

Annex 2

'Annual State of the Coast' Report

SEA-EU

(Task 5.2)

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Aims and Objectives:

This report examines how socio-economic activities are planned and managed in the coastal and marine regions of the SEA-EU alliance. Building upon the 2024 *Annual State of the Coast* report and the regional SWOT analyses therein, the study aims to compare regional strengths, weaknesses, opportunities, and threats in the socio-economic, ecological and technological dimensions, in order to identify common challenges, highlight best practices, and support more coordinated approaches to sustainable development of coastal and marine ecosystems. These objectives are consistent with the terms of reference of the SEA-EU proposal document (Task 5.2) in contributing to the development of sustainable development strategies in the coastal area guided by an ecosystem-based approach.

The key objectives of this report are to:

- Compare the SWOT analyses across SEA-EU regions for the topic: “spatial planning of socio-economic activities” to reveal shared trends and differences.
- Identify synergies and examples of good practice that can inform interregional practices and learning.
- Analyse the main challenges,
- Map the distribution of marine and coastal uses through the SeaSketch platform, providing a visual synthesis.

Comparative analysis of spatial planning of socio-economic activities in the coastal regions of SEA-EU

1. Maritime Spatial Planning and Integrated Coastal Zone Management in the European Union

The management of the seas in the European Union is approached from an integrated perspective that seeks to balance economic, environmental, and sectoral objectives. Historically, EU maritime policies have developed around three main themes: economic, environmental, and fisheries.

- **Fisheries:** The Common Fisheries Policy (CFP), established in the 1970s, is one of the oldest and most consolidated EU policies. Its objectives are to preserve fish stocks, protect the marine environment, ensure the viability of European fleets, and guarantee quality food. Since 2002, the focus on sustainability has been reinforced, based on scientific criteria and the precautionary principle.
- **Environmental:** This issue is fundamental and transversal to all other maritime policies. Its most important instrument is the Marine Strategy Framework Directive (MSFD, 2008/56/EC), which represents the environmental pillar of maritime policy and seeks to achieve a “good environmental status” of EU seas. Other key directives, such as the Birds and Habitats Directives and the Water Framework Directive, are also crucial for marine conservation and the management of land-sea interactions.
- **Economic and the Integrated Maritime Policy:** To provide a holistic approach to all maritime policies, the EU developed the Integrated Maritime Policy (IMP). The IMP is a framework that facilitates coordination and development of different policies. Within it, the “Blue Growth” strategy is key, as it seeks to promote sustainable growth in the marine and maritime sectors, contributing to the objectives of the Europe 2020 Strategy.

Maritime Spatial Planning (MSP) emerges as a central tool within this integrated framework. Its goal is to organize human activities at sea, both in space and time, to achieve ecological, economic, and social objectives defined through a political process. The MSP Directive (2014/89/EU) establishes a common framework for all Member States, setting out principles, objectives, and minimum requirements. Its purposes are: To promote the sustainable development of maritime economies, aligned with Blue Growth and other policies such as the CFP. To apply an ecosystem-based approach in line with the Marine Strategy Framework Directive, ensuring that human activity pressures do not compromise the health of marine ecosystems. To contribute to the objectives of many other EU policies, such as water management, habitat conservation, renewable energy, and maritime transport.

To advance MSP, the European Commission, through the Directorate-General for Maritime Affairs and Fisheries (DG MARE) and the Directorate-General for the Environment (DG ENV), coordinates and promotes its implementation. Support mechanisms such as the MSP Expert Group (MSEG), the MSP Platform for information exchange, and funding through the European Maritime and Fisheries Fund (EMFF) and the European Regional Development Fund (ERDF) for cross-border cooperation projects have been established.

In parallel, Integrated Coastal Zone Management (ICZM) is considered a key approach to address the complexity of coastal areas, where ecological, economic, and social dynamics converge. Its objective is to coordinate different policies, sectors, and levels of government to ensure balanced development that combines environmental protection with economic progress and community well-being.

In the European context, the Recommendation of the European Parliament and Council on ICZM (2002/413/EC) provided a common framework for Member States, establishing principles and guidelines for its implementation. This framework focuses on several key aspects. First, it promotes sustainable development in coastal areas, integrating activities such as tourism, fisheries, maritime transport, and urbanization in a way that is compatible with environmental conservation. It also seeks to apply an ecosystem-based and territorial approach, recognizing the interdependence between marine and terrestrial ecosystems and ensuring resilience against human pressures and the effects of climate change.

Through ICZM, public participation and inclusive governance are encouraged, involving authorities, economic sectors, local communities, and civil society in planning and management processes.

