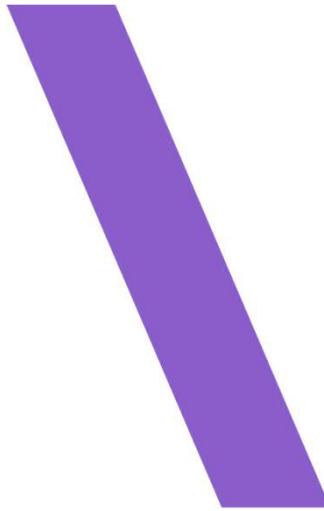




Analysis of Economic
and Social Networks
in the Gulf of Finland
and the Archipelago
Sea area

Blue Economy
Potential identified in
the Plan4Blue project



Reports (wp 1.1)



Report on current status of blue economy business sectors and development trends (1.1.1)



Report on existing strategies of key maritime sectors and on their future development trends (1.1.2)

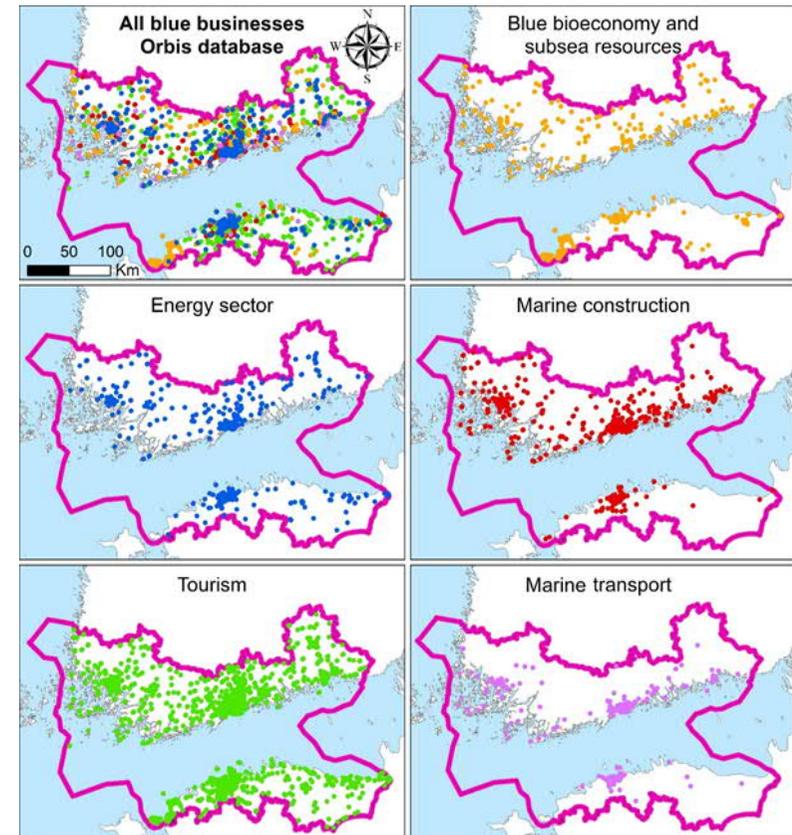


Report on blue economy potential, sector strategies and development trends (1.6.1)

<https://www.syke.fi/projects/plan4blue>

Characteristics of the Plan4Blue (NUTS3) regions and (LAU2) areas

- Higher GDP rate per capita
- Higher employment rate
- Higher population density (especially the capital city areas)
- All the blue sectors have economic growth potential
- Industries and businesses in the coastal regions continue to be major drivers of economic growth in Finland and in Estonia.
- Combining **ecological, economic and social** aims to achieve more sustainable growth in the future **calls for continuous, goal-oriented coordination and cross-sectoral & cross-border interaction**



Energy sector

Coastal /
maritime Tourism

Marine Fishing &
Aquaculture

Maritime
Transport Sector

Marine
Construction

Blue economy potential

- **Sustainability** is a key concern and a source of competitive advantage in the future
- Infrastructure development, **collaboration and right timing of marine operations** are vital to minimise environmental pressure and cross-sectoral conflicts
- **MSP decisions and guidelines impact the future Blue Growth potential** of the sectors. Especially relevant for companies with coastal and marine presence.
- Especially the rising travel and tourism numbers were considered having various **cross-sectoral and cross-border impacts**
- The applied **mixed-method approach** offers deeper insights and future perspectives to the investigation of industry development trends and sustainable growth potential.

