



STUDY ON BLUE GROWTH, MARITIME POLICY AND EU STRATEGY FOR THE BALTIC SEA REGION



CONTRACT NUMBER
MARE/2012/07 - REF. No 1

ANNEX 1.6:

COUNTRY FICHE LATVIA

DECEMBER 2013



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Annex Country Fiche Latvia

1. General overview

Morphological structure of the coastline

- The length of Latvia's coastline is 498 km from the Lithuanian border to the Estonian border. Latvia's coastline represents 0,4% of the total coastline of the EU-22 coastal Member States.
- Latvia's coastal zone (within a range of 10 km from the coast) covers 4.842 km², the equivalent of 1,2% of the total EU-22 coastal area.

Population and related social conditions for maritime areas

- In 2012 1,29 million inhabitants or 62,68% of the country's population lived in Latvia's coastal areas. This population corresponds to 0,27% of the total population living in the EU-22 coastal Member States.
- In 2010 coastal NUTS-3 regions (Riga, Pieriga, Kurzeme) employed 63,80% of the country's total labour force, or 594,9 thousand persons. This represents only 0,29% of the labour force employed in all the EU-22 coastal Member States.
- In 2012 total unemployment in the population aged 20-64 years in Latvia's coastal NUTS-2 regions (which is the whole country) was about 149 thousand people, representing 0,67% of the unemployed persons in all EU-22 coastal Member States.

Economic role of maritime areas over the national total

- In 2010 the Gross Domestic Product (GDP) per capita in Latvia's coastal regions (Riga, Pieriga, Kurzeme) was about EUR 10.000 or 16,5% higher than the national average GDP per capita, which was about EUR 8.600.
- In 2010 Latvia's coastal regions were responsible for EUR 12,49 billion in gross value added (GVA) or 77,22% of the nation's total.

GVA – Details by NACE rev. 2 activities in 2010

Sector	GVA of the coastal regions (billion EUR)	Share in the national GVA for the sector
Agriculture, Aquaculture and Fishing (A)	0,41	50,32
Manufacturing (C)	1,48	68,92
Construction (F)	0,65	76,41
Wholesale and retail trade; transport; accommodation and food service activities; information and communication (G-J)	4,63	86,42

Employment – Details by NACE rev. 2 activities in 2010

Sector	Employment of the coastal regions (thousand)	Share in the national employment for the sector
Agriculture, Aquaculture and Fishing (A)	30,90	38,10
Manufacturing (C)	79,30	60,67
Construction (F)	43,50	68,61
Wholesale and retail trade; transport; accommodation and food service activities; information and communication (G-J)	206,30	69,58

2. Marine and maritime economic activities (MEAs)

Table 1 - Overview of relevant maritime economic activities in Latvia at NUTS-0 level

Maritime economic activities	GVA (EUR, billion)	Employment (*1000)	Number of enterprises	Further indicators	Source & Reference year
0. Other sectors					
0.1	Shipbuilding (excl. leisure boats) and ship repair	0,03	2,06	123	Eurostat (2010)
0.2	Water projects	0,02	0,76	39	Eurostat (2010)
1. Maritime transport					
1.1	Deep-sea shipping	0,004	0,12	18	18% of goods transported by DSS in 2010 Eurostat (2010)
1.2	Short-sea shipping (incl. Ro-Ro)	0,02	0,57	82	82% of goods transported by SSS in 2010 Eurostat (2010)
1.3	Passenger ferry services	0,04	1,19	28	Eurostat (2010)
1.4	Inland waterway transport	0,001	0,1	11	Eurostat (2010) NACE rev.2 code H5040 Inland freight water transport is counted, which includes also the operation of towing or pushing boats, etc.
2. Food, nutrition, health and ecosystem services					
2.1	Fish for human consumption	0.07	8.06	601	Eurostat (2010) Central Statistical Bureau (2010) JRC Scientific and technical report (2012): The 2012 Annual Economic Report on the EU Fishing Fleet
2.2	Fish for animal feeding	0.002	0.25	5	Eurostat (2010) Central Statistical Bureau (2010) JRC Scientific and technical report (2012): The 2012 Annual Economic Report on the EU Fishing Fleet
2.3	Marine aquaculture	0	0	0	Eurostat, Marine aquaculture, fish_ag2a (2010)
2.4	Blue biotechnology	0	0	0	Submariner project (2012)
2.5	Agriculture on saline soils	0	0	0	Corine Land Cover dataset 2006; JRC (2009): Saline and Sodic Soils Map
3. Energy and raw materials					
3.1	Offshore oil and gas	0	0	0	Ministry of Economy
3.2	Offshore wind	0	0	0	European Wind Energy Association (EWEA), (2013)
3.3	Ocean renewable energy	0	0	0	Ministry of Economy
3.4	Carbon capture and storage	0	0	0	Latvian Environment, Geology and Meteorology Centre
3.5	Aggregates mining (sand, gravel, etc.)	0	0	0	European Aggregates Association (2010) Central Statistical Bureau (2008, 2009)
3.6	Marine minerals mining	0	0	0	Central Statistical Bureau (2010)
3.7	Securing fresh water supply (desalination)	0	0	0	Ministry of Environmental Protection and Regional Development
4. Leisure, working and living					
4.1	Coastal tourism	0,05	5,2	604	Eurostat (2010)

4.2	Yachting and marinas	0,001	0,12	26		Eurostat (2010)
4.3	Cruise tourism	0,002	0,05	3		Eurostat (2010)
5. Coastal protection						
5.1	Coastal protection	N/A	N/A	N/A		Ministry of Environmental Protection and Regional Development
5.3	Protection of habitats	0,0009	N/A	N/A	Total public expenditure for protection of biodiversity and landscape: EUR 7,1 million.	Eurostat (2010) Maritime share is calculated as a per cent of regional coastal protected area over total regional protected area – 12,6%
6. Maritime monitoring and surveillance						
6.1	Traceability and security of goods supply chains	0,009	0,20			The turnover of the Maritime Administration was 2,52 million lats (EUR 3,58 million) in 2010 and 2,04 million Lats (EUR 2,90 million) in 2008. It employs 147 persons. The State Border Guard's total expenditure in 2011: 22,66 million lats (EUR 32,24 million) and 2,8 thousand persons employed. In 2009 total expenditure was 22,35 million Lats (EUR 31,80 million) and 2,62 thousand persons employed. In 2011, the National Customs Board of the State Revenue Service had a total expenditure of 62,2 million Lats (EUR 88,5 million). The number of persons employed was 1,5 thousand.
6.2	Prevent and protect against illegal movement of people and goods	0,01	0,41			The State Revenue Service annual report (2009, 2012) The State Border Guard's annual report (2009, 2011) The Maritime Administration annual report (2009, 2010) Maritime share is calculated as a per cent of regional coastal protected area over total regional protected area – 12,6% The State Border Guard's and the National Customs Board's GVA and employment data for MEAs 6.1 and 6.2 are calculated as 1/3 for MEA 6.1 and 2/3 for the MEA 6.2. The share of the Maritime Administration turnover and employment for MEA 6.1. (GVA-EUR 0,004 billion, employment – 0,005 thousand) are taken as 1/10 of the total figures.
6.3	Environmental monitoring	0,02	0,13			In 2009, total expenditure of the Ministry of Environmental Protection and Regional Development – 169,69 million Lats (EUR 241,43 million) for the implementation of the entire environmental monitoring programme and 106,42 million Lats (EUR 151,41 million) in 2011. The total number of persons employed in 2009 was 1.551 and in 2011 1.009.

Table 2 Overview of relevant maritime economic activities in Latvia at NUTS-0 level

Maritime economic activity		Overview	Socio economic indicators	Source & reference year
0. Other sectors				
0.1	Shipbuilding (excl. leisure boats) and ship repair	The Latvian shipbuilding sector is predominantly active in ship repair, although some new construction work is also carried out. It comprises four major enterprises (Riga shipyard, Tosmare shipyard, Bolderaja shipyard and Mangaļi shipyard). Shipyards serve European and Scandinavian customers. The repair works of vessel underwater parts also takes place in Liepāja, Ventspils and Roja ports through the use of docks.	The GVA generated by this MEA and number of persons employed decreased from 2008 to 2010, mainly due to the negative effects of the crisis. However, this MEA has been traditionally well developed and provides a variety of job opportunities for highly skilled workers.	Eurostat (2010)
0.2	Water projects	Construction of water projects is less significant than shipbuilding and repair activities. Basic works cover modernising and extension of docks and dredging activities.	The number of employed persons in this MEA since 2008 has decreased by 28,5% and generated GVA decreased by 37,5% in the same period, which reflects the negative effect of the financial and economic crisis on this sector. Although affected by the economic	Eurostat (2010)

