable to cope in future if they continue as they have done in the past: "*We would not be able to plan the future development of marine activities or emerging technologies, nor adapt to and combat challenges such as climate change, in an integrated and efficient way. Conflict between the various economic, social and environmental needs and objectives for the marine area would continue and potentially increase.*"

2.6.   The added value of action at EU level

Why act at EU level?

There appears to be a strong case for more coherence to overcome the problems associated with the current sector-based approach. A clear vision of the totality of EU objectives as regards maritime affairs will add to our ability to pursue EU policy goals internationally and in a more coherent fashion.

An integrated Maritime Policy at EU level is necessary as there are numerous EU policies that relate to the sea, but which have been developed and pursued until recently in a fragmented fashion. To name but a few:

- Maritime transport and maritime security policy

- Border control and other law enforcement activities at sea

- Industrial policies in areas such as shipping, pleasure boats and tourism

- Marine environmental protection, ship dismantling, climate change impacts on coasts, integrated coastal zone management, ship pollution, water policy

- The Common Fisheries Policy

- Research policies relating to all these subjects

- Naval strategy as part of the European Security and Defence Policy

Furthermore, the EU has set up a number of agencies in order to support the implementation of these policies, some working exclusively on sea-related matters (EMSA, CFCA), some with important projects/mandates relating to the sea (Frontex, EDA), and others that devote only a small part of their activities to sea-related issues.

Finally, the European Community is a member of international organisations or conventions (FAO, UNCLOS, HELCOM, OSPAR) or there is coordination within the EU on policies and treaties in numerous other organisations (IMO, ILO, UNEP, CITES).

If thus there is a case to overcome sectoral fragmentation, therefore the EU level has a key role to play in the light of its present activities.

Adopting a holistic approach at EU level would not negatively affect similar approaches in Member States or at international level. Rather, similarly coherent approaches at various levels of government would mutually reinforce one another.

The step towards more coherence in the EU approach towards existing competences in maritime affairs does not have implications for EU competences or questions of subsidiarity. The EC and EU Treaties and the associated body of EU law do not provide a specific legal basis for an EU Maritime Policy, in addition to the existing provisions for conducting sectoral policies impacting on maritime affairs. The latter will continue to provide the basis for integrated policy proposals. An integrated, overarching policy will find its expression in measures that, depending on their specific content, will have to be taken under one or more existing legal bases for sectoral action in the treaties.

The contribution of Maritime Policy to broader EU policy goals

In seeking a coherent vision, the EU Maritime Policy aligns well with other policies concerned with maritime affairs. It addresses all three components of sustainable development; seeking a balance between them is at the heart of its approach. It aims to contribute to EU activities under both the Lisbon agenda and the Sustainable Development Strategy[31]. It is intended to help realise the potential of maritime industries and clusters and is therefore fully consistent with LeaderSHIP 2015[32] and clustering initiatives under the EU's Enterprise and Industry policy.

The EU Maritime Policy incorporates the EU Strategy for the Marine Environment as an integrated environmental component and recognises the importance of the oceans for the quality of life of EU citizens, first and foremost in the coastal regions. It also supports actions to comply with international and European obligations to halt the decline in biodiversity by 2010. Moreover, in view of the so far largely unrealised potential of offshore wind and ocean energy, it can provide support towards reaching the EU's target of 20% of overall energy consumption from renewable resources by 2020.

The goal of coherence of policies, both within and between pillars, is fully in line with treaty requirements.

3.   **GENERAL POLICY OBJECTIVES/ SPECIFIC OBJECTIVES**

Building on a careful assessment of the problems set out in the previous section and the results of the public consultation, the challenge for the EU is to exploit fully the potential of oceans and seas by developing a new holistic approach to maritime policy. Such a policy should be anchored in the Lisbon agenda for growth and jobs and in the revised European Strategy for Sustainable Development.

The EU's general aim is therefore to develop an integrated approach to Maritime Policy which, first, aims to introduce a governance framework that applies the

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[31]   See http://ec.europa.eu/growthandjobs/index_en.htm and
        http://ec.europa.eu/sustainable/welcome/index_en.htm.
[32]   "LeaderSHIP 2015" - COM(2003) 717, 21.11.2003.

integrated approach and, second, to develop horizontal and cross-cutting tools for integrated policy-making. The EU Maritime Policy should enhance the EU capacity to pursue the following objectives when dealing with oceans and seas:

- maximising the sustainable use of the oceans and seas;

- building a knowledge and innovation base for the Maritime Policy;

- delivering the highest quality of life in coastal regions;

- promoting Europe's leadership in international maritime affairs;

- raising the visibility of Maritime Europe.

4. **POLICY OPTIONS: AN INTEGRATED POLICY OR NOT**

Assessing the implications of a new integrated EU Maritime Policy implies two separate issues: first assessing whether the EU should develop an integrated approach to Maritime Policy and what type of framework would be best suited to achieve this. Second, what would be the concrete content of a Maritime Policy and the likely added value of the actions that would be developed under the chosen overarching policy-making framework?

This is why the present Impact Assessment examines both the options for and effects of a new approach to maritime affairs (chapters 4 and 5) and the instruments proposed for reaching the Maritime Policy goals (chapter 6).

4.1. **Integrated policy approach**

Stakeholders were asked how a maritime policy could add value to activities already undertaken in the maritime field. In their responses, they indicated the benefits that would accrue from stronger cooperation, common learning and more transparency about maritime affairs in general. They expected that more integration would bring about more coherence among EU policies and contribute towards its overall objectives for growth, jobs and sustainability. Stakeholders also expected to see potential benefits in terms of more efficiency in managing maritime affairs. Others expected Maritime Policy to promote the importance of Europe's maritime economy and to set an example leading to higher standards internationally.

Coordination has also proven its value in other domains of EU policy-making for a number of years.

