



The EU Blue Economy

Fragkiskos Nikolian

Economic Analysis, Markets and
Impact Assessments Unit
Directorate-General for
Maritime Affairs and Fisheries



European
Commission

Political context

Overview of key policy areas

European Green Deal: making Europe carbon neutral by 2050

EU main priorities

Recovery and Resilience

Main policy objectives

Climate neutrality

Circular Economy

Zero-pollution

Farm to Fork

Biodiversity

Digital transformation

Scope of EMFAF

Sustainable Blue Economy – Common Fisheries Policy – Maritime Policy – International Ocean Governance



EUROPEAN GREEN DEAL

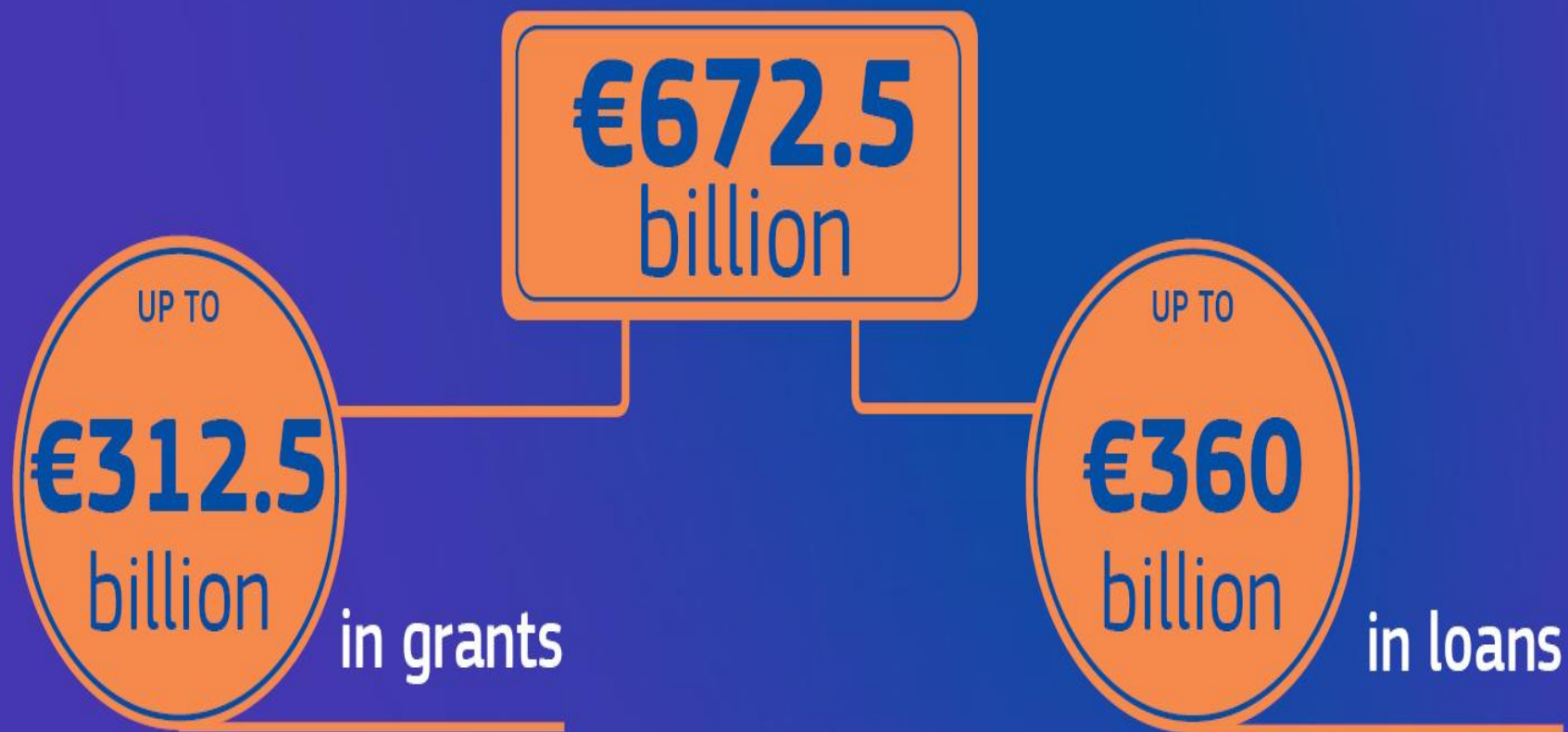
- European Green Deal calls for a transformation of our economy towards a modern, resource-efficient and competitive economy.
- Recovery Resilience Plan (ESIF(EMFAF)+Horizon EU) the financial tools for the green and digital transitions to make EU economy fairer, more resilient and more sustainable for future generations.
- The EU BE can help achieve this dual challenge: need to put the blue economy on a transformative recovery path for a lasting recovery and preserve our natural capital (biodiversity strategy), to promote food security (F2F strategy), and support circular economy.

