

How can offshore wind energy and fisheries sustainably coexist in the Nordic Seas?

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pub.nordregio.org/pb-2025-28-offshore-wind-energy-and-fisheries



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Executive summary

The rapid expansion of offshore wind energy in Nordic marine areas underscores the need to support coexistence with traditional sectors, particularly fisheries. **Sustainable coexistence involves more than just sharing space:** it requires inclusive governance built on continuous dialogue, adaptive planning and recognition of diverse social, economic, ecological and cultural interests and values.

Offshore wind development, however, unfolds within a fragmented governance context, shaped by shifting political priorities, emerging planning traditions and complex permitting frameworks. These conditions make cross-sector collaboration both challenging and essential.

This policy brief presents **four building blocks for sustainable coexistence:**

- Establishing structured dialogue and guidelines
- Fostering a participatory planning culture
- Strengthening knowledge foundations
- Creating supportive institutional pathways

Drawing on Nordic experiences, the brief encourages countries in the region to exchange lessons, adapt promising practices and **advance cross-border dialogue.**

Who is this brief for?

This brief is intended for marine governance **policymakers, planning authorities and sector professionals across the Nordic countries**. While the focus is on offshore wind and fisheries, the governance challenges and collaboration insights outlined here offer valuable perspectives for other marine sectors facing similar overlapping spatial pressures.

Introduction

Offshore wind energy (OWE) is rapidly emerging as a key pillar of the Nordic Region's energy transition, driven by ambitious climate and energy goals and the global imperative to accelerate renewable energy deployment. Defined by large-scale, capital-intensive developments with long-term spatial commitments, offshore wind farms typically occupy designated marine areas for several decades. **Whether fixed or floating, these installations reshape seascapes**, limit other maritime activities to varying degrees and fundamentally transform the governance and use of marine space, while also potentially creating refuges that benefit the marine environment. (World Economic Forum, 2025; European Commission, 2020).

By contrast, fishing represents a centuries-old, adaptive **livelihood deeply embedded in the cultural and economic fabric of Nordic coastal communities**. Rooted in seasonal and spatial mobility, it encompasses a wide range of actors, from small-scale family-run vessels and subsistence fisheries to large industrial fleets. Fishers operate within dynamic, ecologically complex environments, shaped by shifting regulations, long-standing traditions and natural variability. Beyond its economic role, fishing sustains cultural heritage and place-based identity across the region (Sepponen et al., 2021).

The rapid expansion of offshore wind energy signals **a profound transformation in how marine space is valued, utilised and contested**. OWE introduces a static, infrastructure-based form of sea use into environments historically shaped by mobile fishing practices. These emerging and traditional sectors are increasingly coming into contact amid **fragmented and often inconsistent political, planning and permitting systems**.