Reaching the EU's objectives for more economic growth and more, and better, jobs, or the Lisbon Strategy, involves a range of sectoral policies. The Commissioner's Working Group on Competitiveness, chaired by President Barroso, mobilises all potentially relevant instruments for this purpose. The Commission's assessment was that the joint effort of a number of EU policies towards clearly defined goals had worked well and that it had started to deliver results.

Equally, since 2001, the EU's Sustainable Development Strategy provides a framework in which different Commission services work together towards common

goals. The Commission noted in its 2005 review of the sustainable development strategy that since the launch of the strategy, ambitions have been translated into policy initiatives that are in turn bringing results on the ground[33].

The EU Industrial Policy[34] is also geared towards a more integrated approach. Based on the screening of the implications of various policies for specific industrial sectors, this approach enables the precise targeting of those policy measures most relevant for each sector. A number of policy dimensions have been brought together under a single initiative, allowing a more powerful impact on competitiveness.

The mainly positive assessments of the potential benefits of an integrated approach, as expected as a result from the analyses of existing policy approaches and in line with the views of stakeholders, should be offset against possible costs. The need for resources to implement an integrated approach depends on how this integration is to be organised: either by centralising all policy issues related to maritime affairs or through enhanced coordination.

In practical terms there are three options for achieving these goals:

(1)   abandoning the idea of an EU Maritime Policy and pursuing the objectives only through single sectoral approaches;

(2)   a structural approach – bringing together all aspects currently concerned with maritime affairs, i.e. transport, environment, fisheries research etc – in one organisation and integrating all legislation and budget for Maritime Policy;

(3)   a procedural approach – coordinating existing sectoral approaches and creating new initiatives in areas only where a genuine cross-sectoral approach is needed.

4.1.1.   *No specific action/sector-based approach*

Maintaining the status quo implies that the EU would not develop a dedicated integrated Maritime Policy for ocean and sea-related matters. Under this scenario, policies would continue to be developed and implemented under the various sectoral policies relating to the oceans and seas.

The benefits of this option are that there would be no need to create an internal function within the Commission or budget to ensure coherence and holistic analysis and no need for other services to step up cooperation.

Procedures for developing proposals would not need to be linked into the overall vision, which would ensure simpler procedures and speedier processes for policy-making. Equally, in Council and Parliament, "normal" work in sectoral structures would continue, without procedures to enhance cooperation across sectors, as were already followed by both institutions in their response to the Green Paper.

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[33]   "Review of the Sustainable Development Strategy: A platform for action" - COM(2005) 658, 13.12.2005.
[34]   "Implementing the Community Lisbon Programme: A policy framework to strengthen EU manufacturing - towards amore integrated approach for industrial policy" - COM(2005) 474, 5.10.2005.

Member States would not need to have specific contacts within the Commission specifically for Maritime Affairs. External stakeholders would not be confronted with any need to adapt their approach to EU policies regarding maritime affairs.

However, the "gains", in terms of time and resources, definitely do not outweigh the benefits, in terms of better quality of decisions through consistency and coherence and the quality of a coordinated policy. This is all the more important in the light of the challenge at stake, which is the future of coastal regions, oceans and sea.

In addition, non-action would clearly go against the results of the consultation process. With very few exceptions, the question "should the EU have an integrated Maritime Policy?" was answered with a resounding yes. The comprehensive report on the public consultation that followed the Green Paper on Maritime Policy concluded that it will provide conditions for long-term growth and development in the maritime sectors. The expectation is that it will ensure a balance between policy objectives and focus EU intervention on cases where it can provide added value. Stronger cooperation between the sectors and sectoral policies, mutual learning and exchange of best practice, plus transparency are highlighted as the first obvious benefits of an integrated approach[35].

It would also ignore the experiences gained in third countries and within a number of EU Member States in moving towards integrated ocean and seas' policies as referred to in section 2.5.

4.1.2. *A structural option – A centralised Maritime Policy function*

A centralised Maritime Policy function covering the whole spectrum of maritime affairs would require substantial internal re-organisation to pool sufficient human resources. Integrating the complete legislative and budgetary environment for all the sea-related elements of existing sectoral policies would create reorganisation costs and political risks. Their impacts would be unforeseeable and difficult to manage.

Centralising the various Maritime Policy functions within the Commission is not seen as a cost-efficient option for the following reasons:

- In all cases except fisheries, sectoral maritime policy areas are also part of a wider policy domain. The integration of these elements within a Maritime Policy would trigger the fragmentation of the policies of which they are part.

- Community competences are uneven in the maritime domain and are aligned more to the wider policy domains (e.g. trade, industry, fisheries, environment, transport).

- The present Commission organisation mirrors to some extent the structure of civil service departments in Member States.

- A central service for handling all maritime affairs would require increased resources. It would need to handle maritime affairs and also ensure intense

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[35] "Detailed report on the contributions to the consultation process on Maritime Policy", see http://ec.europa.eu/maritimeaffairs.

coordination with the related sectoral policies (in such a setting, a central maritime service, in charge of e.g. the marine environment or maritime transport, would have to handle considerable additional coordination with the overall environment or transport policies).

- A centralised policy approach would lead to the loss of existing synergies in sectoral policy areas and increase the risk of duplication. The delays due to re-organisation could substantially harm the implementation of Maritime Policy in the initial phase, which may have consequences for its continuation.

In view of these points, this option does not appear to be beneficial for the effectiveness of overall EU policy-making.

4.1.3.   *A procedural approach for coordination*

Enhanced coordination of sectoral policies concerned with maritime affairs should resolve inconsistencies, duplications and uncertainties in sectoral policy initiatives. Common, integrated, tools for Maritime Policy could be developed where these would benefit more than one policy. This would bring about efficiency gains through better sharing of information and resources.

Such an approach would also rely on measures to promote collective learning and an enhanced consultation of stakeholders, and specifically:

- Dialogue with stakeholders can clarify the links between the sectoral policies and explain their overall impact on the oceans and seas. Such work should focus on the promotion of a holistic vision on the oceans and seas. To avoid duplication or unnecessary costs, there should be links to existing tools for communicating sectoral policies and to organisations of external, public or private, stakeholders. As all European citizens are stakeholders in the future of the seas, communication should also reach them, through the appropriate information channels.