Key role for the BER in policy making with accurate intelligence for informed policy decisions

2021-2027 EU budget

	MFF	NEXT GENERATION EU	TOTAL
Single Market, Innovation and Digital	132.8	10.6	143.4
Cohesion, Resilience and Values	377.8	721.9	1 099.7
Natural Resources and Environment	356.4	17.5	373.9
Migration and Border Management	22.7	-	22.7
Security and Defence	13.2	-	13.2
Neighbourhood and the World	98.4	-	98.4
European Public Administration	73.1	-	73.1
TOTAL MFF	1 074.3	750.0	1,824.3

Financial support to public investments and reforms





ESIF + HORIZON EU 2021-2027

- **ESIF**: (Cohesion + Natural resources): 734,2 bl
 - EMFAF: contribute to the achievement of the environmental and climate change mitigation and adaptation objectives of the Union. (6,1 bl)

- **H - EU** research and innovation programme: €95.5 billion
 - Pillar 2: “Global Challenges and Industrial Competitiveness”. (53 bl): 6 clusters
 - ✓ Cluster 2 (Culture) related to underwater cultural heritage
 - ✓ Cluster 4 (Digital, Industry and Space) (See observation)
 - ✓ Cluster 5 (Climate, Energy and Mobility)
 - ✓ Cluster 6 (Food, Bioeconomy, Natural Resources, Agriculture and Environment)

The EU Blue Economy Report

Objectives:

An **overview** of EU Blue Economy based on the latest available data

Accurate **monitoring** of the EU Blue Economy over time

Reference facts and figures on the EU Blue Economy which are **comparable and consistent**

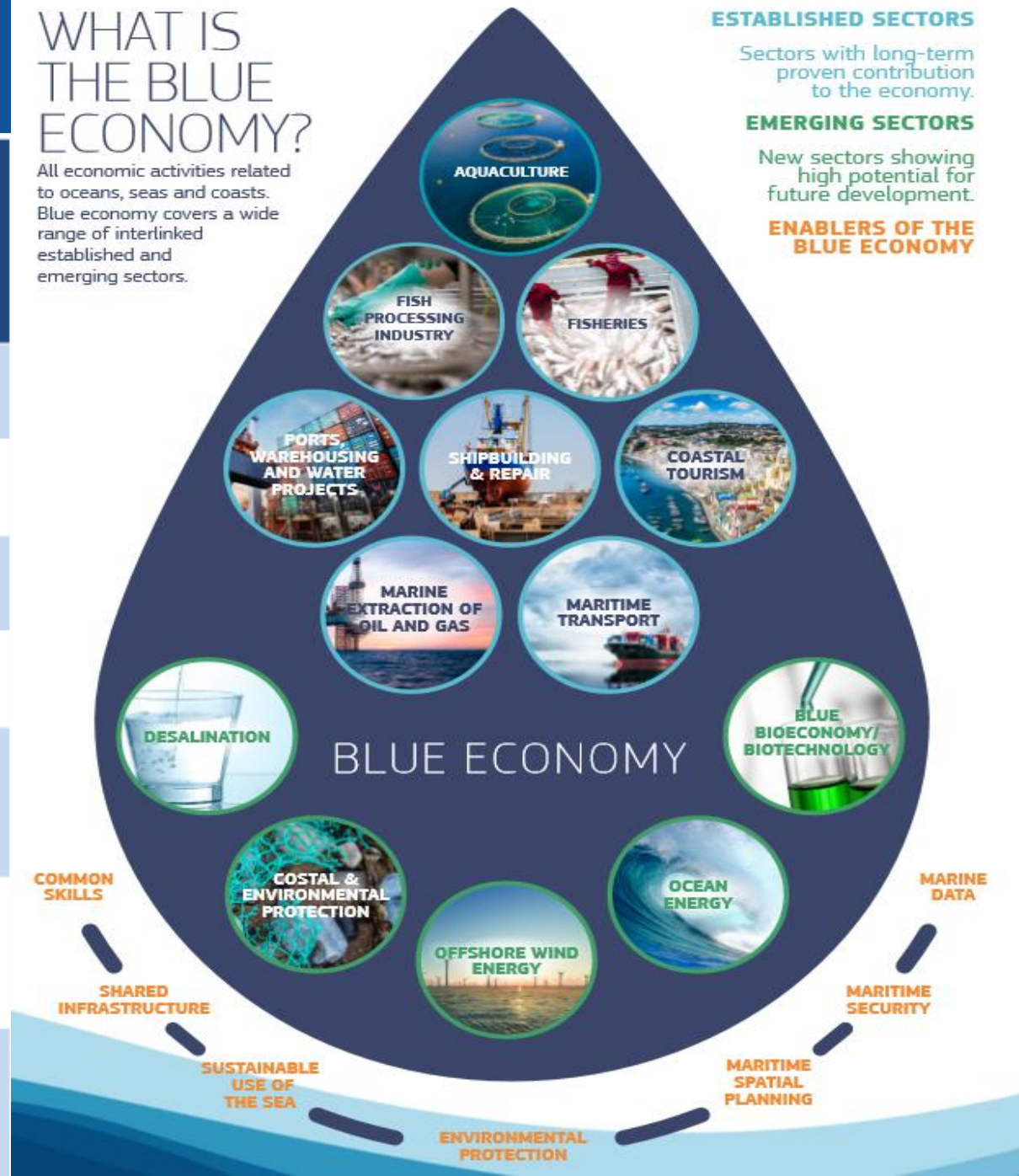
Economic analysis of the EU Blue Economy to inform policy making and stakeholders

