



Draft for consultation with NSC members: North Sea Region 2030 Strategy

Approved by the NSC Executive Committee – 08 November 2019 – Brussels

BACKGROUND:

The North Sea Commission's current strategy runs to 2020. In 2017 the Annual Business Meeting asked the Executive Committee to start preparing a post-2020 strategy.

The work started with a survey to politicians and officers active in the work of the North Sea Commission to learn how they perceived the current strategy. A scanning was made of development plans/strategies from all member regions to compare priorities.

The Executive Committee appointed a Strategy task force, led by the NSC secretariat and consisting of the thematic group advisors and additional officers representing regions from all North Sea countries. The task force developed a general framework of priority areas and key topics, which were adopted by the Annual Business Meeting in 2019.

NSC thematic groups have been consulted at several stages in the process. There have also been informal consultations with stakeholders. This version was drafted by the Strategy task force and approved by the Executive Committee in November 2019.

North Sea Region 2030 Strategy

The North Sea Region is one of the most coherent macro-regions in Europe. The region is a stronghold for accountable democratic institutions and is characterised by high environmental standards, fair conditions on the labour market, well-functioning welfare systems, social inclusion, justice, equality, low corruption and trust. The majority languages of all states are closely related, and the region shares a long common history, for the past 75 years one of peaceful and prosperous cooperation.

The North Sea Region and its immediate hinterlands have played a major role in world history, including exploration and innovation, and is the cradle of modern industrial development. The region is home to strong industrial and research clusters which need to be further strengthened in all priority areas. Most North Sea Regions count as innovation leaders or strong innovators in the European Innovation Scoreboard and Regional innovation Scoreboard.

The North Sea Region is a gateway for Europe's world trade, an energy hub for Europe, home for more than 70 million Europeans. A well-managed North Sea Region is vital for ambitions to make Europe stronger in the world and fit for the digital age. It is vital for Europe's efforts to live up to its commitments under the Paris agreement, to become increasingly self-sufficient with renewable energy.

As such, societies and regional authorities across the North Sea Region have a key role in tackling the major challenges:

- To manage **global competition**.
- To prevent and manage the short- and long-term **effects of climate change** on biodiversity, weather conditions, sea levels, sea and land temperatures, health, etc.
- To maintain and increase **social and geographical cohesion and general welfare** in urban as well as rural areas in a situation of urbanisation, migration and ageing populations.
- To **involve citizens** and the civil society based on the principles of multilevel governance.
- To engage in particular the **younger generation** in decision-making and public debate.
- To take advantage of the **fast technological and digital development** which changes our ways to communicate and interact, to travel, and to produce goods and services.
- To contribute towards the **global sustainable development goals** in Agenda 2030.

Regional governments in the North Sea area are different in size, competences, legal and financial status. Some of them are located in Member States of the European Union and some are not, but they will all benefit from a high degree of coordination and collaboration in tackling these common challenges. They share an interest in a stable and sustainable development of the North Sea itself and of the North Sea macro-region in general.

A shared platform

This strategy defines four priority areas for cooperation in the coming years: a productive and sustainable North Sea, a climate-neutral North Sea Region, a connected North Sea Region and a smart North Sea Region.

The CPMR North Sea Commission (NSC) invites regional and local councils, national governments, European institutions, organisations and other stakeholders to collaborate across national, administrative and sectoral borders and join our efforts to unlock the full potential of the North Sea Region.

Purpose of the strategy

The North Sea Region 2030 strategy

- guides the work of the North Sea Commission and will be further specified in biennial activity plans
- is a basis for joint lobby initiatives, for joint input to potential consultations on European and national North Sea related initiatives, for the development of joint projects, for the exchange of information/best practice between members, and for public awareness raising
- defines the NSC's priorities for transnational cooperation between different levels of government and sectors in the North Sea Region
- will be used in NSC's dialogue with the Interreg North Sea Programme, with a view to develop synergies between policy and projects
- is an instrument for the NSC's communication with members, potential members and stakeholders in the North Sea Region
- is complementary and contributory to the work of the Conference of Peripheral Maritime Regions (CPMR)
- focuses on those areas where there is a need for transnational cooperation, and where regional authorities have a role to play
- describes the North Sea Region's contribution towards the UN Sustainable Development Goals

1. A productive and sustainable North Sea

Vision: Sustainable marine and maritime development

The North Sea is one of the busiest and most intensively used seas in the world. Shipping, oil, gas, wind energy, fishing, aquaculture, tourism and recreation are activities that all require coordination and sometimes a weighted priority in order to achieve a sustainable North Sea.

