

Case study of Gothenburg region, Sweden

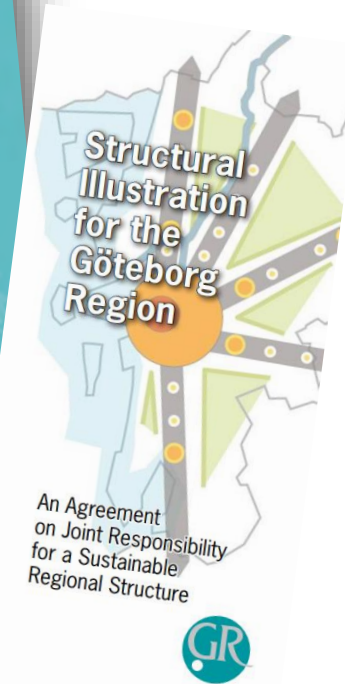
Mapping maritime businesses, for increased integration of
business perspective in planning

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The Gothenburg Region

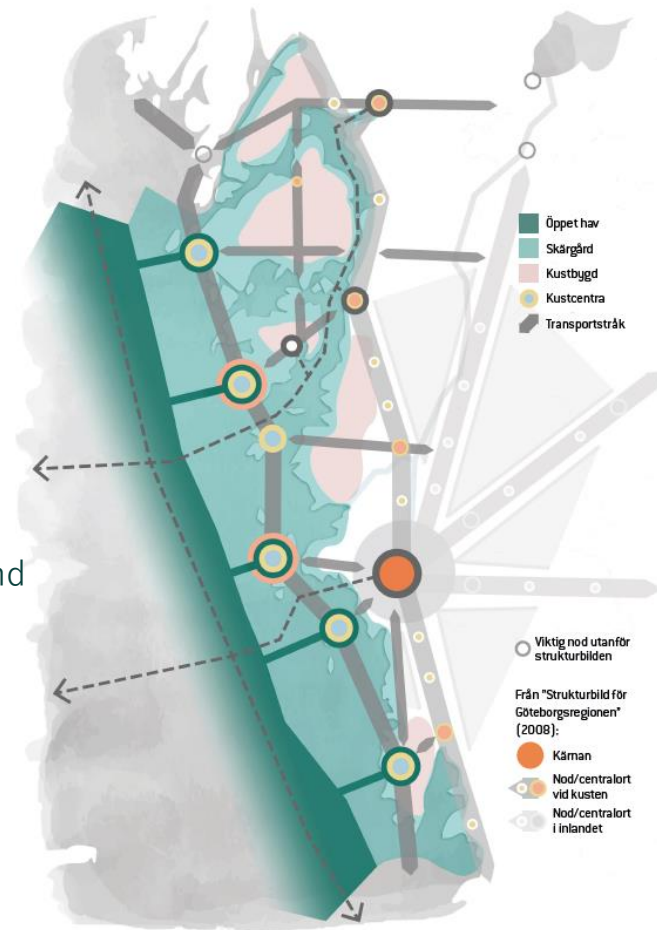


- Co-operative organisation uniting thirteen member municipalities in western Sweden.
- Promotes co-operation over municipal borders and provides a forum for exchange of ideas and experience within the region.
- Two strategic documents focused a regional planning and a sustainable regional structure.
 - Structural illustration/vision (2008)
 - Sustainable growth (2013)
- The development and conservation of the unique values in the coastal zone is highlighted as a responsibility for the entire region.



Deepened structural vision for the coastal zone

- A Strategy for future social and regional development based on sustainable physical structures.
- Politically approved by 8 coastal/island municipalities in 2019/2020.
- Includes joint agreements within six thematic areas and a map image displaying central elements in a future sustainable physical structure of the coastal zone.
- Functions as a guiding document for spatial planning in coastal and marine areas.
- Maritime businesses an important part of coastal community development! – Basis for joining Land-Sea-Act



Pilot case activities within Land-Sea-Act

Better understanding of preconditions and spatial aspects of maritime business in the region, as a basis for the development of a regional maritime strategy

- GIS-mapping of maritime businesses
- Interview study
- Mapping of maritime businesses spatial claims