Within the European context, MSP and ICZM are consolidated as strategic and complementary instruments of the Integrated Maritime Policy. Both tools should not be understood as isolated policies but as transversal approaches that aim to harmonize ecological, economic, and social interests in marine and coastal spaces.

2. Methodology

The methodology is based on a qualitative comparative analysis of the SWOT data already collected for the different regions (Annual State of the Coast Report, 2024).

The analysis focuses on the information derived from the SWOTs of each study region, specifically the SWOT entitled “Spatial planning of socio-economic activities”. In addition, to complement the information, the socio-economic dimensions of the other SWOTs are used, along with ecological-biophysical and technological-infrastructure aspects when they are

directly related to the planning and development of socio-economic activities in marine and coastal space.

Based on these premises, the methodological steps are as follows:

- a) Conduct a comparative analysis of the strengths, weaknesses, opportunities, and threats of socio-economic spatial planning from the individual analyses of each study region.
- b) Identify common challenges and opportunities through comparative analysis for each factor analysed: ecological, socio-economic, and technological. First, this requires identifying themes common to more than one region. Second, a matrix is developed to visualize in which regions the analysed theme is shared.
- c) Produce a joint mapping to comparatively visualize the main uses and activities in the coastal-marine areas of the study regions. For this joint mapping, the SeaSketch tool will be used. SeaSketch is a digital platform designed to facilitate marine and coastal spatial planning through participatory and evidence-based processes. Initially developed by the McClintock Lab team at the University of California, its main goal is to integrate science, governance, and social participation in decision-making regarding marine space use (www.seasketch.org).
- d) Formulate conclusions on the current state of spatial planning of socio-economic activities in the SEA-EU regions.

3. Common issues and trends in the spatial planning of socio-economic activities

The overall vision for spatial planning of socio-economic activities in these regions aims to balance sustainable development, environmental protection, economic growth, and social well-being. Emphasis is placed on integrated management of coastal and marine areas, multi-stakeholder participation, and adaptation to the challenges posed by climate change.

Annex 1 presents a table with the main conclusions obtained through a comparative analysis across the different regions, based on the Annual State of the Coast Report, 2024. The comparative SWOT analysis is obtained that evaluates socio-economic spatial planning in various marine regions, including Malta, Algarve (Portugal), Brest (France), Cádiz (Spain), Naples (Italy), Split (Croatia), Gdansk (Poland), Bodø (Norway), and Kiel (Germany).

When analysing the different regions, common patterns emerge in the identified strengths and weaknesses. Among the most notable strengths is the natural and cultural richness characterizing many of these territories. Regions such as Algarve, Cádiz, and Kiel possess valuable natural heritage and diverse ecosystems, complemented by international recognition, such as the Wadden Sea in Kiel or the cultural heritage of Algarve, which promote both tourism and environmental conservation. Another positive aspect is the research and innovation capacity demonstrated in certain territories. Malta, for example, stands out for advances in

water- and energy-related technologies, while Naples has a strong marine research network, and Gdansk contributes expertise in marine technology and environmental engineering. Governance and advanced planning are also prominent in some contexts, such as Malta, a pioneer with the launch of its first marine spatial plan in 2015 supported by an interministerial committee, or Split, which shows notable progress in Integrated Coastal Zone Management.

However, weaknesses are also recurrent and significant. One of the most common is limited coordination across different sectors and levels of government, as seen in Malta, alongside political dynamics that sometimes prioritize specific interests over the common good, as in Naples. Added to this is a strong economic dependence on activities, especially tourism, affecting regions such as Algarve and Split, generating vulnerability to economic crises and conflicts over space use between development and conservation, a situation evident in Cádiz and Kiel. Environmental degradation is also a transversal concern, manifested in coastal artificialization in Malta, green algae proliferation in Brest, ineffective waste management in Split, or urban pressure affecting various marine habitats.

Despite these challenges, the identified opportunities provide prospects for a more sustainable future. Sustainable tourism emerges as a central focus in almost all regions, with diversification approaches toward niche, scientific, or cultural modalities, as seen in Brest, Cádiz, and Algarve. Complementarily, the so-called blue economy offers development opportunities through collaboration in research and innovation in fields such as marine biotechnology and renewable energy, particularly highlighting offshore wind potential in Kiel and Gdansk. In parallel, the use of digital technologies, artificial intelligence, and remote sensing for environmental monitoring and spatial planning constitutes a pathway for advancement already explored in regions such as Malta, Cádiz, and Split. Additionally, access to European funding and interregional cooperation, visible in examples such as the participation of Gdansk and Kiel in governance frameworks like HELCOM and OSPAR, represents a key resource for implementing sustainable projects.