- Reporting on progress towards the main goals of Maritime Policy, results of actions and new challenges and access to comprehensive information via a website are cost-efficient tools to provide a holistic perspective in written format.

- Exchanging best practices is instrumental to promote a holistic approach to maritime affairs within the EU Member States that fully respects Europe's regional traditions and the principles of proportionality and subsidiarity. That would imply providing the platform for exchanging information, by way of arranging discussion fora and ICT tools. A periodic conference would allow broad discussions and mutual learning. Studies could provide the networks with a factual and objective underpinning. The work should lead not only to improved understanding of the inter-linkages between different maritime activities and policies, but also assist in setting objectives and defining benchmarks for policy.

Compared to centralisation, enhanced co-ordination would entail less in the way of resources and budget. It would require efforts to organise the coordination process, gather the required knowledge base and engage in dialogue with stakeholders, maintaining and furthering the holistic vision of the oceans and seas. But it can build

on what exists already and has the advantage that substantial restructuring between Commission services would be unnecessary.

Under this scenario, what would be necessary is that the Steering Group of Commissioners and the fruitful cooperation between Commission Services within the Interservice Group Maritime Policy continues with a view to full and speedy implementation of new policy initiatives. The functions of the MPTF should in this case be integrated into the new organigram of the present Directorate-General for Fisheries and Maritime Affairs in such a way as to ensure maximum coherence i.a. between fisheries policy, coastal development and maritime policy in the sea regions surrounding Europe. The thus restructured Directorate-General should stay in charge of coordinating and monitoring the implementation and future policy development. It should continue to service the Steering Group and animate the Interservice Group on Maritime Policy.

Success depends on the involvement of stakeholders as well as on the degree to which the results permeate into policy-making within the Member States. A truly inclusive bottom-up approach should lead to the necessary acceptance or ownership of the results by stakeholders. To be effective, the results should be disseminated beyond the network to reach everyone who is directly or indirectly concerned with them. An important dimension of the work to collect best practice examples will be lost in the absence of an appropriate dissemination strategy.

As the holistic approach is also about changing mindsets as regards the way in which we organise our policies that affect the oceans and seas, the true success of an integrated approach will extend beyond its own operations and the policies for which it is responsible. Maritime Policy relies on the commitment of sectoral policy-makers and actors to commonly work towards a single vision. It also depends on the extent to which public authorities throughout the EU and in international fora adopt a similar approach. Convincing evidence and clear promotion of the importance of moving towards a single vision both inside and outside the Commission, together with the development of tools for this purpose, is thus a crucial element for success.

By practicing enhanced cooperation and following a holistic approach in its policy measures specifically concerning the seas, oceans or coastal regions, the Commission can lead the way in encouraging other EU institutions, public authorities at all levels of governance as well as science and business to pursue themselves a more holistic approach and structure their own organisation accordingly.

In the light of the above, enhanced coordination appears to be the most effective and cost-efficient tool to realise the objectives of EU Maritime Policy.

5.   ACHIEVING MARITIME POLICY GOALS

This section describes the way in which policy integration through enhanced coordination would contribute to achieve the broad goals of Maritime Policy.

5.1. Maximising the Sustainable Use of the Oceans and Seas

A range of policies, i.e. on fisheries, maritime transport, industry, tourism, employment, environment and regional development, are already in place to deal with the three components of sustainable development, i.e. economic growth, social well-being and a healthy environment. Policy integration will hence be the primary tool to forge stronger linkages where maritime affairs are concerned. More integration can specifically contribute to reinforcing the competitive position of the entire maritime cluster, creating better conditions for job mobility among different sectors, finding alternative employment for e.g. fishers and ensuring fair burden-sharing in tackling the effects of marine pollution and climate change. A clear and consistent regulatory framework and self-regulation where possible can reduce the time and costs for industry in dealing with the implications of policy.

Responsibility for a healthy marine environment devolves principally on EU environmental policy. As a Marine Environmental Strategy is well on the way to being implemented, efforts should concentrate on ensuring its good functioning within Maritime Policy as well as continuing commitment to marine nature protection sites under the Birds and Habitats Directives[36]. Nonetheless, close coordination is needed with the Common Fisheries Policy, which has instruments to maintain biodiversity and restore fish stocks and other policies, such as energy policy, which impacts on the oceans through climate change, or agricultural policy, which affects the nutrient load carried by estuaries into the seas, should not be neglected either.

Responsibility for measures to boost competitiveness, growth and jobs involves a range of Commission departments. In addition to integration, therefore, cross-cutting activities can be developed to cover the totality of maritime issues beyond the individual remits of sectoral policies. This can for example involve a comprehensive analysis of all different sea-related sectors, their interactions and competitive strength or shared legal constraints. As clusters are being developed on the basis of different models, there is also scope for exchanging best practice.

The integration of data and surveillance will produce information that is important for purposes of environmental protection and socio-economic development. For example, better ocean data will not only help to identifying more precisely the need for environmental policy responses in line with the precautionary principle, but also ensure that these are proportional with minimal impact for industry. Better data will also allow industry to find appropriate responses to ocean phenomena, e.g. to adapt the construction and the routes of cruise ships to wave patterns.

Maritime surveillance can help track non-compliance with safety, security or environmental obligations or illegal activities, thus not only improving the prevention and combating of such activities, but also reducing the competitive advantage of substandard operations. A secure and safe environment will reduce risks and their associated costs for shipping and related activities.

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[36] 79/409/EEC and 92/43/EEC respectively.

Finally, forward-looking spatial planning helps to optimise both the development of economic activities and activities to protect the marine environment. A predictable public strategy for the future use of the sea will also be conducive to attracting investment in future economic growth and the creation of new jobs. This is particularly important for offshore projects, which often require large-scale investment and long lead times.