The laws that support the many different uses of the sea are as varied and complex as the activities themselves. International conventions, European regulations and national legislation are often sectoral and promote different economic or environmental objectives. The different regulations and laws may not always be consistent with each other or with those of a neighbouring country. Additional complexity arises from the lack of an overall approach to the sustainable use of marine resources within a single sea basin.

The regions around the North Sea have different competences in planning processes and management for an optimal economic development based on sustainability.

There is also a need to address the effects of climate change in the North Sea waters. The Intergovernmental Panel on Climate Change (IPCC) reports on ocean warming, marine heatwaves, surface acidification due to CO₂ uptake, loss of oxygen, sea level rise, etc, leading to changes in marine and coastal ecosystems and biodiversity. This will challenge and influence the way marine biological resources are harvested and exploited. Fish stock will migrate to colder waters, leading to activities in other geographic areas than today. Cultivation of cold-water species will have to find new locations, in aquaculture more diseases will occur due to warmer waters. Species from warmer waters will migrate into the North Sea. Changes will also create and promote new opportunities.

The catch and production of fish, seafood and algae will be of even more importance for feeding a growing world population in years to come. It is a common obligation for the regions of the North Sea to provide healthy food. Know-how and skills on how to achieve sustainable growth based on harvest and production of marine resources are more needed than ever.

To accomplish a productive and well-managed North Sea different interests need to be balanced to promote sustainability. Marine and maritime research has an important role to play. The NSC can be a driving force to influence authorities, sector players and companies to choose the most sustainable solutions even if in a short term it seems more costly.

1.1. Healthy marine environment

Goal: lower emissions and reduced disposal of waste into the North Sea

Plastic waste from land, rivers, fishing boats and cruise ships, air-transported micro plastic, nuclear emissions, leakages from ship wrecks, dumped munitions, oil spill and sewage are some of the threats facing the marine environment and biodiversity. Tackling marine emissions and litter is therefore an increasingly important priority.

There is a need to strengthen the work that is being done locally, nationally and internationally to reduce emissions and waste. It is vital to prevent litter and plastics from entering the seas and harming marine wildlife and habitats. A reduction in waste can be achieved through a combination of investments and innovations for tackling marine litter and a more developed cross border approach. Recycling is one way that in the short term can contribute to a reduction of waste from plastic products.

1.2. Maritime Spatial Planning (MSP)

Goal: Better coordinated MSP across national borders and administrative levels

How to balance different interest in the management of the North Sea is a political matter. It is of greatest importance that the economies in the North Sea itself and in the regions develop and grow in a sustainable manner to ensure the future generations a healthy and clean North Sea.

The EU Directive on Maritime Spatial Planning defines MSP as a process by which the relevant Member State's authorities analyse and organise human activities in marine areas to achieve ecological, economic and social objectives. MSP is supposed to reduce conflicts, encourage investments, increase cross-border cooperation and to protect and preserve the environment. MSP is a work area under the North Seas energy cooperation, initiated by the coastal states in 2016 and renewed in 2019, and there are cross-border projects to develop a common approach to MSP.

MSP is useful for decision-makers, and an opportunity to make political long-term decisions for various activities and use of the marine environment. MSP is generally designed to deliver largely national objectives. They also vary considerably in their scope and approach. Representation of local and regional interests and stakeholders – through existing and new mechanisms – is essential in this process. New, digital tools will make MSP easier accessible, but its quality will still depend on the quality of the process and interpretation of information.

MSP is also useful for interregional and international coordination and cooperation as well as to promote best practice from various regions. A comprehensive understanding is needed of what MSP can deliver for ecosystems since these systems do not acknowledge artificial human-scale administrative boundaries and transnational sectoral interests.