On the other hand, the threats facing these regions are equally shared and urgent. Climate change presents a universal threat, with impacts, such as sea-level rise, extreme events, and ocean acidification, affecting both ecosystems and coastal communities. Socio-economic and political conflicts also constrain progress: competition for multiple uses of marine space, present in Malta, along with political instability, regulatory changes, as in Cádiz and Gdansk, or shortages of skilled labour in regions such as Algarve and Naples, are critical factors. Finally, pollution and biodiversity loss constitute a major risk. Examples include land-based pollution affecting marine environments in Gdansk, maritime traffic in Split, historical munitions dump in Kiel, and the threat of invasive species impacting Malta.

From all the issues described above, Table 1 presents the socio-economic, ecological, and technological aspects that may be common to one or more of the study regions.

Table 1. Common issues in marine spatial planning of uses and activities across SEA-EU regions

	Malta	Algarve	Bre st	Cad iz	Napol es	Spl it	Gdan sk	Bo dø	Kiel
Ecology	Valuable ecosystems at risk			X	X	X	X	X	
	Climate change vulnerability	X	X	X	X		X	X	X
	Insufficient management of protected areas			X		X		X	
	Pressures from urbanization	X			X		X		X
	Pollution and invasive species	X		X			X	X	X
	Potential for nature-based solutions	X					X		X
Socioeconomic	Dependence on tourism	X	X		X		X		
	Deficits in governance / coordination / regulation	X				X		X	
	Threats linked to conflicts of interest		X		X		X		X
	Blue growth					X	X	X	
	Stakeholder participation	X			X	X		X	
	Education and research as drivers of innovation		X				X	X	X
Technology	Limitations in the development of green infrastructure and clean energy	X	X			X		X	
	Investment in modernization of maritime infrastructure						X	X	X
	Advances in renewable energy, digitalization, and marine technologies	X			X		X	X	X
	Use of remote sensing, GIS, and AI for monitoring and planning	X			X		X	X	

In red: Common issues that represent a challenge for the region

In green: Common issues that represent a strength or opportunity for the region

A specific issue may occur in a region but may not constitute a challenge or strength and therefore is not considered in the matrix.

In the socio-economic dimension, it is observed that most regions show dependence on tourism as a critical factor, particularly Algarve, Cadiz, and Split, making them vulnerable to economic shocks. At the same time, there is a recurring pattern of needs for economic diversification and governance strengthening, with Malta, Naples, Gdansk, and Bodø demonstrating advanced capacities in institutional coordination or stakeholder participation. Education and research stand out as drivers of innovation in several regions (Algarve, Gdansk, Bodø, Kiel), highlighting potential for linking scientific knowledge with sustainable development.

In the ecological-biophysical-climatic dimension, Table 1 shows that most regions face similar vulnerabilities: habitat degradation, pressure on biodiversity, and climate change impacts. Regions such as Cadiz, Naples, Split, and Bodø have valuable ecosystems at risk, while pollution and invasive species affect Malta, Gdansk, and Kiel. Nevertheless, some regions show potential for implementing nature-based solutions and coastal protection strategies (Malta, Split, Kiel), suggesting opportunities for integrated ecosystem management.

In the technological-infrastructure dimension, a general pattern of progress in renewable energy technologies, digitalization, and remote sensing for environmental planning and monitoring is identified, particularly in Malta, Cadiz, Gdansk, Bodø, and Kiel. Investment in the modernization of maritime infrastructure is notably observed in Gdansk, Bodø, and Kiel, reflecting efforts to combine technological innovation with operational sustainability.

4. Mapping of uses and activities in the marine environment of SEA-EU regions

The spatial analysis conducted through the SeaSketch workshop has revealed a consistent and crucial pattern across the study regions: the high degree of spatial overlap among various marine and coastal socio-economic activities and uses.

As illustrated in the example maps of the Bay of Cádiz, the Algarve, and Split (figures 1 and 2), activities in most coastal and marine areas do not occur in isolation. On the contrary, we find that limited geographical zones are simultaneously important for:

- Economic activities: such as artisanal or large-scale fishing, aquaculture, and commercial maritime traffic.
- Tourism and recreational uses: including swimming, water sports, and coastal tourism.
- Environmental interests: comprising protected areas, sensitive habitats, or zones of importance for biodiversity.