5.2.   Building a Knowledge and Innovation Base for the Maritime Policy

Policy integration in this area will facilitate priority-setting within EU Programmes, in line with EU policy goals. It can help reduce the ecological footprint of activities at sea and encourage development whereby economic growth and environmental protection go hand in hand, such as offshore renewable energy, carbon capture and storage or the exploitation of methane hydrates. It can also bring about a more targeted use of research funds to enhance the competitiveness of European maritime industries.

Research networks, including industrial and governmental stakeholders can provide broader access through platforms for common learning to ensure that research results permeate into entrepreneurial society. There are already good examples of cooperation to build on, such as the Waterborne Technology Platform.

Policy integration can identify and trigger action needed to improve the availability of skills for the maritime sectors. Coordination between industrial, transport and social policies will help develop a broader approach to training and education and equip people with skills that offer broader career perspectives and job mobility across sectors and countries. This should provide the well-educated workforce that the industry needs, while at the same time offering an attractive work environment.

Broader access to marine observation and data systems as well as enhanced monitoring and surveillance capabilities will make direct and undeniably positive contributions to achieving Europe's knowledge potential.

5.3.   Delivering the Highest Quality of Life in Coastal Regions

Policy integration will allow Europe's maritime regions to benefit more from the enormous potential of the Structural Funds for contributing to the harmonious development of coastal areas and islands and cross-border links. Coordination with the Common Fisheries Policy will be advantageous for these regions as fishing constitutes a traditionally important source of activity in coastal communities, especially in remote areas, e.g. it will help in finding alternative employment for fishers in new areas, such as guardians of the sea, helping to protect the environment, becoming involved in education, etc.

Policy integration can help to ensure a better oversight of expenditure under the Structural Funds. Furthermore, integration can help to better align port policy with environmental legislation, notably the Birds and Habitat Directives, the Water Framework Directives and the forthcoming Marine Strategy.

In addition to policy integration, other instruments of Maritime Policy add value in improving the quality of life on the coast.

Recognising the maritime regions as key partners in achieving this objective makes a pro-active dialogue with coastal regions imperative. Such a dialogue is crucial in building sound understanding of the challenges of maritime regions. Drawing on the diversity and experience of these regions, common learning can be encouraged through platforms for exchanging best practice in areas of specific interest.

Spatial planning provides promising opportunities to avoid competing and conflicting uses of the sea. Allocating space to specific types of users in an optimal way will help to ensure that favourable economic development can go hand in hand with safeguarding the attractiveness of the coast in other terms, e.g. their cultural or recreational value, and with nature conservation.

Better marine observation and data will feed into spatial planning processes and make them more effective. Better data will also help provide an understanding of the effects of climate change on life on the coast and hence provide more evidence to assist coastal regions in their efforts regarding risk reduction and coastal protection.

Maritime surveillance will allow a better and earlier identification and response to threats from the sea, such as accidents, marine pollution, and illegal or criminal activities. This will also be of benefit for the quality of life in coastal regions.

5.4.   **Promoting Europe's Leadership in International Maritime Affairs**

Policy integration embracing the Community's external policies, including external relations, trade, development aid, cooperation with third countries and neighbourhood policy can help build EU leadership as regards the oceans and seas around the world. The neighbourhood policy and its instruments could play an important role in dealing with the specificities of Europe's marine regions.

Achieving EU goals via international means allows us to maintain an international level playing field, avoiding specific European measures that risk duplication or loss of competitiveness. However, given that this depends on the readiness of Member States to act, the EU could monitor and encourage the ratification of international conventions under its coordinated Maritime Policy. Such efforts will, if successful, meet Europe's environmental and safety requirements, without negatively affecting the competitive position of European enterprises.

5.5.   **Raising the visibility of Maritime Europe**

Raising the visibility of the maritime sectors would require a concerted effort with policies on maritime transport, industry, employment, education and communication.

Specific action could be taken to communicate a holistic picture embracing all aspects of maritime affairs. The consultation process highlighted the existence of such promotional and educational initiatives. The Ecotec study for example provides a list of national activities to promote the maritime professions. Encouraging such initiatives by spreading examples of best practice, including through awards, would have a multiplier effect, e.g. through extensive media attention.

Such promotional activities at EU level could be centred as far as possible around a maritime event. Concentrating promotion and outreach efforts and labelling them as a Maritime Day or Week is a clear signal of their political importance.

A better dialogue with stakeholders and citizens will mobilise the public support essential for realising the Maritime Policy goals. It will also help to bridge the gap with the EU's citizens, which fits in well with the Commission's objectives for transparency and dialogue with citizens.

6. **WHICH ACTIONS FOR A NEW EUROPEAN MARITIME POLICY? THE ACTION PLAN FOR A EUROPEAN MARITIME POLICY**

The Commission's vision of an EU Maritime Policy is accompanied by an Action Plan, providing an overview of the main actions to be developed in order to contribute to achieve the vision's objectives.

In addition to providing a framework within which maritime-related policies can be managed in a more efficient, coherent and transparent way, Maritime Policy also is intended to bring together and steer the development of the various sector-specific policy initiatives that underpin it. Therefore, besides cross-cutting actions to implement Maritime Policy, it also includes the most significant sectoral initiatives that can be expected during the lifetime of this Commission – i.e. before November 2009. This list of sectoral initiatives is not exhaustive.

The process for selecting the cross-sectoral themes in the list was as follows: The Green Paper on Maritime Policy put 59 questions to stakeholders on the way forward and set out a number of possible activities to be developed in a range of areas. The themes in the Action Plan are those from the Green Paper which were clearly endorsed by the stakeholders. For instance, the Green Paper suggested ideas for a common EU-coastguard and using military assets for civil purposes. To quote just an example, stakeholders mostly rejected the idea of a centralised EU coast guard, but would encourage further cooperation. This idea is therefore not retained, but a dialogue with European navies on their contribution to the execution of tasks falling outside the European Security and Defence Policy has begun within a different context.

