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National Ocean Strategy 2013-2020 (NOS)

Strategic monitoring framework in Portugal

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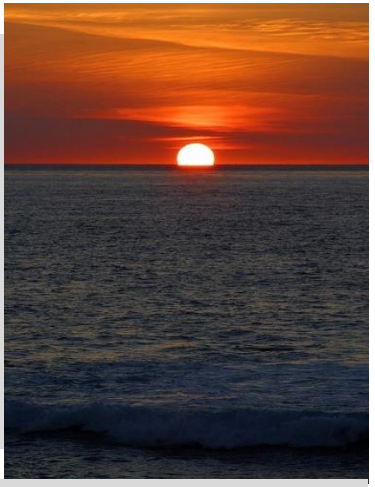
National Ocean Strategy 2014-2020 and its Action Plan Mar-Portugal

The NOS 2013-2020 proposes a sustainable development model that is based on the Ocean, in articulation with the coastal zone, grounded on knowledge, which guarantee that Portugal faces the challenges that promotion, growth and competitiveness of the ocean economy imposes



This model is in parallel with:

- **The *green growth* discussed in Rio + 20 (August 2012) and expressed in the respective Declaration *The Future We Want.* Aligned with the Sustainable Development Goals of the UN Pós-2015 Development Agenda**

- **The Blue Growth model in the context of the Integrated Maritime Policy of the EU, maritime contribution to European Strategy 2020, and the EU Martime Atlantic Strategy/Atlântic Action Plan**

And is beeing articulated with several finantial instruments available (ESIF, Horizon 200, LIFE, COSME, EEA Grants, EIB funds, …)

