



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

CLIENT: **DG MARITIME AFFAIRS AND FISHERIES**

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ANNEX II A - 2 PAGE COUNTRY SUMMARY

BELGIUM



Background

The North Sea area of Belgium comprises of the provinces of West Flanders, Antwerp and East Flanders with just over 300 km¹ of coastline and about 250.000 inhabitants² in the coastal areas. The coastal zone of Belgium (are within 10 kilometres of the sea) covers 1,920 km² which is 0.5% of the total EU-22 coastal area. The country relies heavily on its shipping industry, which is centred around the main ports of Oostende and Antwerp.

Maritime economic activities

The report has found that among the seven largest maritime industries shipping features prominently with in addition to deep- and short-sea shipping, both construction of waterways and passenger ferry services have registered.

Table Error! No text of specified style in document..1 Listing the 7 largest, fastest growing and most promising maritime economic activities in Belgium at NUTS-0 level

Rank	Largest Maritime economic activities	Fastest growing maritime activities	Most promising maritime activities
1.	Short-sea shipping (incl. Ro-Ro)	Aggregates mining (sand, gravel, etc.)	Offshore wind
2.	Coastal tourism	Construction of water projects (incl. protection against flooding)	Construction of water projects (incl. protection against flooding)
3.	Inland waterway transport	Catching fish for human consumption	Deep-sea shipping
4.	Deep-sea shipping	Protection against flooding and erosion, preventing salt water intrusion, protection of habitats	Short-sea shipping
5.	Construction of water projects (incl. protection against flooding)	Inland waterway transport	Inland waterway transport
6.	Passenger ferry services	Coastal tourism	Cruise tourism
7.	Cruise tourism	Shipbuilding (excl. leisure boats) and ship repair	Blue biotechnology

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

While many of the largest economic activities have been long established in the country, there are still ones such as construction of water projects and inland waterway transport with further development potential. This development potential is reflected by the growth of these industries

¹ Sogetti, Eurostat, 2008: Description of the coastal and sea areas in the European Union. Chapter 2. P. 20. Available here: <https://webgate.ec.europa.eu/maritimeforum/content/498>

² <http://statbel.fgov.be/fr/statistiques/chiffres/population/structure/agesexe/popbel/>



during the past 3 years³. Consequently these two sectors are also accounted amongst the most promising activities.

Regional level activities

Belgian NUTS 2 regions are related to three of the Flemish provinces: West Flanders, East Flanders and Antwerp:

- In terms of GVA, 100% of the oil and gas and 75% of inland waterway transport activities were related to Antwerp;⁴
- West Flanders activities were concentrated on passenger ferry services, fishing, blue biotechnology, coastal tourism and yachting (all with 100% of GVA);
- East Flanders maritime activities were more scarce and related to shipping (both deep and short-sea) as well as inland water way transport (25% of GVA).

In some analyses, the ports of Liège and Brussels are also referred to. However, these ports are not accessible by sea-going vessels and not covered here.

Clusters

Four maritime clusters were identified in Belgium; these are Antwerp, Oostende, Zeebrugge and Ghent. Zeebrugge is the only cluster identified as being in the “growing” stage and focused on shipping exclusively.

Antwerp is the largest of the clusters and while it can rely heavily on its strategic location its weakness is the lack of flexibility and strong attachment to established activities such as oil and gas or shipping. These can provide a hindrance in opening up towards new activities and innovative ventures.

National strategies and policies

In Belgium the Federal State has the general competency for the North Sea policy. It embraces the Blue Economy as a concept, and takes the Limassol Declaration as the overarching framework for its policies. The Master Plan for marine spatial planning system is a regulatory and legally enforceable blueprint that covers Belgium’s territorial sea. The original 2005 “Master Plan” was developed by the Ministry of the North Sea; It has been revised in 2012 under the egis of the Federal Ministry of Environment.

³ Based on data availability

⁴ derived from Eurostat figures