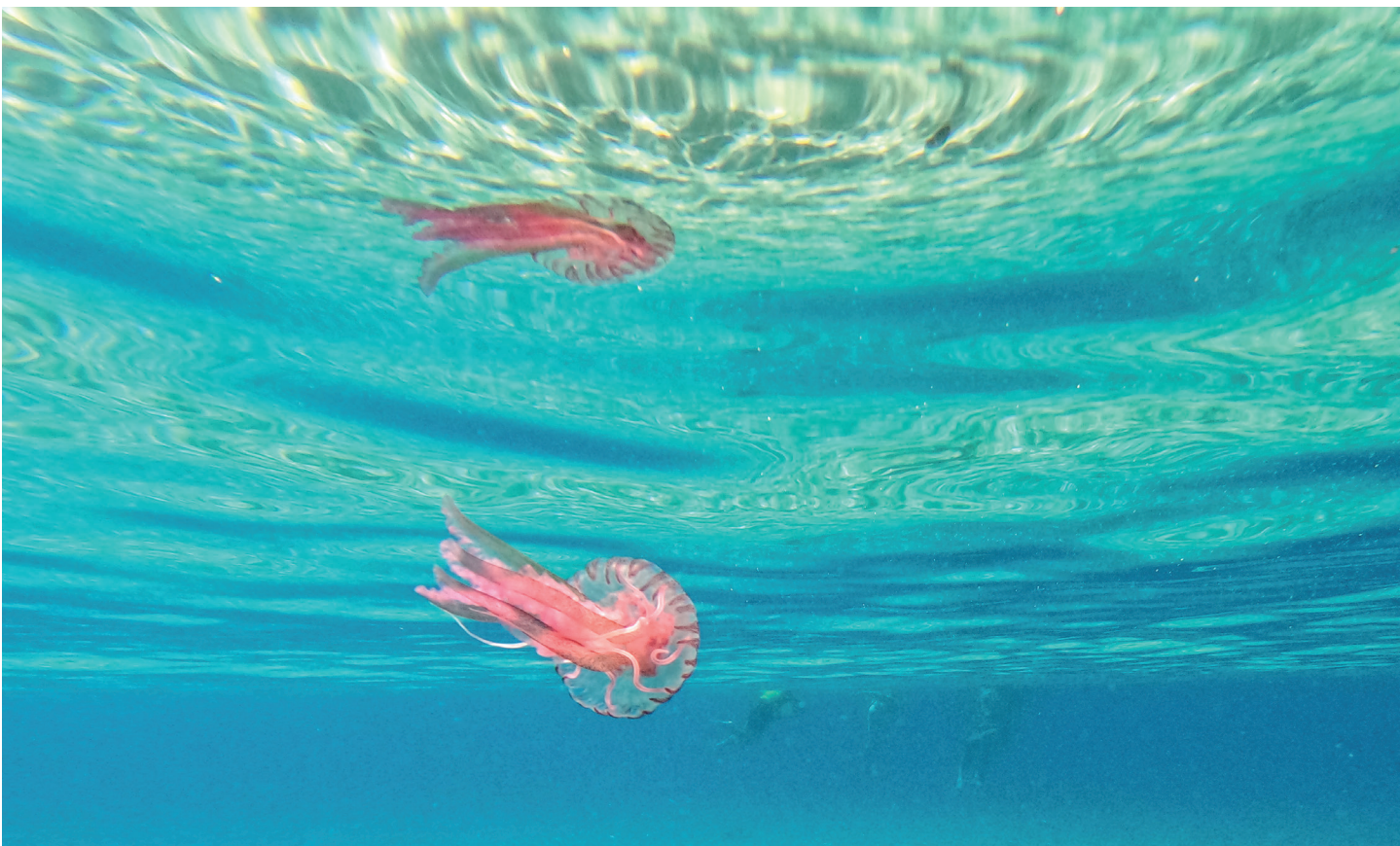


A watershed moment: The role of the Ocean Act in advancing the EU's environmental, economic and military security

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Credit: WILL VASSILOPOULOS / AFP

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List of abbreviations

BBNJ	Agreement on the Conservation and Sustainable Use of Marine Biological Diversity of Areas beyond National Jurisdiction
CFP	Common Fisheries Policy
EBA	ecosystem-based approach
ECF	European Competitiveness Fund
ETS	Emissions Trading System
GES	Good Environmental Status
MFF	Multiannual Financial Framework
MPA	Marine Protected Area
MSFD	Marine Strategy Framework Directive
MSP	maritime spatial planning
MSPD	Maritime Spatial Planning Directive
NbS	nature-based solutions
RED III	Renewable Energy Directive
WTO	World Trade Organisation

Executive summary

The European maritime area, our ocean, is a critical domain where economy, sustainability, culture and security intersect. At the same time, EU ocean governance is deeply fragmented along the lines of national jurisdictions, sectoral agendas and investment priorities.

The Integrated Maritime Policy, introduced in 2007, was the first attempt at integrated ocean governance of the EU. The upcoming Ocean Act, building on the 2025 Ocean Pact, is the Union's chance to get it right (see Box 1). It is an opportunity to both recognise and reduce trade-offs by enabling the synergies between healthy oceans, competitiveness and security agendas. To realise the maximum potential of the ocean in advancing competitiveness, environmental protection, energy transition, defence and the well-being of coastal communities, the EU and member states need to consider the following in particular:

- **The Ocean Act should be guided by the six priorities of the Ocean Pact** and supported by precautionary, rectification at source, polluter pays, integration and non-deterioration principles of EU law.

- **Marine spatial plans should become a strategic tool** to encourage a regional sea basins approach and enable synergies between sustainability, competitiveness and security priorities, backed by streamlined reporting and inclusiveness toward coastal and other relevant stakeholders.
- The Ocean Act objectives should be **anchored by long-term targets on** achieving and maintaining **good environmental status** and protecting 30% of marine areas by 2030, including placing 10% under strict protection.
- The Ocean Act should **envisage overarching ocean plans** to support a whole-of-ocean approach to financial planning, helping to identify where public funding can be deployed most strategically while enabling the transparency and long-term predictability needed to mobilise private capital.

Box 1. EU policy recommendations for improved ocean governance.

KEY RECOMMENDATIONS FOR AN OCEAN ACT

- The Ocean Act should be **guided by objectives aligned with the six priorities of the Ocean Pact and supported by a set of governance principles**. These should include the precautionary, rectification at source, polluter pays, integration and non-deterioration principles of EU environmental law, alongside the ecosystem-based approach and ocean mainstreaming measures across policy fields and financial instruments.
- The Ocean Act objectives should also be **anchored by long-term targets**. Achieving and maintaining **good environmental status (GES)** should serve as the primary objective, both because healthy marine ecosystems underpin long-term competitiveness, food security, resilience and security, and also because it would strengthen coherence with the MSFD. The Ocean Act could also give binding force to wider strategic commitments, such as the target to protect 30% of marine areas by 2030, including 10% under strict protection, while **considering the introduction of new forward-looking targets linked to emerging priorities** such as climate adaptation and preparedness for coastal infrastructure and communities.
- The Ocean Act should **turn marine spatial plans from a largely procedural exercise into a strategic tool** to enable benefits discussed in Section 1. As such, the MSPs would help coordinate environmental, economic and security priorities, encourage a regional sea basin approach in national MSPs or ocean plans (see below), implement nature targets and GES, resolve trade-offs, and simplify governance through better implementation. **Adopting the Ocean Act as a regulation** could provide greater consistency and accountability across member states while positioning a strengthened MSP as its principal implementation mechanism. This approach would, however, need to account for member states' maritime specific interests, capacities and sovereignty concerns (see Section 2). To that end, the regulation should **introduce targets and principles, streamline reporting, and encourage regional sea basin management and financing**, while allowing for flexibility and leaving the specifics around the implementation of such requirements to member states.
- The Ocean Act should **envisage overarching ocean plans to streamline reporting and integrating activity and investment planning across the maritime domain**. Beyond reducing administrative burdens, it could support a whole-of-ocean approach to financial planning, helping to identify where public funding can be deployed most strategically while providing the regulatory standards, transparency and long-term predictability needed to mobilise private capital. Commission oversight of these plans, potentially supported by the Ocean Board, could further strengthen the coherence of ocean plans across member states with an emphasis on regional sea basins cooperation. However, the ocean plans should be pursued only if it strengthens, rather than weakens, the ambition of existing legislation. To manage the political risks associated with reopening existing legislation in the context of the 'green backlash', the **Ocean Act should facilitate transition financing and encourage multi-use projects** that can work for marine protection, energy goals, fisheries, shipping industry, coastal communities and defence purposes.

CROSS-CUTTING PRIORITIES FOR EU OCEAN GOVERNANCE

- ▶ **Take a more strategic approach to ocean governance** that focuses not only on managing trade-offs but also on ocean mainstreaming across policy fields and financial instruments and systematically identifying and maximising synergies across environmental, climate, industry and security sectors.
- ▶ **Strengthen enforcement** through improved monitoring, harmonised reporting requirements and timely, proportionate Commission action to address persistent implementation failures, including, where appropriate, through infringement proceedings. In that sense, the OceanEye and envisaged drone fleet should serve the movement of sea vessels that are detrimental both for maritime protection and for security of the European maritime domain.
- ▶ **Simplify through greater coherence, coordination and implementation capacity** rather than through reduced ambition or safeguards. This includes stronger inter-authority and member state coordination, ocean plans, clearer guidance, better data-sharing, inclusive participation and support for evidence-based decision-making that delivers durable outcomes in practice rather than targets on paper.
- ▶ **Improve access to finance via the MFF, ETS, and EIB-led private investments and credible nature credits markets.** This needs to be coupled with a benchmark of financing needs, robust monitoring frameworks and clear prioritisation of projects of highest quality in terms of climate resilience, environmental protection, economic viability and livelihoods of coastal communities.
- ▶ **Address ocean-related data and information accessibility and sharing** via harmonised reporting standards, indicators and data formats, investments in better monitoring, ocean observation, monitoring and data collection, and balancing security and commercial confidentiality with access to information.

