



European
MSP Platform

Methods for socio-economic analysis in Blue Growth area – looking back at earlier work

Socio-economic round table, 3rd July

Jan Maarten de Vet, Ecorys

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Contents

- I. Defining maritime economic activities
- II. Challenges in measuring MEA's
- III. A ,mixed' approach
- IV. Examples
- V. Some conclusions

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I. Defining maritime economic activities

Eurostat: The maritime economy is now often referred to as the 'blue economy'. It covers all marketable activities linked to the sea. The link between activities and the sea may be explained by the use of marine resources, maritime areas or regions or by the vicinity of these spatial units. The relationship between the activities and the sea can be more or less direct and maritime sectors cannot be seen as a single sector activity within the NACE classification but rather as a set of activities.

USA (National Ocean Economics Program): Any economic activity which is a) an industry whose definition explicitly ties the activity to the ocean, or b) which is partially related to the ocean and is located in coastal zones or regions (shore-adjacent zip code)

Ecorys: All sectoral and inter-sectoral economic activities relating to the oceans, seas and coastal regions. This definition also includes the group of activities that serve as direct and indirect support for the functioning of maritime economic sectors, thus, apart from coastal zones, these activities can also be found in countries without coastline.technology

-> *Three main dimensions: ,sectoral' versus ,functional' versus ,spatial'*



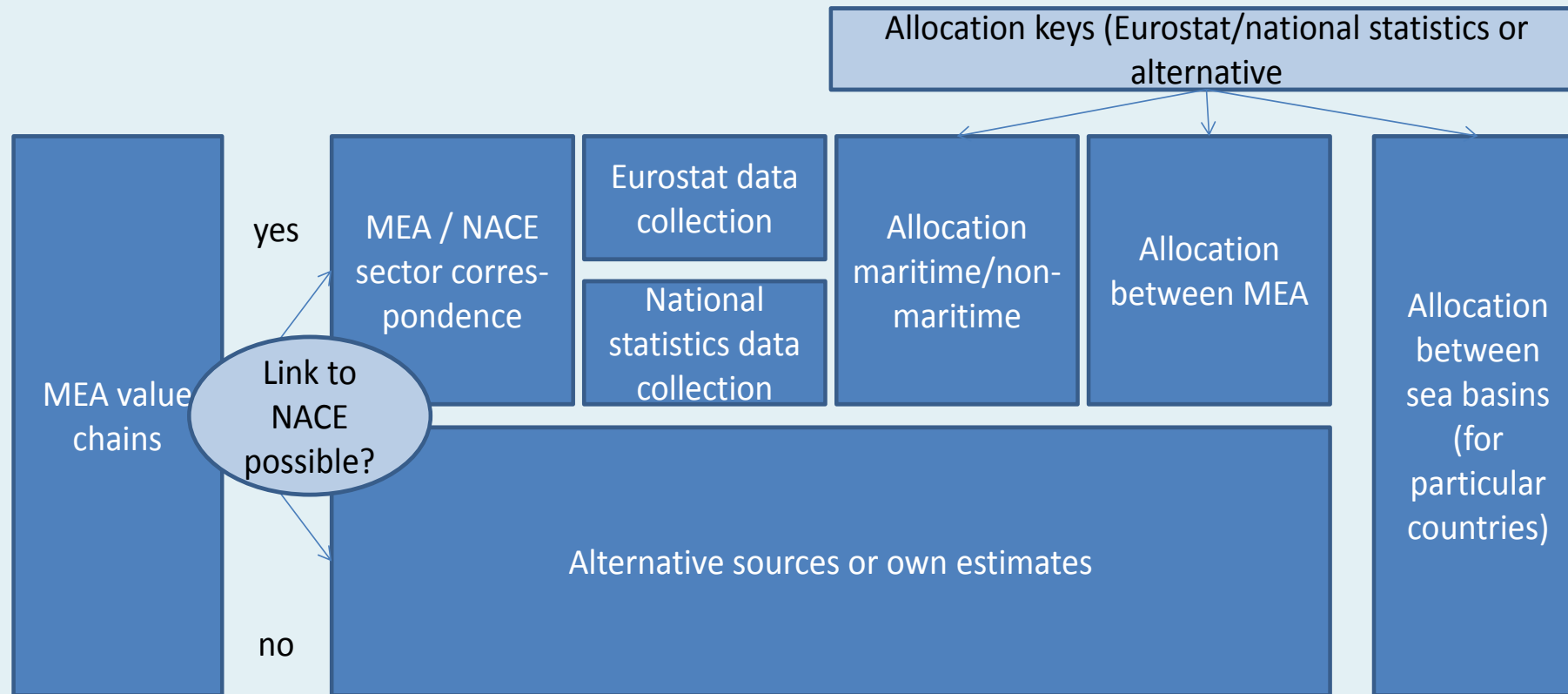
II. The challenges in measuring maritime economic activities