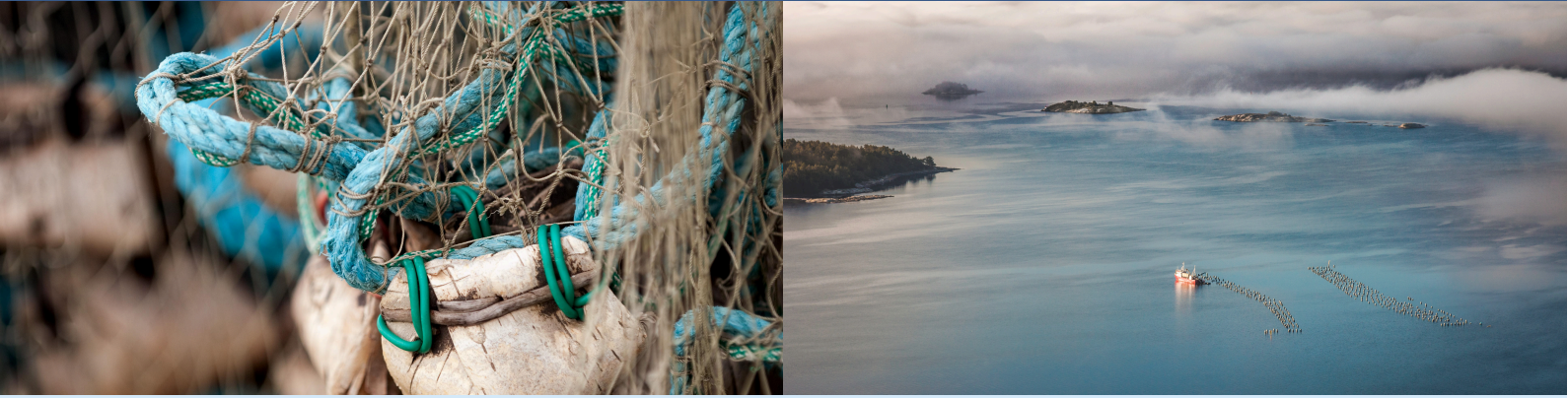
In such complex governance settings, tensions arise not only from **spatial competition** but also from **contrasting sectoral logics, operational practices and relationships with the marine environment**. Furthermore, recognising the seas as a shared resource means acknowledging that no single actor holds exclusive rights to ocean space. Sustainable coexistence therefore requires more than technical spatial solutions; it demands **transparent, continuous and meaningful dialogue** between sectors.

This brief argues that addressing these challenges through **collaborative governance** has become a Nordic imperative. For both EU and non-EU countries, there is an urgent need to leverage **marine spatial planning frameworks** and **align regulatory regimes** that can mediate sectoral pressures, balance competing interests and values and enable long-term coexistence.

Achieving this depends on sustained cooperation, ranging from **project-level engagement** to **cross-sector coordination at the scale of entire sea basins**. A crucial first step is a **pan-Nordic dialogue** that fosters shared learning, exchange of experience and joint problem-solving on this escalating challenge.

This policy brief builds on findings from the Green Meets Blue project, in particular the Nordregio publication [Green Energy Meets Blue Food – Moving Towards Sustainable Coexistence](#) (2025), as well as input from a Nordic workshop on sustainable coexistence between offshore wind and blue food (14–15 May). Both sources draw on extensive scientific research and policy reviews.

Governance gaps in Nordic offshore coexistence: between sectors and systems



Images: Johannes Jansson / Norden; Per Pixel Petersson / Imagebanksweden

Political volatility

Offshore wind energy in the Nordic Region operates in a volatile political environment. Changing national priorities, economic pressures and shifts in public sentiment generate fluctuating support and disrupt policy continuity. Our case studies show that these dynamics undermine stakeholder confidence and affect cross-sector interactions, particularly between offshore wind and commercial fisheries. They raise concerns about unequal access to subsidies, compensation and other support mechanisms, often intensifying perceptions of sectoral favouritism. Furthermore, authorities struggle to align shifting political agendas with consistent planning and permitting regulations.

The Nordic countries initially set ambitious offshore wind targets to boost industry competitiveness. However, in some cases, this has marginalised the fisheries sector. Fishers describe a sense of exclusion, which is compounded by the cultural importance of fishing as a multigenerational livelihood.

More recently, in Sweden, defence-related objections and conflicting political signals disrupted ambitions for coexistence in marine spatial planning. Despite plans to add 90 TWh of capacity, 14 OWE projects were denied permits in the Baltic Sea at the end of 2024 for defence reasons. In Denmark, relatively sudden OWE subsidy withdrawals, tightened sustainability requirements and a 20% state ownership mandate raised costs and discouraged investment.

Such abrupt changes not only create insecurity for wind developers but also reinforce perceptions of an unstable policy landscape and unreliable dialogue. In these uncertain conditions, each sector feels compelled to protect its position, eroding trust and narrowing the space for constructive coexistence.



