FACILITY FOR BLUE GROWTH IN THE BLACK SEA

Stakeholder Seminar on Blue Economy

"Towards a Common Maritime Agenda for the Black Sea"

19 March 2019 in Istanbul

Concept paper

Workshop 4

Healthy marine environment and fight against plastic pollution

Contents

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Concept paper

Workshop 4

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Chapter 1

Introduction

This Stakeholder Seminar stems from the 2018 Burgas Ministerial Declaration[1], where the participating countries[2] committed to work on the setting up of a Common Maritime Agenda for the Black Sea in 2019. The Burgas Declaration lists the possible cooperation areas to be further developed under the Common Maritime Agenda. The purpose of the seminar is to gather input from the stakeholders in the region in the shaping of the Maritime Agenda.

The seminar is being organised by the Facility for Blue Growth project in cooperation with the European Commission and with the support of the Permanent International Secretariat of the Organisation of the Black Sea Economic Cooperation (BSEC PERMIS).

Experts for the region and beyond will share their vision and experience in developing actions and projects in the Black Sea, with a focus on six blue economy thematic areas. These areas in line with the priorities listed in the Burgas Ministerial Declaration and will be discussed during six parallel workshops. The workshop sessions will be highly interactive and will be flanked by a plenary opening session and a closing discussion. Workshops topics:

- 1) Research and Innovation
- 2) Connectivity
- 3) Tourism
- 4) Sustainability
- 5) Fisheries and Aquaculture
- 6) Blue Skills and Careers

The purpose of this paper is to help guide the discussions during the seminar. The next chapter (2) will provide a brief overview of the blue economy in the Black Sea. The final chapter (3) will present the gap analysis and list of indicative questions to be discussed by the participants during the workshop sessions.

[1] https://ec.europa.eu/maritimeaffairs/.../sites/.../burgas-ministerial-declaration_en.pdf
[2] Bulgaria, Georgia, Republic of Moldova, Romania, Russia, Turkey, Ukraine.

Chapter 2

Background: challenges and opportunities for blue growth in the Black Sea

The blue economy includes all economic activities related to oceans, seas and coasts[3]. It is an essential contributor to the national economic growth and job creation. The competitiveness and sustainability of the blue economy depend on the ability of the stakeholders to embrace and support innovation. Thus, the established activities[4] need to be adapted to the current market demands and the environmental standards. At the same time the emerging sectors, which have significant growth potential, need to be supported.

The Facility for Blue Growth in the Black Sea (Facility) has analysed the state of the blue economy in the Black Sea sea-basin through a desk review of available secondary sources[5]. This analysis[6] has been discussed, expanded upon, and validated through a series of workshops held with stakeholders across the Black Sea coastal countries, as reported on the Facility website[7].

The outcomes of the national workshops[8] confirmed that there is a significant potential for more and more sustainable blue growth and jobs through in the Black Sea. For example, only in Romania and Bulgaria combined the gross added value (GVA) of the blue economy in 2016 was EUR 2 billion. This resulted in about 200,000 jobs in those countries[9]. These figures could well increase in the future if the development of the blue economy is further promoted politically and supported with adequate public and private funding and investment[10].