1. Split between land based and maritime activities – e.g. ports, shipbuilding
2. Many sectors are relevant for more than one activity – e.g. multi-use platforms
3. ‚New‘ or emerging activities insufficiently covered – e.g. blue biotechnology, ocean energy
4. Economic sectors close to the sea are not necessarily maritime – e.g. tourism to London, Lisbon or Barcelona is not necessarily maritime

-> *Broadly two approaches to address these challenges: a ‚sectoral‘ versus a ‚functional‘ approach*



III. A mixed approach to ,reconcile' both sectoral and functional approaches



III. A ,mixed' approach

1. Specification of value chains – based on the 27 MEA's from the Blue Growth report

2. Mapping MEA's to NACE codes – versus alternative approaches

MEA based on NACE correspondence	MEA estimated using alternative sources
1.1 Deep-sea shipping	2.4 Blue biotechnology
1.2 Short-sea shipping	3.2 Offshore wind
1.3 Passenger ferry services	3.3 Ocean renewable energy sources
1.4 Inland water transport	3.4 Carbon Capture & Storage
2.1 Catching fish for human consumption	3.6 Marine mineral resources
2.2 Catching fish for animal consumption	3.7 Securing fresh water supply (Desalination)
2.3 Marine aquatic resources	4.2 Yachting and marinas
2.5 Agriculture on saline soils	5.1+5.2+5.3 Coastal protection

3. Collection of statistical data (Eurostat, national sources)

4. Allocation to maritime / non-maritime

5. Allocation between maritime economic activities

IV. Examples

1. Specification of value chains – based on the 27 MEA's from the Blue Growth report

This MEA is strongly interlinked with 4.1 Coastal tourism. It can be defined as coastal tourism including the use of yachts and other pleasure boats excluding cruise. The value chain for yachting and marinas contains sectors such as:

- Yacht building
- Port services and logistics, e.g. energy supply, waste water etc. in marinas
- Maritime works – constructing marinas, maintaining access channels
- Service sectors like hotels & restaurants, landside logistics & transport.

2. Mapping MEA's to NACE codes – versus alternative approaches

VGA	NACE code	Type (Primary, Secondary, Tertiary)	Comments
Shipbuilding and marine equipment	30.12 Building of pleasure and sporting boats	P	Already included in 0.1 Shipbuilding
	33.11 Repair and maintenance of ships and boats	P	Already included in 0.1 Shipbuilding
Port services and logistics	52.22 Service activities incidental to water transportation	P	Already included in MEAs on maritime transport
Maritime works – constructing ports, maintaining access channels	42.91 Construction of water projects	P	Already included in 0.2 Water projects
Accommodation	Various under NACE 55 at coastal regions (NUTS) level	S	Already included in 4.1 coastal tourism



IV. Examples

3. Collection of statistical data (Eurostat, national sources)

4. Allocation to maritime / non-maritime – e.g. 55.10 hotels & accommodation

Eurostat GVA & empl available at national level

Number of hotel nights spent at NUTS-2 level

Calculate share of nights spent in coastal NUTS-2

Assume coastal/maritime % GVA/empl to be relative to % nights spent

5. Allocation between maritime economic activities – e.g. 50.10 passenger water transport

Covers both ferries (MEA 1.3) and cruise (MEA 4.3)

No Eurostat based cruise indicator available

Hence gather data on number of passengers by ship type)

And calculate % cruise

Do cross-check with sector sources (European Cruise Council)



V. Some conclusions

1. Complexity of socio-economic analysis not to be underestimated
2. A conflict between sectoral, functional and spatial dimensions
3. No ,one size fits all' – e.g. these dimensions all play out differently across MEAs
4. A need to thoroughly understand the MEAs involved, including their value chain
5. A combination of top-down (statistical) and bottom-up (field research) approaches
6. Emerging MEAs particularly hard to catch