Image: Paul Einerhand / Unsplash

Limitations of marine spatial planning frameworks

Marine and Maritime Spatial Planning (MSP) and other planning frameworks are increasingly applied in the Nordic Region to allocate marine space to offshore wind while minimising conflicts with fisheries and environmental objectives. These frameworks integrate ecological, economic and social data and aim to support stakeholder collaboration. Our case studies indicate that spatial allocation frameworks are still maturing, creating practical and relational challenges for offshore wind developers and fisheries, with stakeholders often uncertain about space allocation and coexistence under these frameworks. Drawing on Nordic experiences, these limitations include:

Lack of clarity and engagement in early planning phases

Early planning phases often lack clarity and consistent stakeholder engagement. For example, fisheries in Sweden and Finland report uncertainty about their role and the purpose of early MSP processes, while offshore wind developers in Denmark report feeling excluded from the Danish maritime spatial plan.

Variable legal influence of marine and maritime spatial plans

The influence of marine and maritime spatial plans varies across countries. In Finland and Sweden, plans are advisory, with permitting and sectoral legislation taking precedence. Early planning phases that are uncoordinated with legally binding processes create confusion, as the MSP process is frequently decoupled from permitting, complicating participation. In Denmark, the plan is legally binding but does not formally allocate space for fisheries, leaving them “everywhere and nowhere”, according to Danish fishers. Across all case studies, stakeholders consistently report that unclear planning mandates make it difficult to coordinate expectations, build trust and have confidence in spatial coexistence.

Data gaps and incompatibility

Missing or incompatible data weaken integrated decision-making and leave lasting trust deficits between stakeholders. Gaps in data on fishing routes, late-phase assessments and stakeholder exclusions complicate dialogue and foster scepticism about planning intentions. These gaps create ongoing uncertainty and caution across both sectors.

Interpretation of spatial allocations and planning outputs

Stakeholders often struggle to interpret MSP frameworks and spatial allocations. For example, Norway's designation of 20 new areas may appear overwhelming for fisheries, even though only a few are expected to be developed. Large offshore wind zones are frequently communicated without full details on turbines, subsea cables, ports or exclusion zones, leaving stakeholders uncertain about practical access and cautious about coexistence.

Limited impact assessments

Cumulative impact assessments remain constrained. National plans are developed under tight timelines, while Strategic Environmental Assessments (SEAs) and Strategic Impact Assessments (SIAs) are often generalised, perceived as non-transparent and difficult to understand. These limitations contribute to unease regarding the implications of offshore wind expansion for fisheries.



Knut Troim / Unsplash

Fragmented and misaligned permitting

Case studies and interaction with key stakeholders reveal several challenges to collaboration between offshore wind developers and fisheries arising from fragmented and misaligned permitting processes. Unlike MSP, which seeks holistic, basin-level coordination, permitting processes for offshore wind are project-specific, legally oriented and sequential, creating barriers to collaboration and, in some cases, conflict between sectors. This misalignment between MSP frameworks and permitting systems contributes to confusion and mistrust among stakeholders.

Fragmented legal frameworks and procedural mismatch

Permitting systems often have their foundation in long-standing sectoral legislation, making them robust but rigid. The EU MSP Directive of 2014 is newer, more flexible and integration oriented. This temporal and procedural mismatch results in parallel processes with differing priorities and timelines, complicating collaboration between offshore wind developers and fisheries.

Complex and overlapping permitting procedures

Permitting procedures across the Nordic Region are widely perceived as lengthy, complex and fragmented. They involve overlapping jurisdictions, multiple licences and sector-specific consultations. Developers are responsible for Environmental Impact Assessments (EIAs), stakeholder engagement and data collection, while authorities retain oversight. This approach creates uncertainty for fishers, who are often consulted only after key decisions – such as site selection – have been made.

Inconsistent consultation formats

The absence of continuous, structured dialogue across all phases, from pre-permitting to decommissioning, undermines trust and collaboration. Consultation formats vary considerably: Sweden relies on one-off written submissions, while Finland employs a more iterative approach. However, these formats are often misaligned with broader MSP processes, limiting meaningful engagement and the building of trust.