SPECIFIC RECOMMENDATIONS

- ▶ Take a more strategic approach to ocean governance that focuses not only on managing trade-offs but also on ocean mainstreaming across policy
- ▶ Harmonise the concepts of ecosystem-based approach and ecosystem-based management.
- ▶ Embed adaptive management within marine spatial plans by integrating long-term projections and ongoing monitoring.
- ▶ Develop transparent criteria and guidance for prioritising competing objectives on maritime space.
- ▶ Require structured stakeholder engagement and conflict-resolution procedures.
- ▶ Encourage the use of e-participation tools in marine spatial planning.
- ▶ Strengthen public access to information regarding marine spatial planning.
- ▶ Include a dedicated access to justice provision within the Ocean Act.
- ▶ Systematise transboundary planning initiatives within the Ocean Act.
- ▶ Strengthen secure data-sharing across authorities and sectors.
- ▶ Establish more permanent arrangements for a regional sea-basin approach and third-country cooperation.
- ▶ Improve coherence with complementary policies such as the MSFD by aligning reporting cycles, indicators and assessment processes.
- ▶ Strengthen integrated planning and harmonised reporting within and across member states.
- ▶ Define 'multi-use' more clearly, including through guidance on compatible activities.
- ▶ Support research and stakeholder engagement to identify evidence-based synergies.
- ▶ Require authorities to use sensitivity mapping and cumulative impact assessments.
- ▶ Prioritise improving the usability of existing data, including through more harmonised reporting standards, indicators and data formats.
- ▶ Provide member states with guidance on balancing security and commercial confidentiality with access to information of public importance.
- ▶ Mainstream investment in ocean observation, monitoring and data collection.
- ▶ Ensure the Ocean Dashboard evolves beyond a reporting repository into a comprehensive monitoring and transparency platform.
- ▶ Introduce national ocean plans to advance a whole-of-ocean financing approach.
- ▶ Develop a comprehensive benchmark of financing needs across the maritime domain.
- ▶ Establish a coordinated framework for monitoring ocean-related spending and investment across EU and national funding instruments.
- ▶ Strengthen communication on the economic, social and security costs of inaction.
- ▶ Phase out and redirect harmful subsidies away from environmentally damaging activities.
- ▶ Use the European Competitiveness Fund, InvestEU, the Industrial Decarbonisation Bank and ReArm Europe to invest in emerging nature-positive projects in the marine and coastal areas.
- ▶ As part of the ongoing ETS reform, consider linking the carbon emissions allowances with nature-based maritime carbon removals to incentivise private investments in a healthy ocean.
- ▶ Identify, structure and scale high-integrity marine restoration, adaptation and blue carbon projects.
- ▶ Explore measures to stimulate demand for high-integrity ocean and nature credits.

Introduction

THE OCEAN'S STRATEGIC IMPORTANCE

The European Union (EU) is navigating a period of profound uncertainty. Russia's full-scale invasion of Ukraine exposed not the fragility not only of Europe's security but also of its food and energy systems.¹ Conflict and war in the Middle East is once again driving energy price volatility, raising the prospect of a second major energy shock within only a few years.² At the same time, increasing geopolitical and geoeconomic rivalries, global competition and accelerating climate impacts are reshaping access to critical resources, supply chains, infrastructure and strategic spaces – notably, in the maritime domain.

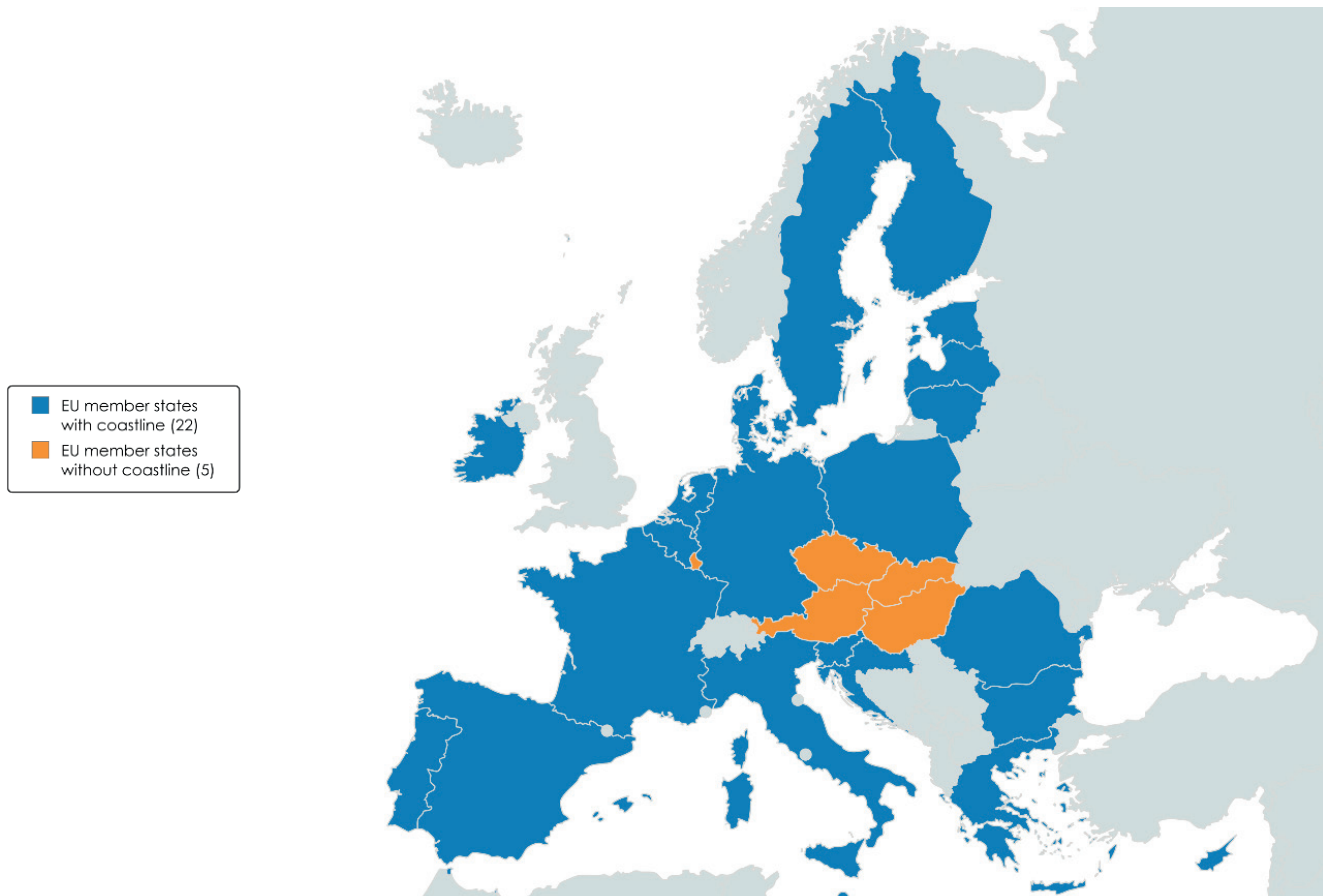
In this overall context, ocean and coastal areas are becoming central to the EU's strategic agendas. Europe's seas span more than 11 million km². Almost all member states have access to the coast, making ocean governance even more pertinent in EU policy debates (see Figure 1). Around 40% of the EU's population lives in coastal regions.³ Approximately 74% of the EU's external trade is carried by sea.⁴

Marine and coastal areas host critical infrastructure – from ports, shipping routes and energy terminals to subsea cables underpinning trade, energy security, maritime security and digital connectivity. Relatedly, sectors such as offshore renewables and marine biotechnology represent emerging sources of innovation and competitiveness, with the blue economy already supporting around 5 million jobs and generating approximately €250 billion in gross value added.⁵ The ocean economy is expected to be 1.5–2.5 larger by 2050 compared with 1995⁶ and during this time global need for energy installations and food production in the ocean will increase fivefold.⁷

These systems and opportunities ultimately depend on healthy marine ecosystems that are critical to avoid catastrophic effects of climate change and environmental degradation. The ocean absorbs more than 90% of the excess heat generated by greenhouse gas emissions, underpins food resilience and biotechnology innovation, and helps protect coastlines and critical infrastructure.⁸ A healthy ocean is therefore not solely an environmental objective but also a prerequisite for

Figure 1

EU MEMBER STATES WITH ACCESS TO THE COAST



Source: Map created with MapChart.net, licensed under CC BY-SA 4.0.

European competitiveness and security. At the same time, the scale-up of more sustainable solutions depends on effective transition mechanisms to account for specific member state interests and costs to fishers, the shipping industry and energy operators. It requires a focus on multi-use projects to maximise the synergies and clear prioritisation when trade-offs are unavoidable.

THE OCEAN POLICY FRAMEWORK

The EU's approach to ocean governance has not kept pace with the strategic importance of the ocean. Responsibilities remain fragmented across sectoral policies, governance levels and jurisdictions, limiting the Union's ability to manage and capitalise on an increasingly crowded and contested maritime space. In that sense, the key existing maritime policies, namely the Marine Spatial Planning Directive and the Marine Strategic Framework Directive, have proven to not be up to the task.

Consequently, the European Ocean Pact was launched in 2025 as an overarching EU strategic framework for better protection of the ocean, promotion of a thriving blue economy and support of the well-being of people living in coastal areas. Namely, it aims to address six priorities: (1) protecting and restoring ocean health; (2) boosting the competitiveness of the EU sustainable blue economy; (3) supporting coastal and island communities and outermost regions; (4) advancing ocean research, knowledge, skills and innovation; (5) enhancing maritime security and defence; and (6) strengthening EU ocean diplomacy and international ocean governance.

The forthcoming European Ocean Act, the legal arm of the Pact expected to be tabled for negotiations in late 2026, offers a timely opportunity to establish a more integrated framework for governing the maritime domain – one capable of supporting the EU's most pressing priorities while safeguarding the ecological foundations on which they depend. Coupled with a strong vision and a holistic approach, the Ocean Act can help move EU policy developments towards the creation of an Ocean Union.

THE OBJECTIVE AND STRUCTURE OF THE DISCUSSION PAPER

This discussion paper examines how environmental, economic and security agendas interact in the maritime domain and especially how a healthy ocean can underpin the EU's competitiveness and security. By looking at cross-sectoral opportunities, trade-offs, synergies and current policy gaps and enablers, the paper outlines recommendations to strengthen ocean governance with a particular focus on the upcoming Ocean Act.

In terms of structure, Section 1 looks at the opportunities, cases and challenges to the alignment of sustainability, competitiveness and security agendas in the maritime domain. Section 2 examines the existing and upcoming policy framework, with a particular focus on the Ocean Act, and provides specific recommendations for the way forward. Section 3 provides conclusions and summarises some of the key cross-sectoral recommendations and recommendations for the Ocean Act.

1. The ocean as a strategic nexus for Europe's competitiveness and security

This section looks at the linkages between maritime sustainability with European competitiveness and security. By looking at existing evidence, relevant sectors and prospective cases, the section examines the state of play on the management of the maritime space, prior to an in-depth analysis of policy enablers and gaps (Section 2).

1.1. COMPETITIVENESS AND ECONOMIC SECURITY

Seas and coastal areas are domains with significant potential to advance competitiveness and resilience. The global ocean economy has doubled since 1995, reaching US\$ 2.6 trillion in 2020, and could quadruple by 2050.⁹ This growth offers major opportunities across industries such as sustainable tourism, green shipping, renewables, biotechnology and sustainable food production (e.g. low-impact bivalve or multitrophic aquaculture). Moreover, roughly one fifth of fish caught

by EU vessels originate outside the EU with half of those originating through partnerships with third countries.¹⁰

At the same time, the blue economy is a domain with significant vulnerabilities, as 66% of publicly listed companies “are exposed to, and to some degree dependent on, the need for a healthy ocean.”¹¹ As climate change impacts agricultural productivity and the distribution of and competition for marine resources, access, including in external waters, is increasingly important for food security, economic resilience and geopolitical stability.¹² In parallel, there is a high potential to advance innovation and further EU objectives and to build a foundational pillar of climate stability and long-term economic viability on and off land.

While over half of global GDP depends on nature,¹³ the ocean's specific importance remains undervalued and absent from both financial and regulatory systems.¹⁴ When environmental impacts on the ocean are factored

in, the cost of CO₂ emissions nearly doubles from US\$ 51 to US\$ 97 per tonne.¹⁵ Against this backdrop, this section elaborates on how ocean-based solutions can apply to energy transition, decarbonisation, environmental and circularity objectives in the maritime domain.