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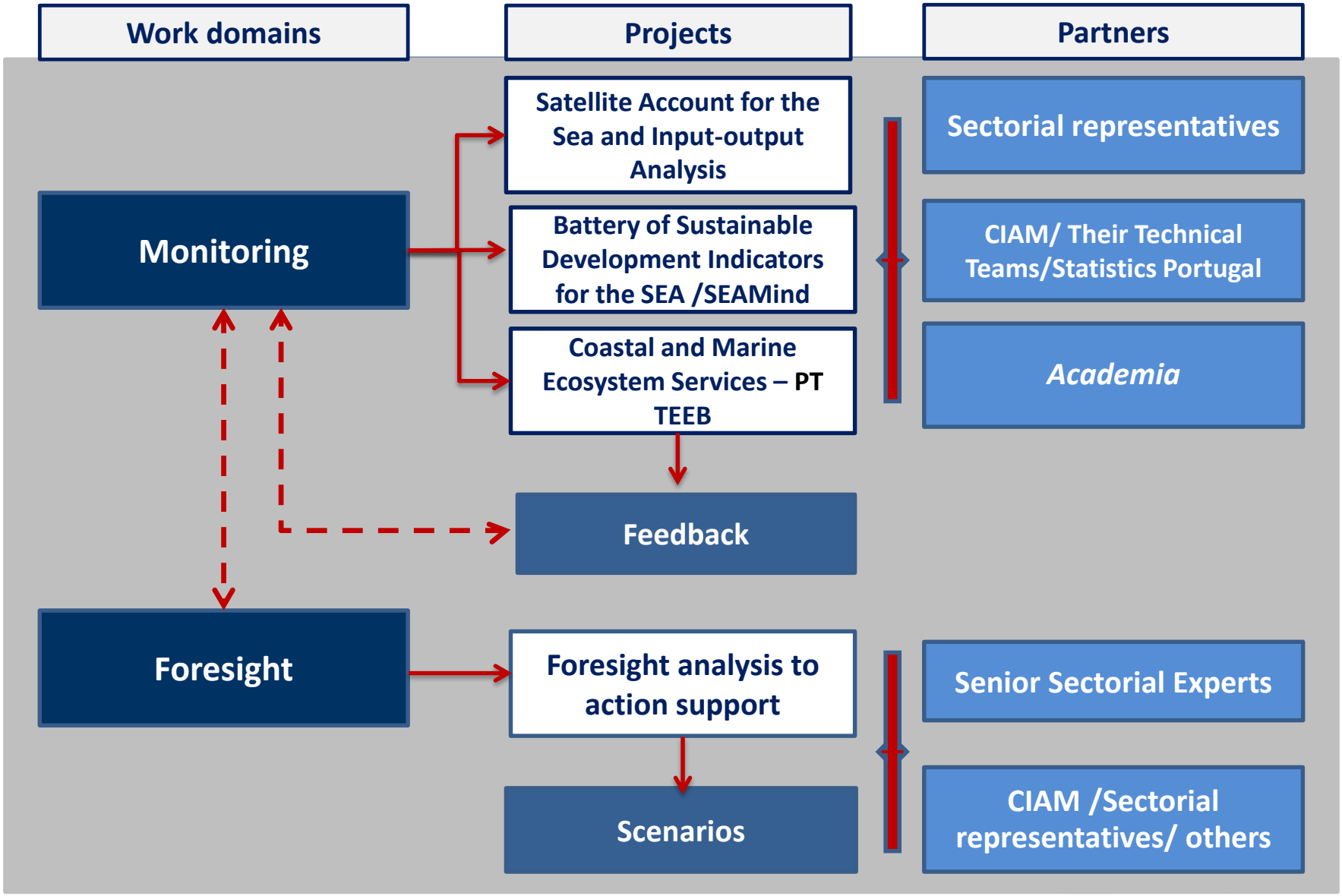
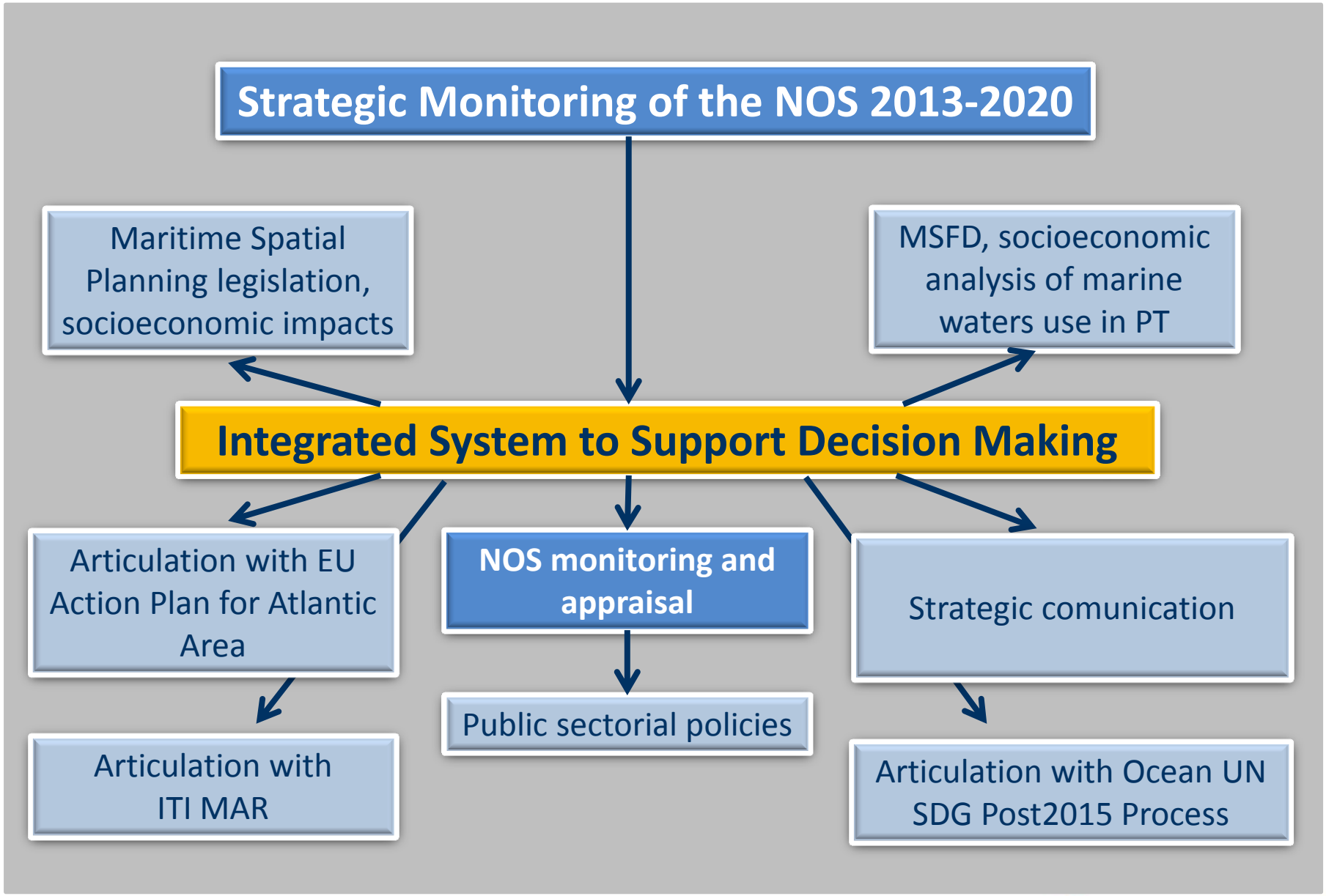

Work domains
Projects
Partners
Monitoring
Foresight
Satellite Account for the Sea and Input-output Analysis
Battery of Sustainable Development Indicators for the SEA /SEAMind
Coastal and Marine Ecosystem Services – PT TEEB
Feedback
Foresight analysis to action support
Scenarios
Sectorial representatives
CIAM/ Their Technical Teams/Statistics Portugal
Academia
Senior Sectorial Experts
CIAM /Sectorial representatives/ others


Strategic Monitoring of the NOS 2013-2020
Maritime Spatial Planning legislation, socioeconomic impacts
MSFD, socioeconomic analysis of marine waters use in PT
Integrated System to Support Decision Making
Articulation with EU Action Plan for Atlantic Area
NOS monitoring and appraisal
Strategic comunication
Public sectorial policies
Articulation with ITI MAR
Articulation with Ocean UN SDG Post2015 Process

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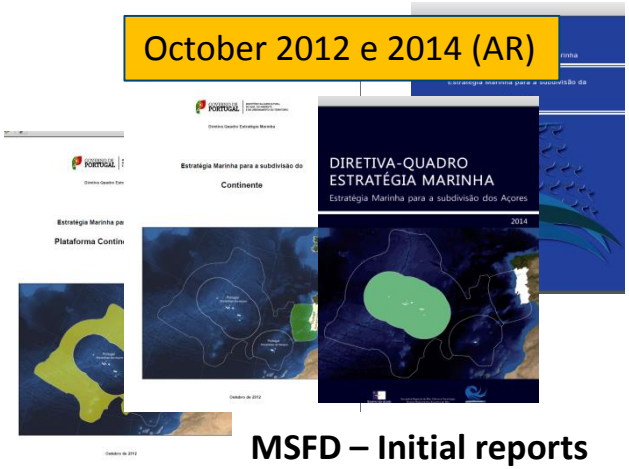
Socio-economic analysis - THE WORK DONE -