In addition, the criterion for the selection and design of cross-sectoral themes was the added value resulting of an integrated approach, which mainly comprises:

- Increased synergies between previously fragmented policy areas;

- Increased predictability of future regulatory decisions that favour the development of future economic projects and their ability to attract investors;

- Better reconciliation of economic, social and environmental objectives with a view to promoting sustainability.

It is not possible at this stage to assess the likely impacts on the economy, the society and the environment of each and every initiative mentioned in the Action Plan as their precise content and form will be elaborated further in the integrated approach to

Maritime Policy. The measures introduced in the Action Plan, such as collective learning and stakeholder relations will themselves contribute towards future impact assessments. Where the type of action to be envisaged requires Impact Assessment, this will be conducted in line with the Commission rules on Impact Assessment.

The following sections provide a summary account of the initiatives included in the Action Plan and explain why they are instrumental to further the five general objectives of a new Maritime Policy. The Action Plan provides, for each of the different areas of action, a fiche presenting in greater detail the general context, the planned actions and a summary analysis of the expected costs and benefits as well as relevance for an integrated Maritime Policy.

6.1. Maritime Governance

An Integrated Maritime Policy requires a governance framework that applies the integrated approach at every level, as well as horizontal and cross-cutting policy tools.

(1)   An EU Maritime Policy will realise its full potential only if analogous arrangements are also adopted by Member States in line with the subsidiarity principle, to provide for the improved coordination of all maritime-related affairs. This requires a number of common arrangements at European level. To promote a more holistic approach towards maritime affairs throughout the entire EU, principles and guidelines would be helpful.

(2)   An integrated approach to maritime affairs should develop policies and legislative proposals that are both coherent and mutually compatible. One of its tools should be a list of existing obstacles or inconsistencies, in order to allow the streamlining and improvement of a coherent regulatory framework. Such a list will provide a basis for further reflection on possible regulatory amendments.

(3)   An integrated Maritime Policy will benefit greatly from stakeholder involvement. Such involvement allows to exchange information, best practice and learning from experiences. Such collective learning process will bring a faster exchange of ideas and experience between different regions and greater opportunities for individuals and interest groups to make their voice heard in policy development.

6.2. Cross-cutting and Integrated Maritime Policy Tools

A new integrated governance framework for maritime affairs requires cross-cutting tools to help policy makers and economic and environmental actors to join up their policies, interlink their activities and optimise the use of the marine and coastal space in an environmentally sustainable manner.

These tools, as set out in the Blue Paper, comprise the development of an EU Marine Observation and Data Network to optimise and bring coherence to the current fragmented initiatives that gather data on oceans and seas; the development of maritime and coastal spatial planning, assisted by a road map drawn up by the Commission and a more integrated network of surveillance systems for European

waters. Indeed, the improvement in data and information, in planning, and in the monitoring and surveillance of our oceans and seas will facilitate cross-fertilisation between all Maritime Policy activities, ultimately leading to a more integrated approach.

Therefore, in the Action Plan, the following actions on data, spatial planning and surveillance presented below will contribute towards the development of the Tools for Integrated Policy-making, set out in the Blue Paper.

(1)   To overcome current fragmentation, a European Marine Observation and Data Network aims to encourage sharing of marine data collected for different purposes. Integrated access to data will enable broader use of data and the provision of customised services to different users. Such integration of data sources and supply mechanisms will help to improve the common understanding of the oceans and seas, which, in turn, will benefit activities related to protection of the marine environment, science and research and technology development. Sharing this knowledge is one of the cornerstones of an integrated approach.

(2)   Action towards integration of maritime surveillance systems aims to improve overall surveillance of activities in coastal waters, hereby enhancing the ability of authorities to identify anomalous behaviour and both raise the effectiveness and reduce the costs of surveillance. More efficient and compatible surveillance and monitoring systems would ultimately provide government agencies in the Member States access to a fully-integrated, single picture with complete information on ship movement and activities. This would also help the Member States to carry out search and rescue activities more efficiently, thus preventing loss of life at sea.

(3)   Integrated maritime spatial planning across EU waters is a essential for continued sustainable development of maritime economic activities, because it constitutes a neutral tool that arbitrates between conflicting or competing activities or interests. Building on Integrated Coastal Zone Management and the proposed Marine Strategy Directive, EU support for maritime spatial planning will encourage more effective implementation of environmental measures and acceleration of planning decisions. It will promote regional responsibility and facilitate the resolution of trans-boundary planning issues. It will yield its full benefits only if all coastal Member States introduce such systems, that they use compatible and comparable systems and learn from each other's experiences.

6.3.   Maximising the Sustainable Use of the Oceans and Seas

Europe is intimately linked to the seas and oceans that surround it. It is not just the shipping or fisheries industries and their related activities. It is also shipbuilding and ports, marine equipment and offshore energy, maritime and coastal tourism, aquaculture, submarine telecommunications, blue biotech and the protection of the marine environment. Many of these activities are growing fast keeping Europe as a world leader in the global maritime economy, with its large fleet and vibrant shipping services industry, its cutting-edge cruise liners and its numerous ports.

Nevertheless, in the fierce competition of today's globalised economy Europe's leadership cannot be taken for granted.

Europe should therefore not only focus on maintaining the competitiveness of existing sea-related industries and activities but should also actively promote their development over the long term and the creation of more and better jobs. In line with the Lisbon Strategy, this is what the Commission intends to pursue with the aim of maximising the use of Europe's oceans and seas.

This use, however, needs to be sustainable as the marine environment is the base-resource for all maritime economic activities. The question of the sustainability of our oceans and seas is therefore a critical one in the Blue Paper's vision for our oceans and seas. Indeed, the very scale of the oceans and seas has traditionally led people to perceive them as an inexhaustible source of wealth. Nevertheless, the current fragmented approach to maritime activities and their sectoral policies has not allowed us to decouple economic development from environmental degradation. Huge strides in technology, climate change impacts and the growing coastal population have combined to create added pressures on available resources, particularly in relation to fishing, transport, recreational navigation and the exploitation of oil and gas as well as the marine environment itself.

