



# STUDY ON BLUE GROWTH AND MARITIME POLICY WITHIN THE EU NORTH SEA REGION AND THE ENGLISH CHANNEL

CLIENT: **DG MARITIME AFFAIRS AND FISHERIES**

FWC MARE/2012/06 – SC E1/2012/01

ANNEX II B - 2 PAGE COUNTRY SUMMARY

*GERMANY*



## Background

Germany is split over two sea-basins, namely the North Sea (north-west coastline) and the Baltic Sea (north-east coastline). The entire coastline has a length of 3,204 km, representing 2.35% of the total coastline length of the EU-22 coastal Member States.<sup>1</sup>

Approximately 2,200 km (1.6% of the total coastline length of the EU-22 coastal Member States) is allocated to Germany's Baltic Sea coastline and about 1,000 km to Germany's North Sea coastline.

In 2010, 1.74 million people or 4.28% of the country's labour force was located in Germany's coastal regions. In the Baltic Sea region 1.06 million people (2.62%) were employed and in the North Sea region 0.68 million (1.67%). In 2010, the coastal regions of Germany generated almost €24,600 gross domestic product (GDP) per capita, this is 19.37% lower than the country's average GDP per capita.<sup>2</sup>

## Maritime economic activities

Regarding maritime economic activities, shipping and fishing are still considered to be the largest sectors in the North Sea region. While deep-sea shipping has been very negatively impacted during the last few years and freight volume declined from over 120 million tonnes in 2008 to 99 million tonnes in 2009 (-20%), a slow recovery process has now been underway.<sup>3</sup>

Short-sea shipping however is on the rise with emerging and ever stronger trade relations with Russia; however these are most likely to benefit the Baltic Sea ports and areas.

Table 1.1: Listing the 7 largest, fastest growing and most promising maritime economic activities in Germany at NUTS-0 level

Rank	Largest maritime economic activities	Fastest growing maritime activities	Most promising maritime activities
1.	Short-sea shipping (incl. Ro-Ro)	Offshore wind	Offshore wind
2.	Fish for human consumption	Fish for human consumption	Coastal tourism
3.	Deep-sea shipping	Cruise tourism	Deep-sea shipping
4.	Coastal tourism	Coastal protection	Short-sea shipping (incl. Ro-Ro)
5.	Offshore wind	Coastal tourism	Cruise tourism
6.	Inland waterway transport	Water projects	Shipbuilding (excl. leisure boats) and ship repair
7.	Shipbuilding and ship repair	Protection of habitats	Marine aquatic products

Note: Cells in colour represent the most maritime economic activities which are prominent in more than one category.

<sup>1</sup> No reference in the country fiche

<sup>2</sup> Source: German NUTS-3: Federal Employment Agency: Labour market statistics; EU-22 coastal: EUROSTAT

<sup>3</sup> Derived from data analysis based on Eurostat



## Regional level activities

In terms of regional breakdown of maritime activities, NUTS1 level distribution was considered for Germany. Maritime transport is still the most important activity in terms of GVA for the North Sea adjacent federal states as Hamburg contributes with € 1.57 billion to the overall € 3 billion regional value of the sector.

North Sea federal states are also particularly influential in the sectors of oil and gas and offshore wind, where the state of Schleswig-Holstein claims 100% contribution for the oil and gas GVA of the North Sea region (€ 620 million) and Lower Saxony contributes with about 44% to the offshore wind GVA (€ 630 million). Lower Saxony is also a major contributor in fishing with 32% of the GVA, whereas the leading federal state for this activity is Bremen with 47% (€ 730 million). Other key sectors in the Northern Sea basin of Germany include coastal tourism with € 880 million GVA, the majority of which is distributed between Lower Saxony (€ 380 million), Schleswig-Holstein (€ 230 million) and Hamburg (€ 260 million). Hamburg also serves as the centre for the maritime activities for yachting and marinas as well as cruise tourism.

## Clusters

The maritime economy in Germany is concentrated in the coastal regions and can be described as a cluster alliance with five integrated sub-clusters.

The cluster area accounts for almost 160 thousand employees in 4,000 enterprises. The five regional sub-clusters are (from west to east):

- Ems-Axis : region in the north-west of Germany along the river Ems (quite unknown but many shipping companies; important shipyards and fast growing offshore wind industry);
- Metropolitan Region Bremen-Oldenburg: region between and surrounding Bremen and Oldenburg;
- Metropolitan Region Hamburg: Hamburg and its hinterland (most important sub-cluster including Hamburg and the surrounding NUTS-3 regions of Schleswig-Holstein and Lower-Saxony);
- Schleswig-Holstein: NUTS-3 regions of Schleswig-Holstein not included in Metropolitan Region Hamburg, almost belonging to Germany's Baltic Sea region;
- Mecklenburg-Vorpommern (NUTS-2 region in the north east).

## National strategies and policies

There are several national and federal level policies governing the development of the maritime industries. Furthermore, a number of initiatives have also been launched on the local level to further boost innovation and development potential of the sectors.

The Maritime Development Plan - Strategy for a German integrated maritime policy serves as a framework for a comprehensive maritime policy in Germany. Its main priority is to strengthen the competitiveness of the German maritime economy and make full use of its employment potential. There are other policy papers for sustainability and biological diversity that impact on the maritime industries. Furthermore specific sectors also have their own policy papers such as port development or shipbuilding.



Additionally federal level administrations also carry out their individual programmes related to high technology, climate change or spatial planning.