October 2012 e 2014 (AR)



MSFD – Initial reports
Chapter – Socioeconomic analysis

2012-2013

OSPAR
Strategic Support for the OSPAR Regional Economic and Social Analysis

December 2012/March 2015

NOS 2013 - 2020
Report “Ocean Economy in Portugal” (Dec 2012)
Annex A of NOS (Nov 2013) and update (March 2015)

October 2011

MSP Exercise
Chapter 3 – Activities, Uses and Functions Caracterization
Chapter 4 – Economy

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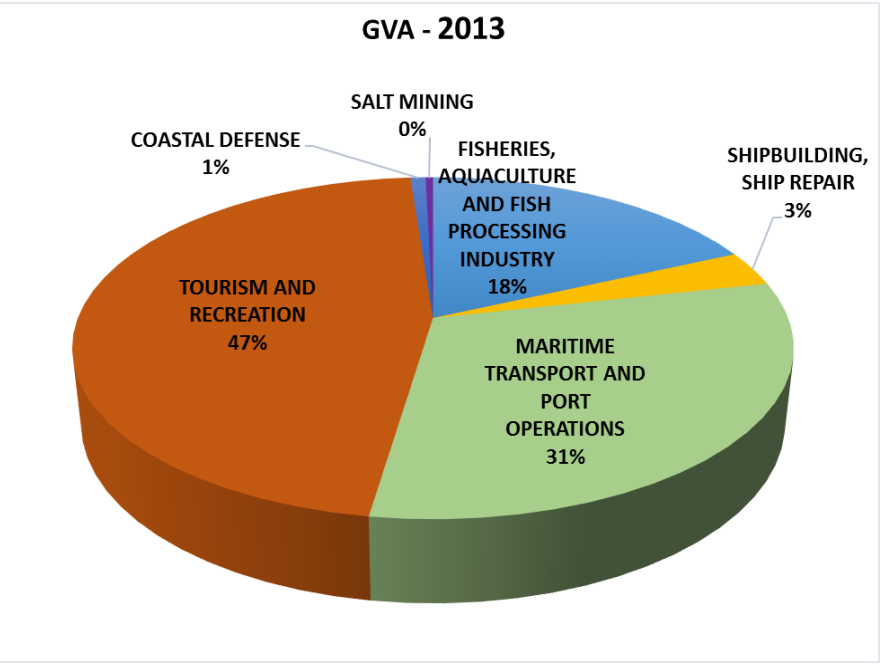
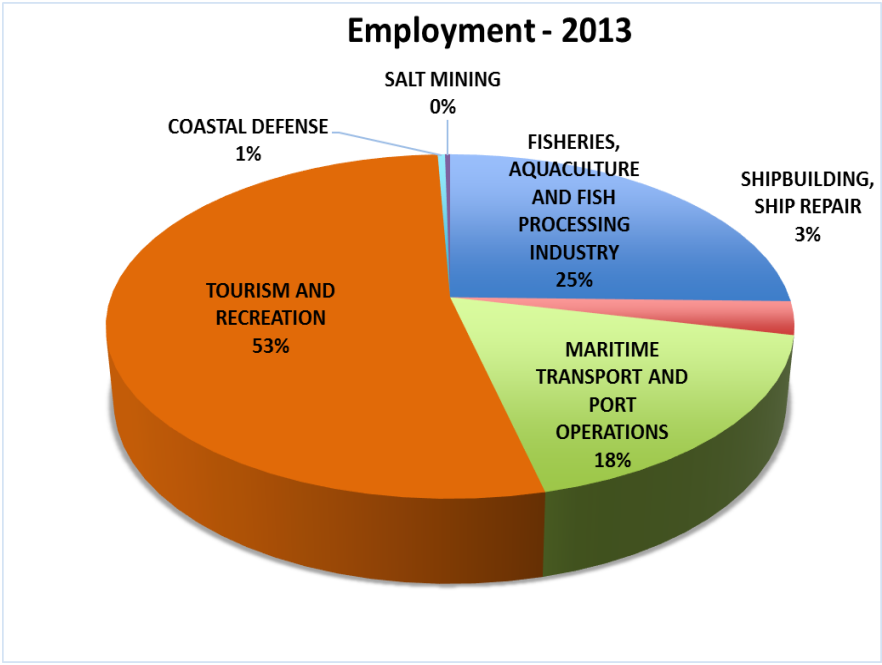
Characterisation of the Blue Economy in Portugal

Structure of GVA and of the Employment, 2013





ource: DGPM 2015 (based on Statistics Portugal, National Accounts)

NOS 2013-2020: Satelitte Account for the Sea (SAS)

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Conta Satélite do MAR

The Project:

- DGPM and Statistics Portugal (INE) signed a Protocol in June 2013, for the elaboration of a Satellite Account for the Sea (SAS).
- A Satellite Account is an extension of the central system of accounts, with additional information, being the National Accounts (NA) the economic overview statistics, par excellence.
- The drawing up of a SAS is considered the most appropriate instrument to estimate the dimension and the importance of the Ocean Economy in the whole economy, as well as to provide information on the production structure of the economic activities related to the sea.