This overlap is not the exception, but the norm in most of the areas studied. This pattern underscores the existing spatial pressure on marine resources, which inevitably generates potential use conflicts and creates significant management challenges for Marine Spatial Planning (MSP). The need for integrated and coordinated planning is, therefore, the most evident conclusion of this mapping exercise.

Figure1. Uses and activities from workshop: Algarve and Bay of Cadiz regions.



Green: Marine protected areas; Yellow: fishing and aquaculture; Red: port; Blue: Offshore wind energy; Dark green: recreational

Figure 2. Uses and activities from workshop: Split region.



Green: Marine protected areas; Yellow: fishing and aquaculture; Red: port; Blue: Offshore wind energy; Dark green: recreational

5. References

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Annex 1. Comparative SWOT for marine and coastal spatial planning of uses and activities in the study regions

Region	Strengths	Weaknesses	Opportunities	Threats
Malta	First marine spatial plan launched in 2015 as a guiding framework. Interministerial technical committee overseeing planning, data management, and international cooperation. NGO involvement in the management of marine parks and protected areas. Research and innovation capacity in water and energy technologies.	Limited coordination in policy implementation across sectors. Focus on land-based activities with little marine consideration. Lack of sustained dialogue between policy and industry. Coastal artificialization and habitat degradation. Limited availability of sustained data for marine spatial plan implementation and monitoring.	Policy convergence and stakeholder participation through high-level coordination. Robust methodology to quantify the value of ecosystem services. Interregional collaboration in research and innovation (e.g., aquaculture, blue biotechnology) and multi-use platforms (renewables and aquaculture). Digital technologies and AI for habitat monitoring and spatial planning.	Conflicts over multiple uses (maritime transport, fishing, aquaculture, strategic infrastructure such as energy and desalination). Risk of exclusion of social and recreational benefits of the sea. Impact on biodiversity from invasive species. Insufficient research on nature-based solutions for climate change.
Algarve	Focus on sustainable development, economic diversification, cultural heritage (UNESCO), and university research. Rich natural heritage (forests, wetlands, coastal areas), Mediterranean climate, natural parks (Ria Formosa). International airport, language skills, coordinated transport systems, and developed road network.	High dependence on tourism, vulnerability to economic shocks, conflicts of interest (fishing, local communities), limited accessibility, and seasonality. Low public awareness of conservation and inadequate regulations. Coastal ecosystems vulnerable to climate change. Limited innovation in businesses and need for investment in	Recognition as a trendy destination, growth of niche tourism, sustainable regulations, and collaboration with local communities. Diversification of local resources for sustainable development and protected areas for biodiversity. Eco-entrepreneurship, funding for green technologies, and collaboration with research institutions.	European economic slowdown, Brexit uncertainties, and political instability. Shortage of skilled workers and low environmental literacy. Short-term financing limiting long-term sustainability. Limited conservation resources and need for better stakeholder coordination.

		technology for marine ecosystem services.		
Brest	Strong commitment to water policy and marine biodiversity ("Breizh Biodiv").	Accelerated coastal erosion, loss of agricultural land, and marine pollution (green algae).	Development of sustainable tourism (label "Valeur Parc Naturel Marin") valuing natural heritage and stimulating the local economy.	Intensification of maritime activities and pollution, environmental degradation due to insufficient management.
Cádiz	Rich cultural heritage and maritime traditions, diverse economy (tourism, fishing). Strong collaboration among stakeholders. Abundant natural resources and diverse marine ecosystems. Remote sensing, GIS, and advances in green infrastructure and renewable energy.	Urbanization, population growth, and socioeconomic disparities. Conflicts between development and conservation. Vulnerability to climate change and human pressures (sea-level rise, habitat degradation). High costs associated with technology.	Growing interest in sustainable tourism and shellfish production (Andalusian Blue Strategy). Development of marine spatial planning projects and ecosystem-based approaches. Advances in technology and data analysis for spatial planning tools.	Political and regulatory uncertainties. Conflicts among stakeholders over socioeconomic priorities. Impacts of climate change on coastal communities and activities.
Naples	Investment in marine spatial planning and blue growth. Regional technicians available for dialogue and innovative local development plans. Strong network of research institutions for marine monitoring and numerous marine protected areas. Implementation of technologies for coastal zone management and investments in marine litter reduction.	Methods incompatible with fragile ecosystems and environmental laws. Political dynamics favoring individual interests, shortage of qualified actors, and bureaucratic obstacles. Inadequate management of marine protected areas. Lack of capacity to systematize long-term economic sustainability of pilot activities.	Presence of numerous "native production chains" with potential for local economy and tourism. Coastal area rich in Mediterranean biodiversity. Presence of large maritime transport and fishing companies capable of investing in sustainable solutions.	Lack of youth recruitment in indigenous production chains (fishing, maritime crafts). Insufficient communication and monitoring of activities impacting biodiversity. Lack of ecosystem governance and governance capable of directing private investments towards collective interest.
Split	Integrated Coastal Zone Management (tourism, infrastructure, conservation, climate adaptation). Social awareness and demographic revitalization. Global marine	Inefficiency in waste management systems. Overemphasis on tourism (loss of green spaces, urban challenges). Habitat degradation due to	Emphasis on sustainable tourism (scientific, cultural, and health). EU support for education and infrastructure and integration of green infrastructure. Agritourism and high biodiversity. Use of AI to	Long-term sustainability requires strategies beyond electoral cycles. Diversion of funds to short-term projects and lack of interest in enforcing legislation. Conflicts between space users and