			crisis there is still a continued development of ports and water projects.	
1. Maritime transport				
1.1	Deep-sea shipping	Maritime freight transport is a significant economic activity in Latvia. It represents 1,8% of the goods traffic in all EU-22 coastal Member States. The inward/outward ratio for maritime goods is 1:8, meaning that the country's ports mainly facilitate export trade. The leading ports for cargo traffic are Riga and Ventspils, and Liepāja to a lesser extent. Riga, Ventspils and Liepāja ports belong to the Trans-European Transport Network (TEN-T). The greatest depth of the ports is 17,5 m, which permits to operate Panamax and Cape-size vessels.	In 2011, 67 million tonnes of goods were handled in Latvian ports, 15% more than in 2010, reflecting the beginning of the recovery of the Latvian economy after the crisis. Dry bulk goods accounted for 48% and liquid bulk goods for 36% of the total weight handled. Deep-sea shipping accounts for about 20% of the total goods handled and since 2007 (except for the year 2010 when a slight decrease was observed) there has been a constant increase in the volume of goods handled (in 2011 by 41,3%, in 2009 by 13,9% and in 2008 by 54,1%).	Eurostat (2011)
1.2	Short-sea shipping (incl. Ro-Ro)	Three big ports (Riga, Ventspils and Liepāja) are specialised in cargo handling, while small ports (Engure, Lielupe, Mērsrags, Pāvilosta, Roja, Salacgrīva and Skulte) primarily provide service to local clients who transport timber and fishing products. More than 85% of all cargo going through Latvian ports is transit cargo.	Short-sea shipping accounts for about 80% of the total goods handled in Latvian ports. Since 2006 (except for the year 2010 when a slight decrease was observed), there has been a constant increase in the volume of goods handled (in 2008 by 10,6%, in 2011 by 11%).	Eurostat (2011)
1.3	Passenger ferry services	Passenger turnover through Latvian ports is less significant than freight transport. The leading port for passenger handling is Riga port, while Ventspils and Liepāja ports also provide ferry services to a lesser extent.	In 2011, 786.000 passengers were embarked/disembarked in Latvian ports, which is 16,4% more than in 2010 and represents 0,2% of the EU-22 total. The ratio of inward and outward passengers is 50/50. The number of passengers has constantly increased over the last decade.	Eurostat (2011)
1.4	Inland waterway transport	There are no inland waterways in Latvia as per Directive 2006/87/EC of the European Parliament and of the Council of 12 December 2006 laying down technical requirements for inland waterway vessels. Therefore this sector is not particularly relevant.	The socio-economic impact of this MEA is very limited.	Eurostat (2010) NACE rev.2 code H5040 Inland freight water transport is counted which includes also the operation of towing or pushing boats, etc.
2. Food, nutrition, health and ecosystem services				
2.1	Fish for human consumption	Fisheries resources and utilisation have traditionally had a significant role in the Latvian national economy, especially in the coastal areas. Although catches are considerably lower than in the previous decade, in the period between 2007 and 2010 catches increased by 1-3% per year. Historically the Latvian fish processing sector has been one of the most important, especially in the coastal area. It is an export-oriented sector, exporting more than 90% of the fish products produced in Latvia.	Despite the country's relatively small fishery fleet it accounts for 4% of the EU total catches. About 77% of the GVA generated by the MEA relates to the fish processing sector. Almost the same percentage (75,6%) of employed persons is also tied to the fish processing sector.	Eurostat (2010) JRC Scientific and technical report (2012): The 2012 Annual Economic Report on the EU Fishing Fleet
2.2	Fish for animal feeding	Generally, the Latvian fishing and fish processing sector produce fish mainly for human consumption. Although there are some meal processing companies (Venta FM, R Soft Ražotājs and Kalifeks), they mainly buy fish waste from fish processing companies for meal production. 100% of total landings are used for human consumption. Sometimes (very seldom) fishermen sell part of the low quality catch for fish meal production.	The production volumes of fish unfit for human consumption are not significant (less than 5% of the total value sold annually).	Eurostat landings (2010) Eurostat (2011)
2.3	Marine aquaculture	Marine aquaculture is not developed in Latvia. Currently there are some new projects beginning, which could help to		Eurostat (2010) Ministry of Agriculture

		develop this area further..		
2.4	Blue biotechnology	Research institutions and companies are considering opportunities to start activities in blue biotechnology using the potential of specialists and students, although investors are oriented towards the more rapid profit bringing branches. The most important area is biotechnological equipment (different laboratory equipment, as well as laboratory and pilot scale bioreactors).	There is no socio-economic impact of this MEA.	Submariner Project (2012)
2.5	Agriculture on saline soils	Sector is not relevant in Latvia.		Corine Land Cover dataset 2006; JRC (2009): Saline and Sodic Soils Map
3. Energy and raw materials				
3.1	Offshore oil and gas	It is assessed that oil extraction from several larger deposits in the Baltic Sea might be economically reasonable in the future. However, Latvia has little or no experience in producing or exploring gas and oil.	According to geological estimates, oil reserves of 360 million barrels can be found in Latvian waters within an area of 21.500 km ² , mostly concentrating in the south-western part of the Latvian EEZ. Five licences have been issued to different national and international companies for oil exploration and extraction within the Latvian EEZ.	State Geological Service (1996) Ministry of Economy
3.2	Offshore wind	So far there are no wind turbines built in the Latvian EEZ. However, wind in Latvian offshore areas and particularly in the open Baltic Sea is recognised as a significant source of alternative energy; therefore there is great interest in offshore wind park development. In 2011, the elaboration of common criteria for development of wind parks offshore was launched to avoid uncontrolled establishment of offshore wind parks. The national target for 2020 is that 40% of the gross energy consumption should come from renewable energy sources (wind energy, among others).	So far there is no socio-economic impact of this MEA.	Ministry of Economy Economic Development of Latvia Report (2012)
3.3	Ocean renewable energy	Sector is not relevant in Latvia.		
3.4	Carbon capture and storage	There is only research carried out on modelling of a carbon capture and storage system with the aim of minimising CO ₂ in the atmosphere and cost analysis of electricity production.	So far there is no socio-economic impact of this MEA.	International Journal of Energy (2010) Latvian Technical University
3.5	Aggregates mining (sand, gravel, etc.)	No aggregates mining takes place offshore.		European Aggregates Association (2010) Central Statistical Bureau (2010)
3.6	Marine minerals mining	Industrial extraction of hydrocarbons has not occurred in Latvia. In accordance with the current legislation it is possible to receive a licence for prospection of hydrocarbons and exploration and production of hydrocarbons.	Currently 4 licences for hydrocarbon exploration and production offshore have been issued as well as 1 licence for hydrocarbon prospecting offshore.	Ministry of Economy Central Statistical Bureau (2010)
3.7	Securing fresh water supply (desalination)	In Latvia, drinking water is mainly supplied from groundwater sources, the stocks are considered sufficient. In part of Riga city residents receive drinking water from the river Daugava. No desalination of water takes place.	There is no socio-economic impact of this MEA.	Ministry of Environmental Protection and Regional Development
4. Leisure, working and living				
4.1	Coastal tourism	Tourism is a fast developing sector in Latvia despite the recent economic recession. The entire coastline is a popular destination for tourism and recreation especially in the summer season. This area is also frequently used for water sports – windsurfing,	In total there are 24 .803 bed places.	Eurostat (2011)

		kite-boarding, paragliding. Historic fishermen villages are still present, yet becoming popular holiday destinations. The maritime history of Latvia can be appreciated in several museums (Ventspils, Liepāja, the sea fishing museum of Roja, Pāvilosta Local History Museum and Salacgrīva).		
4.2	Yachting and marinas	Out of 14 marinas built in the coastal regions of Latvia, Riga Yacht Centre "Andrejosta", Riga City Yacht Club, Liepāja Yacht Centre, Pāvilosta marina and Yacht Centre, and Mērsrags Marina are the most important, offering services to both motor and sailing yachts. The berth type for many marinas is floating pontoon and wooden berth. 3 marinas were awarded Blue Flag in 2013 (Kuiviži Yacht Club – for the first time, Pāvilosta Marina and Liepāja Yacht Centre).	Yachting creates demand for small harbour development and thus ultimately leads to development of the coastal areas.	www.marinasLatvia.lv
4.3	Cruise tourism	Over the past decade cruising has become popular. The free port of Riga offers convenient infrastructure for cruise vessels. It is located near the historic centre of Riga city. Some cruising activities are going on in Ventspils port.	The number of cruise passengers in 2011 was 64.000.	Eurostat (2011)
5. Coastal protection				
5.1	Coastal protection	According to existing research, areas most sensitive to erosion are from Pāvilosta to Jūrkalne, the largest capes (Mietrags, Bernāti, Melnrags) and down drift of the ports of Liepāja and Ventspils, as well as in the Engure and Roja municipality areas. Ever growing and frequent storms reaching speeds of up to 30 m/s endanger 60% of the Latvian coastline. Coastal protection measures are mainly applied by local municipalities and private landowners. There are around 34 coastal protection structures in total on the coastline of Latvia. Most of the coastal protection structures are based on natural materials like greenery, stones and timber. Construction of new and reconstruction of existing hydro-technical installations for flood risk prevention are supported by the European Regional Development Fund. There are more than 40 protected nature areas located on the coastline, which are also Natura 2000 territories. While the floods issue has not yet become severe, coastal erosion is expected to intensify in the following decades. Global climate change factors such as increasing severity and frequency of storms and the rise of sea level are foreseen as the most influential of natural impacts to cause coastal erosion. Seawater intrusion is a serious process related to changes in the balance of ground waters especially in Liepāja city. Intensive water abstraction during the previous decades has contributed to this process. Indirect seawater intrusion is detected also in the centre of Riga and Jūrmala.		G. Eberhards (2006 – 2009) Ministry of Environmental Protection and Regional Development Environmental Policy Strategy (2009-2015) Draft Environmental Policy Strategy (2014-2020)
5.3	Protection of habitats	Approximately 90% of the total coastline is covered by natural habitats, the rest with buildings. It comprises 23 coastal habitats of EU importance. There are more than 40 territories		Ministry of Environmental Protection and Regional Development