The Purpose:

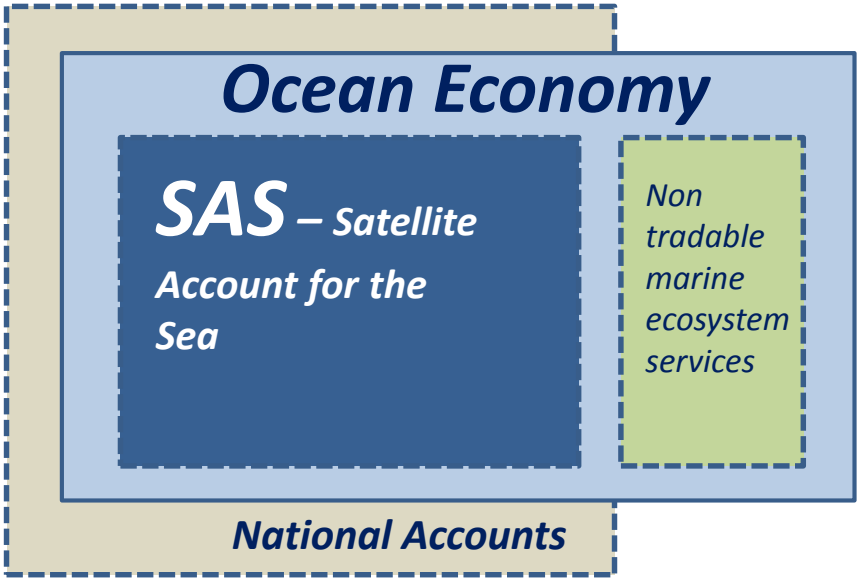
i) to measure the relevance of the Ocean Economy;

ii) to support decision making regarding the coordination of public policies for the ocean;

iii) to monitor the National Ocean Strategy 2013-2020 (NOS) in its economic component, giving support to the Inter-Ministerial Commission for Maritime Affairs (ICMA).

iv) to provide reliable and adequate information for Portugal in the context of the Integrated Maritime Policy (IMP) and other processes where data for the Ocean Economy is decisive.

First draft concept of "Ocean Economy"



"Set of economic activities carried out in the sea and others, dependent upon the sea, including non tradable marine ecosystem services"

NOS 2013-2020: Satelitte Account for the Sea (SAS)

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Expected results:

Country Portugal (Mainland and Islands)

- Output
- Intermediate Consumption
- **Gross Value Added**
- Gross Operating Surplus
- **Employment**
- Compensation of Employees
- Other Subsidies on Production
- Other Taxes on Production
- Gross Fixed Capital Formation
- Imports and Exports of Goods and Services.

Direct contribution of the Sea Economy to the whole Economy (% GVA)

Advantages:

- Coherent approach to compare all sectors
- Consistent with National Accounts and GDP
- Support long-term, macroeconomic and structural analysis
- Produce a supply and use table for the ocean economy

Limitations:

- Time lag - Results with 21 months lag
- Geographic disagreggation - May be NUT II, but not NUT III
- It doesn't include environment dimension

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INDICADORES E MONITORIZAÇÃO ECONÓMICA, SOCIAL E AMBIENTAL

OBJECTIVE

To implement a restricted number of relevant indicators to check the NOS 2013-2020 results, considering a sustainable development perspective.

Connection with NIPIM@R/enhanced CISE

- Information sharing
- Information visualisation in specific context

Partner in the **NIPIM@R Project**
Model for information sharing/visualisation on Sustainable Development Pillars – Governance, Economy, Social and Environment