Good governance and an integrated approach require us to move towards a more overarching strategy that joins up sectoral policies for maritime activities and environmental policy relating to Europe's seas. The Commission intends to follow this path with the aim of maximising the sustainable use of the oceans and seas.

With this objective in mind, the Commission is proposing a number of actions covering maritime transport; ports and logistics; the development of multisectoral clusters enhancing the competitiveness of Europe's maritime companies; the strengthening of careers and employment in the maritime sectors; sustainable maritime tourism; reduction of air pollution from ships; ship dismantling; mitigation and adaptation to climate change; and the protection of the high seas; these will be accompanied by action strengthening the ecosystem approach to maritime activities and to fisheries in particular.

(1)   Clustering works particularly well for many maritime businesses, as their activities are often closely inter-related. The promotion of multi-sectoral clusters and regional centres of maritime excellence will bring increased awareness of market developments via better linkages with research and technology development and strengthen employment prospects through targeted training and better mobility. An integrated Maritime Policy that creates the right framework conditions for maritime clusters can help them become engines of value creation and prosperity.

(2)   Further steps to promote maritime transport, including removing obstacles to intra-European maritime transport and the promotion of e-maritime, will give an impetus to economic growth, not only for the sector itself but also for the further development of the maritime economy in coastal regions. It will also strengthen the contribution of transport policy to mitigating global climate change by facilitating the modal shift from road to sea.

(3)   Maritime development will only be genuinely sustainable if it is socially acceptable and allows the maritime professions to share in the benefits of the EU social model. Proposals for strengthening employment, qualifications and working conditions in the maritime sectors will link a number of EU policies including employment, transport, fisheries and education policies in order to increase the currently unacceptably low number of Europeans seeking maritime careers. Action will require not only coordination of all actors involved, but also coordination between the EU policies concerned. The different levels of competence furthermore call for the support and active participation of Member State and regional authorities and institutions. Seafarers in the EU, including fishers, and the maritime cluster, would benefit from a more integrated approach to employment.

(4)   The ports policy will enable harmonious development of ports with their environment so that this not only eases logistics, but addresses also related issues such as the quality of life, regional development, tourism and environmental protection. In addition many ports are not destined to play an expanding role in the logistics function but rather to specialise in other activities, including fishing. Ports policy will be developed with the linkages to other areas in mind as well as the need to ensure joined up policy development regarding all aspects of ports, including their contribution to the culture and tourist potential of port cities. This broader view of the multifunctional role of ports will need to be developed in close consultation with all stakeholders.

(5)   Action to reduce air pollution from ships will improve the environment both globally and especially near ports. The potential benefits of action in this area will range from better fuel economy to increased use of renewables and a cleaner environment in and around ports – including for tourism. The development of proposals to reduce air pollution by ships should thus be seen both in the context of the EU's action on the environment and climate change, and in the context of a joined-up approach to ports and port cities and the quality of life in coastal regions. Finally, addressing air pollution by ships is part of an overall drive for the development of quality shipping, which itself is part of the two concepts of a quality maritime economy and a quality coastal state and a key element in keeping European shipbuilding and shipping competitive.

(6)   Measures for ship dismantling and de-pollution aim to protect the workers who undertake this work and prevent damage to the environment. The coordination of action, involving all international partners, as well as EU policies in various sectors, will lead to a solution that takes into account the interests of the shipping industry, dismantling operators and host countries, and will benefit the environment.

(7)   Enhanced attention for the role of the oceans and seas in energy policy, as well as a solid link between Energy and Maritime Policy will facilitate dealing with offshore energy. A forward-looking vision for the oceans and seas will create the clarity and stability needed to attract investments in marine-based energy infrastructures and resources, which normally are large-scale and involve several Member States. A coherent approach to maritime

affairs will also facilitate the necessary cross-border cooperation regarding offshore energy infrastructures.

(8) Action for the situation of fishermen at sea aims to reduce the currently unacceptable accident rate, increase alternative employment possibilities and create better conditions for achieving sustainable fisheries. The integration of fishermen into broader maritime economic activities can be beneficial, both for their job prospects and for the development of the conditions under which they work and under which their sector operates. In addition the well-being of traditional fishing communities is an important element of the quality of life in coastal areas. The Commission's joined-up approach to Maritime Policy is essential to ensure that the necessary linkages are developed.

(9) Strengthening the implementation of the ecosystem approach in the Common Fisheries Policy (CFP) will ensure more coherence between fisheries and environmental policies. This is part of an overall approach towards the eco-system based management of maritime activities and an integrated marine environment strategy, which promotes the sustainability of the maritime economy. Action for the progressive elimination of discards is one of a series of actions aimed specifically at reducing the environmental impact of fisheries.

(10) Proposals for the protection of fisheries resources in international waters will contribute to achieving the ecosystem and sustainable development goals of the Johannesburg World Summit. Combating IUU fisheries is part of an integrated approach towards the protection and sustainable management of marine resources and is linked to actions for the protection of the high seas, the integration of the eco-system approach within the CFP and the regulation of destructive fishing practices. As to the latter, this action is also part of an overall approach towards the eco-system based management of maritime activities and part of an integrated marine environment strategy, which promotes a sustainable maritime economy.

6.4. Building a Knowledge and Innovation Base for the Maritime Policy

An integrated Maritime Policy has to be based on sound knowledge of how the oceans and seas work, and how they can best be managed. While our understanding of the factors affecting the sustainability of the marine environment is increasing all the time, intensive scientific research is still needed to ensure the preservation of its ecosystems. We also need to be able to deal with the cumulative impacts we make on the oceans and seas and not continue dealing with them separately. This is another key reason to change the current governance framework of maritime affairs by introducing a new and more integrated Maritime Policy.