1.3. Sustainable aquaculture and fisheries

Goal: Sustainable supply-chain in fisheries and aquaculture

Goal: Development of new products

An even more sustainable aquaculture sector has a huge potential to create wealth and jobs. It is thus important to facilitate further development of the sector. Increased dialogue between the aquaculture sector and local and regional authorities is necessary to ensure use of areas and resources in best way possible.

In the North Sea, aquaculture production of salmon and trout are by far the largest. There is a need to better facilitate for the introduction, development and production of 'new' marine species and species on lower trophic levels (mussels, scallops, micro and macro algae, cleaner fish etc.). It is necessary to secure, support and promote knowledge, education and training customised to new forms of products, for instance cosmetics, antibiotics and vitamins.

Due to climate change, over-exploitation and natural migrations, wild fish stocks face new sets of threats. It is important to ensure that spawning and nursery areas for different species of fish are taken care of and protected from harmful activities. These areas are often coastal and attractive also for other activities and actors.

The development of improved and selective fishing gear will improve sustainability and provide a more optimal use of the resources in the fisheries sector.

1.4. Sustainable blue economy

Goal: Higher levels of skills and more career opportunities in sustainable blue economy sectors

Goal: The North Sea Region is a global front-runner in sustainable blue economy innovation

Seas and oceans are drivers for the European economy and have great potential for innovation and growth. The NSC member regions can contribute to identifying new sustainable and profitable marine and maritime business areas to support the development of the sustainable blue economy. This can be provided through a closer dialogue with the business community and through mapping, promoting and exchanging best practice transnationally.

The regions have a responsibility to promote sustainable maritime business development and competitive blue economy. The interaction between different sectors and levels of government needs to be strengthened. There is also a need to improve the access of SMEs to finance for developing cross border innovations in the blue economy.

The NSC will support activities which increase skills in the blue economy in the North Sea Region. It is also important to promote and contribute to the development of career opportunities in the marine and maritime sectors.

2. A climate-neutral North Sea Region

Vision: a resilient and adapted North Sea Region with Net Zero greenhouse gas emissions by 2050

Climate change is one of the greatest global threats that we face and is a major challenge which we all must be engaged in for the health and wellbeing of all citizens and the planet. The North Sea Region will have an important role in achieving the European Commission's ambitious goal of becoming the first climate-neutral continent and in creating a European Climate Pact. It is an area with a strong historical relationship in maritime affairs which makes it the perfect place to be an active part of the climate emergency solution.

The region is already a leader in offshore renewable energy and the sector is developing fast. The role as Europe's renewable energy hub can be even further developed through technical and legislative coordination, interconnectors, a North Sea Grid and new energy solutions. This work also needs to be combined with energy efficiency measures to ensure a reduction in our consumption of energy as well as reducing emissions.

The North Sea Region must move towards decarbonization. The oil and gas sector will play an important role in the energy transition. In addition, methods such as Carbon Capture, Utilization, and Storage (CCUS) and restoring biodiversity and natural carbon sinks must be considered if the region is to meet ambitious targets of carbon neutrality by 2050. There must also be development of new methods to adapt to rising sea levels and sea temperatures, and the increasing frequency and intensity of extreme weather events. This can only be successful through cooperation and knowledge sharing across the region and through engaging with citizens so that they too embrace the required change and become engaged.

2.1. Renewable Energy/Alternative Fuels

Goal: More renewable energy is produced and used in the North Sea Region

The primary energy supply will increasingly be coming from renewable energy sources – a mix of wind, hydro, solar, wave, tidal, green and blue hydrogen, biomass and biofuels. This will require battery development and storage. To make this happen we will need to continue active sharing of research and best practices across member regions of NSC and seek out funding opportunities. Support for and research and development of new technological innovations in clean energy generation and storage is also required so that they can be developed, piloted and adopted within the North Sea region and beyond. New opportunities for experimentation will be needed.

Education, skills and training need to be increased and encouraged in this area to support the energy transition if the North Sea region is to remain a leader within renewable energy. This includes seeking out and encouraging circular economy opportunities to be established and adopted across the energy sector, together with the use of fossil infrastructure for new energy generation and economic development incentives.