Project-based approvals and cumulative impact blind spots

A key challenge is the project-based permitting of offshore wind developments, which are approved individually, with limited integration into broader MSP frameworks. Fishers face uncertainty about the cumulative impacts of multiple projects, reducing their willingness to collaborate with developers.

Data gaps and technical uncertainties

Critical fishery data are often insufficient in pre-construction assessments, and long-term monitoring of offshore wind impacts on fish stocks is rarely mandated. Technical, operational and liability risks, such as cable conflicts, safety zones and collision hazards, are often poorly defined, heightening distrust. Confidentiality requirements and company-level control over sensitive data further reduce transparency, in contrast to MSP processes.

Regulatory rigidity across all development phases

During the pre-permitting phase, fragmented consultations and uncertainty over applicable frameworks create initial hesitation. In the permitting phase, project-specific approvals and developer-led Environmental Impact Assessments (EIAs) generate administrative and relational burdens. During construction and operation, unresolved technical and liability risks hinder collaboration. Even decommissioning is affected by unclear monitoring and mitigation strategies.

Delayed economic and social considerations

Considerations of economic and social impacts are often sidelined until late in the permitting process, often due to requirements only covering the environmental impacts of single projects. Compensation schemes are frequently unclear or introduced too late to support meaningful engagement, undermining fishers' willingness to cooperate. Developers often need to redo EIAs due to evolving requirements, creating inefficiencies and increasing the potential for conflict.

Enabling sustainable coexistence: identifying building blocks for offshore collaboration



Images: Getty Image; Fredrik Broman / Imagebanksweden

The interaction between Nordic offshore wind energy and fisheries experiences persistent challenges, including political volatility, limitations of MSP frameworks and fragmented, misaligned permitting systems. These dynamics undermine trust and complicate collaboration, hindering constructive coexistence. Consequently, a **more inclusive governance model is needed – one that fosters sustained dialogue**, integrates cross-sector knowledge and values and balances ecological, social, cultural and economic priorities throughout the offshore wind development process.

Achieving this requires basin-wide approaches that move beyond isolated consultations. Offshore wind development should be viewed not merely as a technical exercise in spatial allocation, but as a continuous platform for dialogue, where fishers, developers, communities and regulators work together to address trade-offs and craft balanced solutions that all parties can accept and implement.

The following sections present four governance building blocks drawn from Nordic experiences. Together, they illustrate how governance can evolve from reactive, often project-driven decision-making towards proactive, structured, long-term coexistence.

Collaboration building block 1: establishing structured dialogue and guidelines

Lessons from Norway

Offshore wind development in the Nordic Region unfolds in politically volatile contexts. Governance that relies on episodic consultations is insufficient to manage these pressures. Long-term coexistence requires **structured, well-resourced sector-to-sector dialogue platforms with clear mandates**, capable of fostering trust.

The Norwegian experience illustrates how such dialogue platforms can be institutionalised. A large-scale site selection process identified 54,000 square kilometres of potential development areas to reduce conflict risks. Although the initial announcement of 20 areas provoked discontent within the fisheries sector, established mechanisms allowed these concerns to be addressed to some extent through direct sectoral dialogue rather than confrontation.

A cross-sector working group became the central arena for this dialogue, allowing sectors to meet and engage directly. While discussions began with mistrust, **they gradually shifted towards constructive exchange as stakeholders articulated perspectives, operational constraints and priorities.** Practical issues such as gear limitations, spatial needs and mitigation strategies were assessed and the group expanded to include additional institutions that enriched the knowledge base.

What proved decisive was not the technical debate alone, but the governance design underpinning it: **experienced facilitation and adequate resources for participation.** A trusted broker further strengthened the process. These features ensured that the dialogue was substantive rather than symbolic, allowing fisheries representatives to access expertise and participate on equal terms.