		along the Baltic Sea and Riga Gulf coast that have been designated as Natura 2000 territories. For the protection of rare, as well as disperse species and habitats, 7 marine protected territories with an area of 562 km ² were established in 2010, which are also designated as Natura 2000 territories. The system of nature protection is mainly regulated by the Law on Species and Habitats Protection and the Law on Specially Protected Nature Territories. The main threats to biodiversity in coastal areas are habitat degradation due to tourism and recreational activities and habitat loss due to housing and expansion of invasive species. The main threats in marine areas are eutrophication and invasive species.		4 th National report to the Convention on Biological Diversity (2010)
6. Maritime monitoring and surveillance				
6.1	Traceability and security of goods supply chains	The Maritime Administration, a subordinated body of the Ministry of Transport, carries out security assessment of the ships registered in the Latvian Ship Register and issues International Ship Security Certificates (ISSC). The Maritime Administration also carries out security assessments at the ports. In case the ports interact with passenger ships or ships with GT over 500, there must be a security plan in place. The National Customs Board of the State Revenue Service carries out control of goods transported by legal entities and private individuals at the external borders of the EU, the airport and harbours. The State Border Guard is responsible for prevention of illegal migration of people. 3 vessels (Valpas, Tiira, Rānda), 10 cutters, are used for monitoring of the marine border.		
6.2	Prevent and protect against illegal movement of people and goods		In 2011, the illegal border crossing attempts of 247 persons from 3 rd countries were stopped, which is 162% more than in 2010. The share of maritime border attempts is not available. In 2012, the most common items smuggled and seized at the border were tobacco, fuel, alcoholic beverages and narcotics.	Maritime Administration State Border Guard Annual report (2011); National Customs Board Annual Report (2012)
6.3	Environmental monitoring	The Latvian Institute of Aquatic Ecology is responsible for and conducts the state programme for marine monitoring. It assesses the ecological impact of different anthropogenic and natural factors on the Latvian marine environment on a long-term basis (t ^o , pH, heavy metals etc.). Samples are taken at 47 stations located at the Baltic Sea and the Gulf of Riga. The Baltic marine environment monitoring and research programmes (phytoplankton, zooplankton, zoobentos, fish resources etc.) are also carried out by the Marine and Inland Waters Administration and the Institute of Food Safety, Animal Health and Environment (BIOR), as well as the Latvian University of Agriculture within their competence area. Spatial planning in Latvia has been and will be performed on three levels: national, regional and local.	From 2010 to 2012, funding from the European Regional Development Fund amounted to about 1,64 million Lats (EUR 2,3 million) and 0,25 million Lats (EUR 0,35 million) of Latvian national co-financing for the development of environmental monitoring and control systems (under the measure Infrastructure and Services). In 2009 the following state budget was allocated for the implementation of the marine environment programme: <ul style="list-style-type: none"> - The Latvian Institute of Aquatic Ecology: 0,07 million Lats (EUR 0,1 million); - The Ministry of Agriculture (i.e., BIOR): 0,18 million Lats (EUR 0,26 million); - The Ministry of Environmental Protection and Regional Development 2,32 million Lats (EUR 3,34 million) for the implementation of the entire environment monitoring programme, of which the marine environment programme is a part; - The Ministry of Health: 0,31 million Lats (EUR 0,44 million), of which the marine environment programme is a part; - The Ministry of Health: 0,31 	Environmental Policy Strategy (2009 – 2015) Water management programme

		million Lats (EUR 0,44 million).	
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3. List of the 7 largest, fastest growing and with most future potential maritime economic activities

3.1 Ranking order of the 7 largest marine and maritime economic activities

The seven largest MEAs, listed in Table 3, were chosen based on a score calculated on the basis of the GVA and the number of persons employed by the sector, using 2010 data (for all MEA scores see Annex Latvia).

Table 3 - Ranking order of the 7 largest maritime economic activities in Latvia at NUTS-0 level

Rank	Maritime economic activity	GVA (billion EUR)	Employment (*1000)	Score
1	Fish for human consumption	0,07	8,06	4,38
2	Coastal tourism	0,05	5,2	2,85
3	Shipbuilding (excl. leisure boats) and ship repair	0,03	2,06	1,18
4	Passenger ferry services	0,04	1,19	0,80
5	Water projects	0,02	0,76	0,48
6	Short-sea shipping (incl. Ro-Ro)	0,02	0,57	0,38
7	Prevent and protect against illegal movement of people and goods	0,01	0,41	0,26

3.2 Ranking order of the 7 fastest growing marine and maritime economic activities over 3 past years

The seven fastest growing MEAs, listed in Table 4, were chosen on the basis of scores calculated using the compound annual growth rate for GVA and number of persons employed over the period 2008-2010 (for all MEA scores see Annex Latvia).

Table 4 - Ranking order of the 7 fastest growing maritime economic activities in Latvia at NUTS-0 level *

Rank	Maritime economic activity	GVA (CAGR)	Employment (CAGR)	Score
1	Fish for animal feeding	0	22,04	11,02
2	Passenger ferry services	6,90	4,78	5,84
3	Traceability and security of goods supply chains	0	2,25	1,12
4	Prevent and protect against illegal movement of people and goods	0	1,24	0,62
5	Water projects	0	-15,44	-7,72
6	Fish for human consumption	-20,23%	-7,68%	-13,96
7	Coastal tourism	-25,46	-12,37	-18,92

Although according to the methodology used – which includes in the MEA Inland waterways transport the operation of towing or pushing boats, etc. – this MEA showed the largest growth in the reference period. However, it is not included in the above table due to the fact that there are no inland waterways in Latvia as per Directive 2006/87/EC of the European Parliament and of the Council of 12 December 2006 laying down technical requirements for inland waterway vessels.

3.3 Ranking order of the marine and maritime economic activities with most future potential

The MEAs with most future potential, listed in Table 5, are based on scores assigned to each MEA by expert views for the six following indicators: innovativeness, competitiveness, employment, policy relevance, spill-over effects and sustainability. (for all MEA scores see Annex Latvia).

Table 5 - Rankin order of the most promising maritime economic activities in Latvia at NUTS-0 level

Rank	Maritime economic activity	Score
1-3	Short-sea shipping (incl. Ro-Ro)	++++
1-3	Deep-sea shipping	++++
1-3	Coastal tourism	++++
4-11	Passenger ferry services	++
4-11	Shipbuilding (excl. leisure boats) and ship repair	++
4-11	Fish for human consumption	++
4-11	Yachting and marinas	++
4-11	Cruise tourism	++
4-11	Traceability and security of goods supply chains	++
4-11	Environmental monitoring	++

4. Growth scenarios for 6 of the most relevant and promising marine and maritime economic activities

Table 6 - Sets of top-7 maritime economic activities ranking in order of size/growth/scores

Top-7 current size	Top-7 recent growth	Top most future potential
Fish for human consumption	Fish for animal feeding	Short-sea shipping (incl. Ro-Ro)
Coastal tourism	Passenger ferry services	Deep-sea shipping
Shipbuilding (excl. leisure boats) and ship repair	Traceability and security of goods supply chains	Coastal tourism
Passenger ferry services	Prevent and protect against illegal movement of people and goods	Passenger ferry services
Water projects	Water projects	Shipbuilding (excl. leisure boats) and ship repair
Short-sea shipping (incl. Ro-Ro)	Fish for human consumption	Fish for human consumption
Prevent and protect against illegal movement of people and goods	Coastal tourism	Yachting and marinas
		Cruise tourism
		Traceability and security of goods supply chains
		Environmental monitoring

Table 7 - 5 most relevant and promising marine and maritime economic activities¹

5 most relevant and promising
Short-sea shipping (incl. Ro-Ro)
Deep-sea shipping
Passenger ferry services
Fish for human consumption
Coastal tourism

- Short-sea shipping was chosen among the most promising MEAs due to its important role in the national economy and positive tendencies observed in the last years. This sector is traditionally well developed and possesses well-equipped ports. Ports are an important element of the logistics chain and it is expected that this growth will continue due to availability of needed infrastructure and links with the TEN-T network. The potential of attracting more container freight goods is another driver for future growth.
- Deep-sea shipping accounts for about 20% of the total goods handled and it has been constantly increasing for several years. Latvia has since long established itself as a transit country and in coming years it is expected the sector will be subject to modest growth by attracting container freights from Asia and the Far East.
- The MEA of Passenger ferry services was chosen due to its relative importance in the country, its growth in the last years and future potential for growth. The sector has important spill-over effects through linkages with different economic sectors and this sector shows good prospects for future growth.
- Although during last years Fish for human consumption hasn't shown a stable trend of development it was chosen mainly due to its important role in the overall development of coastal areas and provision of employment possibilities in the regions. This MEA is one of the few sectors of the Latvian national economy that has a considerably positive trade balance.
- Coastal tourism has been a clear growth sector during the past decade. Riga in particular is becoming an important tourism attraction in the Baltic Sea region. Additionally, this MEA provides many job opportunities along coastal regions and it is considered to have future potential.

¹ Only 5 MEAs qualify as "most relevant and promising" in Latvia for the purpose of this study.

The following can be said of these selected maritime economic activities and their impact on sustainability. The enhancement of all maritime transport sectors - short-sea and deep-sea shipping and passenger ferry services - is directly linked with the sustainable use of the sea and coastal areas as well as environmental sustainability due to a more stringent policy on marine environmental protection, introducing specific requirements on the safety of ships and shipping, emissions from maritime transport and the operation of ports (e.g. sulphur emission regulation). The activities of the MEA Fish for human consumption are closely associated with the management and protection of living resources in Latvian waters, including the conservation and protection of biological diversity. Fishing activities and quotas in the Baltic Sea, the Gulf of Riga and the high seas are regulated by EU regulations. Regulations on sustainability and environmental protection are likely to become more stringent (for example, discard ban and fishing restrictions aimed at renewal of fish stocks). Coastal tourism activities, along with socio-economic sustainability, are tightly connected to coastal area environmental protection and sustainable development.

4.1 Description of the nature of each of the 6 maritime economic activities and value chain

In general, the global financial crisis has affected the national economy of Latvia particularly severely and the period of economic downturn overlaps with the period of analysis of maritime economic activities within the scope of this study. However, the economic recession in Latvia has stopped since the beginning of 2010 and growth has resumed, based largely on external demand.

Short-sea shipping (incl. Ro-Ro)

The short-sea shipping sector plays an important role in the national economy and ports are an important element of the country's logistic chain. The size and role of each port is influenced by many factors, such as nautical accessibility, location and closeness to the inland transport network (road and rail). Port competitiveness is considerable in Latvia due to the fact that it is almost impossible to substitute a port with any other mode of transport given its role in the transportation chain.

The bulk of the cargo entering Latvia comes from Russia (mostly oil products, fuel and coal) and is transported to other ports in Europe (UK, Sweden and the Netherlands). Timber and timber products are exported to Sweden, Finland, Norway and the UK, while woodchips are exported to Sweden and peat to the Netherlands, Belgium and Germany.

There are three large ports in Latvia – Liepāja, Rīga and Ventspils – which are mainly involved in handling freight transit (share in total cargo turnover over 98%) and seven small ports (Engure, Lielupe, Mērsrags Pāvilosta, Roja, Salacgrīva and Skulte), which are situated along the entire coastline of Latvia and have more local significance. They are mainly engaged in the shipment of timber products and providing service to fishing vessels. The ports of Rīga and Ventspils have been granted the status of free ports, but the port of Liepāja is an integral part of the Liepāja special economic zone. The Ventspils and Liepāja ports are ice-free ports.