If the global “blue economy” were to be compared to a national economy, it would be the 7th largest in the world

Indicator	EU Blue Economy 2018
Turnover	€650 billion
Gross value added	€176 billion
Gross profit	€68 billion
Employment	4.5million
Net investment in tangible goods	€6.4 billion
Net investment ratio	3.6%
Average annual salary	€24 020

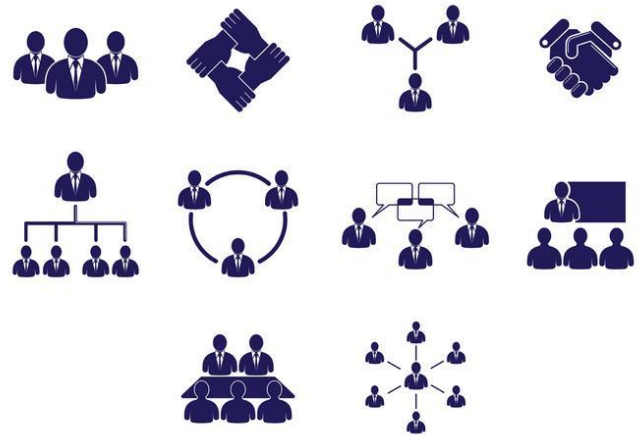
WHAT IS THE BLUE ECONOMY?

All economic activities related to oceans, seas and coasts. Blue economy covers a wide range of interlinked established and emerging sectors.



Process: Involve and Discuss

- Joint effort with JRC + DG involvement
- DG Consultation
- MS Consultation
- Industry Consultation



METHODOLOGY

(TRADITIONAL SECTORS)