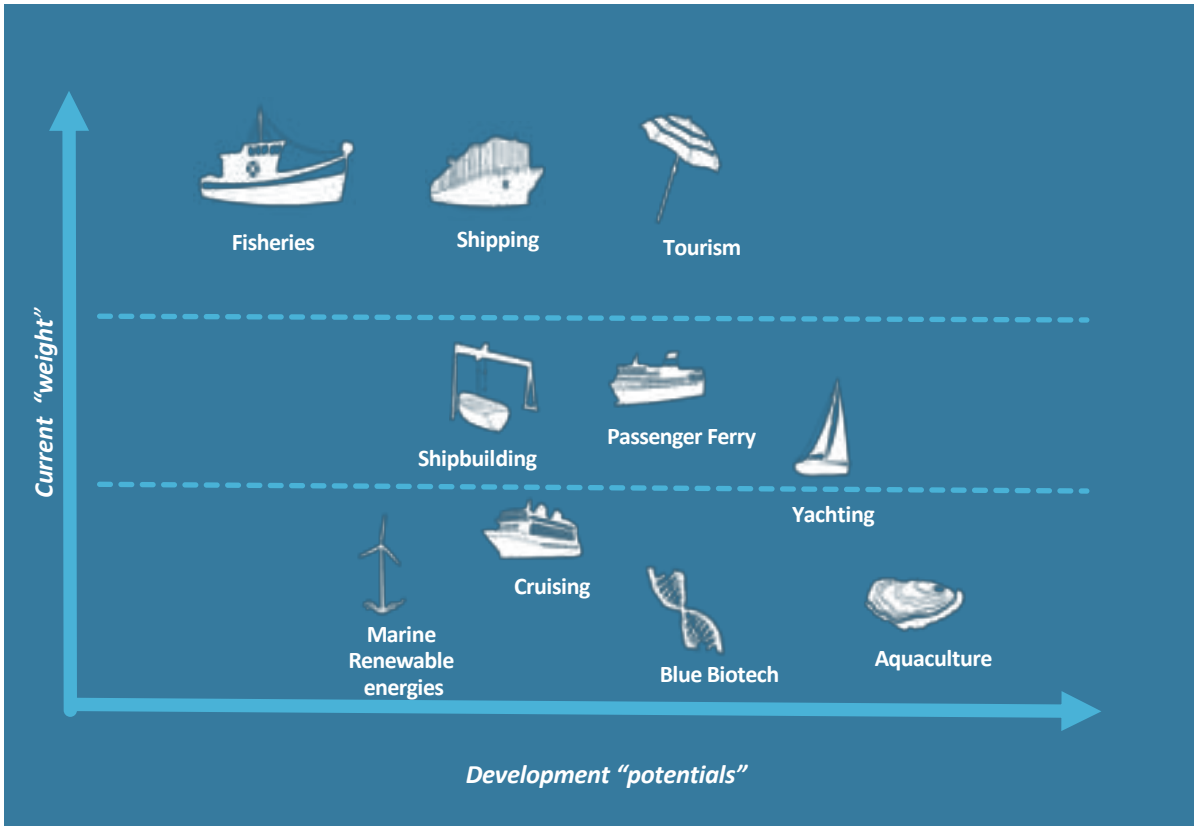
The performance in GVA and jobs creation strongly varies across the various maritime economic activities. Striking differences emerge when comparing activities among countries with respect to the: i) current levels of GVA and job generation (activities such as tourism, fisheries, and shipping are the most relevant today), as well as ii) expected improvements of

[3] A recent definition by the European Commission (The 2018 annual economic report on the EU blue economy) divides the sectors in the blue economy into: *i) marine-based activities,* that are directly undertaken over or under the oceans, seas and coastal areas (e.g. capture fisheries, aquaculture, offshore oil and gas, offshore wind energy, ocean energy, desalination, shipping and marine transport, marine and coastal tourism), and *ii) marine-related activities,* that use or produce material products and services related to the oceans and seas (e.g. seafood processing, marine biotechnology, shipbuilding and repair, port activities, communication, equipment, marine insurance and marine surveillance). The blue economy also includes those parts of the public sector with direct coastal and ocean responsibilities (national defence, coast guard, marine environmental protection, etc.) as well as marine education, research and observation.
[4] for instance, fisheries, maritime transport maritime and coastal tourism
[5] Based on a targeted analysis of Strengths, Weaknesses, Opportunities and Threats (SWOT) of the maritime sectors and marine and coastal capital at national and regional level (national administrations, regional studies in particular the scoping mission in support to the development of Blue Economy and Integrated Maritime Policy in the Black Sea.
[6] Regional assessment of the Blue Economy
[7] https://blackseablueconomy.eu/publication-categories/deliverables
[8] https://blackseablueconomy.eu/our-events
[9] 2018 annual EU Blue economy report
[10] Innovation /education (for emerging sectors) or adaptation/training (for existing sectors)

such performance in the future (tourism may still remain relevant, but other emerging activities such as yachting or aquaculture, which are expected to grow exponentially in the next years).