1.1.1. Energy transition

Offshore renewables are central to the EU's clean energy transition which, in turn, curbs carbon emissions and reduces energy costs for European businesses and households. Offshore wind deployment is targeted at 111 GW by 2030.¹⁶ While installed capacity is only estimated at 21.5 GW,¹⁷ the sector is expanding rapidly, with gross value added rising by 42% between 2021 and 2022 to €5.3 billion.¹⁸ Moreover, the EU already accounts for 46% of global public investment in tidal and wave energy,¹⁹ and has the aim of scaling capacity from around 1 GW in 2030 to 40 GW by 2050.²⁰ This reflects both its increasing importance to the EU's energy mix and its strong potential to generate economic opportunities and jobs.

Besides the importance of evidence-based prioritisation between energy projects and marine protection priorities, there is a case to advance prospective synergies, such as the role of offshore renewables in replenishing fish stocks and acting as engineered reef structures.

In addition, offshore renewables aid regional development. Many coastal regions face land and grid constraints, while access to clean energy can better support energy-intensive processes such as desalination²¹ – an increasingly critical tool for managing worsening water stress across households, agriculture and industry.²²

The clean energy transition indirectly benefits ocean health, helping to mitigate climate-driven pressures such as ocean acidification, which carries cascading risks for the EU's food system.²³ However, the potential impacts of offshore infrastructure on marine ecosystems need to be recognised.²⁴ Besides the importance of evidence-based prioritisation between energy projects and marine protection priorities, there is a case to advance prospective synergies, such as the role of offshore renewables in replenishing fish stocks²⁵ and acting as engineered reef structures.²⁶

Despite strong public investment, high costs, financing gaps, grid connectivity barriers, technological immaturity – except for from offshore wind – and complex permitting frameworks continue to hamper deployment.²⁷ While initiatives such as the Net-Zero Industry Act, the revised Renewable Energy Directive (RED III) and the Industrial

Accelerator Act aim to address these challenges, particularly through streamlined permitting, shorter timelines risk weakening environmental review and stakeholder engagement.²⁸

1.1.2. Ports and shipping

Ports and shipping are the backbone of Europe's trade, economy and supply chains, as recently recognised by the EU Ports Strategy and the EU Industrial Maritime Strategy. Ships carry 76% of EU imports, worth nearly €1.3 trillion,²⁹ while maritime transport employed 392,800 people in 2022.³⁰ At the same time, marine transport accounts for a significant share of 3–4% of EU CO₂ emissions.³¹

New clean technologies and business models for ports and shipping are already emerging. Wind-assisted propulsion systems for ships are gaining momentum,³² together with electrification³³ and alternative fuels for maritime vessels.³⁴ Ports are also evolving into clean energy hubs. For instance, the Port of Bilbao has integrated onshore clean energy systems,³⁵ while the Port of Rotterdam is scaling up green hydrogen production and transportation.³⁶ Ports are also becoming sites of circular activity, enabling industrial symbiosis for reuse and recycling across value chains.³⁷ Waste-to-resource operations at the Port of Antwerp-Bruges, from residual heat for energy to plastics for products, illustrate how decarbonisation and circularity can be mutually reinforcing.³⁸ Together, these sustainable solutions offer pathways to reduce costs, limit exposure to fuel price volatility, avoid stranded assets and strengthen the competitiveness of EU businesses as the global maritime sector transitions.

However, barriers remain. Although shipping and ports are ranked first in blue economy investor hotspots, access to finance remains a key constraint, particularly given high upfront costs, the long lifespans of existing ships and screening requirements due to security risks around ports.³⁹ Environmental considerations also persist.⁴⁰ Ports are often located in sensitive ecosystems or close to local communities, while innovations such as green hydrogen⁴¹ and carbon capture have their own considerations, including life-cycle emissions linked to electricity use, manufacturing and transportation.⁴² These challenges are compounded by limited access to high-quality data, which is necessary for activities ranging from research and design to risk analysis and investment decisions.⁴³

1.1.3. Marine biotechnology

Employing 17.2 million people and generating €728 billion in value added, the EU bioeconomy is increasingly positioned as a driver of green innovation and economic security.⁴⁴ Within this broader sector, marine biotechnology and coastal communities offer strong potential to support food resilience, circularity and more sustainable resource use across land and sea.

Fertilisers illustrate this potential. Conventional fertilisers contribute to pollution, emissions and import dependence⁴⁵ – costing the EU roughly €10.7 billion

in imports in 2025⁴⁶ amid rising costs driven by the US attack on Iran.⁴⁷ By contrast, seaweed-based alternatives can support agriculture through fertilisers, biostimulants and plant protection products, reducing environmental impacts while strengthening economic security.⁴⁸ Further potential lies in converting marine biomass into biofuels, biochar, pharmaceuticals and bioplastics.⁴⁹

Through initiatives such as the Bioeconomy Strategy and EU4Algae,⁵⁰ the EU recognises this potential and the need to maintain its competitive edge as the world's second-largest bioeconomy, accounting for 12% of the global market, just ahead of China.⁵¹ However, challenges persist. Despite strong support for bioenergy broadly, the marine sector faces low visibility and prioritisation compared to land-based industries, alongside financing gaps and regulatory complexity.⁵² Moreover, bioeconomy solutions may still hold environmental impacts, underscoring the need for robust environmental standards and implementation as well as for rigorous data and monitoring to ensure transparency and genuine sustainability.⁵³

1.1.4. Sustainable food systems

In the European food system, ocean health is both an economic condition and an environmental ambition. Despite high demand, EU fishery production declined 18% between 2014 and 2021, leaving self-sufficiency at just 38%.⁵⁴ At the same time, current fisheries and aquaculture practices – from fuel-intensive fleets to habitat degradation and chemical use – place increasing pressure on ecosystems, undermining long-term productivity.⁵⁵ An estimated 94% of global fish stocks are fully or overexploited.⁵⁶ Bottom trawling in Europe costs between €2.07 billion and €15.97 billion annually.⁵⁷ Conversely, fisheries near marine protected areas (MPAs) report higher catch rates. In the Côte Bleue Marine Park, for example, fish size, mean weight and yields increased by 1.5, 2.9 and 7 times, respectively, between 1995 and 2022.⁵⁸

Despite high demand, EU fishery production declined 18% between 2014 and 2021, leaving self-sufficiency at just 38%. Fisheries near marine protected areas report higher catch rates.

This dynamic points to a broader shift: Sustainable ocean practices can strengthen the food sector's competitiveness and resilience. Emerging models demonstrate this dual value. Multitrophic aquaculture integrates multiple species to reduce environmental impacts while increasing efficiency, as seen in projects such as the PHAROS project, where macroalgae absorb byproducts from fish farming.⁵⁹ Bivalve farming (mussels,

clams, oysters) requires no external feed and improves water quality, supporting biodiversity while reducing input costs.⁶⁰ These approaches sustain the ecological base of production while enabling income diversification – an important buffer as biodiversity loss impacts yields.⁶¹

In parallel, algae production supports protein diversification, particularly for animal feed, offering low-input alternatives that reduce pressure on land, strengthen supply chain resilience and deliver co-benefits such as carbon sequestration.⁶² Together, these developments show how sustainable ocean-based businesses can support only the blue economy but also the EU's wider objectives around food security, supply chain resilience and economic stability.

However, long-term competitiveness depends on reversing biodiversity decline and harmful practices.⁶³ Even solutions intended to support sustainability can create environmental harm if deployed at an excessive scale, in the wrong places or without accounting for issues such as cumulative impacts.⁶⁴ Robust safeguards and enforcement are therefore essential, coupled with additional financing to facilitate the transition. Fragmented regulatory frameworks across sectors and member states can undermine effective governance.⁶⁵ At the same time, risks of disproportionate lobbying power can sideline sustainable aquaculture projects or low-impact, small-scale fisheries,⁶⁶ undermining the potential for more innovative, resilient and diverse business opportunities.⁶⁷

1.2. SECURITY AND RESILIENCE

The maritime space is becoming increasingly intertwined with wider EU security objectives. Russia's war in Ukraine has sharpened this reality, not only through disruptions to energy and food systems, but also through direct maritime risks such as suspected sabotage of subsea infrastructure or Russia's shadow fleet carrying the risk of severe environmental hazards.⁶⁸ In parallel, the closure of the Strait of Hormuz due to the Middle East conflict and US threats to assert control over Greenland have underscored the growing strategic value of the maritime space, particularly as Arctic melting raises questions around emerging resource frontiers, shifting shipping routes and geopolitical influence.⁶⁹

The overlap between security, environmental governance and climate resilience is likely to deepen. Military and law-enforcement authorities have long supported environmental monitoring and enforcement around issues such as illegal fishing.⁷⁰ However, marine and coastal areas now host critical infrastructure, systems and economic activity increasingly exposed not only to hybrid threats, such as sabotage and cyberattacks, but also to escalating climate impacts.⁷¹ For example, climate change can slow down the Atlantic Meridional Overturning Circulation,⁷² which could affect global food supply, sea level rise and global rainfall patterns.⁷³ In this sense, security is both about deterrence and control at sea, as well as resilience: protecting the sea routes, infrastructures, ecosystems and communities on which European security and prosperity

depend. This section explores how these overlapping challenges and objectives are shaping EU priorities, as well as areas of cross-sectoral cooperation.

1.2.1. System and infrastructure security

The stability of marine and coastal infrastructure and activities is increasingly shaped by ocean health and climate impacts. This includes extreme weather events, erosion and coastal flooding, with the latter expected to have one of the largest impacts on industry, transport and energy infrastructure in the coming years.⁷⁴ These pressures are already materialising. Storm Eunice, for instance, caused port closures, ferry cancellations and delays of over a week across supply chains,⁷⁵ building on a 23% increase in port waiting times between 2023 and 2024 in developed economies.⁷⁶

The stability of marine and coastal infrastructure and activities is increasingly shaped by ocean health and climate impacts.

Geopolitical and climate-related pressures are also disrupting key chokepoints. Reduced reliability on maritime routes such as the Suez and Panama Canals is increasing shipping distances (+5.9% ton-miles in 2024).⁷⁷ This raises fuel costs, emissions and ultimately consumer prices, with CO₂ costs, under the EU Emissions Trading System (ETS), adding around US\$ 400,000 per large vessel on lengthened routes.⁷⁸ Climate-related impacts to the seabed, including shifting sediments, further threaten infrastructure such as cables and pipelines, and determine infrastructure installation feasibility and cost.⁷⁹ The food and energy disruptions triggered by the war in Ukraine likewise exposed the EU's vulnerability to external shocks, reinforcing the need to strengthen infrastructure and supply chain resilience.⁸⁰

These pressures do not necessarily stop marine systems from functioning, but they make them more fragile, costly and disruption-prone. They can raise insurance costs, increase the cost of goods and threaten the maritime flows of energy, critical raw materials and goods needed to support defence-related projects under European Commission's ReArm Europe Plan.⁸¹ Disruptions also have direct implications for military mobility, given the growing strategic importance of ports and other maritime infrastructure.