Coal and oil products dominate the cargo handled at the Riga port, while grain, cereal, timber, metals and oil products are predominant at the Liepaja port. The cargo handled by Ventspils port has historically been dominated by oil products and coal chemicals in bulk. Currently Ventspils Nafta Terminal Ltd is the largest oil and petroleum product transshipment terminal in the Baltic Sea region. Petroleum products are received by pipeline and railway. JSC Ventamonjaks is one of the largest Baltic Sea region terminals for handling chemical products, such as ammonia, different spirits, methanol, oils, as well as petrochemicals. JSC Kalija Parks, also located in the Ventspils port area, is the largest fertiliser transshipment terminal in Europe, handling approximately 20% of the world potash trade. The Mērsrags and Skulte ports are the fastest growing ports among small ports, attracting new cargo types, timber, logs, woodchips, peat, etc.

In addition to cargo handling services, the ports also provide cargo storage services, a full range of logistic and expedition services as well as stevedoring and custom brokerage services. In 2012 60 stevedoring companies and 74 shipping agents operated at all three major ports. The Ventspils port also hosts the stevedoring company Ventspils Commercial Port, one of the largest in the Baltic region.

Deep-sea shipping

Latvia has since long established itself as a transit country (mainly for Russia, Belarus and Central Asia) and its ports handle more than 65 million tonnes of cargo per year. The main ports are Riga and Ventspils, and to a lesser extent Liepāja, which are all multifunctional ports. Deep-sea shipping accounts for about 20% of the total goods handled, though this has been on the increase for several years.

Cargo shipments provided by Latvian shipping companies cover a wide geographical area – from the Baltic Sea and northern Europe to the Atlantic Ocean, the Caribbean region and Middle East.

Deep-sea shipping is largely related to Russian energy goods. Latvian ports compete with the neighbouring ports of Tallinn (Estonia) and Klaipeda (Lithuania) and some of the cargo flows from Russia have been re-directed to these ports. At the same time, Russian transit cargo volumes have been strongly affected by the notable investments in the Russian port of Ust-Luga, Primorsk and re-directing of Russian cargos to its own ports.

Passenger ferry services

In contrast to freight transport, passenger ferry services play a less important role in the country's economy. However, the number of sea passengers continues to increase. In 2011 0,79 million passengers were transported to/from Latvian ports.

All major ports in Latvia have ferry connections with other ports in the Baltic Sea region. A regular freight/passenger ferry line operates from Riga port, linking Riga with Stockholm (Sweden). The port is open throughout all seasons and accommodates passenger and cruise ships of medium size. It uses ice-breaking services in cold winters. The Ventspils port operates three regular cargo and passenger ferry connections: Ventspils-Nynäshamn (Sweden), St.Petersburg-Ventspils-Lübeck (Germany) and Ventspils-Travemünde (Germany), while the port of Liepāja offers ferry connections with Travemünde (Germany).

The passenger ferry services sector is accompanied by sea and coastal cargo services, towage services, ship repairs, accommodation, retail sales and other tourism related services.

Fish for human consumption

The main species caught by the Latvian fishing fleet are sprat, herring and cod. The annual catch quota allocated to Latvia in the Baltic Sea for these species is usually acquired almost to 100% and it comprises c.a. 72 thousand tonnes, which is about 43-44% of the total fishing quota including high-seas. 34 out of the 63 fish species registered in the Baltic Sea and coastal waters have commercial importance.

In 2012, 44 fishing companies were fishing in the Baltic Sea and the Gulf of Riga and 161 companies in coastal waters. In 2011, the majority of fishing companies (58%) owned a single vessel and 41% of companies owned two to five fishing vessels. Only 2 fishing companies (Grifs and Irbe) owned six or more fishing vessels.

There are different types of fish products made in Latvia – frozen, salted and smoked fish, preserves and ready to serve food, as well as canned fish. Canned fish is mainly produced from the raw material from the Baltic Sea, while Atlantic fish (mainly imported) is used for production of smoked, salted, marinated fish as well as preserves.

The largest part of fish processing companies is composed of micro and small size companies that employ about 18% of the total employed persons in the fish processing sector. Medium size companies employ about 33% of employees, while the seven largest fish processing companies employ 49% of the total employed persons. With regard to turnover, large fish processing companies' share accounts for 46%, medium size companies for 40% and micro and small size companies for 14%. In terms of fish processing, small and micro companies mostly produce preserves, smoked and frozen fish, while medium-size and large companies focus on the production of canned fish.

Coastal tourism

Tourism is a developing field in coastal areas and provides a variety of job opportunities. There are various types of tourism: active, passive, nature tourism, spa tourism, interest in cultural heritage, in military history, botanical interests, bird watching, entomological investigations, landscape watching and painting, as well as scientific tourism (geology, geomorphology, etc.). Recently several new active sports have become very popular in coastal areas, such as spas and other health procedures. Some areas are particularly popular, such as Jūrmala town, the beaches around Rīga, Liepāja and Ventspils. Coastal villages during the high season are quite overloaded.

Even if tourism activities are controlled, the pressure on coastal areas is high. Popular tourist sites are often associated with valuable natural territories and habitats, and therefore tourism has a significant effect on biological diversity. Problems also exist due to the lack of proper public infrastructure (parking places, WC, accessibility facilities for disabled persons and wooden paths over the dunes) and waste/garbage management in the coastal zone. So far these issues have not been properly addressed. The obstacle is related to property rights: the land of coastlines and beaches is state owned but municipalities manage waste collection.

In 2010, most of the tourists staying in Latvia for several days were travellers from Russia (14%), Lithuania (13%) and Sweden (11%).

4.2 Description of economic and infrastructural scenario

Short-sea shipping (incl. Ro-Ro)

Although the total gross weight of handled short-sea shipping goods at Latvian ports fell during the period 2009-2010 due to the crisis, the trend was reversed again and the total gross weight increased by 14% in 2011 and it is expected to continue growing. The amount of cargo handled in all Latvian ports was at its highest level in 2011, when it reached 67 million tonnes, out of which only 7,4 million tonnes or 11% were inward freights. This illustrates that the Latvian shipping sector is transit oriented. The total increase of cargo was 12,4% in 2011 and the greatest growth was for Ro-Ro container cargo (+24,5%), large container cargo (+16,8%) and dry bulk cargo (+16,3%), while liquid goods increased by 10,5%. Only 35% of short-sea shipping goods come from or are destined for the Baltic Sea region ports, while 45% come from or are destined for ports located in the North Sea.

The Riga port, with 32,9 million tonnes handled in 2011 is among the 20 top ports in Europe and it represents 1,2% of EU-27 total volumes. An increase in the volume and proportion of containerised cargo was observed in 2010-2011 largely due to the contribution of the Riga port. This is a positive trend since containerised cargoes have a higher added value compared with transit of coal or timber. The Riga port provides the shortest way from Russia to Western Europe and vice versa. It is estimated that about 80% of transit cargo handled in the port originated from CIS countries exporting to the Western European market. The rail modality is the main port connection.

Due to very strong competition in the region the most promising direction for growth of Latvian ports is the increase in the added value for the cargoes handled, while at the same time maintaining current positions in the transit flow in the region. Environmental sustainability will be ensured through introduction of new requirements on the safety of ships and shipping, emissions from maritime transport and the operation of ports (e.g. sulphur emission regulation).

Deep-sea shipping

Although only 20% of the gross weight of goods transported to/from Latvian ports corresponds to deep-sea shipping goods, this sector is export-oriented and has an important impact on the economy of Latvia. This MEA has had the same increasing trend as short-sea shipping observed since 2006 with a slight decrease in 2010.

In this sector, there are only few shipping companies, which are niche market players and primarily chartered out to third parties.

To foster development of the sector, intensive work is being carried out (incl. official visits of the State President and Prime Minister) to attract large container ships from Asia and the Far East to use Latvian ports as a distribution centre to link Asia/Far East with Western Europe. Recently an agreement between the Riga port and the Shanghai port (China) was concluded regarding container freight transport. This will contribute to socio-economic sustainability and increased demands for higher standards with regard to the environmental sustainability for the maritime transport sector.

Passenger ferry services

The number of sea passengers has constantly increased over the last decade and continues to do so. Thus, this sector is playing an increasingly important role in the national economy. Also the development programme of Riga Freeport (2009-2018), one of the leading ports for passenger traffic, emphasises the great potential of the port with regard to passenger traffic development. It has good potential in socio-economic sustainability terms and provides important spill-over effects through linkages with different economic sectors.

The Tallinnk Group AS is the largest passenger (and cargo) shipping company in the Baltic Sea region, which provides passenger services on the route between Riga and Stockholm, while Stena Line and Finnline operate from the Ventspils port and Stena Line from the Liepāja port.

Fish for human consumption

The size of the Latvian Baltic Sea fishing fleet followed a decreasing trend between 2008 and 2012. The number of vessels declined by 16% (or 136 vessels), while the total GT and kW of the fleet declined by 30% and 27% respectively during the same period. Since 2007 the catches in the Baltic Sea and Gulf of Riga have decreased considerably due to the decrease in the total quotas of sprat and herring. On the other hand, sprat and herring prices have increased, as has the total income of the sector.

However, due to the number of engaged producers, acquired production experience, highly qualified specialists and territorial expansion, the MEA has development potential. As one of few national economy sectors with considerably positive trade balance the MEA (both fishing and fish processing) will remain an important economic sector, providing employment possibilities in coastal areas and contributing to the overall development of the coastal regions, as well as to the country's gross domestic product. This shows that the sector contributes to socio-economic sustainability and is very closely linked with environmental sustainability. Fish for human consumption activities are closely associated with management, protection and sustainable use of available fish resources and contribute to the sustainable development of coastal regions and conservation and protection of biological diversity.

The main players in the fishery are the fishing companies Bradava, Grifs, Verģi, Līcis-93, 5B and Irbe. Many organisations have been established by fishermen, namely the Latvian Fisheries Association, the Fishermen Association of Kurzeme region, the Fisheries Society of Nordkurzeme and the National Fisheries Producers Organisation. Latvian fishermen and organisations are very active in the implementation of European Fisheries Fund projects (vessel scrapping, building of landing terminals, storage, sorting, cooling and freezing facilities).