The outcome was the co-development of a “**living manual for coexistence**”, which consolidates principles of early engagement, role clarity, spatial sensitivity and long-term mitigation planning (Offshore Norway, 2025). While non-binding, it has begun to influence national guidance and shape best practices. The Norwegian case study shows how **institutionalised dialogue, supported by resources and political recognition**, can transform sectoral relations from reactive conflict management towards proactive coexistence.

Key takeaways

- **Institutionalised coexistence platforms:** Sustained, cross-sectoral forums reduce conflict and support early alignment.
- **Dedicated facilitation and resources:** Skilled facilitators, funding and expert support enable meaningful participation and mutual understanding.
- **Co-development of coexistence guidelines:** Collaborative guidance, framed as “living documents”, can standardise engagement, clarify roles and integrate long-term mitigation planning.

Collaboration building block 2: fostering a participatory planning culture

Lessons from Finland

Marine and maritime spatial planning in the Nordic countries is evolving but remains **hampered by misalignment with political priorities and sectoral regulations**. This mismatch creates governance gaps and undermines stakeholder confidence. Addressing these gaps requires **participatory and adaptive planning arrangements** that can accommodate uncertainty and build legitimacy in the process.

Finland's MSP process is designed around **iterative feedback loops, regional engagement and dedicated coordinators** who ensure responsiveness to data limitations and a broad range of stakeholder concerns. This design counters top-down tendencies, fosters transparency and anchors the process in local realities and values, particularly in relation to fisheries. Regional workshops enable fishers to articulate priorities, while mapping exercises address outdated data and strengthen mutual understanding. In this way, **MSP functions not merely as a technical instrument but as a mechanism for dialogue and deeper discussion among stakeholders**.

A distinctive strength of the Finnish MSP model lies in its commitment to **fairness and legitimacy**. By seeking to balance the needs of different maritime industries rather than privileging a single sector, the process broadens acceptance and builds trust. Dedicated MSP coordinators and accessible, information-rich platforms further enhance continuity and meaningful participation.

The Finnish experience shows that **technical planning tools alone cannot deliver coexistence**. The decisive factors are **soft governance measures such as continuous feedback, skilled facilitation and responsive institutions**. By embedding iterative learning and transparency into spatial planning, Finland demonstrates how MSP can provide strategic oversight, reduce conflict, foster trust and support coexistence between sectors, while encouraging other phases of offshore wind development to adopt similar approaches.

Key takeaways

- **Adaptive and participatory MSP:** Embedding iterative feedback loops allows MSP to respond to dynamic project realities and better address stakeholders' economic, social and cultural concerns and values.
- **Dedicated coordination and facilitation:** Regional coordinators and skilled intermediaries enhance transparency, accessibility, trust and alignment with existing land use plans.
- **Inclusive engagement and knowledge integration throughout OWE development:** Workshops, local forums, online platforms and access to information and iterative data updates create informed, collaborative decision-making processes.

Collaboration building block 3: strengthening knowledge foundations

Lessons from Sweden

In the Nordic countries, there is a **misalignment between impact assessments** for developing marine spatial plans and offshore wind project permits. Current **assessments focus mainly on environmental impacts** and on **single projects**, leading to two gaps: a lack of consideration of **broader societal consequences** and insufficient evaluation of **cumulative impacts across larger areas and multiple projects**. To strengthen knowledge foundations and enable robust, evidence-based decision-making in offshore wind development, **early, broad, inclusive and comprehensive assessments** aligned with MSP frameworks are essential.

Sweden is an example of a country where collaboration between offshore wind developers and commercial fisheries has been challenging due to differing frameworks and timelines for impact assessments. This has led to conflicting interpretations of broader societal impacts. While MSP processes evaluate environmental, economic and social consequences at a broad marine basin level, they have not been fully aligned or integrated into early offshore wind site designation. Sweden's current "open door" permitting system has relied on project-specific environmental impact assessments, often overlooking social and economic trade-offs and lacking the cumulative and cross-sector scope of MSP analysis.