Security also depends on protection and enforcement across the maritime space itself. The growing presence of ageing, sanctions-evading "shadow fleets" illustrates how security and environmental objectives increasingly depend on stronger enforcement capacities. In that sense, MPAs could potentially help limit the movement of not

only fishing boats, but also hostile vessels. Moreover, shadow fleets have contributed to an estimated US\$ 68.8 million in uninsured maritime risk exposure across the Baltic region,⁸² while pollution risk in the Gulf of Finland more than doubled between 2023 and 2024.⁸³ By requiring boarding check-ups to inspect vehicles' compliance⁸⁴ with EU environmental standards in the ocean, member states' surveillance authorities can effectively drive off hostile vessels in disguise.⁸⁵

These examples show how infrastructure resilience, maritime security and ocean health increasingly form part of the same risk landscape. It also demonstrates how environmental tools – from monitoring to port state controls and pollution enforcement – can directly support maritime security objectives.⁸⁶ Strengthening infrastructure and system resilience, however, depends on sufficient funding, as well as access to reliable and timely information.⁸⁷ It also requires that the EU address the fragmented governance that continues to hinder coordinated monitoring, enforcement and decision-making across authorities, member states and sectors – the subject of the next subsection.⁸⁸

1.2.2. Ocean data, monitoring and strategic awareness

As the ocean becomes a convergence point for multiple EU objectives, including security and climate, the need to capitalise on synergies and strengthen strategic coordination is essential. The EU has been collecting and managing ocean-related data thanks to the European Maritime Safety Agency,⁸⁹ the European Fisheries Control Agency⁹⁰ and initiatives such as European Marine Observation and Data Network⁹¹ and the European Digital Twin Ocean.⁹² However, with direct observation covering only around 3% of the ocean, the EU faces growing blind spots as geopolitical tensions rise, critical offshore infrastructure expands, demanding greater monitoring, and climate impacts intensify.⁹³

Although the announced US closure of several monitoring sites across the Atlantic and Pacific did not fully materialise, it signals the backtracking in the ocean monitoring and risks widening information blind spots.⁹⁴ In this context, decision-grade data are a core component of integrated, intelligence-driven systems supporting environmental management, climate action and maritime security.⁹⁵ This includes domain awareness and the enforcement of measures on illegal fishing and pollution, the protection of critical infrastructures, early warning of extreme events, climate modelling of carbon sinks and acidification to support climate targets, and biodiversity and ecosystem management to sustain the blue economy and broader resilience.⁹⁶

Ocean observation technologies are rapidly advancing, including autonomous robotics, sensors, artificial intelligence (AI) analytics and digital twins.⁹⁷ Platforms such as MESPAC illustrate this shift, combining satellite and in-situ data with AI to optimise shipping routes, including reducing fuel consumption and emissions, improve vessel safety in unpredictable sea and weather conditions, and support environmental compliance.⁹⁸

Similarly, AI-driven systems such as Sinay enhance real-time monitoring, from pollution tracking to managing a variety of risks around critical infrastructure such as offshore wind farms and cables.⁹⁹ Beyond these systems, dual-use infrastructures are emerging as a complementary layer, with subsea cables increasingly used for environmental and hazard monitoring, including the detection of submarine currents linked to tsunami risks.¹⁰⁰

Beyond improving data availability, the challenge lies in turning ocean data into a shared maritime operating picture. Increasing commercial interest in ocean data raises risks around information control, as well as unequal access for actors such as small-scale fishers.¹⁰¹ These challenges are compounded by tensions between transparency and security concerns, as well as between the need for monitoring versus the protection of sensitive ecosystems.¹⁰² Where data are available, fragmentation and interoperability gaps further limit its impact, reducing its value for timely decision-making and integrated management.¹⁰⁵

1.2.3. Coastal community resilience

Coastal areas concentrate around 40% of the EU population alongside significant critical infrastructure, yet face growing exposure to climate impacts.¹⁰⁴ Coastal flooding alone already causes €1.2 billion in damages and affects 72,000 people annually, with impacts projected to reach €137–814 billion by 2100.¹⁰⁵ This exposure also has implications for EU defence, with many ports, facilities and assets concentrated in vulnerable coastal zones.¹⁰⁶ Beyond coasts, marine ecosystems act as critical climate regulators, absorbing around a third of global CO₂ emissions, yet their degradation is weakening their absorption capacity.¹⁰⁷ Against this backdrop, nature-based solutions (NbS) offer a practical means of reducing exposure to climate risks while delivering broader environmental and economic benefits. By restoring ecosystems such as wetlands, dunes and seagrass beds, they provide effective protection against floods, storm surges and erosion, while delivering co-benefits including biodiversity restoration, carbon sequestration and support to coastal community livelihoods.

The scale of this opportunity is significant: globally, conserving coastal vegetation could generate around US\$ 274 billion in adaptation benefits by 2100,¹⁰⁸ while ocean degradation could cost up to US\$ 8.4 trillion over the next 10–15 years.¹⁰⁹ At EU level, this is reflected in the estimated economic benefits of restoring seagrass (€284–€514/ha/year) and shellfish ecosystems (€5,000–€90,000/ha/year),¹¹⁰ alongside evidence from the Life Adapto project, where coastal adaptation measures reduced climate risk while supporting biodiversity, fisheries and tourism.¹¹¹

Despite their multilayered benefits, marine NbS remain underfunded, receiving only around 9% of total NbS investment.¹¹² This reflects broader challenges, including limited political prioritisation, poor stakeholder engagement and fragmented governance across policy domains.¹¹³

These barriers also highlight an opportunity to strengthen the political and economic case for ecosystem protection by identifying interventions that deliver multiple policy objectives. For example, current research suggests that submarine cables generally have a relatively limited environmental footprint once installed, while both cables and MPAs are vulnerable to activities such as bottom trawling.¹¹⁴ This creates opportunities for more strategic maritime planning to identify where marine protection could simultaneously strengthen ecosystem conservation, safeguard critical infrastructure, limit maritime intrusions by spying vessels (e.g. those posing as fishing boats) and enhance ocean observation through cable-enabled monitoring. Realising potential synergies, however, would require stronger coordination, stakeholder engagement and further research to address questions around cable repair, operational access and long-term environmental impacts.

1.2.4. International cooperation and maritime governance

States depend on shared seas for trade, food, climate regulation and connectivity, but are competing more intensely over routes, resources and infrastructure. The Arctic, for example, has long been seen as a model of international cooperation, but is now emerging as a potential flashpoint.¹¹⁵ Rapid ice melt – potentially leading to the first ice-free day before 2030¹¹⁶ – is opening access to new shipping routes and resource frontiers while transforming the ocean from a largely open and undergoverned space into one of growing strategic importance.¹¹⁷ As offshore infrastructure expands and countries seek greater access to critical resources, competition for access is intensifying.¹¹⁸ These tensions are already visible and highlighted by unilateral actions by global actors such as the US, from renewed strategic interest in Greenland to debates around seabed resource extraction, where the push to secure critical raw materials sits uneasily alongside environmental risks and scientific uncertainty.¹¹⁹ In this context, the ocean is no longer peripheral to questions of security and competitiveness, but central to them.¹²⁰

States depend on shared seas for trade, food, climate regulation and connectivity, but are competing more intensely over routes, resources and infrastructure.

At the same time, the ocean remains a domain where cooperation is both possible and necessary, precisely because of the shared dependencies it creates. This interdependence is increasingly recognised: 78% of national climate plans now reference the ocean, while recent agreements such as the World Trade Organisation (WTO)

Agreement on Fisheries Subsidies¹²¹ and the Agreement on the Conservation and Sustainable Use of Marine Biological Diversity of Areas beyond National Jurisdiction (BBNJ – the first global treaty to protect biodiversity in the high seas) highlight the continued scope for collective action.¹²² However, while agreements such as BBNJ demonstrate the potential for collective action, they also illustrate how ocean governance is inherently geopolitical. For BBNJ this means not only protecting ecosystems but also shaping jurisdictions and norms around resources access and use in strategically important spaces.

As geopolitical competition intensifies, attention may likely shift towards regional and issue-specific forms of cooperation, as has been seen on climate in recent years, and increasingly around offshore renewable energy, such as in the North Sea.¹²³ As the EU seeks to diversify and deepen its partnerships, this creates opportunities to anchor engagement in shared ocean interests. With African countries, for example, cooperation on regenerative blue economy models, sustainable fisheries and aquaculture and ocean observation and data-sharing offers possibilities to support both development and resilience objectives.¹²⁴ In this context, the ocean becomes not only a site of shared risk but also a practical platform for building more stable and mutually beneficial partnerships.

Despite these opportunities, significant challenges remain. Gaps in ambition and enforcement continue to limit the effectiveness of existing agreements, while competing priorities – such as securing critical raw materials versus protecting marine ecosystems – create tensions in policy and practice.¹²⁵ For example, the recent EU–UK dispute over UK restrictions on sand eel fishing illustrates how conservation objectives can come into tension with economic interests in marine resources across jurisdictions.¹²⁶ At the same time, rising geopolitical competition, overlapping territorial claims and uneven capacities – from monitoring and enforcement to data collection – across regions complicate cooperation.

1.3. CROSS-CUTTING CHALLENGES

The EU's ability to harness the ocean as a strategic domain remains constrained by a set of cross-cutting challenges that recur across several areas:

1.3.1. Financing and economic barriers

Many of the solutions highlighted within Section 1 are capital-intensive. While EU initiatives increasingly seek

to mobilise both public and private capital, less bankable areas such as climate adaptation and NbS face persistent public financing gaps and will likely continue to do so under the future Multiannual Financial Framework.¹²⁷ Recent simplification measures on sustainable finance may further constrain investor access to the comparable and reliable data needed to support these sectors.¹²⁸

1.3.2. Fragmented governance and regulatory complexity

EU ocean governance remains dispersed across multiple policy frameworks, such as on fisheries, nature, water and chemicals, with varying degrees of application across member states.¹²⁹ More recently, the role of the maritime domain in strengthening European security has added yet another layer to this already intricate set of frameworks. This creates a complex and often siloed policy landscape that can hinder coordination and create uncertainty for businesses. These difficulties are further complicated by the transboundary nature of maritime ecosystems, overlapping national jurisdictions and the growing number of actors with interests in the maritime space – from industry and regulators to coastal communities and security actors.¹³⁰ The challenge of fragmented governance is further elaborated in Section 2.1.1.

1.3.3. Environmental safeguards

Healthy marine ecosystems are an enabling condition for food security, renewable energy deployment, maritime resilience and wider economic competitiveness. Nevertheless, 93% of EU marine areas are under stress from human activities and only around 2% are effectively protected through management plans.¹³¹ At the same time, the rapid scaling of ocean-based solutions introduces new trade-offs that require careful balancing of competing priorities – for example, between offshore energy expansion and ecosystem protection or between critical raw material extraction and biodiversity preservation.¹³²

1.3.4. Data and information gaps

As highlighted in the previous section, access to high-quality, decision-grade information is essential for risk management, spatial planning and enforcement, but also for encouraging opportunities around R&D, investment and international cooperation. However, fragmented data systems, limited access to data, interoperability gaps and uneven capacities across member states continue to limit the effective use and sharing of information.¹³³

2. Current landscape of EU ocean governance

Building on the state of play explored in Section 1, this Section aims to take stock of the existing ocean governance. It explores latest developments with the adoption of the Ocean Pact and how the EU's

maritime policies could develop in the context of the upcoming Ocean Act to strengthen maritime protection and its linkages with European competitiveness and security.