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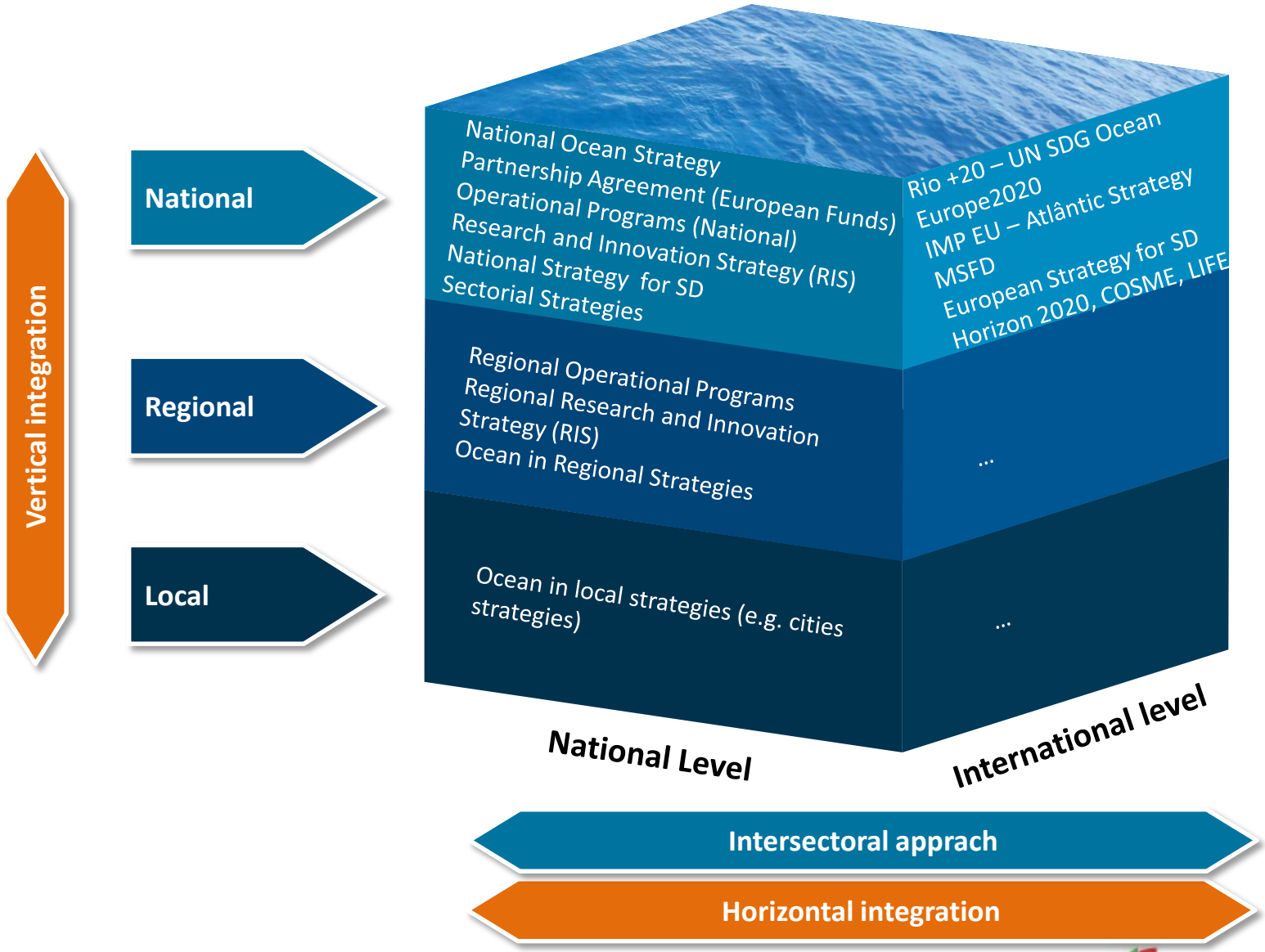
Levels of policy coordination



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Data Desagregation and Geographic Scale Analysis

Marine waters			Terresterial area
NOS 2013-2020			**Ocean Economy Chain value**
MSFD in PT			**Human and economic activities that occur in marine waters and terresterial area**
MSP in PT			**Economic data by:** - **NACE** - **NUT** - **Ports** - **Others**
Extended Continental Platform	**EEZ**	**Territorial waters**	

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Calendar of monitoring reports

	2012	2013	2014	2015	2016	2017	2018	2019	2020
NOS 2013-2020			Annual report (DGPM)	Annual report	Annual report	Annual report	Annual report	Annual report	Annual report
MSFD	Initial Assessment (MS)						2sd cycle Initial Assessment (MS)		
OSPAR Initial Assessment 2017?						IA 2017			
MSP national legislation							Report each 3 years (Government)		
SDG (Post-2015 UN Process)				TBD					
National Compromise for Green Growth - Ocean Pilar					Annual assessment	Annual assessment	Annual assessment	Annual assessment	Annual assessment
Atlantic Action Plan (EU)						Mid-term review (Comission)			

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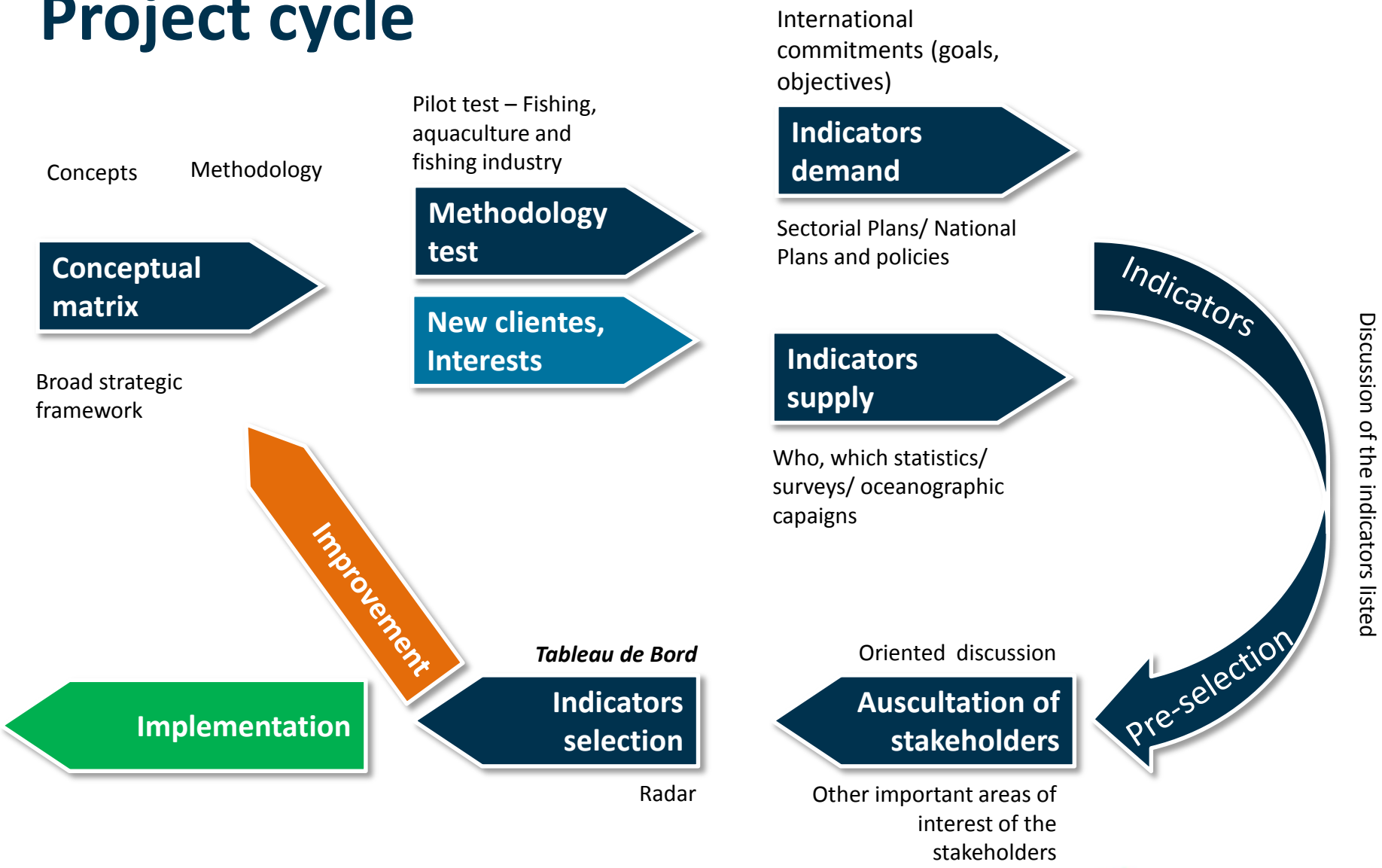
Project cycle