The main players in the fish processing sector are the fish processing companies Gamma A, Brīvais vilnis, Unda, Kolumbija Ltd, Līcis-93 and Kaija. Two associations have been established: Latvian Fish industry Union and Society "Rīgas Šprotes" to protect Latvian fish producers' interests in Latvia and EU.

Coastal tourism

The coastal tourism sector has seen clear growth over the past decade and is considered to be one of the best possibilities for national economic development and a priority for the service industry as the sector contributes significantly to the country's gross domestic product. Riga in particular is becoming an important tourist attraction in the Baltic Sea region. There has been an increase in the number of hotels

and other tourism infrastructure. On the coast of the Baltic Sea and the Riga Gulf the number of tourist campsites, holiday dwellings and other tourist accommodation establishments has increased constantly, even during the crisis period.

According to the priorities set in the Tourism Marketing Strategy for 2010-2015² there are identified priority products regarding Latvian tourism, among them the development of nature tourism in the coastal regions (walking tours, boat trips, visiting historic fishermen villages, etc.). The Sustainable Development Strategy of Latvia until 2030 also underlines the need to improve tourism infrastructure on the seacoast, as well as preserve the special natural and cultural values and diverse landscape thus contributing to environmental sustainability aspects.

4.3 Regulatory environment of the maritime economic activity

Shipping and port services

Due to the international nature of the shipping industry, the International Maritime Organisation (IMO) regulates shipping with measures applied to all type of ships. Latvia has ratified over 50 United Nations and IMO conventions.

The EU implements a more stringent policy on marine environmental protection introducing specific requirements on the safety of ships and shipping, emissions from maritime transport and operation of ports (e.g. sulphur emission regulation).

At the national level, the shipping and port services sector is governed by the 1994 Law on Ports (and subsequent amendments) (in Latvian: <http://likumi.lv/doc.php?id=57435>), the Maritime Code (2003) (in Latvian: <http://likumi.lv/doc.php?id=76358>), Maritime administration and marine safety law (in Latvian: <http://likumi.lv/doc.php?id=68491>), and complementary laws such as the Freeport of Riga Law (2000), the Freeport of Ventspils Law (1997), etc. Port authorities have been established for each port by the relevant city council to manage public infrastructure space, while the private sector provides port operations and services and finances superstructure. Port authorities are bodies governed both by the public and private laws, depending upon responsibilities, and by the by-Laws and regulations of the respective port.. Each Port Authority is supervised by eight board members (four representatives from the municipality and four representatives from the government).

Tourism

The tourism sector is governed by the Tourism Law (amended in July, 2012) (in Latvian: <http://likumi.lv/doc.php?id=50026>). The amendments, among other things, specify the liability of tourism agents for offer and sale of complex services.

In order to ensure efficient enforcement of the EU Council Directive on package travel, package holidays and package tours, the Ministry of Economy has developed the Database of Tourism Agents and Tourism operators.

Planning regions and local municipalities are entitled to plan tourism activities in their development planning documents.

Fisheries

The MEA Fish for human consumption is governed by the Fisheries Law (1995) (in Latvian: <http://likumi.lv/doc.php?id=34871>), which regulates the catch, utilisation, research, conservation, enhancement and monitoring of fish resources in inland waters, territorial marine waters and economic zone waters of the Republic of Latvia. It sets the basis for fisheries legislation and institutions responsible for fisheries management and control.

² (<http://www.tava.gov.lv/sites/tava.gov.lv/files/dokumenti/strategiskie-dokumenti/Latvian-tourism-marketing-strategy-2010-2015.pdf> in English)

Different regulations of the Council of Ministers determine requirements in several areas, such as commercial fishing, lease of fishing rights, etc.

The activities within this MEA are closely associated with management and protection of living resources of Latvian waters, including the conservation and protection of biological diversity. Fishing activities and quotas in the Baltic Sea, the Gulf of Riga and the high seas are regulated by EU regulations. Regulations on sustainability and environmental protection are likely to become more stringent (for example, discard ban, and fishing restrictions aimed at renewal of fish stocks).

5. Growth drivers and barriers to growth for the 6 most promising marine and maritime economic activities

Table 8 - Strengths and weaknesses analysis of most promising maritime economic activities

Short-sea shipping (incl. Ro-Ro)

(Benchmark instance: The Netherlands)

	Drivers for Growth		Barriers for Growth	
	from SWOT analysis	from Benchmark analysis	from SWOT analysis	from Benchmark analysis
Maritime research		Scientific research traditions	Not sufficient and stable state financing for R&D, especially in the post-crisis period. Latvia's investments in R&D as a percentage of GDP are one of the lowest in EU (0,7% in 2011)	Reduced funding due to the economic crisis
Development and innovation	Geographical location of Latvia in the centre of the Baltics allows forming Pan-Baltic logistics centre. Increase in value added for cargo.	Innovation is promoted through a multitude of means and supported by the EU Structural funds	Small local market, which cannot maintain demand and creates dependence on foreign market fluctuations. Insufficient capacity to meet new environmental requirements – electrification of terminals, possibility to bunker ships with gas	Strong competition
Access to finance	Establishment of a single national development finance institution comprising all the financial assistance instruments offered by the state			Limited access to credits/loans
Smart infrastructure	Envisaged development of the TENT-T network infrastructure (incl. ports)	Developed access transport (road and rail) infrastructure and logistics system. Modern operating environment. Ice-free ports	Inadequate railway sidings	High infrastructure maintenance costs
Maritime clusters	Envisaged cooperation within "Baltic Infrastructure of Research, Technology and Innovation (BIRTI)" initiative	Shipping companies and ports are partner organisations of the Latvian Supply Chain Cluster	Weak cooperation and unwillingness to cooperate. Strong competition among Latvian three major ports. Not enough critical mass.	
Education, needs in training and skills	Qualified workforce with considerable experience and skills	Good maritime professional training at all levels	Aging of specialists	Problem in attracting sufficient number of applicants
Maritime spatial planning		The European Integrated Maritime Policy concept has been incorporated in the national legislation and policy planning documents	Conflicts of economic interests	
Integrated local development		Partnership Agreement for the 2014 –2020 EU Funds Programming Period is under development in close consultation with		Reduced public funding

		stakeholders and the general public		
Public engagement		Public is involved at all levels	Private sector cooperation with scientific research institutes, scientists and universities is weak	

Deep-sea shipping

(Benchmark instance: Greece)

	Drivers for Growth		Barriers for Growth	
	from SWOT analysis	from Benchmark analysis	from SWOT analysis	from Benchmark analysis
Maritime research		The Latvian Maritime Academy with its established Research and Development Centre is the major institution in maritime science		Reduced funding due to the economic crisis
Development and innovation	To take advantage of rapidly growing markets of Asia and the Far East. Increase in value added for cargo.	Strong links with international classification societies and ship repair yards	Decline of global economy	
Access to finance		Good relations with banks. Stock exchange markets (NASDAQ)		Limited access to credits loans in the post-crisis period
Smart infrastructure	Envisaged development of the TEN-T network infrastructure (incl. ports). Tax incentives in free ports of Rīga and Ventspils, and Liepāja as part of the Special Economic Zone	Geographic location of ports linking East with West market. Developed transport infrastructure and logistics system. Ice-free ports.		Insufficiently developed infrastructure of major ports, (except Ventspils port which has the deepest quays) fairway depth is insufficient). Railway/road access is of insufficient capacity. Unpredictable political relationships with Russia, main cargo transit country
Maritime clusters	ERDF support is available for establishment of clusters	Shipping companies and ports are partner organisations of the Latvian Supply Chain Cluster	Weak cooperation and unwillingness to cooperate. Strong competition among Latvian three major ports. Not enough critical mass.	Weak linkage with related and supporting industries. Absence of local demand of services
Education, needs in training and skills	Latvian seafarers have strong skills and experience	Well respected and publicly funded Maritime Academy and colleges and public Maritime museums	Aging of specialists. Labour migration	Insufficiently financed state educational establishments. Public Maritime Museums underfunded
Maritime spatial planning	The European Integrated Maritime Policy concept has been incorporated in the national legislation and policy planning documents			
Integrated local development	To move port areas to more favourable locations closer to the sea and away from inhabited areas	Property development;. Hotel/tourism expansion		The economic downturn and future uncertainty decreased interest of investors
Public engagement		Favourable tax system		Absence of state intervention

Passenger ferry services

(Benchmark instance: Greece)

	Drivers for Growth		Barriers for Growth	
	from SWOT analysis	from Benchmark analysis	from SWOT analysis	from Benchmark analysis
Maritime research		The Latvian Maritime Academy with its established Research and Development Centre is the major institution in maritime science		Reduced funding due to the economic crisis
Development and innovation		Innovation is expected to be promoted through the guidelines on Research, Technology Development	Weak innovation performance	Limited funding

		and Innovation (2014-2020)		
Access to finance		Availability of public financial support to develop port infrastructure (CF, ERDF, EFF)		Difficult access to financing
Smart infrastructure		Good general infrastructure (ports infrastructure, ice-free ports, etc.)		Insufficient port capacity due to the berth depth
Maritime clusters	Ports are partner organisations in the Latvian Supply Chain Cluster		Not enough critical mass	No organised maritime clusters linked to passenger ferry services
Education, needs in training and skills		Good standard of marine education. Widespread presence of marine academies and professional schools/colleges	Labour migration	
Maritime spatial planning		The European Integrated Maritime Policy concept has been incorporated into national legislation and policy planning documents	Conflicts of economic interests	
Integrated local development		Partnership Agreement for the 2014 –2020 EU Funds Programming Period is under preparation in close consultation with stakeholders and the general public		
Public engagement		Ministry of Transport		Red tape

Fish for human consumption

(Benchmark instance: The Shetland Islands)