2.1. STATE OF PLAY

As Section 1 demonstrated, the ocean presents significant opportunities to advance a wide range of EU objectives, from food security and industrial competitiveness to climate neutrality, resilience and maritime security. Core marine policies include the Common Fisheries Policy (CFP) which governs fisheries and aquaculture while linking marine resource use to sustainability objectives¹³⁴ and includes legislation such as the EU's regulation combating illegal, unreported and unregulated fishing.¹³⁵ The Integrated Maritime Policy, introduced in 2007, was the first attempt at integrated ocean governance of the EU. Although it could not overcome the fragmented policy landscape, it led to important legislative outcomes, such as the Marine Strategy Framework Directive (MSFD) and the Marine Spatial Planning Directive (MSPD). However, given the ocean's varied importance, the governance of ocean and coastal spaces increasingly extends far beyond explicitly 'marine' policy.

Marine resources, for example, are no longer governed solely through the CFP. Growing pressures on land-based food systems, from climate change and biodiversity loss to geopolitical disruption such as the war in Ukraine, have increased the strategic importance of marine resources for food security and circular economy.¹³⁶ Consequently, fisheries and aquaculture governance increasingly intersects with broader EU frameworks such as the Bioeconomy Strategy¹³⁷ and the Vision for Agriculture and Food,¹³⁸ which promote protein diversification and resource efficiency. Marine and coastal sectors, including algae cultivation and multitrophic aquaculture, are therefore not only creating new opportunities within the blue economy but are also becoming important contributors to wider EU objectives beyond traditional fisheries management.

Although the Integrated Maritime Policy could not overcome the fragmented policy landscape, it led to important legislative outcomes, such as the Marine Strategy Framework Directive and the Marine Spatial Planning Directive.

A similar shift is visible in the security domain. The 2024 Progress Report on the Strategic Compass for Security and Defence highlights not only the growing importance of mitigating climate risk but also the resilience of critical infrastructure.¹³⁹ This includes assets such as ports and shipping lanes critical for military mobility and the movement of strategic goods, but also food and energy systems. In this context, blue economy sectors – from sustainable food production and shipping to offshore renewable energy – are important contributors to broader

security objectives. This is reflected in the European Union Maritime Security Strategy, which frames the protection of critical maritime infrastructure, natural resources and the marine ecosystems that support them as integral to economic and societal resilience.¹⁴⁰

While the ocean offers considerable potential to advance a range of EU priorities, the governance architecture underpinning these ambitions remains fragmented and poorly equipped to manage their increasing interconnectedness. Built largely through sector-specific policy responses, it continues to face persistent implementation gaps and a lack of strategic coherence.

2.1.1. Barriers to effective ocean governance

This section looks at the implementations gaps related to the existing ocean governance and specific challenges concerning fragmented policy frameworks for the maritime domain.

Implementation gaps

Sectors increasingly framed as strategically important for food security, low-carbon production and economic resilience continue to face weak policy delivery. An evaluation of the CFP found that despite relatively strong provisions on issues such as overfishing and fleet capacity, implementation remains insufficient, fish stocks continue to be depleted and progress in operationalising an ecosystem-based approach (EBA) has been slow.¹⁴¹ Likewise, a 2023 evaluation of EU aquaculture policy found that, despite emerging opportunities and its increasing strategic importance, sectoral growth across the Union has been limited.

Environmental implementation gaps are equally pronounced. Under the MSFD, member states were required to achieve good environmental status (GES) – defined by a range of ecosystem health descriptors – of their marine waters by 2020.¹⁴² GES was not achieved,¹⁴³ while the Commission's 2025 implementation report confirms continued biodiversity decline across EU seas.¹⁴⁴ Relatedly, the EU Biodiversity Strategy calls for protecting 30% of marine areas, with 10% strictly protected by 2030,¹⁴⁵ yet only 12.3% of EU waters are currently protected¹⁴⁶ and less than 1% are strictly protected,¹⁴⁷ and harmful activities are still permitted in roughly half of MPAs.¹⁴⁸ Inadequate implementation of GES and maritime protection can lead to sub-optimal security, as member states are missing out on the opportunity to inspect potential vessels belonging to the (Russian) shadow fleet on the ground safeguarding environmental standards (see Section 1).

In the security domain, reporting under the revised EU Maritime Security Strategy Action Plan has been criticised as too generic to meaningfully assess progress on risks such as hybrid threats and natural hazards.¹⁴⁹ Even the EU's primary tool for coordinating maritime space and resources across sectors, the MSPD, does not include security and defence as a priority for planning and continues to face implementation challenges.¹⁵⁰

While 20 of 22 coastal member states have adopted plans, eight were only adopted recently, infringement cases against Greece and Croatia remain open, and the Commission continues to describe implementation as largely procedural and in its infancy.¹⁵¹

Many of these implementation gaps are underpinned by weaknesses in enforcement. The EU's framework for combating illegal, unreported and unregulated fishing demonstrates the value of robust compliance mechanisms. Shortcomings identified by the European Court of Auditors¹⁵² were followed by a 2023 revision of the EU Fisheries Control System, strengthening stringency around sanctions.¹⁵³ By contrast, the MSPD contains no dedicated access to justice provision and primarily establishes procedural obligations, leaving considerable discretion over the content, quality and use of plans.

The Ocean Pact was adopted in recognition of both the ocean's growing strategic importance and the need for a more coherent governance framework capable of addressing the challenges outlined above.

Fragmented governance

These implementation and enforcement gaps are closely linked to a wider problem of fragmentation. EU ocean governance remains spread across multiple sectoral frameworks with differing objectives, timelines, reporting cycles and competent authorities, creating risks of duplication, contradictory incentives and weak alignment.¹⁵⁴ The revised European Union Maritime Security Strategy itself reflects this challenge, placing considerable emphasis on streamlining coordination, improving information sharing and enhancing interoperability across civilian and military actors.¹⁵⁵ Similarly, the MSFD was intended to provide the ecological framework for sectoral policies through GES and the EBA.

In practice, however, coherence remains weak. The CFP and MSFD operate through different competent authorities, reporting cycles and policy objectives, limiting alignment. For the MSPD, coherence is further weakened by the inconsistent operationalisation of the concepts intended to bridge the MSFD and MSPD, particularly GES and EBA, with both varying considerably across member states.¹⁵⁶ One assessment found that only 8% of GES definitions under the MSFD were sufficiently robust,¹⁵⁷ while the absence of a common definition of EBA has led to divergent applications, with some member states limiting it to project authorisation rather than embedding it within strategic planning.¹⁵⁸ These inconsistencies in concepts, indicators and reporting undermine the environmental

principles intended to align the MSPD and MSFD, resulting in an inconsistent basis for planning and decision-making.

Fragmentation is not only operational, but also strategic. Objectives that were once governed separately now increasingly overlap and, at times, conflict. Expanding offshore renewables, for example, can create tensions with fishery management, biodiversity protection and maritime security.¹⁵⁹ Conversely, efforts to expand MPAs may displace fishing activity and raise complex cross-border governance challenges.¹⁶⁰

A clear framework for prioritising between competing objectives and ensuring synergies whenever they are possible is currently missing. Offshore renewable deployment, for example, is supported by binding targets, accelerated permitting procedures including those established by the Renewable Energy Directive III¹⁶¹ and strong investment signals such as the EU ETS, which uses carbon pricing to incentivise investment in cleaner technologies.¹⁶² Meanwhile other policies such as the MSFD rely largely on qualitative objectives, insufficient investment signals and weaker implementation mechanisms. Emerging blue economy sectors such as algae cultivation and multitrophic aquaculture are increasingly recognised in EU competitiveness strategies but lack similarly robust delivery frameworks and a general industrial strategy. As a result, certain objectives are institutionally better positioned to shape outcomes than others, creating a structural imbalance in decision-making, increasing the risk of inconsistent implementation across the maritime domain and weakening the incentives to support multi-use projects with a synergetic effect. As maritime risks become increasingly systemic and global, ocean governance can no longer remain fragmented across disconnected sectoral frameworks. This also has implications for the Commission's simplification efforts.¹⁶³ Specifically, these are that many governance challenges stem not from an excess of regulation but from fragmented structures and weak coordination that make implementation and investment decisions more difficult than they need to be.

2.1.2. From an Ocean Pact to an Ocean Act

In 2024, the Commission introduced the European Ocean Pact,¹⁶⁴ building on the Manifesto for the European Ocean Pact,¹⁶⁵ and the civil society-led Blue Ocean Manifesto.¹⁶⁶ The Pact was adopted in recognition of both the ocean's growing strategic importance and the need for a more coherent governance framework capable of addressing the challenges outlined above. These include not only persistent policy shortcomings, such as fragmentation and implementation gaps, but also sectoral barriers related to financing, data, environmental protection and regulatory complexity that continue to limit the ocean's contribution to broader EU objectives. This ambition is reflected in the Pact's six priorities, which span strengthening ocean health, promoting a sustainable and competitive blue economy, supporting resilient coastal communities and islands, advancing ocean research and innovation building on existing knowledge innovation communities,¹⁶⁷ enhancing maritime security and defence and reinforcing international ocean governance and diplomacy.¹⁶⁸

Moreover, the Ocean Pact envisages concrete actions such as creation of the OceanEye – a digital twin observation system – and a drone fleet to enhance the security-related monitoring and surveillance of the maritime domain.¹⁶⁹ Both initiatives could potentially serve a dual purpose, for example, to monitor and survey both illegal fishing practices and the movement of shadow fleets.

To operationalise the vision and establish a strong legal basis for the Ocean Pact, the Pact envisages a European Ocean Act, currently framed to be built upon a revision of the MSPD. Together with the MSFD, the MSPD formed the core of the EU's original attempt to bring greater coherence to ocean governance. While the MSFD establishes targets around GES and EBA, the MSPD seeks to coordinate competing maritime activities and uses within those ecological boundaries. As one of the EU's few tools explicitly designed to manage interactions between sectors across finite marine space, maritime spatial planning (MSP) provides a natural foundation for the Ocean Act. With that said, the broad priorities under the Ocean Pact also highlight the limitation of relying on spatial planning alone. The MSPD continues to face implementation challenges, while many of the barriers identified in Section 1 – from financing and data gaps to regulatory complexity and environmental safeguards – extend beyond the scope of what the MSP can address.¹⁷⁰ More fundamentally, however, the Pact's emphasis on coherence reflects a need not only for MSP that better manages trade-offs, priorities and competing uses, but for a broader strategic vision capable of guiding decision-making across the maritime domain.

2.2. DESIGNING AN OCEAN ACT – BASIC NEEDS AND SPECIFIC RECOMMENDATIONS

This section provides an analysis of the ways in which the Ocean Act can build on and improve the existing ocean governance framework. This includes the identification of basic needs and the elaboration of specific recommendations related to how the Ocean Act can address the trade-offs and strengthen the synergies between sustainability, competitiveness and security in the maritime domain.