2.2. Energy Efficiency

Goal: Energy efficiency improvements are researched, tested and adopted by industry, business, Government and citizens.

Energy efficiency improvements, including developing new industrial processes, are needed to ensure that a growing population is using less energy and therefore having less of an impact on the climate. This will also support the reduction in greenhouse gas emissions required to become a climate neutral region. Action on energy efficiency can also help tackle the challenge of energy poverty therefore benefiting people, businesses and society as a whole. The transition must be socially fair and involving citizens, so they become more engaged.

2.3. Carbon Capture, Utilization and Storage and natural carbon sinks

Goal: CCUS solutions are utilised in the North Sea and across the regions.

Goal: Increased afforestation and restoration of degraded ecosystems.

Carbon Capture, Utilization, and Storage (CCUS) and natural carbon sinks solutions need to be rolled out in the North Sea and across the region if climate neutrality is to become a reality. This will need to include two approaches both of which enhance economic development incentives. One covering continued research of CCUS opportunities in the North Sea including being open to new technology for carbon use. The second approach is the need for nature-based solutions to play a key role in mitigating against and adapting to climate change. An increase in afforestation and restoration of degraded forest lands and other ecosystems such as coastal wetlands supporting carbon sinks are key. This will also benefit biodiversity, soils and water resources. Biodiversity is essential through its provision of ecosystem services, for example food, fuel, construction materials, flood prevention and enjoyment but also in its own right as part of the natural world.

2.4. Climate Adaptation

Goal: The North Sea region is climate ready, adaptable and resilient to climate change.

Efforts on climate change adaptation across local, regional and national levels need to be intensified across the North Sea region. Active sharing of research and best practices in climate change adaptation as well as staying informed on new technological innovations being adopted by regions will continue to be vital. It is important that those areas most vulnerable to climate change have the support and ability to adapt. Importing goods and services could be impacted and disrupted by climate change. Addressing this is also an important part of

adaptation. Similar to mitigation the NSC members will share funding and project opportunities, and best practice across industry, business, and Government including community engagement projects ensuring a transition that is socially fair and just.

3. A connected North Sea Region

Vision: Fossil-free, safe and user-friendly accessibility for all and in every territory of the North Sea Region

The North Sea Region (NSR) is a major transport hub in Europe and vital for the competitiveness, internal and external trade of the EU and beyond. The region is host to the biggest ports in Europe, and more than 20 ports are part of the Trans-European Transport Network (TEN-T) core network. The NSR has a competitive transport and logistics industry, with vehicle and aviation manufacturers and transport-related technology developers. The transport sector is on the other hand causing billions of Euros in negative externalities in Europe per year, in the form of accidents, pollution, greenhouse gas emissions and congestion.

Globalisation, increasing urbanisation, demographic changes and technological developments within clean vehicles and digitisation are having a strong impact on the configuration of the future transport system. Changes in lifestyles towards the shared economy are paving the ground for new and innovative mobility concepts. The NSR is in a good position to adapt to and exploit these developments in support of a more sustainable, efficient, safe and inclusive transport system.

Efficient and sustainable transport of passengers and goods in and between countries is key for promoting a desirable development in the NSR. To be competitive, the NSR needs to be well connected to the TEN-T and capable of benefiting from the Connecting Europe Facility (CEF) funding instrument. Important tools are the promotion of modal shift from road/air to rail/sea, intelligent transport systems and smart mobility concepts. Climate-neutral public transport in cities and rural areas needs to be further developed, shared mobility options better exploited and the conditions for walking and cycling improved. Satisfactory and affordable transport services need to be available in all kind of territories and for all groups in society.

3.1. Transnational accessibility

Goal: The accessibility to markets, jobs and services is satisfactory for people and businesses

Goal: Good connections to the TEN-T core and comprehensive networks and improved conditions for maritime transport

The TEN-T policy is key for promoting free circulation of goods, services and citizens throughout the EU and in the NSR. The TEN-T network is crucial for promoting accessibility, as well as for ensuring quality, efficiency, safety and sustainability of transport operations in the NSR. The network is also important for linking up to third countries and the rest of the world. The NSR is on overall well embedded in the TEN-T network and many sea ports, air ports and urban nodes are included in the core layer and corridors. However, not all parts of the NSR – in particular peripheral areas in the Northern and Western part of the region – are sufficiently integrated in the TEN-T network. These areas suffer from long distances to markets, with extended transport times, higher costs and fewer route options. There is also a need to improve the conditions for maritime transport, and to integrate Motorways of the Sea (MoS) better in logistics chains.