	Drivers for Growth		Barriers for Growth	
	from SWOT analysis	from Benchmark analysis	from SWOT analysis	from Benchmark analysis
Maritime research	Strong competence at the fish processing company level for development of products		No national level "Centre of excellence"	Limited capacity of private sector for implementation of R&D projects in the fisheries sector
Development and innovation	Geographic proximity – nearby strong sales and raw material markets. Competitive advantages in relation to CIS markets. Availability of fish raw materials caught by the national fleet. Increasing global demand in fish products.	Innovation (both technological and product) seen by the fish processing companies as a key to remain competitive in the market	In the fish processing sector, small share of innovative enterprises, small local market. Increase in energy and fuel prices. Growing global price competition	Generally low level of technological innovation in both fishing and fish processing sectors. Old and obsolete fishing fleet.
Access to finance	Available public financial support (business start-up capital, credit guarantees); available EFF support for fishing and fish processing sectors.		Limited access to bank credits/loans because bank crediting policy in the post-crisis period is more oriented towards enterprises with stable financial performance and position in the market. Insufficient own resources	
Smart infrastructure		Development of IT technologies	Business support infrastructure not sufficiently developed (access roads, engineering communications, etc. to fishing ports and fish processing facilities).	
Maritime clusters	Good coverage of different sectoral associations in fishing and fish processing sectors.		No maritime clusters linked to this MEA	
Education, needs in training and	Qualified workforce on board fishing vessels and in the fish processing	Good professional education at all levels (seafarer's, fish products		Budget cuts may affect quality of education

skills	sector	technology)		
Maritime spatial planning	The European Integrated Maritime Policy concept has been incorporated into national legislation and policy planning documents		Conflicts of catching sector with other economic activities	
Integrated local development		Fisheries Development Strategy (2007-2013), Aquaculture Development Strategy (2014-2020) currently under preparation		
Public engagement		Fisheries Consultative Council (which is composed of sectoral ministries, local municipalities, associations) and different sectoral associations are strong advocates.	Complexity of legislation	

Coastal tourism

(Benchmark instance: Sardinia)

	Drivers for Growth		Barriers for Growth	
	from SWOT analysis	from Benchmark analysis	from SWOT analysis	from Benchmark analysis
Maritime research				No maritime research linked to coastal tourism
Development and innovation	Natural and rich cultural heritage of the coastal zone. Development of high added value tourism products (health care, sport)	Several environmental protection policies, planning documents. Tourism Marketing Strategy of Latvia (2010-2015)	Highly qualified workforce emigrating from regions. Noticeable seasonality of tourism activities. Insufficient supply of innovative tourism products	
Access to finance		Available public financial support (seed and business start-up capital, micro-financing, credit guarantees, venture capital)	Difficult access to credits/loans	
Smart infrastructure		Effective ports and airport system	Public, tourism related, infrastructure poorly developed	Insufficient rail and roads public transport
Maritime clusters		The Sustainable Tourism Cluster has been established (however, no coastal tourism related activities)		No maritime clusters linked to coastal tourism
Education, needs in training and skills		Good standard of education with university "Turība" having faculty of international tourism and Vidzemes University providing education in management of tourism.	Highly qualified workforce emigrating from regions.	
Maritime spatial planning		The European Integrated Maritime Policy concept has been incorporated into national legislation and policy planning documents	Conflicts with other economic activities	
Integrated local development		Planning Regions and local municipalities plan tourism activities in their development planning documents	Territorial disparities in terms of business activity and employment	High environmental pressure in some areas (Natura 2000)
Public engagement	Municipalities play a key role in planning and public engagement.	Public support for marketing and advertising activities. Awareness from all levels (government/local municipalities/public)		Red tape

6. List of existing clusters

Overall, currently there are about 15 clusters in Latvia. The majority of clusters were established thanks to support from the European Regional Development Fund (ERDF). However, due to the negative effect of the financial and economic crisis, this programme was cancelled in 2008. The support has been available again since January 2012. The total financing available for the programme until 2015 amounts to LVL 3,4 million Lats (EUR 2,39 million) and is expected to attract private financing of over LVL 0,5 million Lats (EUR 0,35 million). Currently ERDF funds are being used to develop 10 clusters operating in 20 cities.

Latvian maritime clusters are not defined in any official policy document. Creation of clusters is not taking place in the maritime sector, but different maritime sectors are involved in clusters of other sectors. This is due to a lack of some key elements like critical mass, e.g. in the shipping, shipbuilding and maritime equipment sectors, and because cooperation among sectors is generally weak. The port sector and related sectors are almost independent from the shipping sector and other maritime sectors. Shipbuilding is also not linked to the shipping sector as shipbuilding focuses on ship repair activities and there is weak demand on the national market.

The **Latvian Supply Chain Cluster** is a branch of the Latvian Logistics Association and it consists of leading manufacturers, logistics and R&D institutions. Ports and shipping companies, marine industry merchants are among the partner organisations of this cluster. Its long-term aim is to position itself as a maritime infrastructure related supply chain cluster.

The **Latvian IT Cluster** is a cooperation platform for development of innovative IT solutions and products in Latvia. It was established in 2007. The cluster member companies specialise in software development, IT consultations, hardware architecture, networking and business solutions, etc.

Collaborating partners of the **Sustainable Tourism Cluster** are travel agents and operators, tourism service providers, research and educational institutions. The aim of the cluster is to promote interdisciplinary collaboration and deal with both incoming and outgoing tourism clients.

Cluster type networks of enterprises can be observed around ports, where shipping companies and cargo handling companies have cooperative relationships with the land transportation sector. Vertical cooperation within the value chain is common for Latvian maritime companies. For example, in the maritime logistics sector ports, shipping companies and cargo handling companies have rather close cooperation, and in the maritime industry field shipyards, design and engineering companies have well-functioning networks. In general, there is very weak tendency to cooperate between ports.

There are also networks fostering maritime development activities, such as the Association of Latvian major ports (Rīga, Vetspils and Liepāja) and the Association of small ports. These associations work mostly on the promotion of trade business interests of their sector. Most of the trade in Latvia is East-West oriented, so that most of the associations work to promote trade in the CIS region.

Table 9 - List and analysis of clusters

Cluster	Member State(s)	Maritime economic activities covered	Status	Strengths	Weaknesses
Latvian Supply Chain Cluster	Latvia	Logistics	Growing	Great potential for R&D and joint innovation activities	Competing companies are members of the same cluster
Latvian IT Cluster	Latvia	IT	Growing	Great competence	Not specifically related to maritime activities
Sustainable Tourism Cluster	Latvia	Tourism	Early development	Strong companies	Not specifically related to coastal tourism activities

7. Analysis of maritime strategies at regional and national level, as well as those under preparation and their links with Smart Specialisation Strategies

Maritime Strategies

Latvian strategic documents of the particular policy fields are land-oriented except traditional maritime issues (fishery and transport policies). However, maritime issues are highlighted in the most recent policies.

All five of the most relevant and promising MEAs are addressed by the **Sustainable Development Strategy of Latvia until 2030** and the **National Development Plan (2014-2020; 2007-2013)**, which define the overall vision for country's development and by the **Strategy for Spatial Development of the Coastal Area**, given its scope and relevance for the sustainable development of the selected MEAs in coastal areas.

Furthermore, Deep- and Short-sea shipping and Passenger ferry services are supported by the **Transport Development Guidelines (2007-2013)**, as these activities are part of the national transport system.

Fish for human consumption is supported by the **Environmental Policy Strategy (2009-2015)**, the **Fisheries Strategic Plan (2007-2013)**, the **National Biodiversity Programme** and the **Guidelines on National Industry Policy (2013-2020)**.

Coastal tourism is supported by the **Tourism Marketing Strategy of Latvia (2010-2015)**, by the **Environmental Policy Strategy (2009-2015)**, which poses some constraints and limitations to this activity, and by the **National Biodiversity Programme** due to interconnection of the economic activities with sustainable development aspects.

Table 10 - Policies/interventions towards maritime economic activities, their objectives and links to the most relevant and promising maritime economic activities (see Table 11 for links between most relevant and promising maritime economic activities and blue growth focus areas and objectives)

Level	Strategies	Objectives	Most relevant and promising maritime economic activities
National	Sustainable Development Strategy of Latvia until 2030	Innovative & eco-efficient economy Renewable & safe energy Sustainable management of natural values and services Spatial development perspective Innovative government and public participation	Short-sea shipping (incl. Ro-Ro)
			Deep-sea shipping
			Passenger ferry services
			Fish for human consumption
			Coastal tourism
			Water projects
National	The National Development Plan 2014–2020	Highly productive manufacturing and internationally competitive services with export potential Outstanding business environment Advance research and innovation and higher education Energy efficiency and energy production Promotion of economic activity in the regions Sustainable management of natural and cultural capital	Short-sea shipping (incl. Ro-Ro)
			Deep-sea shipping
			Passenger ferry services
			Fish for human consumption
			Coastal tourism
			Water projects
National	The Strategy for Spatial Development of the Coastal Area	Protection and development of Coastal natural and cultural heritage Economic activity in coastal area Tourism, sport and construction in coastal area Effect of climate change Spatial development planning of the coastal area	Short-sea shipping (incl. Ro-Ro)
			Deep-sea shipping
			Passenger ferry services
			Fish for human consumption
			Coastal tourism
			Water projects
National	Latvian National Development Plan (2007 - 2013)	Commercialisation of the results of applied science, innovation and technology transfer Application of knowledge in boosting the competitiveness of companies Creation of new competitive companies Development of creative industries Sustainable and efficient use of natural and energy resources	Short-sea shipping (incl. Ro-Ro)
			Deep-sea shipping
			Passenger ferry services
			Fish for human consumption
			Coastal tourism
			Water projects