2.2.1. Strategic vision and conditions

A central question for the Ocean Act is whether it can provide a clearer strategic vision for EU ocean governance and create a strong case for advancing a healthy ocean in a context where competitiveness and security dominate the European political discourse. More concretely, the challenge is to ensure synergies between sustainability, competitiveness and security agendas are maximised and to determine how competing objectives should be prioritised when trade-offs are unavoidable.

MSP is one of the EU's principal mechanisms for coordinating activities across marine space and the most likely vehicle through which many of the Ocean Act's ambitions would be delivered. While the MSPD currently requires member states to consider a broad range of environmental, economic and social objectives,

it provides limited guidance on how these should be prioritised in practice, where synergies or multi-use is not possible.

In principle, the aforementioned gap was intended to be addressed through its relationship with the MSFD, with GES and EBA providing the ecological framework within which planning decisions would be made. In practice, however, weak operationalisation of both concepts has limited this function, leaving member states without a consistently applied reference point for balancing competing uses and encouraging synergies.¹⁷¹ Reviews of maritime spatial plans reflect this imbalance: offshore renewable deployment has become a dominant driver of plan revisions while priorities such as climate adaptation, NbS, circular economy approaches and the decarbonisation of ports and shipping remain comparatively underdeveloped.¹⁷² Beyond affecting progress in these sectors, the absence of transparent and predictable prioritisation criteria, and a strong direction towards maximising synergies, can reduce the signals and certainty necessary for objectives such as channelling public and private funds.¹⁷³

The challenge extends beyond prioritisation where necessary to the practical management of competing claims. Few maritime spatial plans include systematic approaches for assessing trade-offs or formal conflict-resolution procedures when objectives collide.¹⁷⁴ Although some member states have experimented with tools such as ecological sensitivity mapping and GIS-based conflict mapping, decision-making continues to rely heavily on qualitative judgement, uneven stakeholder input and incomplete data. As a result, plans often identify where activities should occur without adequately addressing under what conditions, at what times or which uses should take precedence when space becomes constrained.

The Ocean Act faces the challenge of ensuring synergies between sustainability, competitiveness and security while prioritising between competing objectives with unavoidable trade-offs.

Taken together, these challenges illustrate both the potential and the limits of MSP. While an Ocean Act, especially in the form of a regulation (see Section 3.1.2. for additional insights), could strengthen MSP as a more effective tool for coordinating maritime space and managing trade-offs, spatial planning alone cannot resolve fundamental questions of strategic prioritisation and the management of the ocean as a complex system. Doing so requires an overarching framework that provides a common reference point for balancing competing objectives across sectors and governance levels.¹⁷⁵

In principle, GES could be a strong option for the new framework under the Ocean Act. Far from being solely an environmental objective, many of its descriptors underpin wider economic and security priorities.¹⁷⁶ Maintaining healthy fish and shellfish stocks under Descriptor 3 supports fisheries and food security, while protecting seabed integrity through Descriptor 6 contributes to the resilience of coastal communities, critical maritime infrastructure and the natural capital on which blue economy sectors depend. Likewise, maintaining hydrographical conditions under Descriptor 7 supports the functioning of ports, shipping routes and offshore assets essential to European trade, connectivity and economic security. Conceiving GES as the overarching operating framework for an Ocean Act would therefore position healthy ecosystems not as a competing objective but as the enabling condition against which competing uses of marine space are assessed and reconciled.

That been said, it is worth noting that more ambitious environmental goals are hardly realistic without an enabling financial framework such as the Multiannual Financial Framework (MFF), state aid, ETS revenues or EIB-led private investments to address the trade-offs between long-term benefits and short-term costs of such regulatory action for the fishing industry, shipping industry and energy operators (see Section 2.2.3 for more information).¹⁷⁷ Moreover, member states' attitudes towards a stronger EU ocean governance vary depending on the importance of their cross-boundary maritime collaboration, impacts on their economies and capacities to implement more ambitious targets and spatial planning. Countries such as the Netherlands¹⁷⁸ and Belgium¹⁷⁹ appear to be in favour of a more coordinated EU maritime framework, arguably due to a crowded maritime space that requires transboundary coordination. Nonetheless, they also caution against the changes of the current division of competences and flexibility, respectively, for the spatial planning of their maritime areas. In 2025, the Council also underlined the importance of respecting existing competences and the subsidiarity principle.¹⁸⁰ Island countries such as Malta repeatedly state the importance of the specific position of member states with such geographical features.¹⁸¹ Countries such as Greece and Croatia still need to adopt MSPs under the current legislation.¹⁸² While Ireland calls for an ambitious and coherent Ocean legislation under its 2026 Council Presidency, success will be difficult without accounting for countries' specificities, capacities and positions with respect to a stronger maritime framework that the Ocean Act would entail.¹⁸³

Specific recommendations

- **Harmonise the concepts of EBA and ecosystem-based management**, supported by clearer operational guidance on translating ecological limits, cumulative pressures and ecosystem connectivity into spatial decisions.
- **Embed adaptive management within MSP by integrating long-term projections and ongoing monitoring**, allowing planning decisions to respond to evolving marine conditions, technological

developments and emerging pressures – from geopolitical tensions and shifting marine resource distributions to climate risks.

2.2.2. Coordination and governance

The challenge for an Ocean Act extends beyond establishing a strategic framework to ensuring that it is both informed and operationalised through effective governance. Coordination across stakeholder groups, sea basins and partner countries are important not only for implementation but also for improving policy quality, negotiating competing interests and building consensus around difficult trade-offs.¹⁸⁴

Stakeholder engagement and participation

Stakeholder participation is central to this objective. Decisions increasingly involve a growing number of actors with competing interests and varying degrees of influence.¹⁸⁵ Effective engagement is therefore not merely a procedural requirement but a mechanism for identifying conflicts early, improving policy design and reducing implementation risks. This is reflected in findings from the European Court of Auditors, which identified litigation and public opposition as significant drivers of project delays and associated costs.¹⁸⁶

Yet participation across EU ocean governance remains uneven. Reviews of fishery governance have highlighted the persistent underrepresentation of small-scale fishers¹⁸⁷ despite their importance for coastal economies, food security and lower-impact fishing practices.¹⁸⁸ Similar shortcomings have been identified in the implementation of the MSPD, with a 2025 review finding a 70% misalignment between how member states and stakeholders perceived the quality of engagement and recurring concerns over late-stage consultations, underrepresentation, weak transparency and limited opportunities to meaningfully influence outcomes.¹⁸⁹ Experiences from the Baltic Sea illustrate both the need for and the potential of stronger inclusion. While opposition from the Swedish armed forces to offshore wind developments demonstrated the increasing likelihood of conflicts between EU objectives,¹⁹⁰ proactive coordination between shipping and conservation interests demonstrated how early engagement can help avoid more costly revisions downstream.¹⁹¹ For an Ocean Act, the implication is a need for governance structures that embed participation early enough to improve long-term policy quality, acceptance and implementation.

Recognising divergent interest is also important in terms of minimising or clearly recognising the opposition to a potentially more integrated marine spatial planning, and especially if the Ocean Act is envisaged as regulation. Besides member state reservations in terms of upholding the subsidiarity and safeguarding their sovereignty in the maritime domain, the European Parliament,¹⁹² together with fishing industry voices,¹⁹³ has been stressing the importance of safeguarding the interest of fisheries in spatial planning when compared with marine protection, offshore energy, shipping and defence zones. Similar voices have been raised by the oil and gas

industry in terms of upholding the rights related to their maritime activities.¹⁹⁴ While trade-off cannot always be overcome, and prioritisation becomes necessary – from the perspective of EU's climate, environmental competitiveness and security objectives – improved MSPs are exactly essential to clarify these questions while exploring synergies, backed by financial instruments whenever that is feasible.

Specific recommendations

- ▶ **Develop transparent criteria and guidance for prioritising competing objectives** within MSP and the wider ocean governance.
- ▶ **Require structured stakeholder engagement and conflict-resolution procedures** within MSP processes – involving governments, coastal communities, small- and large-scale fisheries, energy operators, defence authorities and NGOs. These procedures should include clear feedback mechanisms, transparency obligations and, where appropriate, the use of neutral professional mediators.
- ▶ **Encourage the use of e-participation tools** to improve stakeholder accessibility and reduce administrative burdens.
- ▶ **Strengthen public access to information**, including spatial planning decisions, exploring the potential use of AI in accessing and sharing information, lobbying records and conflict-resolution outcomes, as a means of improving transparency, accountability and engagement.¹⁹⁵
- ▶ **Include a dedicated access to justice provision within the Ocean Act** to align with commitments under EU and International law.

EU sea-basin coordination and partnerships with third countries

Beyond participation, the effectiveness of an Ocean Act will depend on its ability to strengthen coordination across jurisdictions. Marine ecosystems and many of the pressures acting upon them do not respect national boundaries, yet governance remains organised predominantly at the member state level.¹⁹⁶ This disconnect is particularly significant because MSP is likely to remain the principal mechanism through which many Ocean Act objectives are implemented. The 2026 evaluation of the MSPD found considerable variation in national plans and identified cross-border cooperation as remaining largely procedural, highlighting the absence of permanent institutional arrangements and other barriers to effective sea-basin governance.¹⁹⁷ Without effective sea-basin-level coordination, the development of cross-boundary needs, such as green shipping corridors, port specialisation, domain awareness and offshore industrial clusters, in ways that maximise EU-level competitiveness and security will be complicated.¹⁹⁸

Marine ecosystems and many of the pressures acting upon them do not respect national boundaries, yet governance remains organised predominantly at the member state level.

Likewise, the effective management of cumulative environmental impacts, the creation of coherent networks of MPAs and the avoidance of 'race-to-the-bottom' dynamics arising from uneven standards across shared waters and national jurisdictions would become more difficult. Initiatives such as the Greater North Sea Basin Initiative demonstrate the potential of basin-level cooperation, but their largely voluntary character limits their consistency and long-term durability.¹⁹⁹ An Ocean Act therefore has an opportunity not simply to strengthen MSP itself but to reinforce the governance arrangements through which planning is coordinated across shared marine regions.

The same governance challenge extends beyond the EU's borders. Recent calls by the European Parliament for a new generation of fishery partnership agreements centred on shared sustainability, knowledge exchange and support for local fishing sectors reflect a growing recognition that such relationships are strategic governance instruments rather than merely access arrangements.²⁰⁰ More broadly, the EU has a direct interest in ensuring that international ocean governance keeps pace with its own domestic objectives. If comparable maritime standards on biodiversity and environmental protection are not progressively adopted internationally, European operators risk bearing costs that their competitors do not. This would further strengthen opposition from business communities towards policies needed to ensure a healthy ocean, despite many of these measures serving their own long-term interests.

Nevertheless, the Commission's evaluation of the MSPD found that cooperation with non-EU countries remains largely informal and project-based, constrained by the absence of permanent institutional frameworks, data-sharing barriers and limited legal alignment with third-country planning regimes.²⁰¹ These shortcomings suggest that if the Ocean Act is to underpin a more coherent external ocean strategy, it will need to strengthen the mechanisms under a revised EU International Ocean Governance Framework through which it coordinates with partners beyond its borders.²⁰²

Specific recommendations

- ▶ **Systematise transboundary planning initiatives within the Ocean Act**, such as the Greater North Sea Basin Initiative, that bring together diverse stakeholders to identify shared priorities, maximise synergies and coordinate action across borders.