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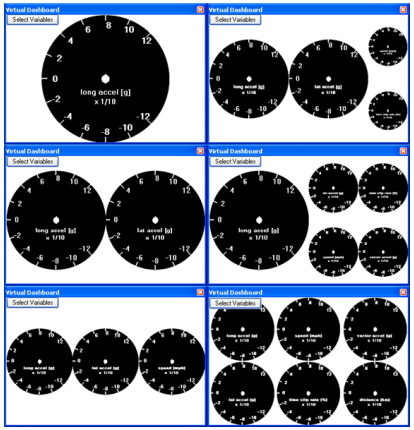
Deliverables

Strategic objectives

Objectives of Programatic Areas

Dash Board

Radar



Control Panel

Periodic reports

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Control Panel

ECONOMY

Fully maritime sectors:

Common indicators

Turnover, GVA, Labour (Structural Business Statistics/SBS)

Sectorial specific indicators

Other maritime activities, including emergente activities:

Sectorial specific indicators

Best examples

Complement of NA analysis:

- **Trends analysis and support to projections**
- **Narrower time lag (n-1)**
- **NUT III and other sub-regional level**

NACE Codes - fully maritime sectors:

Living resources

Fishing

Aquaculture

Processing and preserving of fish, crustaceans and molluscs

Retail sale of fish, crustaceans and molluscs

Ship and boat building

Building of ships, floating structures and pleasure and sporting boats

Repair and maintenance of ships and boats

Transport

Sea and coastal passenger water transport

Sea and coastal freight water tranport

Inland passenger water transport

Inland freight water transport

Renting and leasing of water transport equipment

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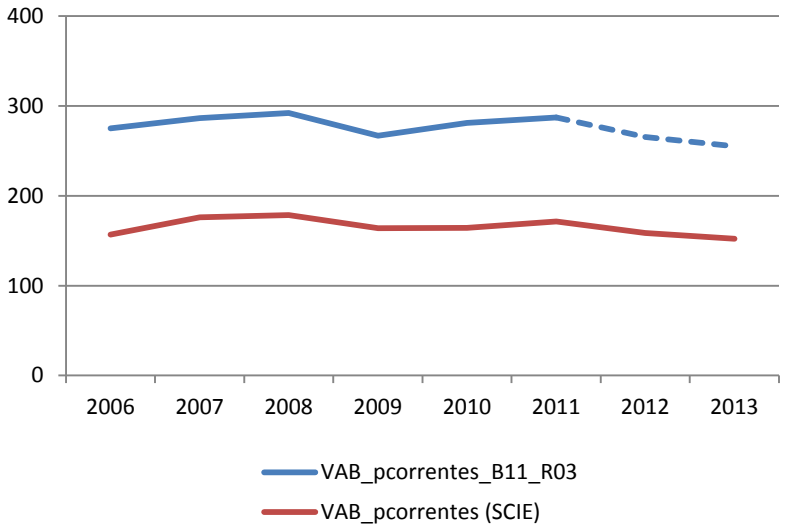
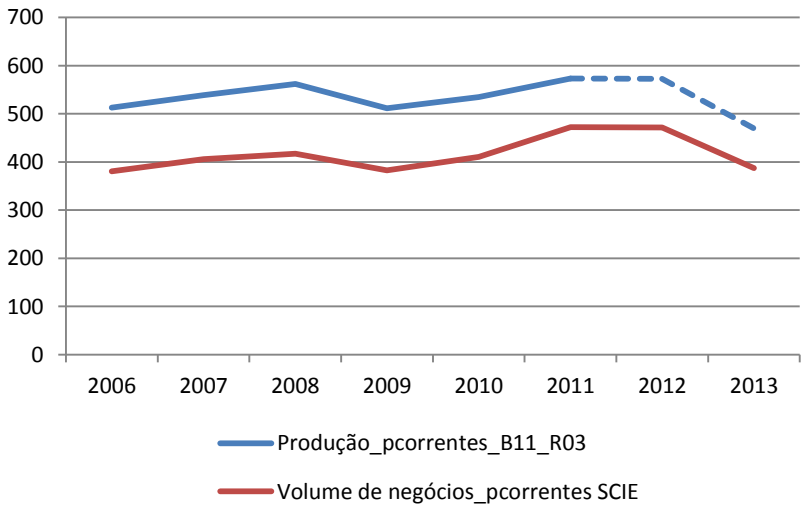
Fishing and aquaculture: Example of tendencies analysis