National	Transport Development Guidelines (2007 – 2013)	Ensuring the safety of maritime transport in line with international standards Constantly growing transport and logistics services export, corresponding to the demand of port throughput, competitive port services and participating in the transport chain	Short-sea shipping (incl. Ro-Ro)
			Deep-sea shipping
			Passenger ferry services
			Water projects
National	Environmental Policy Strategy (2009 – 2015)	To ensure water quality in compliance with the legislative requirements, to reduce eutrophication of inland waters and to ensure quality of water services To ensure balance between nature conservation and economic interests	Fish for human consumption
			Coastal tourism
			Water projects
National	The Fisheries Strategic Plan (2007 – 2013)	Adjustment of the fishing fleet capacity with the fish stocks available Modernisation of the fishing fleet by increasing its economic viability without increasing the total fishing capacity Improvement of port infrastructure to ensure the operation of fishing vessels Preservation of water environment, fauna and flora Competitiveness increase of fish processing enterprises Facilitation of market research and extension of production outlet in the market Facilitation of development of areas important to fisheries	Short-sea shipping (incl. Ro-Ro)
			Fish for human consumption
			Water projects
National	Tourism Marketing Strategy of Latvia (2010-2015)	Development of Latvia's tourism products (incl. Nature tourism in coastal areas)	Coastal tourism
National	National Biodiversity Programme	To conserve and restore natural ecosystems and their diversity To maintain and enhance local wildlife species diversity To ensure the conservation of biological resources in a balanced and sustainable way	Fish for human consumption
			Coastal tourism
National	Guidelines on National Industry Policy (2013-2020)	Improvement of competitiveness Satisfaction of specific needs of separate sectors Activation of regional advantages	Shipbuilding
			Fish for human consumption
			Water projects

Table 11 – Most relevant and promising maritime economic activities and ties to blue growth focus areas (top) / Blue growth focus areas and objectives

Most relevant and promising maritime economic activities	Blue growth focus area
Short-sea shipping (incl. Ro-Ro)	Maritime, coastal and cruise tourism
	Blue technology
Deep-sea shipping	Maritime, coastal and cruise tourism
	Blue technology
Passenger ferry services	Maritime, coastal and cruise tourism
	Blue technology
Fish for human consumption	Aquaculture
	Blue technology
	Marine and mineral resources
	Maritime, coastal and cruise tourism
Coastal tourism	Aquaculture
	Maritime, coastal and cruise tourism
	Blue technology
Blue growth objectives	
Blue energy:	Enhance the efficiency of harvesting the European energy resources
	Minimise land-use requirements of the power sector
	Reduce the European greenhouse gas emissions
Aquaculture:	Contribution to an overall improvement in human diet and more quality merchandise
	Diversification of coastal communities activities
	Preservation of fish stock sustainable aquaculture
	Promote aquaculture based on binding strategic guideline, multiannual national strategic plans and the exchange of best practices
Maritime, coastal and cruise tourism:	Healthy environment

	Increase the growth potential of activities Increase the attractiveness of coastal areas
Marine and mineral resources:	Advances in technology Security of supply
Blue technology:	Provider of mass-market products High added value specialised products

Smart Specialisation Strategies

In Latvia, the Smart Specialisation Strategy is planned to be a part of the Research, Technological Development and Innovation Framework 2014-2020. The preparation of both these documents is coordinated by the Ministry of Education and Science. It is expected that these documents will be approved by the Council of Ministers by the end of 2013. The objectives of the Smart Specialisation Strategy derive from the National Development Plan 2020 (such as competitiveness increase, productivity increase, increase of investments in R&D, etc.)³. There are no specifically highlighted blue growth related priorities.

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STUDY ON BLUE GROWTH, MARITIME POLICY AND EU STRATEGY FOR THE BALTIC SEA REGION



CONTRACT NUMBER
MARE/2012/07 - REF. NO 1

COUNTRY FICHE ANNEX

LATVIA

DECEMBER 2013



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1. 7 largest maritime economic activities: indicative size of all activities

Maritime economic activity		GVA (EUR, billion)	Employment (*1000)	Score	Source & reference year
0. Other sectors					
0.1	Shipbuilding (excl. leisure boats) and ship repair	0,03	2,06	1,18	Eurostat (2010)
0.2	Water projects	0,02	0,76	0,48	Eurostat (2010)
1. Maritime transport					
1.1	Deep-sea shipping	0,004	0,12	0,08	Eurostat (2010)
1.2	Short-sea shipping (incl. Ro-Ro)	0,02	0,57	0,38	Eurostat (2010)
1.3	Passenger ferry services	0,04	1,19	0,80	Eurostat (2010)
1.4	Inland waterway transport	0,001	0,1	0,05	Eurostat (2010)
2. Food, nutrition, health and ecosystem services					
2.1	Fish for human consumption	0,07	8,06	4,38	Eurostat (2010) Central Statistical Bureau (2010) JRC Scientific and technical report (2012): The 2012 Annual Economic Report on the EU Fishing Fleet
2.2	Fish for animal feeding	0,002	0,25	0,13	Eurostat (2010) Central Statistical Bureau (2010) JRC Scientific and technical report (2012): The 2012 Annual Economic Report on the EU Fishing Fleet
2.3	Marine aquaculture	0	0	0	Eurostat, Marine aquaculture, fish_ag2a (2010)
2.4	Blue biotechnology	0	0	0	Submariner project (2012)
2.5	Agriculture on saline soils	0	0	0	Corine Land Cover dataset 2006; JRC (2009): Saline and Sodic Soils Map
3. Energy and raw materials					
3.1	Offshore oil and gas	0	0	0	Ministry of Economy
3.2	Offshore wind	0	0	0	European Wind Energy Association (EWEA), (2013)
3.3	Ocean renewable energy	0	0	0	Ministry of Economy
3.4	Carbon capture and storage	0	0	0	Latvian Environment, Geology and Meteorology Centre
3.5	Aggregates mining (sand, gravel, etc.)	0	0	0	European Aggregates Association (2010) Central Statistical Bureau (2008, 2009)
3.6	Marine minerals mining	0	0	0	Central Statistical Bureau (2010)
3.7	Securing fresh water supply (desalination)	0	0	0	Ministry of Environmental Protection and Regional Development
4. Leisure, working and living					
4.1	Coastal tourism	0,05	5,2	2,85	Eurostat (2010)
4.2	Yachting and marinas	0,001	0,12	0,07	Eurostat (2010)
4.3	Cruise tourism	0,002	0,05	0,04	Eurostat (2010)
5. Coastal protection					
5.1 – 5.2	Coastal protection	N/A	N/A	N/A	Ministry of Environmental Protection and Regional Development
5.3	Protection of habitats	0,0009	N/A	N/A	Eurostat (2010) Maritime share is calculated as a per cent of regional coastal protected area over total regional protected area – 12,6%
6. Maritime monitoring and surveillance					
6.1	Traceability and security of goods supply chains	0,009	0,20	0,15	The State Revenue Service annual report (2009, 2012) The State Border Guard annual report (2009, 2011) The Maritime Administration annual report (2009) Maritime share is calculated as a per cent of regional coastal protected area over total regional protected area – 12,6%
6.2	Prevent and protect against illegal movement of people and goods	0,01	0,41	0,26	The State Border Guard's and the National Customs Board GVA and employment data for MEAs 6.1 and 6.2 are calculated as 1/3 for MEA 6.1 and 2/3 for the MEA 6.2. The share of the Maritime Administration turnover and employment for MEA 6.1. (GVA- EUR 0,004 billion, employment – 0,005

					thousand) are taken as 1/10 of the total figures.
6.3	Environmental monitoring	0,02	0,13	0,17	Annual report of the Ministry of Environmental Protection and Regional Development (2009, 2011) The maritime share is calculated as a per cent of regional coastal protected area on total regional protected area – 12,6%

2. 7 fastest growing maritime economic activities: relative growth of all activities

Maritime economic activity		GVA (CAGR, %)	Employment (CAGR, %)	Score	Source & reference year
0. Other sectors					
0.1	Shipbuilding (excl. leisure boats) and ship repair	-22,54%	-15,85%	-19,20	Eurostat (2010)
0.2	Water projects	0	-15,44%	-7,72	Eurostat (2010)
1. Maritime transport					
1.1	Deep-sea shipping	-36,75%	-35,43%	-36,09	Eurostat (2010)
1.2	Short-sea shipping (incl. Ro-Ro)	-29,29%	-34,77%	-32,03	Eurostat (2010)
1.3	Passenger ferry services	6,90%	4,78%	5,84	Eurostat (2010)
1.4	Inland waterway transport	29,10%	41,46%	35,28	Eurostat (2010)
2. Food, nutrition, health and ecosystem services					
2.1	Fish for human consumption	-20,23%	-7,68%	-13,96	Eurostat (2010) Central Statistical Bureau (2010) JRC Scientific and technical report (2012): The 2012 Annual Economic Report on the EU Fishing Fleet
2.2	Fish for animal feeding	0	22,04%	11,02	Eurostat (2010) Central Statistical Bureau (2010) JRC Scientific and technical report (2012): The 2012 Annual Economic Report on the EU Fishing Fleet
2.3	Marine aquaculture	0	0	0	Eurostat, Marine aquaculture, fish_ag2a (2010)
2.4	Blue biotechnology	0	0	0	Submariner project (2012)
2.5	Agriculture on saline soils	0	0	0	Corine Land Cover dataset 2006; JRC (2009): Saline and Sodic Soils Map
3. Energy and raw materials					
3.1	Offshore oil and gas	0	0	0	Ministry of Economy
3.2	Offshore wind	0	0	0	European Wind Energy Association (EWEA), (2013)
3.3	Ocean renewable energy	0	0	0	Ministry of Economy
3.4	Carbon capture and storage	0	0	0	Latvian Environment, Geology and Meteorology Centre
3.5	Aggregates mining (sand, gravel, etc.)	0	0	0	European Aggregates Association (2010) Central Statistical Bureau (2008, 2009)
3.6	Marine minerals mining	0	0	0	Central Statistical Bureau (2010)
3.7	Securing fresh water supply (desalination)	0	0	0	Ministry of Environment
4. Leisure, working and living					
4.1	Coastal tourism	-25,46%	-12,37%	-18,92	Eurostat (2010)
4.2	Yachting and marinas	-29,29%	-24,54%	-26,91	Eurostat (2010)
4.3	Cruise tourism	-19,83%	-23,70%	-21,76	Eurostat (2010)
5. Coastal protection					
5.1 - 5.2	Coastal protection	N/A	N/A	N/A	Ministry of Environmental Protection and Regional Development
5.3	Protection of habitats	0,0009	N/A	N/A	Eurostat (2010) Maritime share is calculated as a per cent of regional coastal protected area over total regional