An overview of such heterogeneity regarding the weight of the sectors (GVA and jobs) and their potential of development is presented on figure 1. This will be the basis for discussion during the workshop aimed at identifying tailored support actions.

Figure 1. Overview of the state of play of the maritime economic activities in the Black Sea



Source: BGBS Facility (based on secondary sources and inputs shared during national workshops held in 2018)

Furthermore, discussions held during the workshops organised by the Facility pointed to a number of challenges. These challenges need to be addressed in order to ensure an economically, socially and environmentally sustainable blue growth in the Black Sea:

- ***Established activities in relatively 'established' and large economic sectors are not fully sustainable. Innovation should be fostered to maximise their positive impact for local communities and ecosystems***. Relatively established maritime economic activities such as

tourism, fisheries, shipbuilding, shipping, ferries require strong adaptation and innovation within existing business models and services offered in accordance with international standards (e.g. Ports services) or to meet customers demand regarding sustainability (e.g. ecotourism) to fulfil their economic potential and become more resilient. This would allow for the maximisation of their potential to boost local economic returns and provide for more stable and high-quality jobs (e.g. in tourism, in shipping).

- ***Emerging activities, currently representing a limited share of the overall GVA and jobs for the blue economy in the region. Those activities require greater support to fulfil their development potential.*** There are specific and valuable niche markets with large potential in the Black Sea - small-scale yachting, cruising and aquaculture - which could be instrumental in the diversification of above-mentioned 'traditional' sectors based on the re-use of the skills between their value chain (fisheries and aquaculture or fisheries and yachting (pescatourism)).
- ***Underdeveloped economic activities have still uncertain potential, due to the lack of availability of essential and applied marine research data. Hence further basic research is required to boost their growth in a sustainable manner.*** Such sectors include renewable marine energy (e.g. offshore wind) and biotechnologies, for which further research would allow for assessment of their actual potential and prospective pre-commercial opportunities.

Building on this analysis, the regional seminar aims to provide the stakeholders from various maritime and marine sectors a forum to discuss the main challenges and opportunities for blue growth in the Black Sea. The participants will be asked to identify strategic joint actions to address the bottlenecks. To do so, structured exchanges will be held through a series of "thematic workshops".

Chapter 3

1. Objectives to be achieved in the Black Sea

What are the objectives foreseen to promote a healthy marine environment and fight marine plastic pollution?

Objective 1: Support the change of habits of citizens and businesses to address pollution

In accordance with Black Sea Convention[11] actions, it is essential to **reduce plastic litter and the broader range of pollution sources** (human discards, oil spills, etc.) which are seriously damaging the marine ecosystem of the Black Sea[12]. **Supporting healthy habits of Black Sea citizens and environmentally sustainable economic activities is a pivotal action** towards the

[11] http://www.blacksea-commission.org/_convention.asp
[12] cf. Black Sea Convention and Europe Environmental Agency

achievement of such an important objective**.** Enhanced sharing of good practices, uptake of innovative (green) technologies, and promotion of capacity building are essential to achieve a sound circular economy in the Black Sea. In line with the European Plastic Strategy[13], measures foreseen may contain specific actions to reduce single-use plastics (SUP) and measures to reduce lost or abandoned fishing gear.

Objective 2: Develop marine protected areas and foster ecosystem planning to recover biological marine resources and mitigate climate change effects

The development of marine protected areas could provide a major **contribution to the protection of natural heritage, while supporting the recovery of biological marine resources and climate change adaptation and mitigation**. Ensuring that planning activities are effectively aimed at addressing ecosystem issues – including through strategic environmental assessments of development plans – is an efficient way of preserving quality. By protecting the most sensitive areas and recovering the good environmental status of the sea and rivers, resilience will be provided to the ecosystem, leading to recovery of their biological resources (reverse effect) but also the demand of coastal citizens (healthy conditions of living) or of ecotourism will be met. Based on an eco-systemic approach[14] at sea basin level, any related actions will contribute to meeting national environmental commitments, as well as any regional and international environmental ones such as the UN Agenda 2030 and its Sustainable Development Goals (SDG).