Trends in Networking

- **Energy sector:** networking between wind energy and defense sectors increases
- **Marine transportation** - networking between both small and big ports of Finland, Estonia and Sweden increases: ports will be more close-knit and specialize more. Focus of networking shifts more to the environmental issues, traffic communication, security and overall accessibility.
- **Marine building** - networking shifts towards easy movement, support, service provision, LNG, sewage, ground energy and overall impacts to environment bringing under the focus resources for development
- **Marine fishing and aquaculture** – networking shifts towards pests and taking care of the sea
- **Tourism and maritime industry** - networking shifts towards coastal experiences, lengthening the seasons, programming logistics of services and accommodation. Networking with research institutes becomes essential

Conflicting Networks

- **Nature protection and tourism:** tourism disturbs wildlife, damages inhabitants and communities
- **Nature protection and fishery:** catching seals and fish as a co-product of fishing; seals destroy nets and eat catch
- **Nature protection and wind parks:** negative impact of windparks and pipelines to the nature
- **Shipping and fishery:** harbour constructions and associated disposal sites are decreasing fishing areas and amount of fish

Other network findings

- Formal networks (53 networks):
 - EU-project specific networks (e.g. SustainBaltic; 30Miles) – 6 networks
 - International networks (e.g. HELCOM; VASAB; BONUS EEIG) – 26 networks
 - National networks (e.g. Eesti Väikesadamate Arenduskeskus; Helsingin Purjehdus Klubi) – 21 networks: 8 FI and 13 EE
- There is a rather high participation in Formal Networks and the maritime sector is interconnected
- Informal networks
 - Sector-based networks
 - Organization-based networks
 - People-based networks

Blue Economy Indicators

Source: <https://blueindicators.ec.europa.eu/public/>

- 2019 Blue Economy Report https://blueindicators.ec.europa.eu/public/sites/default/files/2019_blue_economy_report_5.pdf
- Blue indicators online dashboard https://blueindicators.ec.europa.eu/public/access-online-dashboard_en

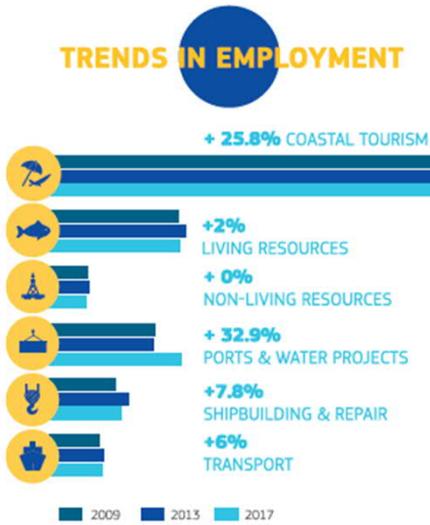
EU Blue Economy established sectors, main indicators, 2017

- Turnover €658 billion
- Gross value added €180 billion
- Gross profit €74.3 billion
- Employment 4 million people (53600 people in Finland, 29668 people in Estonia)
- Net investment in
- tangible goods
- €14.9 billion
- Net investment ratio 24%
- Average annual salary €26,400

Notes: Turnover calculated as the sum of the turnover in each sector; it may lead to double counting along the value chain. Nominal values. Direct impact only. Net investment excludes maritime transport and coastal tourism. Net investment ratio is defined as net investment to GVA. Source: Eurostat (SBS), DCF and own calculations.

ESTABLISHED SECTORS

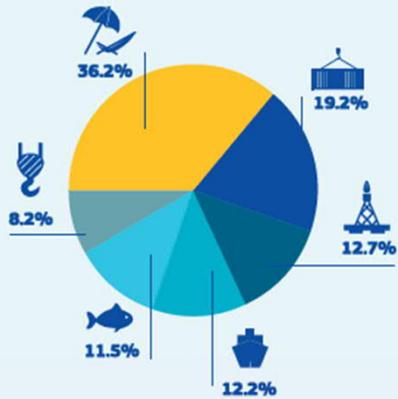
TRENDS IN EMPLOYMENT



GVA GROWTH 2009-2017



€ 180 BN
GROSS VALUE ADDED



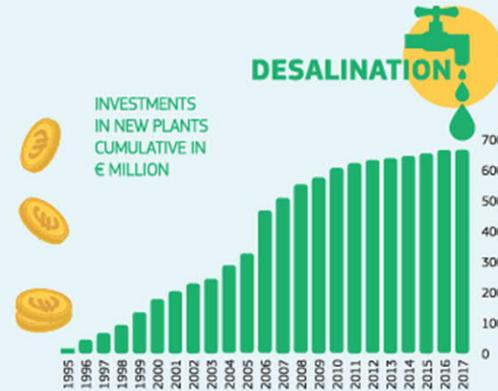
EMERGING SECTORS



OCEAN ENERGY



DESALINATION



BLUE BIOECONOMY

MICRO AND MACRO ALGAE SECTOR

17,000 DIRECT & INDIRECT JOBS

€ 1.5BN TURNOVER



UNIVERSITY OF TURKU

Turku School of
Economics
PORI UNIT

Thank you!

tuomas.pohjola@utu.fi



European Union
European Regional
Development Fund



RECOMMENDATIONS

- MSP should actively seek to support cross-sectoral and cross-border Sustainable Growth.
 - Including cross-sectoral networking, communication and cross-border project development to create new opportunities
- The potential of Blue Economy in the overall sustainability of coastal regions and industries should be further investigated.
 - Including systematic cross-border data collection, information sharing, professional standards, documents and long-term plans