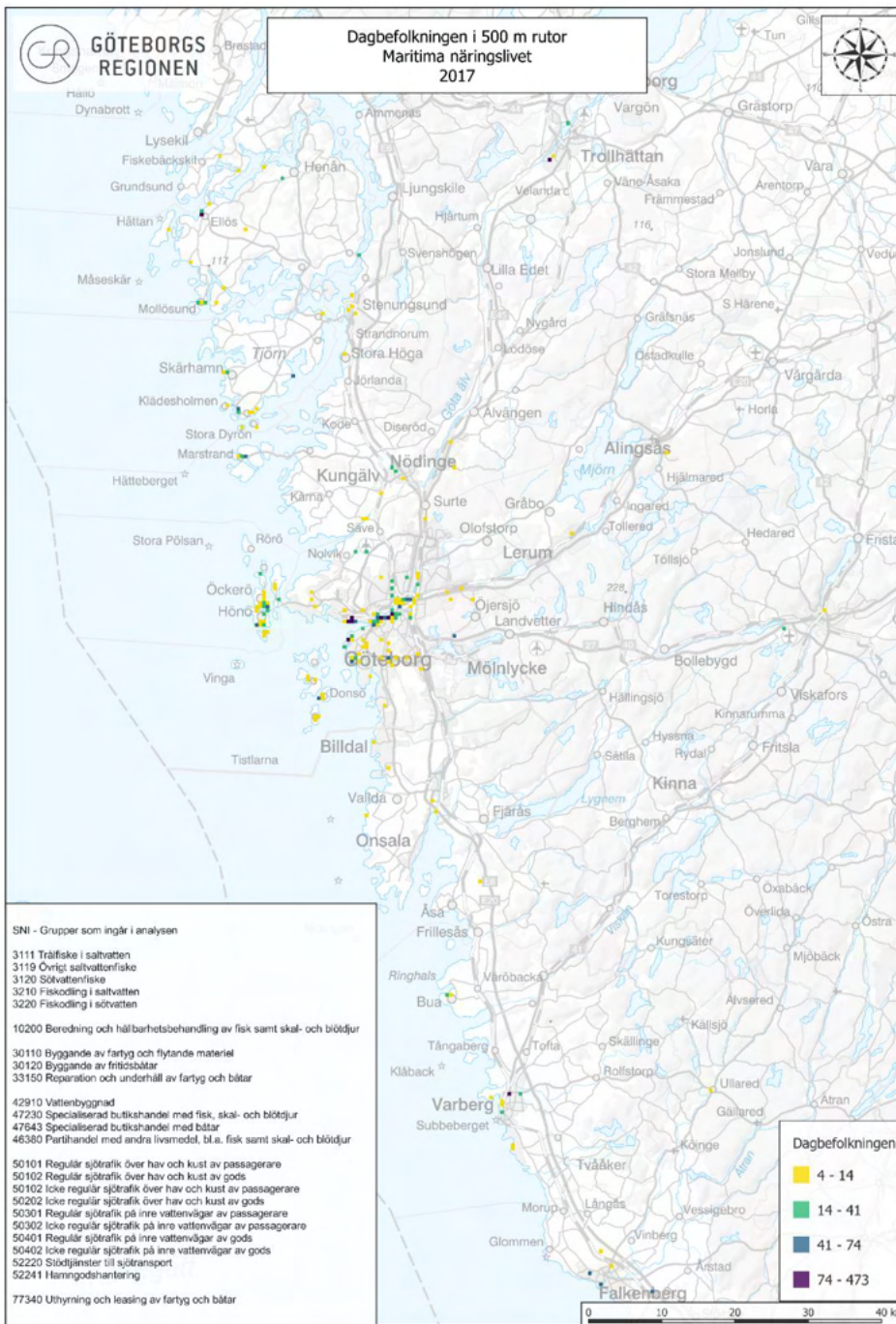
GIS-mapping of maritime businesses

- Based on SNI-codes (corresponds to NACE-codes)
 - Selected with basis in the Swedish maritime strategy
 - Sectoral analysis – also tourism
- Data Source - Register-based labor market statistics (RAMS) from Statistics Sweden on "Day and night-population" per 500 meters