GVA (NA) (current prices) vs GVA (SBS)



Production (NA) (current prices) vs Turnover (SBS)



The GVA (SBS) could be a *proxy* to make the projections of GVA (NA) in current prices.
The Turnover (SBS) could be a *proxy* to make the projections of Production (NA) in current prices

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Ports and logistics:

Port Administration is a fully maritime activitie but… it is included in NACE Class 52.22 - Service activities incidental to water transportation, that includes non maritime activities

Port Commmunity? Includes also service companies such as pilotage, tows, concessionaires, navigation agents, brokers, shipowners, other suppliers, road and railway transporters and also public administration companies (customs, emigration services, sanitary and veterinarian services).

NACE Codes (all partially) Class 4291, Group 521, Class 5222, Class 5224, Class 5229, Class 7490, Subclasse 77340

Sectorial specific indicators (proxys of economic activities in the ports):
Analyzes of the seaborne traffic of the ports by calculating the volume of the cargo/passengers that is handled over a period of time.

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Deliverables

Strategic objectives

Radar

Dimensions (domains identification and indicators available ongoing)
Geography
Macroeconomics and trade
Employment
Market labour
Innovation
International cooperation
Marine ecosystems and biodiversity
Marine resources/fishing resources
Carbon and energy
Marine waste

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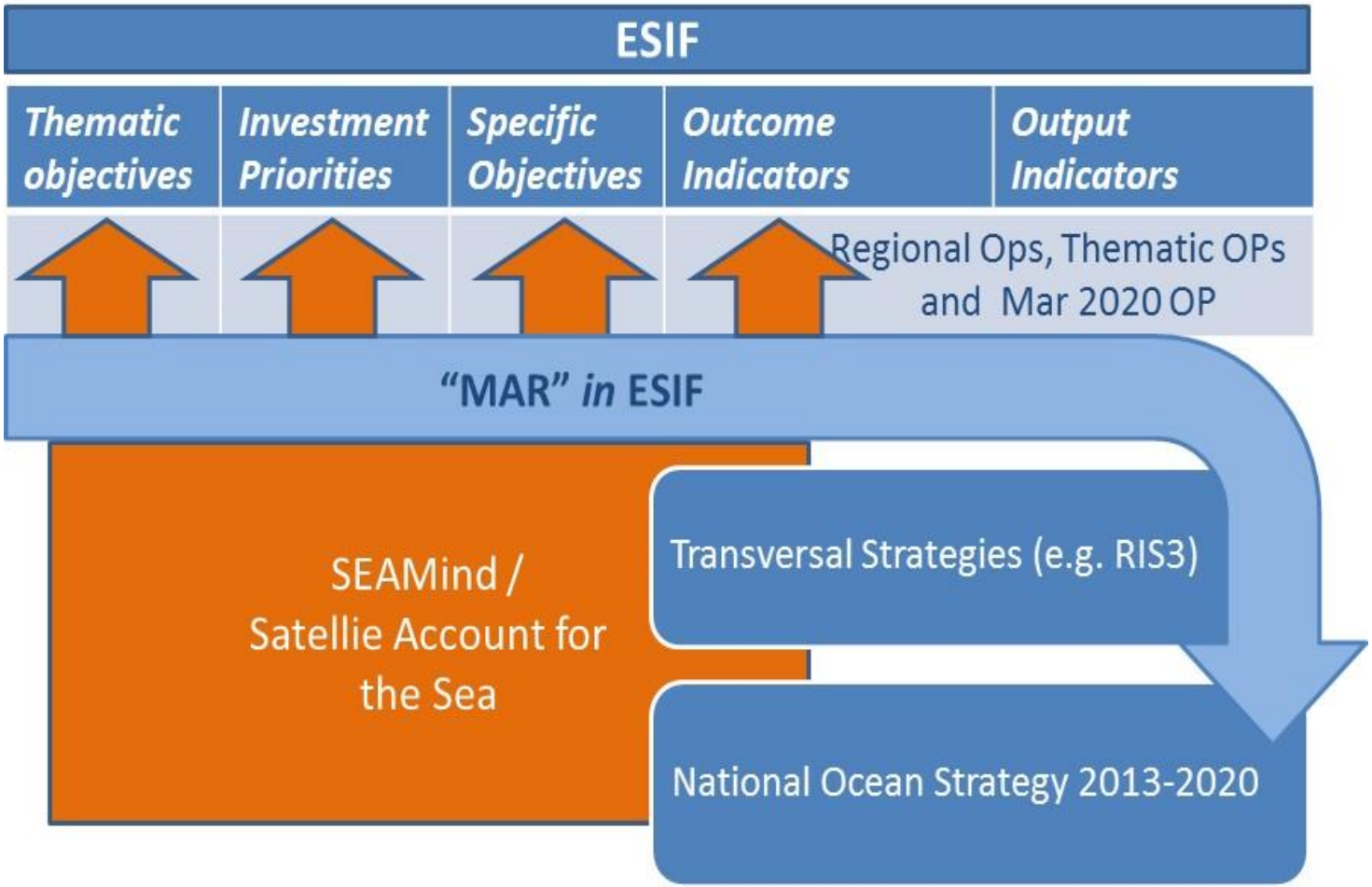
Monitoring information fluxes