Objective 3: **Set up common monitoring and observation systems and practices to assess performance of the blue economy contribution towards a litter-free circular economy**

Finally, it is essential to set up common monitoring and observation systems and practices across the Black Sea. This need has already been highlighted by the Strategic Research and Innovation Agenda for the Black Sea (SRIA), with the objective to develop a decision support system, that would provide essential information to policy makers and will further support better ecosystem assessments, forecasts and management, to preserve a valuable and unique ecosystem and to serve as a basis for sustainable blue growth.

[13] https://ec.europa.eu/commission/news/eu-plastics-strategy-2018-nov-20_en

[14] An ecosystem-based approach to the management of human activities enables a sustainable use of marine goods and services with a priority given to achieving or maintaining good environmental status of the marine environment, to continuing its protection and preservation, and to preventing subsequent deterioration.

2. Challenges

What are the specific challenges and gaps to be addressed to achieve such objectives?

Challenge 1: The lack of public awareness of human-related impacts on the marine environment persists in the Black Sea, and prevents changes towards responsible behaviour for businesses and citizens

Blue economy activities in the Black Sea (e.g. maritime transport, port activities, coastal and nautical tourism, exploitation of mineral and biological resources, amongst others) are the origin of a wide spectrum of increasing pressures affecting coastal and marine ecosystems and contributing to their rapid degradation.

In addition, **lack of public awareness persists on the dramatic effects of human-related activities on the ecosystem** (e.g. sewage, plastic litter), including an understanding of the potential ecosystem losses they imply, as well as the indirect damages induced due to maritime and coastal economic activities (e.g. tourism, fisheries) leading to a degradation of essential marine and environmental assets for the region.

Some relevant activities have been promoted more recently to address the root-causes of marine littering and pollution in the Black Sea. Several actions are on-going. Here for instance the MARLITE project[15] aims to improve the availability and interoperability of online public access data and data tools for environmental monitoring and adaptive management policies, supporting innovative non-formal education and capacity building and joint measures on the reduction of marine litter across the region. Despite this, greater efforts should be made in educating the various interest groups and citizens at large across the Black Sea on environmentally respectful and sustainable behaviour.

Challenge 2: Ecosystem based planning initiatives have been growing in the past decade but Marine Protected Areas (MPAs) are still limited

The MARSPLAN[16] cross-border planning project between Romania and Bulgaria (Mangalia-Shabla) demonstrated the added value of the approach which could be extended throughout Black Sea coastal zones. However, **current activities only cover a fraction of the regional ecosystem. Furthermore, as part of the planning, the creation of Marine Protected Areas has so far proven to be limited in the Black Sea**. According to the UNEP-World Conservation Monitoring Centre[17], numerous protected areas have been designated which border the Black Sea coast. These vary in size from tiny scientific reserves (1 ha) up to the Zernov's Phyllophora

[15] https://blacksea-cbc.net/projects/
[16] http://www.marsplan.ro/en/
[17] World Protected Areas Data Base, 2018

Field in the northwest shelf of Ukraine (402,500 ha). Some 1.1 million ha of coastal/marine protected areas have been designated by Black Sea countries, but about half is represented by the Danube Delta Biosphere Reserve (recognized as part of the EU Natura 2000 network in the Black Sea which represents 4.5% of EU waters in the sea-basin[18], a major part of which located in Romania (1,424.1km^2)). In addition to the designation of Natura 2000 or Marine Protected Areas, it is essential to have a network of MPA defined in a consistent and global manner and based on ecosystem protection. Some improvements in connectivity are needed in the Natura 2000 areas network, in particular in Bulgaria which has 16 sites covering 13.8km^2.