European companies are continually developing further know-how in pollution control, renewable marine resources, oceanographic research, deep-sea exploration and maritime works and coastal engineering. Such innovative knowledge constitutes an opportunity for Europe's economy and deserves to be supported. Indeed, science and technology are one of the keys to reconciling the economic growth of sea-based activities with environmental sustainability.

Therefore, in the wake of the Blue Paper on the EU Maritime Policy, we need to take a qualitative step forward in strengthening linking it to technology development.. The following action on an EU strategy for marine research will give Europe the basis for this step and will deliver the science and research pillar of the EU Maritime Policy.

(1)   A Maritime Research Strategy aims to strengthen cooperation within the maritime and marine science community. It should define common priorities with a view to creating a sound knowledge base for policy and the sustainable use of the oceans and seas. Science, research and technology are themselves cross-cutting activities that underpin all aspects of Maritime Policy, both economic activities and the work done to ensure sustainability and environmental protection. The importance of the task at hand requires the mobilisation of the resources and expertise of all EU stakeholders, including Member States.

6.5.   Delivering the Highest Quality of Life in Coastal Regions

Europe's coastal regions, including the outermost regions, are its gateway to the sea, and beyond that, to the wider world. They are a source of wealth, and a store of history and culture, in their own right. So it is not surprising that they have been one of the strongest supporters of the Commission's consultation on the Green Paper on a Future Maritime Policy for the Union. Coastal Regions have also been quick to recognise the challenges, and opportunities of an emerging Maritime Policy for Europe's coasts and maritime sectors.

The opportunities are clear: while more and more Europeans wish to live and to work in our coastal regions and islands, because of the growing economic opportunities they offer and the attractiveness of the coastal environment, the maritime regions already generate over 40% of Europe's GDP. The economic potential offered by the sea in an age of globalisation is enormous. A worldwide boom in maritime transport, especially in container shipping, has triggered rapid growth in port construction and shipbuilding, as well as in related services. Demand for seafood is constantly rising and maritime and coastal tourism growing steadily, while blue biotech holds out the promise of new uses for the sea's natural resources. Meanwhile, off-shore wind farms, together with tidal and wave energy, are set to provide an increasing share of renewables in Europe's energy mix.

However, only if we can strike the right balance between economic development and environmental sustainability can we ensure that the quality of life in our coastal regions continues to grow along with their GDP. To do this effectively, the right mixture of central coordination and decentralised decision-making must be found.

The following actions constitute a first step by the European Commission in addressing this central objective of promoting the quality of life in Europe's maritime regions:

(1)   Regions along the coasts of Europe have been active in developing projects to strengthen their maritime economy and its sustainable development. An integrated approach to Maritime Policy calls for the best practices developed in these projects to be made visible and used for future initiatives. It is equally important to ensure coherence in both the design of projects and in their

funding to achieve the kind of added value that is sought by the EU Maritime Policy. Better information on Community projects in coastal regions and their funding will enable better dissemination of best practice and lessons learned and permit a better assessment of the need for change. Progress depends on ensuring transparency on current EU assistance and future possibilities.

(2)   EU Maritime Policy should recognise the specific situation of remote regions and islands and adapt maritime policies to take these specificities into account, thus placing these regions in a better position to exploit their particular assets. A strategy will be developed to deal with Europe's outermost regions and islands by placing them in a better position to exploit their particular assets.

(3)   Strategies for the protection of the coasts and prevention of risks, taking into account the latest research and technologies, should be developed in the context of policies for adaptation to climate change, risk reduction and EU crisis management, and should be linked to regional policy initiatives and projects. Networks of exchange of best practice can be instrumental in ensuring the involvement of stakeholders, particularly in coastal regions. An enabling legal framework for Carbon Capture and Storage (CCS) aims to define the conditions on the CO_2 streams for storage, risk management and the adaptation of existing legislation to enable CCS, including removal of barriers to storage in sub sea formations. As technologies for seabed storage of CO_2 will have important inter-linkages with other forms of seabed exploration, their compatibility must be ensured. For example, such technologies can also be used to develop the capture and storage of methane hydrate gas extracted from the ocean floor. Seabed exploration also needs an international legal framework and operational international cooperation. The transport of CO_2 to sub sea sites must also be included in maritime spatial planning. Finally, the technology used must ensure that the environmental gain form carbon storage is offset by deterioration of the local marine environment. An integrated approach to these issues is thus essential.

(4)   Developments related to coastal and maritime tourism are closely linked to the state of the coastal and marine environment, to development of ports and the quality of life in maritime regions. An integrated Maritime Policy, bringing more coherence between policies concerned with these issues, will underpin efforts to promote sustainable coastal and maritime tourism. The Commission intends to take due account of the importance of coastal and marine tourism in its Agenda for Sustainable and Competitive European Tourism. In this context, the inter-linkages between the current growth in cruise tourism and the development of ports will be further assessed. The Commission can act as a facilitator in this, yet genuinely achieving sustainable development requires the involvement of actors at national, regional and local levels. In this light, the exchange of best practice among these actors could be beneficial.

(5)   Policy design and projects, as well as maritime clusters and regions, need more and better data covering all socio-economic aspects of the maritime economy. The development of widely accepted and used concepts and definitions, and better data collection, assessment, and dissemination methods

should be an important element in an integrated Maritime Policy. Better socio-economic data on maritime sectors and maritime regions will provide the necessary factual basis for an integrated Maritime Policy.

6.6.   Promoting Europe's Leadership in Maritime Affairs

Europe's leading position in maritime activities and scientific research gives it a duty to maximise its influence in international maritime affairs. Bringing the EU external policy and its development and cooperation instruments into the core of an integrated Maritime Policy will allow the EU to play this leadership role.