**GÖTEBORGS
REGIONEN**

**Dagbefolkningen i 500 m rutor
Maritima näringslivet
2017**



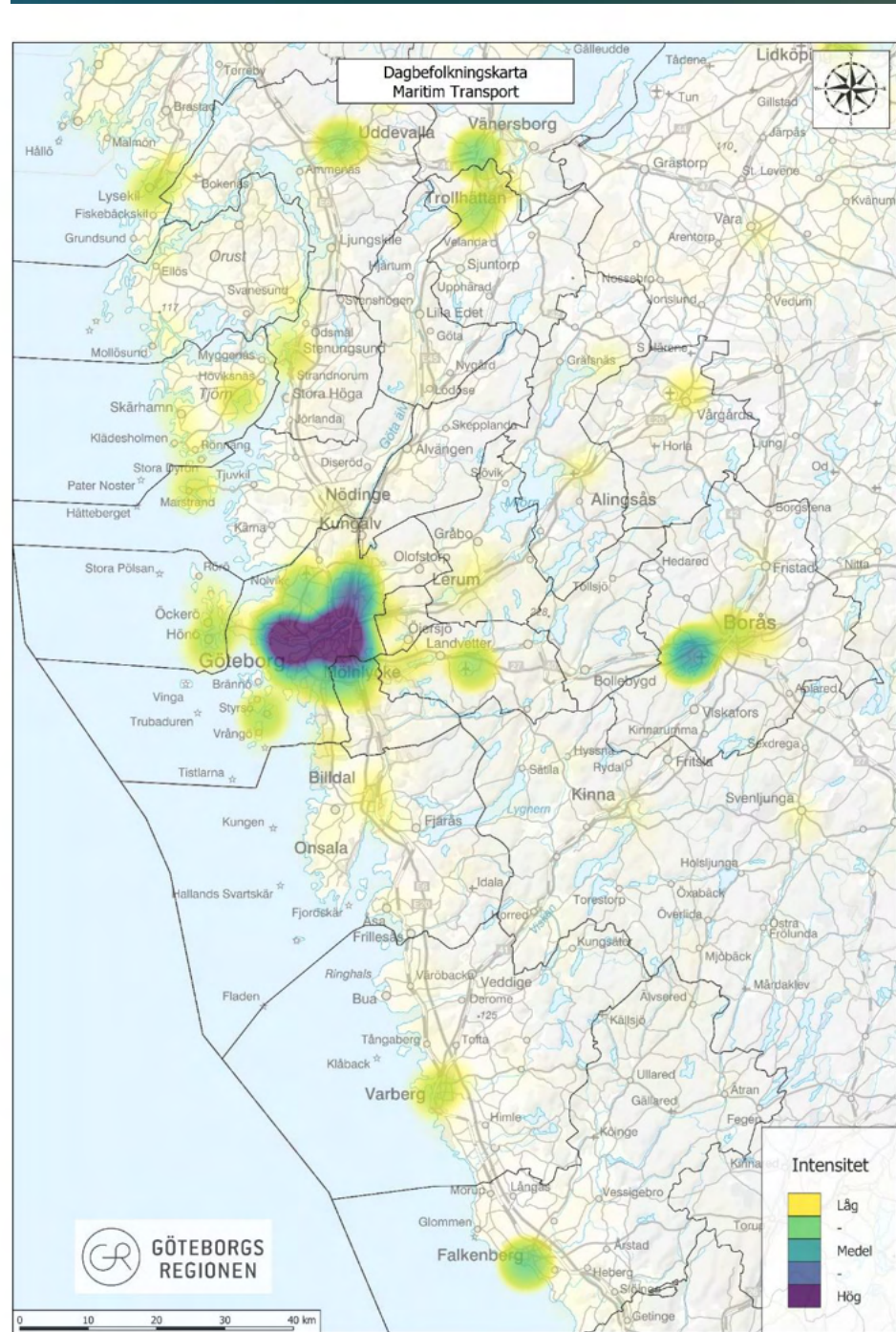
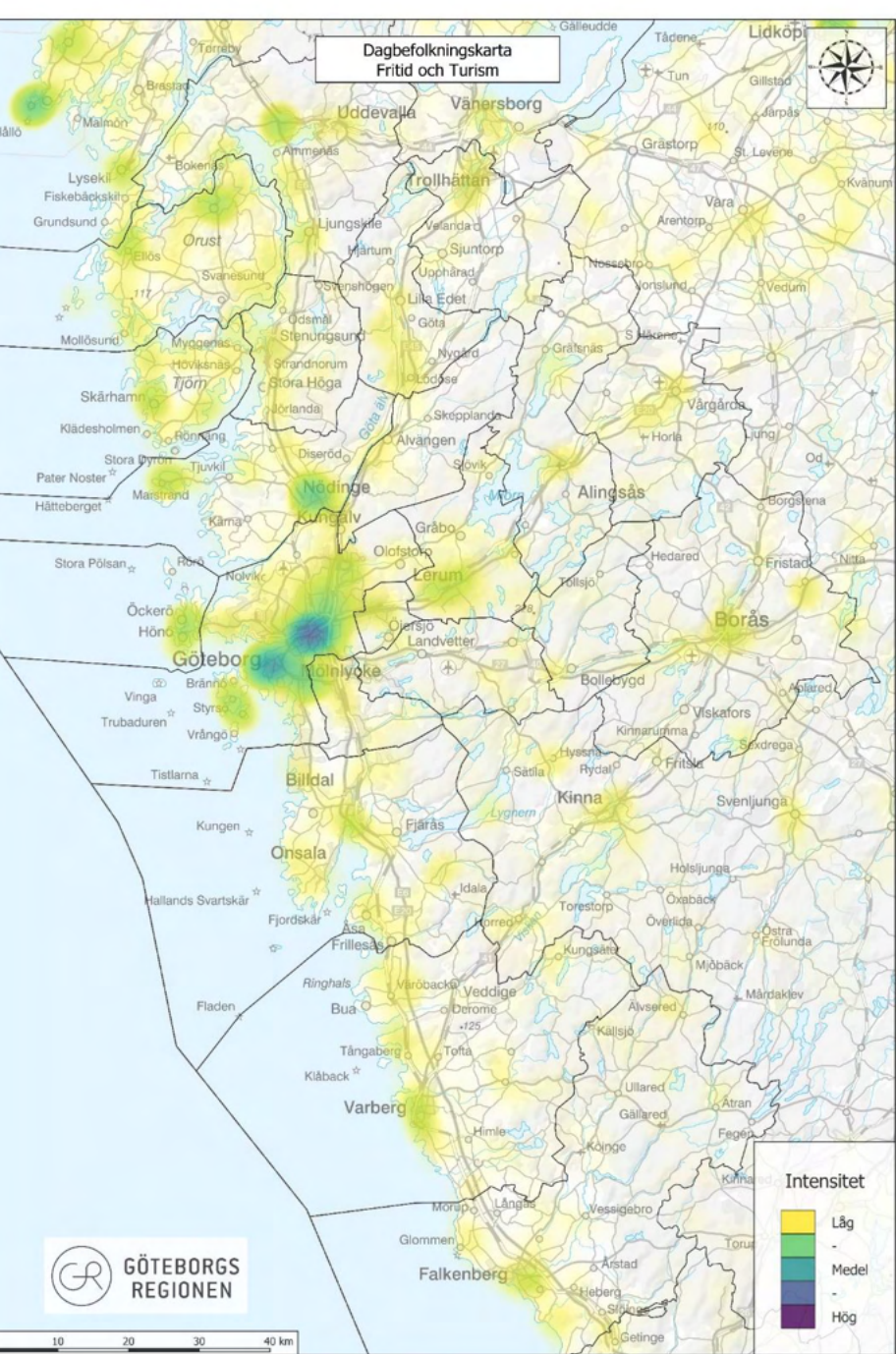
SNI - Grupper som ingår i analysen