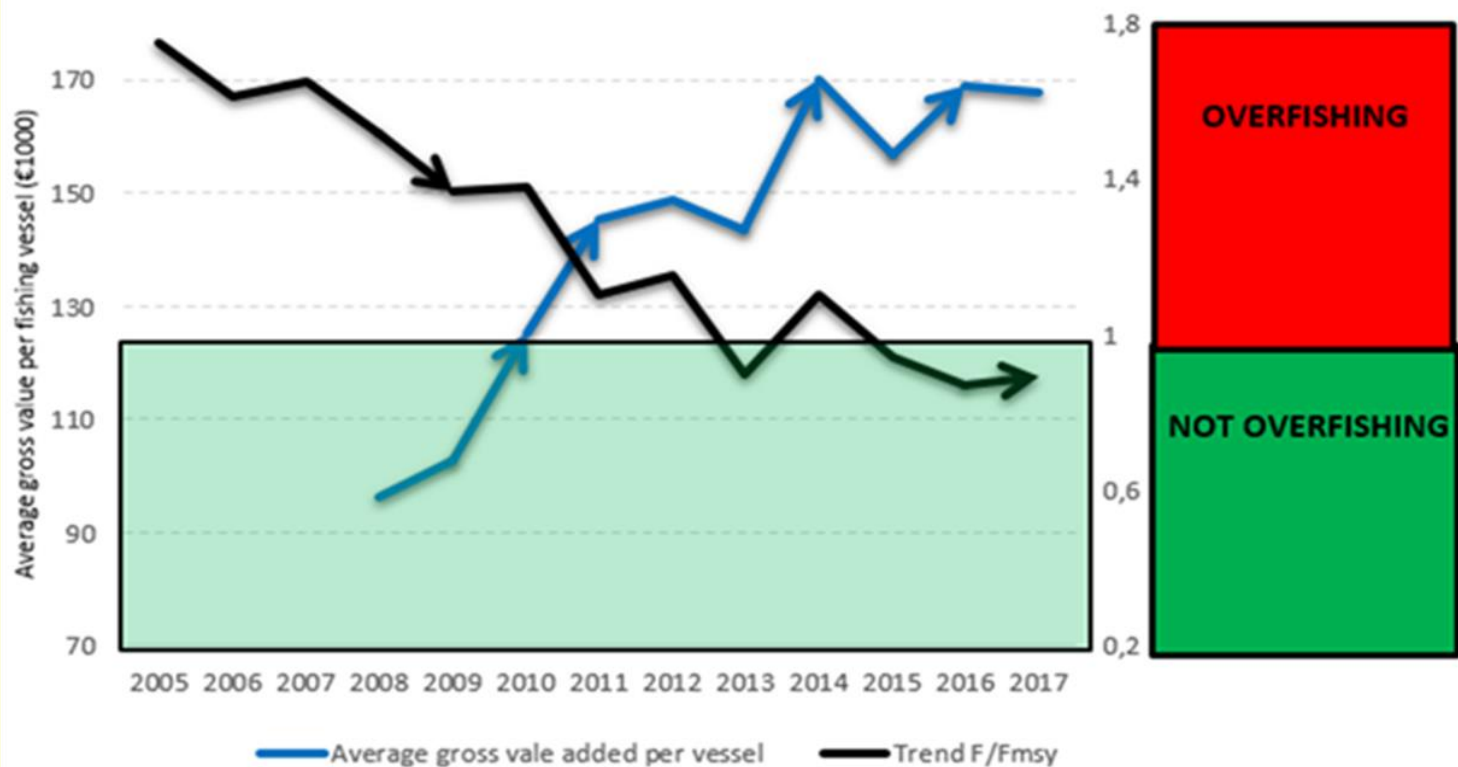


Sector	Sub-sector	Corresponding NACE sectors		NACE codes split between maritime and non-maritime
BIOECONOMY (LIVING RESOURCES)	Primary Production	Harvesting – fishing fleet Aquaculture		DCF data DCF data
	Processing and Distribution	Processing and preserving of fish, crustaceans and molluscs	C10.20	NACE R2 = C102
		Wholesale of other food, including fish, crustaceans and molluscs	G46.38	
		Retail sale of fish, crustaceans and molluscs in specialised stores	G47.23	
MARINE EXTRACTION OF OIL AND GAS	Oil and Gas	Extraction of crude petroleum	B06.10	
		Extraction of natural gas	B06.20	
		Support activities for petroleum and natural gas extraction	B09.10	
PORTS, WAREHOUSING AND CONSTRUCTION OF WATER PROJECTS	Ports	Service activities incidental to water transportation	H52.22	NACE 52.22 Service activities incidental to water transportation is assumed to be 100% maritime
		Cargo handling	H52.24	seaport related share 50%
		Warehousing and storage	H52.10	seaport related share 50%
	Construction of Water Projects	Construction of water projects	F42.91	
SHIPBUILDING AND REPAIR	Shipbuilding	Building of ships and floating structures	C30.11	Assumed to be 100% maritime
		Building of pleasure and sporting boats	C30.12	
		Repair and maintenance of ships and boats	C33.15	
MARITIME TRANSPORT	Shipping and transport	Sea and coastal passenger water transport	H50.10	Assumed to be 100% maritime
		Sea and coastal freight water transport	H50.20	
		Inland passenger water transport	H50.30	
		Inland freight water transport	H50.40	
		Renting and leasing of water transport equipment	N77.34	Assumed to be 100% maritime
COASTAL TOURISM	Accommodation	Hotels and similar accommodation	I55.10	Allocation maritime/non-maritime:
		Holiday and other short-stay accommodation	I55.20	% of tourist nights spent in coastal NUTS-3 regions compared to the total – by Member State
		Camping grounds, recreational vehicle parks and	I55.30	

POLICY MESSAGES BASED ON THE BER



Trends in economic performance and fishing mortality compared to Fmsy (Celtic Sea)



Next steps...

For the Report:

- BER 2021 (May -EMD)
- COVID impacts
- Recovery Fund

For the Blue Economy:

- Blue Indicators
https://blueindicators.ec.europa.eu/access-online-dashboard_en
- Blue Observatory



Thank you for
your attention.

Any questions?