The following actions will develop the external dimension of the European Maritime Policy, in line with the Blue Paper objective of promoting Europe's leadership in maritime affairs:

(1)   The international nature of shipping and governance of global commons demands that their activities be governed to a very large extent by international rules, which also need to be implemented. Raising the EU's profile in international fora and relations with partners should increase the chances that proposals agreed at a European level will be adopted internationally. At the same time, the linkage between environmental concerns and economic activities is also important in the high seas. To be consistent, the integrated approach to European maritime affairs must be reflected in our contacts with international bodies and partners and coherence of EU action must be ensured as well.

(2)   Including Maritime Policy objectives in the context of the European Neighbourhood policy aims to ensure that these objectives are achieved in those waters with coastlines shared by EU and non-EU countries. It will support the Barcelona Process objective of building a zone of shared prosperity in the Mediterranean partly, but not only by promoting good practice in the sustainable exploitation of marine resources. It is in the EU's interest to ensure that an integrated approach is also promoted in neighbouring countries and waters. Its success in doing so will depend on the extent to which it can successfully share its ideas with third country partners.

(3)   A report on strategic issues for the EU in relation to the Arctic will further clarify the diverse interests within Europe relating to the Artic Ocean. The diversity of the issues relating to the Artic Ocean requires an integrated, cross-sectoral approach. This will allow us to arrive at an overall assessment of European interests and concerns, based on an analysis of different sectoral interests and their interrelationships.

(4)   Action for protection on the high seas would contribute to European efforts to further international measures to protect vulnerable habitats from destructive fishing practices and maintain a healthy global ecosystem. Such action must be seen in conjunction and coherent with EU internal action on the protection of habitats, and the implementation of an eco-system based approach, including in fisheries. An integrated approach to these issues should go beyond the current sectoral fragmentation of measures in the high seas. The joint implementation of international commitments under UN instruments is

necessary to ensure coherent action by economic sectors in the high seas, a condition for sustainable development in areas beyond national jurisdiction.

6.7.   Raising the Visibility of Maritime Europe

Raising the visibility of Maritime Europe is one of the key objectives of an integrated Maritime Policy. The Commission will begin to pursue this goal through a number of proposals, including the decision to celebrate a European Maritime Day and the creation of a European Atlas of the Seas:

(1)   The successful implementation of an integrated approach to Maritime Policy will require constant contact with and involvement of stakeholders. It will also require networking of actors who do not otherwise automatically get in touch. A European Maritime Week, an Annual Report, and maritime awards will bring stakeholders together with the aim to generate innovation, reward excellence and provide a monitoring facility on the progress of collective learning. Such activities will not only allow enhanced stakeholder commitment, but also provide a visible recognition of success stories in order to generate further efforts and innovative ideas.

(2)   Tools to make visible the holistic nature of Europe's marine environment and maritime heritage would contribute to raising a generation of citizens and stakeholder for whom an integrated approach to Maritime Policy is self-evident. The development of an EU Atlas of the Seas will demonstrate the relevance of setting up an integrated data network, and the importance of the cross-sectoral accessibility of such data. It will provide a means to educate citizens on the beauty, value and diversity of Europe's oceans and seas.

(3)   Developing an integrated approach requires transparent information, the visibility of the actions undertaken and the linkages between them. Making information on Commission proposals on Maritime Affairs publicly available will allow stakeholders to point out inconsistencies or gaps in the EU's activities and contribute significantly to a sense of ownership of stakeholders and citizens. It will also contribute significantly to a sense of ownership among stakeholders and citizens.

7.   CORE INDICATORS OF PROGRESS TOWARDS MEETING THE OBJECTIVES

Policy integration

The EU Maritime Policy will focus on coordinating sectoral policies, which should all be geared towards a single future vision for the oceans and seas. As a first step in monitoring this process, annual reports will be drawn up on the coherence and evolution of sectoral policies and Maritime Policy-led actions. The annual report will include indicators that can be tracked for the years to come based on the objectives defined. As the policy is expected to evolve as it matures and will be updated to respond adequately to changing conditions, the indicators will be developed and added to as better data become available and objectives are defined in more detail.

Preparatory actions – cross-cutting projects

In line with the requirements for both Impact Assessment and Ex-Ante Evaluations, an outline is provided below of the projects to be funded under preparatory actions. The main milestones in the three preparatory projects for the European Marine Observation and Data Network, surveillance and spatial planning are:

- Completion of the legal study on barriers to access and sharing of information. This will be launched in October with results available in the first half of 2008.

- Launching of actions, these will enable lessons to be learned from prototype regional-scale tests before a full-scale proposal is made. The call for proposals should be launched in early 2008 and contracts signed in autumn 2008.

- Setting up of an advisory structure (see point 3 below).

The Commission will monitor those actions under a four pronged strategy:

- **Inter-service sub-groups to follow each** theme. These sub-groups already exist and have helped in defining the action plans. They will monitor compatibility with past and future sectoral initiatives.

- **representatives nominated by Member States**. The appropriate forum has already been set up and meets regularly.

- **advisory groups** to be set up to monitor each theme. This is a new development. These groups will ensure an appropriate sectoral and geographical balance. Member States and interest groups will be welcome to provide suggestions for membership. Their responsibilities will vary according to the particular theme but some indications have already been established – determining the priorities for data to be collected in the case of the European marine observation and data network, assessing the compatibility of the proposed integrated system with existing sectoral systems for vessel surveillance and choosing appropriate European standards for the description of restrictions and obligations for marine spatial planning.

- **special studies or projects** to quantify specific aspects of costs and benefits where this is possible – for instance (1) the benefit of improved surveillance in terms of fewer false positives, (2) reduced uncertainty in climate change projects or reduced cost of collating data for impact assessments with better ocean data or (3) cost of developing maritime basin fora for spatial planning.

The above actions will be evaluated towards the end of their implementation phase (interim/ex-post evaluation) in accordance with Article 21(3) of the Implementing Rules for the Financial Regulation. These evaluation findings will feed into the preparation of any future proposals: the interim/ex-post evaluation(s) will provide useful information for the ex-ante evaluation and Impact Assessment of activities that might be proposed later to concretise the themes set out in the Action Plan.