- 3111 Trälfiske i saltvatten
- 3119 Övrigt saltvattenfiske
- 3120 Sötvattenfiske
- 3210 Fiskodling i saltvatten
- 3220 Fiskodling i sötvatten
- 10200 Beredning och hållbarhetsbehandling av fisk samt skal- och blötdjur
- 30110 Byggande av fartyg och flytande material
- 30120 Byggande av fritidsbåtar
- 33150 Reparation och underhåll av fartyg och båtar
- 42910 Vattenbyggnad
- 47230 Specialiserad butikshandel med fisk, skal- och blötdjur
- 47643 Specialiserad butikshandel med båtar
- 46380 Perihandel med andra livsmedel, bl.a. fisk samt skal- och blötdjur
- 50101 Regulerad sjötrafik över hav och kust av passagerare
- 50102 Regulerad sjötrafik över hav och kust av gods
- 50102 icke regulerad sjötrafik över hav och kust av passagerare
- 50202 icke regulerad sjötrafik över hav och kust av gods
- 50301 Regulerad sjötrafik på inre vattenvägar av passagerare
- 50302 icke regulerad sjötrafik på inre vattenvägar av passagerare
- 50401 Regulerad sjötrafik på inre vattenvägar av gods
- 50402 icke regulerad sjötrafik på inre vattenvägar av gods
- 52220 Sjödtjänster till sjötransport
- 52241 Hamngodshantering
- 77340 Uthyrning och leasing av fartyg och båtar

Dagbefolkningen

- 4 - 14
- 14 - 41
- 41 - 74
- 74 - 473



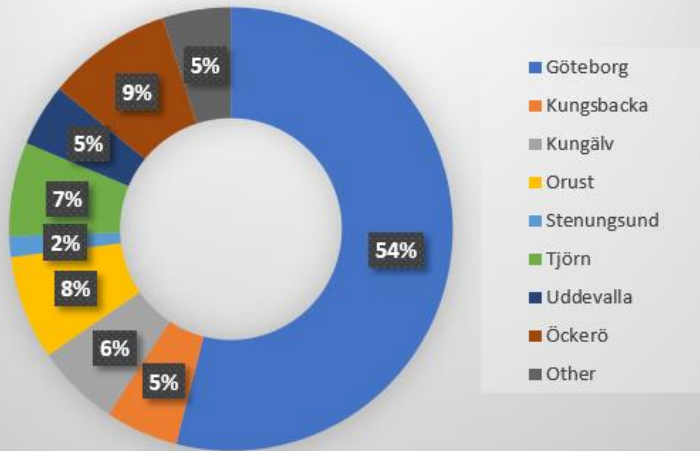


Interview study with maritime businesses

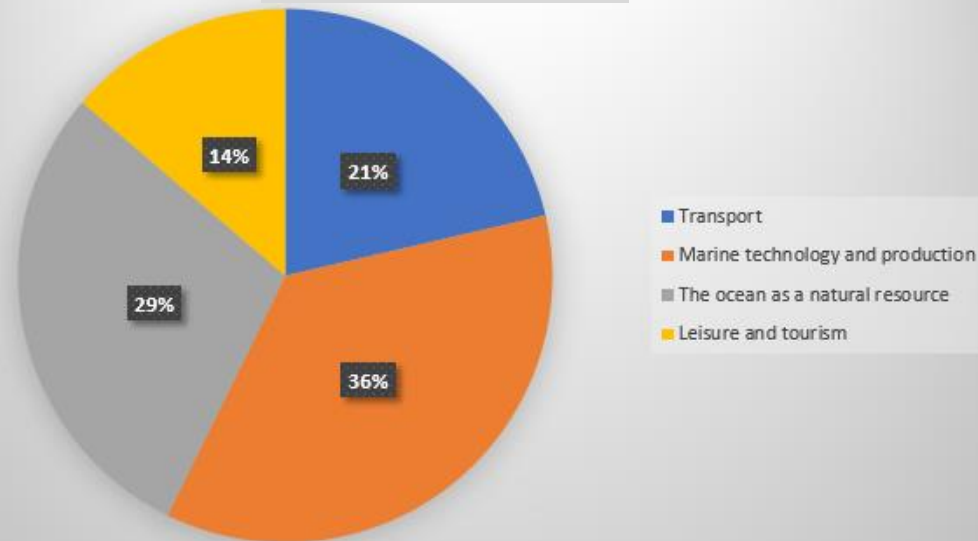
- Interview study with 130 small and medium sized maritime businesses. Selections again based on SNI-codes.
- Structured telephone interviews
- Focus on most important markets and networks, supply of competence, local cooperation and dependence, future need for space and facilities, future development