	spatial planning improving territorial waters management. Advanced broadband infrastructure, sustainable traffic systems, and energy efficiency.	overbuilding and urbanization. Insufficient green infrastructure and vulnerability to climate change impacts. High costs and logistical challenges for implementing green infrastructure and renewables in remote locations.	optimize human-nature interactions and environmental monitoring. High-tech waste management and eco-friendly public transport.	potential marine pollution from maritime traffic. Demographic decline reducing environmental awareness. Shortage of high-tech specialists.
Gdansk	Opportunities for sustainable tourism and eco-friendly accommodations. Skilled labor (fishermen, shipbuilders, marine engineers). Protection of rich ecosystems and significant potential for renewable energy (offshore wind). Ports (Gdansk, Gdynia, Szczecin) supporting marine logistics and offshore renewable energy. Research in marine technology and environmental engineering.	Dependence on traditional industries (fishing, maritime transport) and resistance to changes in marine spatial plans. Lack of local awareness of collaboration benefits. Difficulty incorporating climate change impacts due to lack of funds for adaptive measures. No strategy for terrestrial pollution affecting the marine environment.	Strategic location in the Baltic Sea. Cooperation with neighboring countries and participation in European governance (fishing, habitat protection). Cooperation with Baltic countries on environmental protection and biodiversity (HELCOM). Access to modern ecosystem monitoring and management technologies. Investment in new technologies, energy balance improvement, and job creation.	External competition, conflicts, and environmental pressures. Changes in national and international policies (uncertainty, instability). Pollution from neighboring regions (Baltic Sea), negative impacts on water quality and marine ecosystems. Dependence on foreign suppliers and risks from political/economic changes. Dependence on digital technologies (vulnerability to cyberattacks).
Bodø	Transparent governance and informed decision-making. Economic diversification (adaptive aquaculture) and public participation. Innovations in climate adaptation. Diverse marine ecosystem (fishing, aquaculture) and sustainable practices. Advanced technologies for aquaculture sustainability.	Indigenous cultures in decline and limited transport infrastructure. Economy vulnerable to environmental changes. "Top-down" governance neglecting local preferences, generating conflicts. Ecosystems vulnerable to climate change and overfishing. Limited green infrastructure and industrial activities with pollution risk.	Economic diversification (sustainable tourism, renewable energy, advanced aquaculture). Improvement of regulatory frameworks and investment in green technology education. Expansion of marine and coastal protected areas. Integration of traditional knowledge with modern science in ecosystem management. Excellence in renewable energy and	Economic stagnation (2050) due to dependence on declining traditional industries. Global market fluctuations. Governance struggling to adapt to changes and obsolete education system. Climate change (sea-level rise, extreme weather, ocean acidification). Biodiversity loss and pollution (plastics, chemicals). Obsolete

		Challenging maintenance of maritime infrastructure.	modernization of maritime infrastructure.	infrastructure and cybersecurity risks.
Kiel	High awareness of the value of ecosystem services. Political cooperation frameworks with neighboring states (OSPAR, HELCOM). Wadden Sea UNESCO World Heritage Site (North Sea). Highly technological coastal protection (dikes, flood barriers, locks) under public administration.	Conflicts over use (agriculture and fishing, tourism, water sports, naval bases, energy production). Old munitions dumps (1.3 million tons in the North Sea, 300,000 tons in the Baltic Sea).	Baltic Sea Conservation Action Plan 2030 and robust research program (sustainMARE). The Baltic Sea is a critical region for NATO security. Offshore wind energy targets in EEZ: 30 GW by 2030, 40 GW by 2035, 70 GW by 2045.	Industrialization of the seas. Increase in low-oxygen zones (Baltic Sea). Overfishing and northward shift of ecozones.