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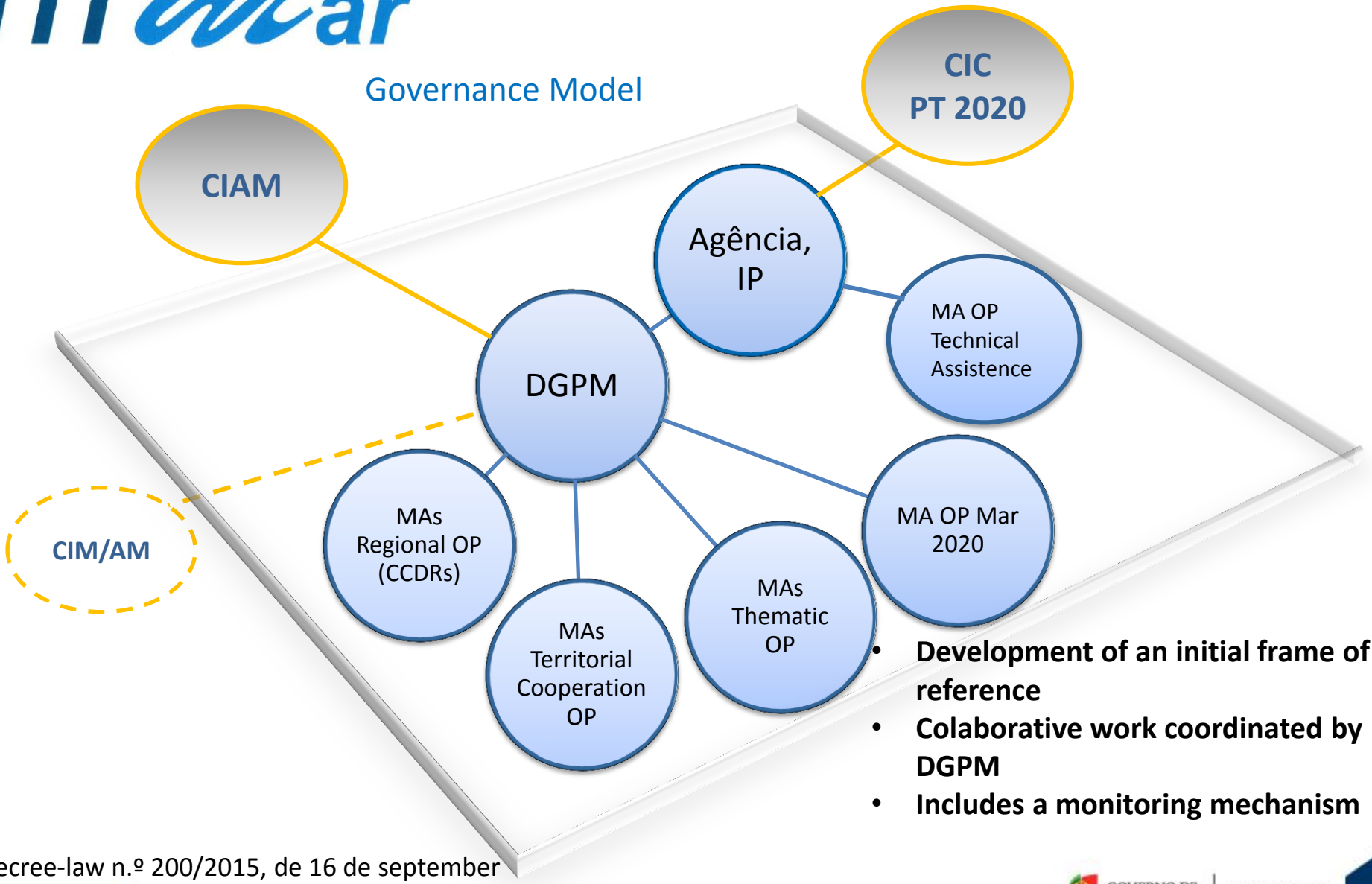
Governance Model



- **Development of an initial frame of reference**
- **Colaborative work coordinated by DGPM**
- **Includes a monitoring mechanism**

Decree-law n.º 200/2015, de 16 de september

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SOME FINAL REMARKS ABOUT MONITORING OF BLUE ECONOMY :

- Articulation between long-term and structural analysis and sort/medium-term and conjuntural analysis
- Ocean Economy analysis grounded on National Accounts (GVA and Employment), complemented with aditional information on sectors
- Ocean Economy definition coherente with future works on coastal and marine ecossystem services valoration
- Sustainable development perspective, not only economic performence indicators
- Articulation with UN SDG Ocean Stand Alone indicators – Post 2015 Development Agenda/Universal implementation
- Coherent vertical and horizontal policy analysis, including in the Atlantic Area

COHERENT, REPRODUCTIVE AND SUSTAINABLE MONITORING FRAMEWORK

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THANK YOU

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