The Swedish **Symphony** tool, a model-based decision-support tool designed for cumulative impact assessment (CIA), has, however, been instrumental in developing Swedish marine spatial plans (Swedish Agency for Marine and Water Management, n.d). Its use in plan development provides an example of how to strengthen the knowledge foundation and represents a strategic advancement in addressing the limitations of traditional project-based assessments. **By integrating social, economic and ecologic data across scales**, the tool provides **planners and stakeholders** with nuanced insights, balancing offshore wind expansion with fisheries sustainability.

This approach helps address governance challenges related to fragmented data and limited cumulative impact analysis, **improving planning quality and stakeholder trust**. Such a support tool could also be developed and scaled up to estimate cumulative impacts in shared marine areas, for example between Sweden, Norway and Denmark.

Key takeaways

- **Cumulative and ecosystem-based assessment:** Integrating social, economic and ecologic data across scales strengthens planning robustness and informs balanced decisions.
- **Enhanced stakeholder trust:** Early and broader impact assessments, with early involvement of stakeholders, improve transparency, capture diverse values and foster inclusive engagement.
- **Transferable and adaptive tools:** Model-based decision-support tools like Symphony support early identification of risks and enable adaptive, scenario-based planning across contexts.

Collaboration building block 4: creating institutional pathways

Lessons from Denmark and Åland

Nordic experiences show that **a central governance challenge persists in the tension between long-standing permitting systems and relatively novel MSP frameworks.** Complex, siloed and lengthy permitting procedures often lag behind MSP, while entrenched frameworks, sectoral power asymmetries and legal rigidity make harmonisation difficult. These gaps slow development, generate uncertainty and can exacerbate sectoral conflicts, underlining the **need to reduce ambiguity in institutional landscapes.**

Denmark's "One-Stop Shop" system demonstrates how centralised, coordinated permitting can partly address this challenge. Managed by the Danish Energy Agency, this approach provides a single point of contact for developers, aimed at better **coordinating stakeholder consultations, identifying development zones early** and conducting SEAs before site selection. **Shared data** systems improve **transparency**, integration and **cross-sector collaboration** while improving timely handling of applications and consolidating inputs into a **single joint licence.**

While Denmark focuses on streamlining the permitting process and coordinating stakeholders through a centralised system, Åland complements this approach by emphasising **a strategic, stepwise governance model in which the public authority leads planning, knowledge collection and early stakeholder engagement.** Åland's Sunnavind project, led by the Government of Åland, represents an innovative governance approach enabling large-scale offshore wind development in the northern marine areas. Rather than focusing narrowly on licensing, the project combines a staged process and a revenue- and benefit-sharing model.

The government's approach is to **establish clear rules before involving private developers,** thereby lowering risk and strengthening regulatory certainty. A revenue- and benefit-sharing model seeks to secure long-term revenues for Åland's society through lease fees or royalties. Together, these measures aim to shift the initiative from private developers to the public authority.

The examples illustrate different, complementary approaches in shaping offshore wind governance in the Nordic Region. Denmark demonstrates how centralised, coordinated permitting can streamline processes, reduce conflict and support transparency and clear leadership. Åland highlights the value of strategic, phased planning led by public authorities, combined with risk reduction and benefit sharing. Together, these experiences show that effective offshore wind development requires both regulatory efficiency and inclusive, knowledge-driven governance to balance economic, environmental and social objectives.

Key takeaways

- **Centralised coordination:** Denmark's One-Stop Shop model demonstrates how a single authority can streamline permitting, reduce delays and manage stakeholder inputs more effectively.
- **Proactive government leadership and liability:** Åland's Sunnanvind project demonstrates the value of governments preparing offshore zones in advance, integrating assessments and revenue models to attract investment and legitimacy.