- **Strengthen secure data-sharing across authorities and sectors**, particularly between industry, security actors and relevant public authorities to improve the usability of existing data for decision-making.
- **Establish more permanent arrangements for the approach to regional sea basins and third-country cooperation** on MSP, data-sharing, maritime domain awareness and ocean governance.
- **Improve coherence with complementary policies** such as the MSFD by aligning reporting cycles, indicators and assessment processes.
- **Strengthen integrated planning and harmonised reporting within and across member states to create a whole-of-ocean picture** of activities and financing needs. This could enable strategic public spending and clearer long-term signals for private investment.

2.2.2. Scaling up multi-use projects and synergies

The Ocean Act also presents an opportunity to maximise the use of increasingly constrained maritime space by fostering synergies between sustainability-, competitiveness- and security-related activities rather than simply managing conflicts between them. In this context, multi-use projects have emerged as a promising approach as they can support multiple priorities, including on sustainability, competitiveness and security. It refers to the planned and coordinated use of the same maritime space by two or more compatible activities, either simultaneously or sequentially, in ways that reduce spatial pressure. Emerging examples include offshore wind projects combined with oyster restoration,²⁰³ aquaculture and seaweed cultivation,²⁰⁴ and the coordination of military zones with shipping routes, critical infrastructure and mineral extraction.²⁰⁵ In this sense, multi-use has the potential to further the opportunities highlighted in Section 1 by improving the efficiency with which marine space is allocated while ideally generating environmental, economic, security and/or social co-benefits.

However, synergies through multi-use remain at an early stage of development, with existing examples primarily concentrated on offshore renewable energy.²⁰⁶ Moreover, successful multi-use depends on participatory planning and stakeholder engagement from the outset, both to minimise environmental pressures and to understand operational constraints, distributional impacts and potential conflicts between users.²⁰⁷ The increasingly proposed combination of offshore wind and fisheries illustrates this challenge: while reserving access for low-impact fisheries or developing energy partnerships with cleaner fishing fleets could create valuable synergies, unresolved questions around issues such as cable entanglement, liability and operational safety demonstrate that compatibility cannot be assumed without better planning, more data, consultation and investment.²⁰⁸

For the Ocean Act, this suggests that while multi-use has considerable strategic potential, its success will

depend less on promoting the concept itself than on strengthening the conditions that enable it. Within MSP, this includes addressing the current lack of guidance on how multi-use should be operationalised in practice and the inconsistent application of tools such as ecological sensitivity mapping and cumulative impact assessments, both of which are essential for identifying compatible activities and evaluating trade-offs on a robust evidence base.²⁰⁹ Beyond planning, successful multi-use will also depend on stronger stakeholder participation and greater investment, particularly in research, to better understand environmental, operational and distributional implications.²¹⁰ Without these foundations, multi-use risks becoming a justification for intensifying activity in already crowded marine spaces rather than a mechanism for delivering genuine synergies.

Specific recommendations

- **Define ‘multi-use’ more clearly**, including through guidance on compatible activities.
- **Support research and stakeholder engagement** to identify evidence-based synergies, including between critical infrastructure, conservation and observation.
- **Require authorities to use tools** such as sensitivity mapping and cumulative impact assessments when evaluating multi-use proposals.

2.2.3. Enabling conditions

The value of an Ocean Act will depend not only on its governance architecture but also on the enabling conditions that support its implementation. Many of the functions discussed above – including trade-off assessments, conflict resolution, ecosystem-based management, multi-use planning and cross-border coordination – rely on robust evidence bases and access to finance that remain fragmented across the current policy landscape. Strengthening access to data and aligning finance with Ocean Act objectives are therefore integral to, rather than separate from, effective ocean governance.

The value of an Ocean Act will depend not only on its governance architecture but also on the enabling conditions that support its implementation.

Access to information and data

A stronger evidence base is a prerequisite for many of the governance functions envisaged under the Ocean Act, particularly since MSP is likely to remain one of the principal mechanisms through which Ocean Act objectives are implemented. However, current evidence

remains fragmented. Both the 2022 and 2026 evaluations of the MSPD identify insufficient data collection and weak interoperability between MSPD, MSFD and sectoral datasets, stemming in part from differing indicators, reporting requirements and data standards.²¹¹ Wider deficiencies in ocean observation capacity compound these challenges, particularly in relation to biodiversity, human activities at sea and long-term climate projections.²¹² At the same time, emerging priorities such as maritime domain awareness, subsea cable monitoring and offshore energy expansion are generating data requirements that existing observation systems were not designed to meet.²¹³ Unless addressed, the Ocean Act risks relying on a planning framework constrained by incomplete and fragmented information, limiting its ability to allocate maritime space effectively.

The Ocean Dashboard is presented as a component under the Ocean Pact to address some of these shortcomings to improve transparency and monitoring against Ocean Act objectives. However, the seemingly most relevant point of comparison – the EU Biodiversity Strategy Dashboard – highlights two important lessons.²¹⁴ First, the design of the dashboard can shape what is measured and prioritised. In particular, an emphasis on tracking the completion of policy actions risks obscuring whether those actions are actually delivering the intended objectives.²¹⁵ Second, dashboard design alone cannot compensate for weaknesses in the underlying evidence base: indicator gaps, inconsistent reporting, uneven monitoring across member states and limited harmonisation continue to constrain meaningful assessment of outcomes.²¹⁶ Consequently, the effectiveness of an Ocean Dashboard will ultimately depend not only on its reporting structure but also on broader improvements in ocean observation capacity, policy performance estimations, data accessibility and interoperability. This includes advances in observation technologies, balanced approaches to commercial data licensing, selective declassification where security considerations permit and stronger mechanisms for coordinated public data sharing across sea basins.

Specific recommendations

- ▶ **Prioritise improving the usability of existing data**, including through more harmonised reporting standards, indicators and data formats, thereby facilitating data exchange across authorities, sectors and borders.
- ▶ **Provide member states with guidance on balancing security and commercial confidentiality with access to information** of public importance. For example, permits and contracts could establish data stewardship responsibilities, usage rights and conditions for data sharing.
- ▶ **Mainstream investment in ocean observation, monitoring and data collection**, including through innovative technologies such as undersea cables.

- ▶ **Ensure the Ocean Dashboard evolves beyond a reporting repository** into a comprehensive monitoring and transparency platform centred around measurable outcomes over procedural milestones.

Access to finance

Access to finance represents a second enabling condition for the Ocean Act. Delivering its ambitions will require not only substantial investment but also greater coherence in how financial resources are directed across the maritime domain. Ocean transition investment needs for 2021–2027 were already estimated at around €500 billion.²¹⁷ Nevertheless, the Commission’s proposed MFF for 2028–2034 includes only €2 billion in ringfenced funding for CFP priorities, compared with €6.2 billion previously.²¹⁸ In response to wider fiscal constraints, the Commission has placed greater emphasis on using limited public resources to mobilise investment through a range of instruments. Central to this approach is the proposed European Competitiveness Fund (ECF), which the Commission identifies as a key source of funding for ocean priorities.²¹⁹ The ECF would streamline programmes supporting strategic technologies and competitiveness, including instruments such as the Connecting Europe Facility, the European Defence Fund and Horizon Europe, while being supported horizontally by InvestEU to mobilise private capital. Under ReArm Europe, €800 billion is estimated to be invested into security and defence based on joint borrowing. This presents an opportunity to partially fund multi-use initiatives, such as earth observation, patrolling boats and surveillance drones, with both defence and environment-related mandates. Investing in multi-value projects could facilitate costs savings and enable member states to repay the debts resulting from the joint borrowing while keeping inflation in check.

The European carbon market and its ongoing reform offer further opportunities to unlock investments into the ocean.

The European carbon market and its ongoing reform offer further opportunities to unlock investments into the ocean. The revenues from selling carbon allowances for industrial operations under the Innovation Fund, national budgets and in the upcoming Industrial Decarbonisation Bank is the opportunity to support the uptake of maritime clean technologies, such as ships driven by wind-assisted propulsion systems.²²⁰ Moreover, as part of the ongoing review of the ETS to make it fit for climate 2040 target, carbon removal projects may be linked to the carbon market and unlock new financing opportunities. Hard-to-abate sectors (e.g. steel, cement, chemicals, aluminium) could invest in nature-based maritime carbon removals (e.g. algae cultivation) to claim carbon credits for their

operations in the context of restricted and costly carbon emission allowances.²²¹ However, if not coupled with rigorous conditions and a transparent accounting system, the risk is that the investments are made into non-permanent and environmentally harmful carbon removals by industries that are technically and financially capable to decarbonise their industrial activities at source.

Together, these instruments could support many of the opportunities identified in Section 1, including maritime decarbonisation, blue economy development, infrastructure resilience and ocean observation. However, there are several challenges in this. First, despite intersecting scopes, there remains little clarity on how financing needs will generally be coordinated and monitored across instruments to avoid overlaps or gaps.²²² Second, while blue economy investors highlighted blended finance as one of the most important facilitators,²²³ the ECF as it currently stands lacks details on how it would incentivise blending.²²⁴ Third, the conditions needed to mobilise private investment for ecosystem restoration, marine conservation and certain adaptation measures remain underdeveloped, despite long-term economic benefits.²²⁵ While instruments such as InvestEU use public guarantees to reduce investment risk and crowd in private finance, mobilising private capital will also require strengthening the wider enabling environment.²²⁶ This includes developing scalable pipelines of investable projects, which tools such as National Restoration Plans under the Nature Restoration Law should help with, alongside greater regulatory certainty and credible standards for measuring environmental outcomes.²²⁷ Emerging initiatives such as the recently introduced Nature Credits Roadmap may help create new investment opportunities over time. However, these markets remain in their infancy, facing challenges including fragmented markets, evolving quality standards and limited demand.²²⁸ This raises broader questions about how the EU can not only support the supply of investable projects but also stimulate demand for emerging nature-based investment instruments.

When public resources are limited, directing support towards activities that undermine long-term ocean objectives or actors that are comparatively better able to absorb transition costs reduces the additionality of public spending. While small-scale fisheries account for around 90% of fishery employment and frequently support coastal communities, food security and lower-impact fishing practices,²²⁹ they receive only around 16% of fishery subsidies,²³⁰ with the majority going to large-scale industrial fleets.²³¹ At the same time, environmentally harmful subsidies – including fuel tax exemptions for industrial fishing fleets and activities contributing to marine degradation – are estimated at €34–48 billion across the EU.²³² Beyond undermining environmental objectives, these spending patterns weaken policy coherence, dilute investment signals and risk undermining the EU's credibility in implementing its commitments under the WTO Fisheries Subsidies Agreement.²³³

Taken together, these challenges suggest that the question is not simply how much funding is available, but how effectively it is directed. Strengthening monitoring

and coordination across funding instruments against common ocean objectives, targets and, where appropriate, earmarked spending priorities will be critical to maximise synergies, avoid duplication and contradictions in financing, and provide greater transparency over investment outcomes. The Ocean Act, however, presents an opportunity both to improve the strategic planning of ocean funding and to strengthen the enabling conditions needed to mobilise private finance. By encouraging greater coordination across authorities and sectors, it could promote a more integrated approach to planning and resource allocation.