Most of the protected areas currently established in the Black Sea are *onshore*, in coastal areas, while there are fewer marine protected areas in the sea. Moreover, a substantial lack of joint initiatives in the sea basin prevents capitalisation on the potential of existing practices, in the Black Sea and internationally. As a consequence, limited marine environmental protection exposes the fragile areas of the Black Sea and its rich ecosystems.

Challenge 3: Data collection and environment monitoring should be set in a regional, consistent and integrative approach

Prior to efficient protection action, **the monitoring of the environment and of the impact of impacts is essential in order to target efforts, to define restrictions on the most harmful activities on the marine environment, but also to fully raise awareness of the local communities**. Actions have already been launched, such as in Bulgaria and Romania, to implement the EU Marine Strategy Framework Directive (MSFD) or EMBLAS project supporting Georgia, Ukraine and the Russian Federation, which looks to improve Black Sea protection, and specifically to enhance the ability of the countries to perform marine environmental monitoring. The newly launched Black Sea CBC project ANEMONE will build upon the monitoring related provisions of the Black Sea Commission, taking into account existing regional (BSIMAP) and national monitoring programmes, the best practices of other Regional Sea Conventions, and Marine Strategy Framework Directive (MSFD) principles aiming to contribute further to harmonization of methodologies and filling of knowledge gaps identified in the region. Data and information gathered through ANEMONE activities will create a compatible and open pool of data, usable by regional partners, the general public and relevant stakeholders, and thus contributing to improvement and upgrading of an existing Black Sea database and to a better understanding of human-induced changes, in order to reduce their impacts.

Despite all this, monitoring the marine environment and human impacts in the Black Sea is still a challenge: there is a **lack of up-to-date data collection and constant region-wide monitoring mechanisms** which are essential to assess the environmental status, for example,

[18] https://www.eea.europa.eu/publications/marine-protected-areas-in-europes

of the rivers flowing into the sea. Even if some actions are implemented at national level, they are not consistent and coordinated enough to support sound policy decisions at the sea-basin level. These actions are also too recent to show any concrete result and further support would be required to effectively scale those actions up to the sea-basin level and monitor their actual results and impacts. Moreover, **a full assessment of the *individual* and *cumulative* environmental impacts of activities such as fisheries, marine renewable energies, aquaculture, and biotechnologies is missing.** More and better efforts to support cross-regional voluntary cooperation and joint work across the Black Sea are essential pre-conditions to safeguard its valuable and fragile ecosystem.

3. Discussions and intervention input

This panel will focus on the concrete actions and projects needed to establish more structured and inclusive approaches to ensure that planning and integrated management at sea and on the coasts (protected areas development) allow the development of a sustainable blue economy, reduce pressures on marine and coastal ecosystems in the region, and help take into account climate change effects. Discussions will also allow assessment of how education, awareness-raising, and research and innovation can support environmental protection by exploiting developments in the fields of observation, monitoring and forecasting for the ecosystems. Concrete ideas will also be shared on how to support a circular economy and the uptake of green innovation in the blue economy, so as to address marine littering and pollution in the Black Sea.

A set of questions is now proposed, as a basis for discussion during the panel:

- How could **prevention of marine pollution** (e.g. marine litter, waste water) be best pursued? Which actions could **promote marine litter harvesting and recycling practices**? Which actions could be put in place to raise awareness and support a healthy behaviour of citizens across the Black Sea?
- What is being or will be done in order to promote **sustainable consumption and production** in the management of ports and fishing vessels? e.g. in managing the waste from fishing vessels (and other vessels)
- How can spatial planning and **ecosystem-based management** ensure a shared maritime space amongst various economic activities in the Black Sea? In which way could a consistent network of **marine protected areas** be defined to support their preservation and foster sustainable value generation (e.g. through eco-tourism)? What are the objectives and which capacities would be used?
- Which are the priorities for **research and innovation** in the monitoring of the marine environment of the Black Sea in order recover good environmental status?

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