3.2. Clean shipping, climate-neutral and inclusive transport

Goal: Significant reduction of the carbon footprint of transport, including shipping

Goal: Well-functioning transport services are available in all kind of territories and affordable for all groups in society

Transport accounts for about 25% of the greenhouse gas emissions in Europe. International shipping is a large and growing source of emissions. While transport on the one hand is part of the climate problem, it is on the other hand also an important part of the solution. There is significant untapped potential to reduce shipping emissions cost-effectively through a combination of regulations, technology development, stakeholder cooperation and targeted financial and other incentives. The introduction of international regulations for the use of shore side power in the cruise industry could contribute to significantly reducing emissions and pollution from vessels in ports. The states and regions in the NSR are in the process of developing and rolling out alternative fuels and low-carbon vehicle technologies and infrastructure which will contribute significantly to lowering emissions from terrestrial transports. The NSR is also well-equipped with renewable energy and spearhead technologies to facilitate a transfer to a low-carbon and eventually fossil-free transport system.

Not all parts of the NSR have sufficient access to green and affordable transport solutions, and there is a need to adapt services to the characteristics of different territories – in particular in remote areas affected by ageing and depopulation. It is also required to develop services which are tailored to the needs of vulnerable and disadvantaged groups in society.

3.3. Intelligent transport solutions

Goal: A coherent regulatory framework related to intelligent transport solutions at the EU level has been adopted.

Goal: Regional and local authorities have the capacity to handle the introduction of automated and eventually autonomous transport solutions

The current developments towards increasing digitalisation and automation have a strong potential for making transport safer, less polluting, more efficient, simpler and cheaper. Sharing of transport-related data can improve the efficiency of logistics chains and open up new opportunities for combining transport of goods and people. However, too little attention is paid to the importance of integrating emerging technologies into the wider transport system. Regional and local authorities also need more knowledge and increased capacity to be able to benefit from the technologies of the future, but also to mitigate related risks and challenges. The introduction of automated transport solutions furthermore requires coherent European regulations (e.g. in terms of liabilities and data protection), governance and societal acceptance. It is furthermore important to exploit the potential in new and innovative mobility concepts, such as different shared solutions, micro-mobility and the concept of Mobility as a Service (MaaS).

4. A smart North Sea Region

Vision: a front runner in sustainable economics and democracy - a macro-region maximising its competitive advantages through innovation and blue and green economies

The North Sea Region is a macro-region with highly specialised industries based on top quality research and access to a wide range of resources and a well-skilled workforce. It remains a leading, competitive, attractive and socially sustainable region, and is a front-runner in circular economy, digital economy and innovation. It is also a lead in maintaining European democratic values and traditions.

Growth in the North Sea Region must be based on sustainable resource use and on circular economy principles, as well as taking full advantage of digital economy opportunities.

The economic potential of climate actions needs to be fully exploited by businesses in the region. This includes green technology and renewable energy development.

There is also industrial expansion potential in the circular economy. This includes the re-use of construction waste, development of new products based on waste from existing production, development of maintenance and replacement services and products. It also concerns integration of production lines between different types of industries and a higher degree of recycling of non-renewable resources.

The North Sea Region should develop cooperation based on smart specialisation priorities. The NSC can be used as a platform for exchanging experiences, transferring good practices and developing projects linked to the member regions' Smart Specialisation Strategies (S3).

4.1. Smart specialisation strategies

Goal: Economic diversification ensures viable jobs in all parts of the region

Goal: New and innovative industries based on marine resources, sustainable energy, sustainable tourism, circular economy and digitalisation

North Sea regions have similarities in business structures linked to the sea and the coast and a potential for exchanging experiences and practices based on their smart specialisation strategies (S3), for instance by establishing a S3 platform, which could address important issues like:

Industrial transition

Industries need support in the transition from carbon-based and non-sustainable production to production based on renewables and circular use of resources. State-aid legislation must be flexible to allow for this.