Selection of companies

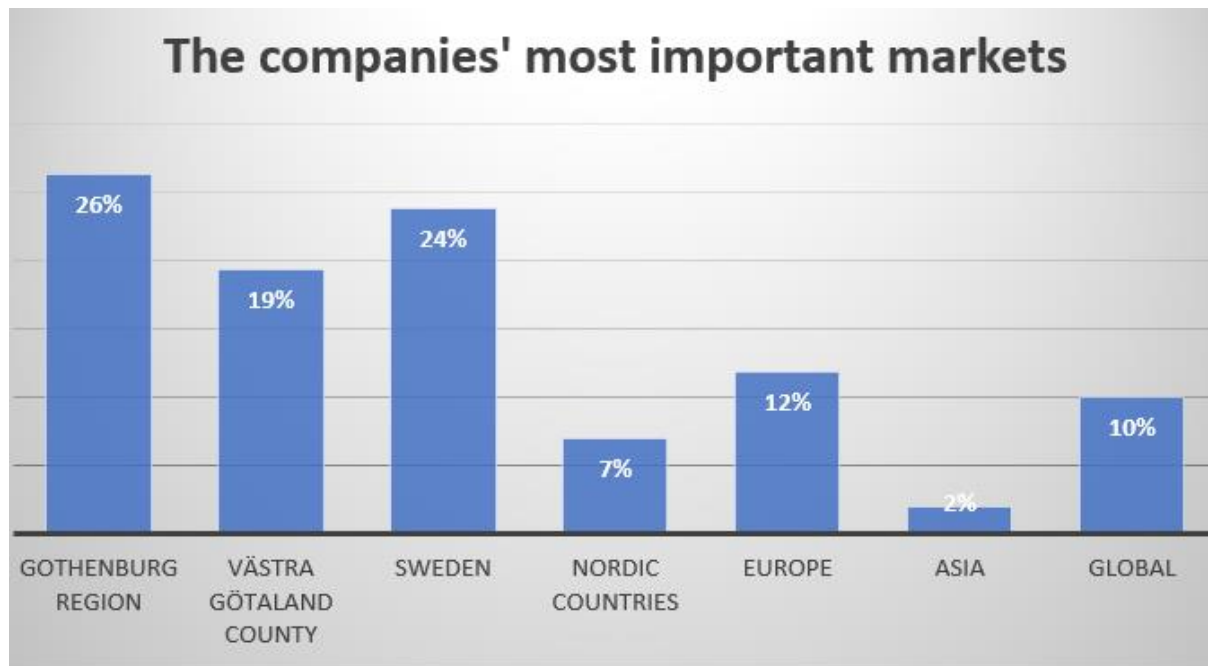
Companies participating in study



Sectors



Most important markets



Networks and meeting places

Many companies experience that there is a lack of meeting places with politicians and public actors to discuss eg.

- 🌀 Climate adaptation
- 🌀 Access and rent levels for quays
- 🌀 Marketing of leisure boat "life" and recreational opportunities
- 🌀 Infrastructure issues
- 🌀 Help and advise on how to meet legal requirements on eg. environment and permit issues.

Local cooperation

74% of the companies state that they are cooperating locally with other companies, the municipality or actors within the education system.

Within most of the municipalities the average for local cooperation is between 70-80%. In a couple of the municipalities the number is around 90-100 %. Two of them are island-municipalities.