6. Maritime monitoring and surveillance					
6.1	Traceability and security of goods supply chains	0%	2,60%	1,30	The State Revenue Service annual report (2009, 2012) The State Border Guard annual report (2009, 2011) The Maritime Administration annual report (2009) Maritime share is calculated as a per cent of regional coastal protected area over total regional protected area – 12,6% The State Border Guard's and the National Customs Board GVA and employment data for MEAs 6.1 and 6.2 are calculated as 1/3 for MEA 6.1 and 2/3 for the MEA 6.2. The share of the Maritime Administration turnover and employment for MEA 6.1. (GVA-EUR 0,004 billion, employment – 0,005 thousand) are taken as 1/10 of the total figures.
6.2	Prevent and protect against illegal movement of people and goods	0	1,24%	0,62	
6.3	Environmental monitoring	-29,29%	-26,40%	-27,85	Annual report of the Ministry of Environmental Protection and Regional Development (2009, 2011) The maritime share is calculated as a per cent of regional coastal protected area over total regional protected area – 12,6%

3. 7 most maritime economic activities with most future potential: indicator scores for all activities

INDICATOR	DEFINITION / GUIDING QUESTIONS
Innovativeness	To what extent is the given MEA driven by constant improvements and innovation? Are there significant investments currently or foreseen in the near future in R&D for this MEA in the MS?
Competitiveness	This indicator assesses the position of a given MEA of a MS in the EU/international market. Furthermore, competitiveness is assessed also by comparing the activity of a given country to the same activities of other countries in the same area/sea basin.
Employment	Will the given MEA generate new jobs in the near future? Is the given MEA labour or technology intensive? Does it generate qualified jobs and/or attractive, long-term employment for the given regional labour force?
Policy relevance	Is the given MEA addressed by current or upcoming policy initiatives or regulatory activities in the given MS, especially taking into account EU 2020 ambitions? To what extent is the given MEA influenced by these developments?
Spill-over effects (Environmental)	What impact does the given MEA have on other (including non-maritime) economic activities within the MS?
Sustainability	To what extent is the given MEA in the respective MS influenced by current or upcoming environmental regulation or depends on a good status of the environment? Does the sector have the necessary adaptive capacity?

Maritime Economic Activity		Innovativeness	Competitiveness	Employment	Policy relevance	Spill-over effects	Sustainability	Overall score
0. Other sectors	0.1 Shipbuilding (excl. leisure boats) and ship repair	+	+	-	0	+	+	++
	0.2 Water projects	+	0	-	?	+	+	+
1. Maritime transport	1.1 Short-sea shipping (incl. Ro-Ro)	+	+	0/-	+	+	+	++++
	1.2 Deep-sea shipping	+	+	0/-	+	+	+	++++
	1.3 Passenger ferry services	0	+	+	0	+	+	++
	1.4 Inland waterway transport	0	+	0/+	0	+	+	+
2. Food, nutrition, health and ecosystem services	2.1 Fish for human consumption	+	0	0	+	+	+	++
	2.2 Fish for animal feeding	0	0	0	+	+	0	0
	2.3 Marine aquaculture	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	2.4 Blue Biotechnology	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	2.5 Agriculture on saline soils	N/A	N/A	N/A	N/A	N/A	N/A	N/A

3. Energy and raw materials	3.1 Offshore oil and gas	0	0	0	0	0	0	0
	3.2 Offshore wind	0	0	0	0	0	0	0
	3.3 Ocean renewable energy (wave, tidal, OTEC, thermal, biofuels, etc.)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	3.4 Carbon capture and storage	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	3.5 Aggregates mining (sand, gravel, etc.)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	3.6 Marine minerals mining	N/A	N/A	N/A	N/A	N/A	N/A	N/A
	3.7 Securing fresh water supply (desalination)	N/A	N/A	N/A	N/A	N/A	N/A	N/A
4. Leisure, working and living	4.1 Coastal tourism	0	+	+	+	+	+	++++
	4.2 Yachting and marinas	+	+	0	0	+	+	++
	4.3 Cruise tourism	0	+	+	0	+	+	++
5. Coastal protection	5.1 – 5.2 Coastal protection	0	0	0	0	+	+	0
	5.3 Protection of habitats	0	0	0	+	+	+	0
6. Maritime monitoring and surveillance	6.1 Traceability and security of goods supply chains	+	0	0	+	+	+	++
	6.2 Prevent and protect against illegal movement of people and goods	?	0	0	0	0	?	0
	6.3 Environmental monitoring	+	0	0	+	+	+	++

4. Maritime strategies

Title of the official document	Level	Responsible body	Maritime strategy concerned	Kind of strategy document / Publishing date	URL
Sustainable Development Strategy of Latvia until 2030 (Latvia 2030)	National Long-term	Ministry of Environmental Protection and Regional Development	Planning of transport infrastructure and development of ports; development of spaces of national interest (incl. Coast of the Baltic Sea); development of wind parks in the sea	Adopted by the Saeima on 10.06.2010	http://polsis.mk.gov.lv/view.do?id=3323 (in Latvian)
The National Development Plan 2014–2020 (NDP2020)	National Medium-term	Cross-Sectoral Coordination Centre	Promotion of economic growth; targeting of manufacturing; logistics and transit; secure and competitive energy	Adopted by the Saeima on 20.12.2012	http://likumi.lv/doc.php?id=253919 (in Latvian) http://www.pkc.gov.lv/images/NAP2020%20dokumenti/NDP2020_English_Final.pdf (in English)
The Strategy for Spatial Development of the Coastal Area (2011-2017)	National Medium-term	Ministry of Environmental Protection and Regional Development	Development of the public infrastructure of the coastal area; foresees elaboration of the spatial development plan; Coastal tourism development; coastal protection against erosion; improvement of coastal governance	Adopted by the Council of Ministers on 20.04.2011	http://polsis.mk.gov.lv/view.do?id=3634 (in Latvian)
Latvian National Development Plan (2007 - 2013)	National Medium-term	Ministry of Environmental Protection and Regional Development	Development of industries; Innovation and technology transfer; development of science and research; development of coastal regions	Adopted by the Council of Ministers, 2006	http://www.varam.gov.lv/lat/pol/ppd/ilgtsp_att/?doc=13858 (In English)
Energy Development Guidelines (2007 – 2016)	National Medium-term	Ministry of Economy	Promotion of the use of renewable energy resources	Adopted by the Council of Ministers on 27.06.2006	http://likumi.lv/doc.php?id=141070 (in Latvian) http://polsis.mk.gov.lv/view.do?id=2017 (in Latvian)
Transport Development Guidelines (2007 – 2013)	National Medium-term	Ministry of Transport	Development of ports; road infrastructure	Adopted by the Council of Ministers on 12 July 2006	http://polsis.mk.gov.lv/view.do?id=2003 (in Latvian)
Environmental Policy Strategy (2009 – 2015)	National Medium-term	Ministry of Environmental Protection and Regional Development	Establishment of marine protected areas; management and monitoring; use of renewable energy	Adopted by the Council of Ministers on 31.07.2009	http://www.varam.gov.lv/lat/pol/ppd/?doc=9323 (In Latvian)
The Fisheries Strategic Plan (2007 – 2013)	National Medium-term	Ministry of Agriculture	Sustainable use of fish resources, sustainable development of fisheries areas	Ministry of Agriculture, 2006	http://www.zm.gov.lv/?sadalas=1325 (in Latvian)

Tourism Marketing Strategy of Latvia (2010-2015)	National Medium-term	Latvian Tourism Development Agency	Promotion of the nature tourism activities, incl. also in the coastal areas; conservation of biodiversity; NATURA 2000 areas; Products of erosion	Adopted by the State Agency of Tourism Development on 16.03.2010	http://www.tava.gov.lv/sites/tava.gov.lv/files/dokumenti/strategiskie-dokumenti/Latvian-tourism-marketing-strategy-2010-2015.pdf (in English)
Regional Policy Framework (2004 – 2014)	National Medium-term	Ministry of Environmental Protection and Regional Development	Development of coastal regions; elaboration of spatial development planning documents	Adopted by the Council of Ministers, 2012	http://www.mk.gov.lv/doc/2005/VARAMpamn_111212_regpol.1250.doc (in Latvian)
National Programme on Biological Diversity	National Long-term	Ministry of Environmental Protection and Regional Development	Conservation and protection of biodiversity; cultural environment preservation activities at coastal areas	Adopted by the Council of Minister on 16.05.2000	http://www.varam.gov.lv/eng/dokumenti/politikas_planosanas_dokumenti/?doc=3304 (in English)
National Guidelines for Cultural Policy (2006 – 2015)	National Long-term	Ministry of Culture	Conservation and protection of the underwater cultural heritage	Adopted by the Ministry of Culture, 2006	http://www.google.lv/url?sa=t&rct=j&q=&esrc=s&source=web&cd=1&ved=0CDMQFJAA&url=http%3A%2F%2Fwww.km.gov.lv%2Fen%2Fdoc%2Fministry%2Fvadlinijas_eng.pdf&ei=VjnwUf-iF8Sn4ATQz4CICg&usq=AFQjCNEdYnIDMnP25vVdtfWB21J3hbPn6Q&sig2=Ij7mMjOOOF_3zzeGiOGgEOg&bvm=bv.49641647,d.bGE (in English)
National Security Concept (2011)	National Short-term	Ministry of Defense of the Republic of Latvia	Co-existence of special military interest zones with other economic activities	Adopted by the Saeima on 10.03.2011	http://www.mod.gov.lv/~/media/AM/Par_aizsardzibas_nozari/Plani,%20konceptijas/2011_EN_ND.ashx (in English)
National Reform Programme of Latvia for the Implementation of « Europe 2020» strategy	EU/National Long-term	Ministry of Economy	Promotion of innovations; development of infrastructure of logistics and transit services; ensuring access to finances	Approved by the Council of Ministers on 26.04.2011	http://www.em.gov.lv/em/2nd/?lng=en&cat=30360 (in English)
Guidelines on National Industrial National Policy (2013-2020)	National	Ministry of Economy	Improvement of competitiveness, satisfaction of specific needs of separate sectors, activation of regional advantages	Adopted by the Council of Ministers, 2012	http://www.em.gov.lv/images/modules/items/finl_en%20%281%29.pdf (in English)