New and innovative industries

The North Sea region has a great potential for new industries based on green technologies, new use of marine biological and mineral resources, sustainable energy production and circular use of resources.

Digitalisation of industries

Digitalisation is a key to innovation in industries and research. Industrialists and experts must work together to speed up industrial digitisation.

Climate-neutral industries

To enable a swift transition to climate neutral industries, there is need for targeted economic support for research and development to fill knowledge gaps, and for public aid to industries to enable their transition.

Diversification of industries

The shift towards sustainable, climate neutral and circular industries will require a stronger diversification, and the development of new, competitive and sustainable products, especially based on blue and green resources.

Development of tourism

This includes the development of hospitality and tourism industries, including the branding and marketing of the North Sea Region as an attractive sustainable tourism destination. The North Sea Region has a huge yet largely unexploited potential for sustainable tourism development. Coastal experience tourism can be further developed in a sustainable way for Europe. Quality offers might include water activities, sailing, fishing tours, seafood experiences.

4.2. Skills/competences and mobility of researchers, students and the work force

Goal: Employment rates are high thanks to high innovation capacity, skilled workforce, successful inclusion of migrants and persons at a disadvantage

To maintain the North Sea Region's position as a key industrial innovator, a skilled workforce is essential. Education and training on all levels must match the needs on the labour market.

Close exchange between educational and research institutions around the North Sea is essential to maintain the region as an innovative hub in the world.

The workforce must be able to move between countries where there is a current need for specific competences, and dedicated measures must be in place to ensure that young people can enter the labour market.

4.3. Circular use of resources

Goal: Circular economy methods and techniques are widely adopted in the industry

Resources are limited and waste must be recycled instead of being burnt or landfilled, and there is a need for research and development to change production and waste management to enable this.

Circular economy is a vast policy field, and recycling includes products designed for a very long use period, products where vital parts can be replaced, and products where the individual components can be re-used or recycled. It also relates to waste management, aiming at reducing leakage of plastics, textiles and other substances to nature, and reducing the amount of waste placed in landfills as far as possible to a minimum and maximising the recycling of non-renewable resources. Circular economy is also about the use of renewable bio-based materials.

4.4. Innovative public procurement to stimulate economic transition

Goal: Economic growth based on sustainability and climate change mitigation should be among the highest in Europe

Public authorities should be drivers for innovation in industries through their procurement. Intelligent procurement should be used to encourage the development of innovative products and services.

Implementation

This strategy was adopted by the NSC Annual Business Meeting (ABM) in June 2020. It was drafted by a task force in the NSC under the guidance of the NSC Executive Committee as a steering group. It builds on a member survey of the 2020 strategy, a thorough analysis of development strategies/plans of NSC member regions. Member regions, NSC thematic groups and external stakeholders have been consulted at several stages during the process.

The strategy will be implemented by the NSC Executive Committee with the support of the NSC thematic working groups. ABM will adopt an action plan specifying the concrete measures to deliver on the priority areas identified in the strategy. The action plan will be evaluated and reviewed biennially. It will also help to enable synergies between priority areas ensuring consistent and targeted actions, capitalising on the expertise of its members and thematic groups and of the CPMR.

To achieve the goals of the strategy, the NSC will:

- Exchange information and experience, and transfer good practice between member regions
- Mobilise members and raise awareness through public activities
- Develop knowledge through mappings and other reports
- Initiate, shadow and capitalise on EU financed projects
- Coordinate with relevant EU programmes, in particular the transnational programme covering the North Sea Region

- Contribute to policy development through resolutions, policy papers and responses to consultations, as well as through cooperation with national, European and international institutions
- Collaborate formally and informally with other organisations and stakeholders
- Build bridges between cultures

The NSC intends to develop its internal work methods in line with the strategy: more travel-free meetings, increased youth involvement and regular exchange between thematic groups to benefit from synergies between the four priority areas.

Annex (will be developed in the coming months)

Facts and figures

NSR 2030 strategy and the UN Sustainable Development Goals

Summary of regional development plans from NSC member regions

Action plan (will be developed spring 2020)