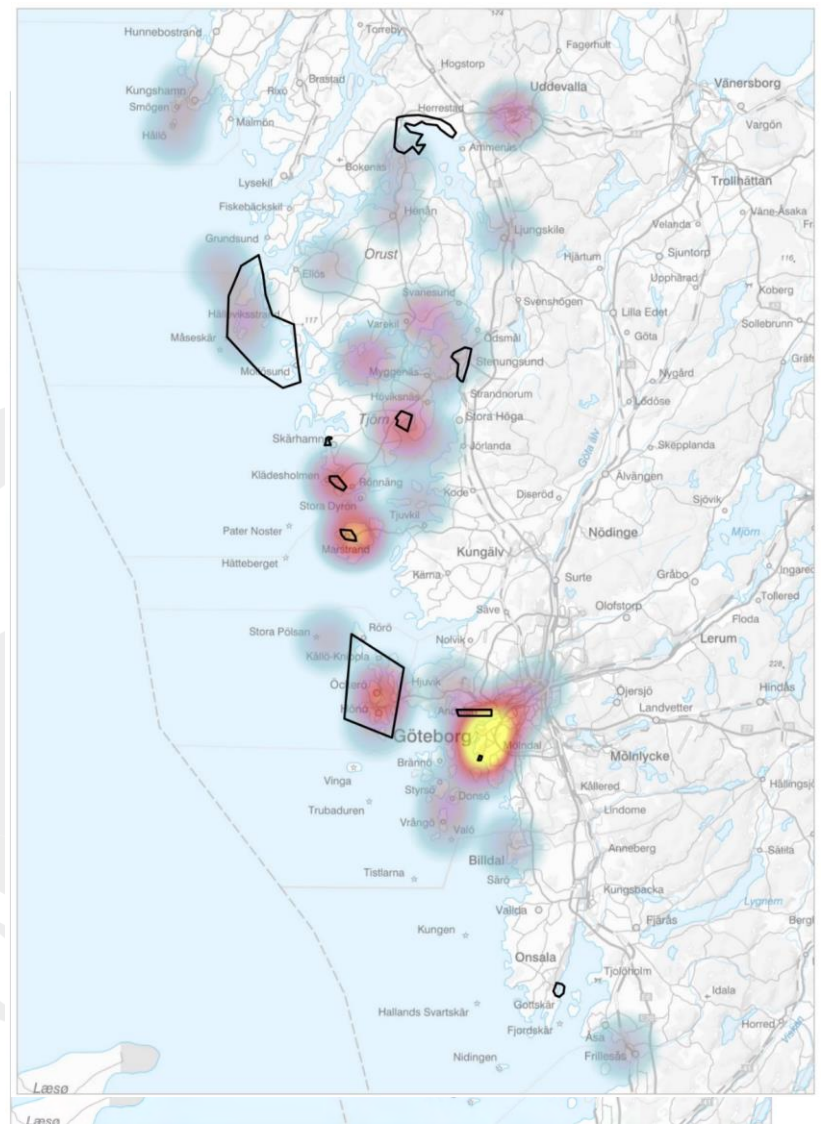
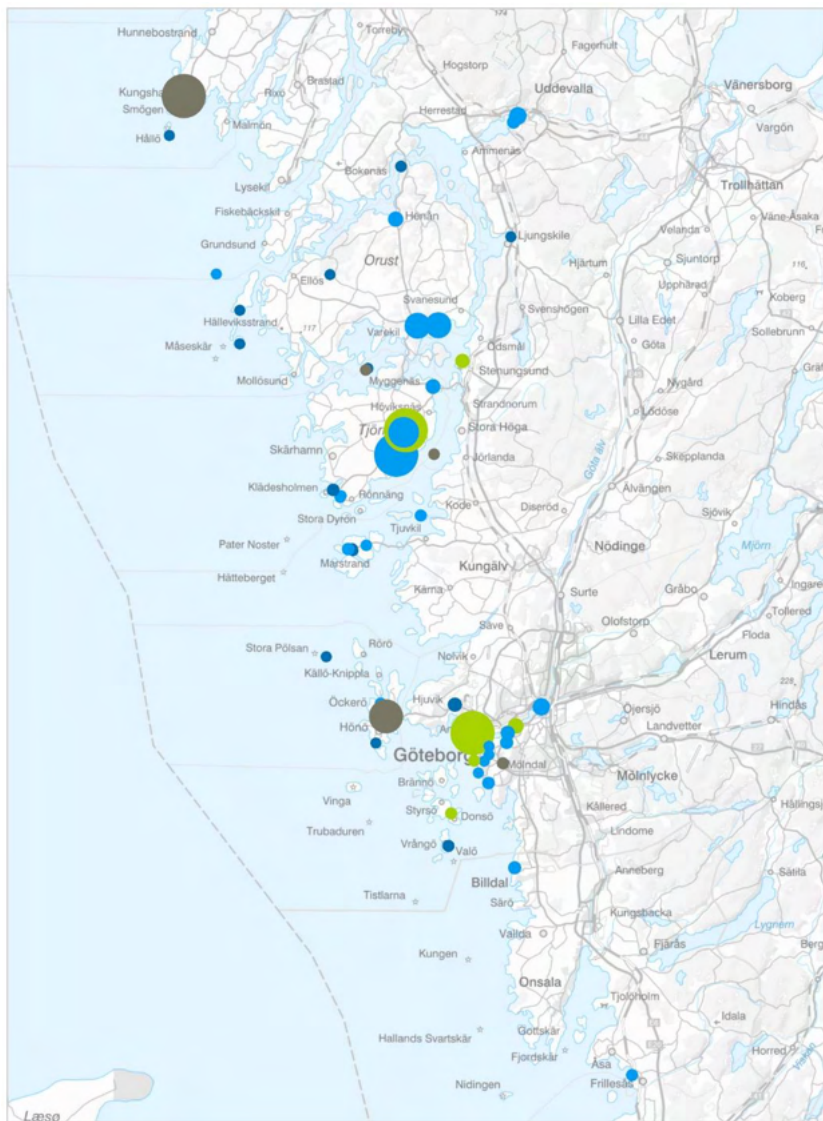
Significance of location