Similarly, requiring more harmonised reporting and implementation across member states would strengthen a whole-of-ocean approach. One potential tool could be overarching national ocean plans,²³⁴ which could play a role similar to that of National Energy and Climate Plans in coordinating climate and energy policy at the member state level.²³⁵ Such plans could streamline planning and reporting across key ocean policies, alongside a targeted spending roadmap, while Commission oversight could enable EU-wide coherence. The Ocean Act could also strengthen the wider investment environment. Binding objectives and regulatory certainty provide more predictable investment signals and reinforce coherence between EU and national spending, while streamlined and harmonised reporting could improve transparency and comparability for investors. National ocean plans could reinforce these benefits by increasing visibility over implementation pathways and project pipelines.²³⁶ However, the benefits of an Ocean Plan must be weighed against the risks of reopening and integrating existing legislation in the current political environment of green backlash which, due to short-term transition costs and populist rhetoric, risks undermining an ambitious ocean agenda despite its long-term benefits. In that sense, it is important to highlight the prospects behind a single and ambitious Ocean Plan in terms of its cost-effectiveness and simplification of complex and fragmented spatial planning frameworks, without diluting existing environmental requirements.

Specific recommendations

- **Introduce national ocean plans to advance a whole-of-ocean financing approach** that more purposefully deploys increasingly strapped public funding towards mobilising private investment;
- **Develop a comprehensive benchmark of financing needs across the maritime domain** – including shipping and fishery transition, port decarbonisation, restoration and conservation, coastal adaptation and wider food, blue economy, innovation, resilience and security goals – to ensure limited public funding at EU, national and local levels is deployed where it can deliver the greatest leverage and public value.
- **Establish a coordinated framework for monitoring ocean-related spending and investment** across EU and national funding instruments.

- ▶ **Strengthen communication on the economic, social and security costs of inaction** associated with marine degradation, biodiversity loss, climate impacts and delayed adaptation, including through education and outreach initiatives.
- ▶ **Phase out and redirect harmful subsidies** away from environmentally damaging activities – such as fuel tax exemptions for industrial fishing fleets – towards goals like small-scale fishery transition, with the support of managed subsidy transition plans.
- ▶ **Use the European Competitiveness Fund, InvestEU, the Industrial Decarbonisation Bank and ReArm Europe** to invest in emerging nature-positive projects in the marine and coastal areas. The EU should maximise the potential of blended public-private finance, especially by using limited public funds as insurance mechanisms to reduce financial risks and unlock private investments into marine protection, renewables, low-carbon fuels and circular economy, with an emphasis on synergetic solutions.
- ▶ **As part of the ongoing ETS reform, consider linking the carbon emissions allowances with nature-based maritime carbon removals to incentivise private investments in a healthy ocean.** By investing in carbon removals in the ocean, private investors could contribute to 2040 climate targets, in return, gaining carbon credits for their economic operations. When exploring these possibilities, the EU must ensure that such carbon removal projects are permanent, not environmentally harmful, that they are allowed only for hard-to-abate sectors and that there are clear accounting and transparency mechanisms in place.
- ▶ **Identify, structure and scale high-integrity marine restoration, adaptation and blue carbon projects** by aligning MSP with MSFD Programmes of Measures, National Restoration Plans, and national adaptation strategies, creating a stronger pipeline of investable projects in line with the Nature Credits Roadmap.
- ▶ **Explore measures to stimulate demand for high-integrity ocean and nature credits**, including options such as mandatory markets or credit stacking where robust.

3. Conclusions and cross-cutting policy recommendations

Marine and coastal areas are not only a distinct policy area, but a space where many of the EU's most pressing objectives and agendas overlap and potentially converge. As the recognition of the strategic importance of the ocean is growing, so too are the pressures on marine space, ecosystems and governance systems. The challenge facing the EU is therefore not only one of organising activities within ecological limits in ways that safeguard long-term competitiveness, security and resilience, but of capitalising on the many potential synergies. While the current EU governance framework has established important foundations, it remains fragmented, unevenly implemented, underfunded and insufficiently equipped to manage the scale of competing demands now emerging across Europe's seas.

3.1. CROSS-CUTTING PRIORITIES AND KEY RECOMMENDATIONS

Building on the identified opportunities and challenges (Section 1) and analysis of the existing policy framework and the upcoming Ocean Act (Section 2), this final section of the discussion paper provides general recommendations on cross-cutting priorities for EU ocean governance and key recommendations on the Ocean Act.

3.1.1. Cross-cutting priorities for EU ocean governance

To realise the vision of an Ocean Union, the EU should prioritise the effective implementation of existing policy frameworks. This requires:

- ▶ **A more strategic approach to ocean governance** that focuses not only on managing trade-offs, but on ocean mainstreaming across policy fields and financial instruments, and systematically identifying and maximising synergies across environmental, climate, industry and security sectors.
- ▶ **Stronger enforcement** through improved monitoring, harmonised reporting requirements and timely, proportionate Commission action to address persistent implementation failures, including, where appropriate, through infringement proceedings. In that sense, the OceanEye and envisaged drone fleet should serve the movement of sea vessels that are detrimental both for maritime protection and for security of the European maritime domain.
- ▶ **Simplification through greater coherence, coordination and implementation capacity** rather than through reduced ambition or safeguards. This includes stronger inter-authority and member state

coordination, ocean plans, clearer guidance, better data-sharing, inclusive participation and support for evidence-based decision-making that delivers durable outcomes in practice rather than targets on paper.

- **Improving access to finance via the MFF, ETS and EIB-led private investments and credible nature credits markets.** This needs to be coupled with a benchmark of financing needs, robust monitoring frameworks and clear prioritisation of projects of highest quality in terms of climate resilience, environmental protection, economic viability and livelihoods of coastal communities.
- **Addressing ocean-related data and information accessibility and sharing** via harmonised reporting standards, indicators and data formats, investments in better monitoring, ocean observation, monitoring and data collection and balancing security and commercial confidentiality with access to information.

3.1.2. Key recommendations for an Ocean Act

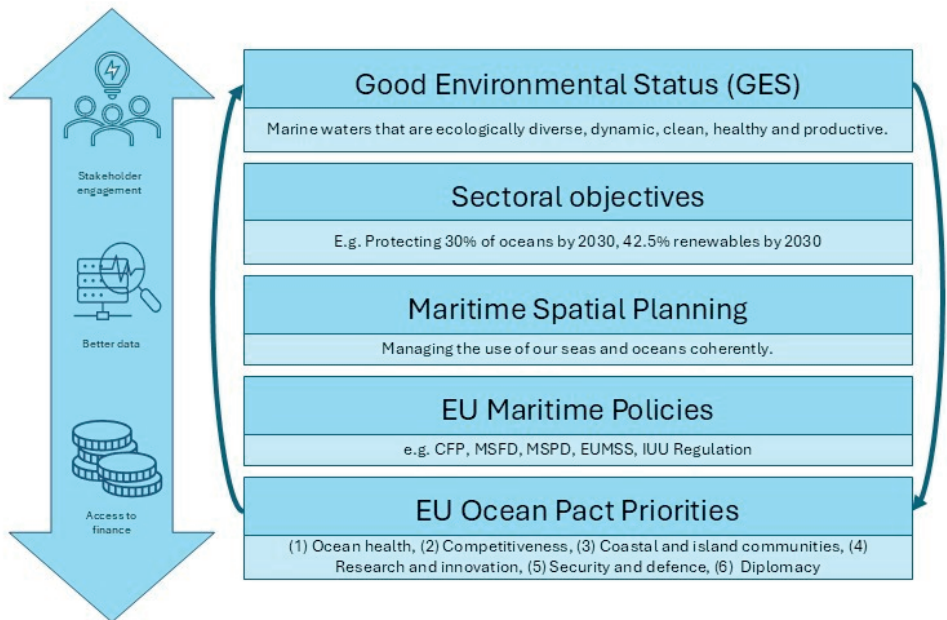
The Ocean Act must go beyond strengthening maritime spatial planning (MSP). While MSP provides a strong foundation for coordinating activities at sea, addressing persistent fragmentation, weak implementation and

inconsistent strategic prioritisation require a broader strategic framework for EU ocean policy (see Figure 2).

- The Ocean Act should be **guided by objectives aligned with the six priorities of the Ocean Pact and supported by a set of governance principles.** These should include the precautionary, rectification at source, polluter pays, integration and non-deterioration principles of EU environmental law, alongside the ecosystem-based approach and ocean mainstreaming measures across policy fields and financial instruments.
- The Ocean Act objectives should also be **anchored by long-term targets.** Achieving and maintaining **good environmental status (GES)** should serve as the primary objective, both because healthy marine ecosystems underpin long-term competitiveness, food security, resilience and security and also because it would strengthen coherence with the MSFD. The Ocean Act could also give binding force to wider strategic commitments, such as the target to protect 30% of marine areas by 2030, including 10% under strict protection, while **considering new forward-looking targets linked to emerging priorities** such as climate adaptation and preparedness for coastal infrastructure and communities.

Figure 2

POLICY FRAMEWORK FOR THE OCEAN ACT



- The Ocean Act should **turn marine spatial plans from a largely procedural exercise into a strategic tool** to enable benefits discussed in Section 1. As such, the MSPs would help coordinate environmental, economic and security priorities, encourage a regional sea basin approach in national MSPs or ocean plans (see below), implement nature targets and GES, resolve trade-offs and simplify governance through better implementation. **Adopting the Ocean Act as a regulation** could provide greater consistency and accountability across member states while positioning a strengthened MSP as its principal implementation mechanism. This approach would, however, need to account for member states' maritime specific interests, capacities and sovereignty concerns (see Section 2). To that end, the regulation should **introduce targets and principles, streamline reporting and encourage regional seas basins management and financing**, while allowing for the flexibility and leaving the specifics around the implementation of such requirements to member states.
- The Ocean Act should **envisage overarching ocean plans to streamline reporting and integrating activity and investment planning across the maritime domain**. Beyond reducing administrative burdens, it could support a whole-of-ocean approach to financial planning, helping to identify where public funding can be deployed most strategically while providing the regulatory standards, transparency and long-term predictability needed to mobilise private capital. Commission oversight of these plans, potentially supported by the Ocean Board, could

further strengthen the coherence of ocean plans across member states with an emphasis on regional sea basins cooperation. However, the ocean plans should be pursued only if this strengthens, rather than weakens, the ambition of existing legislation. To manage the political risks associated with reopening existing legislation in the context of the 'green backlash', the **Ocean Act should facilitate transition financing and encourage multi-use projects that can work for marine protection**, energy goals, fisheries, shipping industry, coastal communities and defence purposes.

3.2. CONCLUSION

The forthcoming Ocean Act presents a significant opportunity to strengthen the EU's ocean governance. Beyond operationalising the broader vision set out under the Ocean Pact, it offers a chance to ensure the EU moves forward in a way that is strategic, coordinated and inclusive as it navigates an increasingly uncertain future shaped by climate impacts, geopolitical instability and shifting global economies and markets. More fundamentally, it creates an opportunity to rethink how the EU coordinates and implements objectives across sectors, scales and borders and whether MSP can evolve from a largely procedural exercise into a genuinely strategic ocean governance tool, guided by a long-term vision. Alongside wider reforms to the EU ocean governance framework, the Ocean Act may ultimately become a test of whether the EU is capable of governing the ocean as the interconnected system it is.

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