Starting points for Nordic dialogues on offshore wind energy and fisheries coexistence



Images: Marine Scotland wind farm image; Fishing boats UHI Shetland

No single Nordic country has all the solutions for balancing offshore wind and fisheries. Each is testing complementary approaches, such as early consultation, structured dialogue, broad impact assessments and coordinated permitting, reflecting different governance priorities. Nordic collaboration is particularly valuable because developments share sea basins and ecosystems, and the region benefits from strong democratic traditions, high public trust, established stakeholder engagement and robust environmental monitoring.

Main recommendation: a Nordic structured dialogue platform

The analysis in this brief points to the need for a Nordic-level structured dialogue platform as a foundation for cross-border cooperation, potentially building on existing networks and governance actors. Given the differing approaches across the region, such a platform would help navigate sectoral tensions, align governance practices and foster mutual learning. Developing a structured dialogue across the Nordic Region would further facilitate knowledge exchange, enable learning from different approaches and potentially inspire countries to build on one another's experiences. The core purpose would be to identify shared challenges, exchange practical lessons and jointly develop tools and frameworks that strengthen constructive coexistence.

Themes and guiding questions for dialogue

As a foundation for a Nordic dialogue platform, and drawing on the lessons outlined in this brief, we recommend that the platform address the following four interlinked themes, each illustrated here with guiding questions.

1. Building structured dialogue

- Is there a need for national or regional sector-to-sector collaborative platforms between actors such as offshore wind and fisheries, and if so, under what circumstances could they be introduced?
- How might dialogue processes contribute to marine spatial planning, impact assessments and permitting decisions, if at all?
- Which institutions could play a role in hosting and sustaining meaningful dialogue and what authority, legitimacy and resources would they require?
- How could sector representatives be identified and supported to participate constructively, where appropriate?

2. Strengthening participation in planning

- Under what circumstances might facilitators or coordinators help ensure effective and inclusive stakeholder participation, and which approaches best support meaningful, open and in-depth dialogues?
- In centrally managed marine spatial planning systems, could the Finnish model of regional coordinators offer useful lessons and how might it be adapted?
- What measures could help smaller organisations access the resources and guidance needed to participate meaningfully, where appropriate?
- How could transparency be improved, for example through public portals on planning status, permitting and data, and in which contexts would this be most beneficial?

3. Improving knowledge and assessment

- Under what circumstances can environmental and socio-economic assessments better be synchronised within marine spatial planning and permitting and what effective approaches or standards could improve coherence or reduce duplication in these processes?
- What common standards, data protocols or cumulative impact methods are most suitable for evaluating socio-economic, cultural and ecologic consequences and when should their integration be prioritised?
- In what ways could early stakeholder engagement, in combination with ex-ante or early impact assessments, influence the development of scenarios and planning outcomes, and in which contexts would these interventions provide the greatest benefit?

4. Creating institutional pathways

- Under what circumstances might a single authority consolidate permitting, assessments and stakeholder input, and how could this affect delays or conflicts?
- How could a phased approach to planning, risk reduction and auctioning influence the balance between investment certainty and ecological or social objectives, and when might it be appropriate?
- In what ways could governments pre-invest in environmental, technical and grid data, and how might this affect project risk and regulatory certainty?

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About this publication

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Nordregio policy brief 2025:28

ISSN: 2001-3876

DOI: <http://doi.org/10.6027/PB2025:28.2001-3876>

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Layout: Kotryna Juškaitė

Cover Photo: Shutterstock

This publication is part of the Green Energy Meets Blue Food project. The project (2024–2025), financed by the Nordic Council of Ministers, explores sustainable coexistence between offshore renewable energy, especially wind, and Nordic marine food sectors, with a particular focus on fisheries. It addresses conflicts over sea space and seeks to promote synergies, cooperation and collaboration between these green and blue sectors. Taking a governance perspective, the project examines how trade-offs, conflicts and synergies are managed within marine and maritime spatial planning frameworks. Its aim is to strengthen the Nordic knowledge base and support more effective and sustainable management of marine resources.

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The project is financed by the Nordic Council of Ministers for Fisheries, Aquaculture, Agriculture, Food and Forestry (EK-FJLS).

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