63 percent of the companies answered that their businesses are completely or partly dependent on location.

Mainly companies in *the sea as a natural resource* and *maritime technology and production* that considered themselves to be location dependent

Mapping of maritime sectors spatial claims (land and water).

- Participatory GIS-mapping - survey
- Changes in need for land or water areas, risks regarding access to land and water areas. Potential for sharing space? What differences are there in sectorwise needs? Type of land/water public vs private?
- Difficult to draw too general conclusions due to low response rate.



Need/claims for space

- Proximity to the coast is seen as crucial and almost all respondents need access to both land and water areas in the coastal zone for their own facilities
- Coast is important due to the "double" accessibility. Port areas and its infrastructure is crucial.
- The greatest future need is for own facilities on land, to a lesser extent water areas.
- Half of the companies wants to use public areas along the coast to a larger extent.
- Companies with few employees can also have large area claims/needs.

Sharing space

- Many of the businesses already share space to some extent. Mainly tourism and marine technology and production, Non competing operations.
- Businesses in the study primarily see a potential in sharing land and water areas with other businesses within the same sector.
- Businesses within leisure and tourism and marine technology and production also see potential to share space with businesses in other sectors and to a larger extent with public interests (e.g. recreation, fishing)
- There can be practical, financial (e.g. insurance costs) and legal obstacles (e.g. Food act) for sharing.

Some overall conclusions

- Blue economy – a diverse set of businesses with different preconditions – needs to be highlighted further - especially on regional and local level.
- Significance of location and local collaboration.
- The interface between land and sea/access-points to sea e.g. ports, quays, ramps etc. is very important. Possibilities for demonstration activities and multifunctionality.
- Vast competition for spaces close to sea - sharing of space will be crucial – and there is potential.
- Readiness in planning important for maritime business development.
- Framing the blue economy – Even if data is available – delimitation is a challenge and can have big implications, especially coastal tourism.

Our project homepage: www.land-sea.eu

Look up and follow us on social media [#LandSeaAct](https://twitter.com/LandSeaAct)

Ida Lindbergh

The Gothenburg Region

Thank you!



Ministry of Environmental
Protection and Regional
Development
Republic of Latvia



Stadt Fehmarn



TALLINN UNIVERSITY

Holboæk
Kommune



LÄNSSTYRELSEN
VÄSTRA GÖTALANDS LÄN
County Administrative Board



GÖTEBORGS
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Hamburg Institute
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