

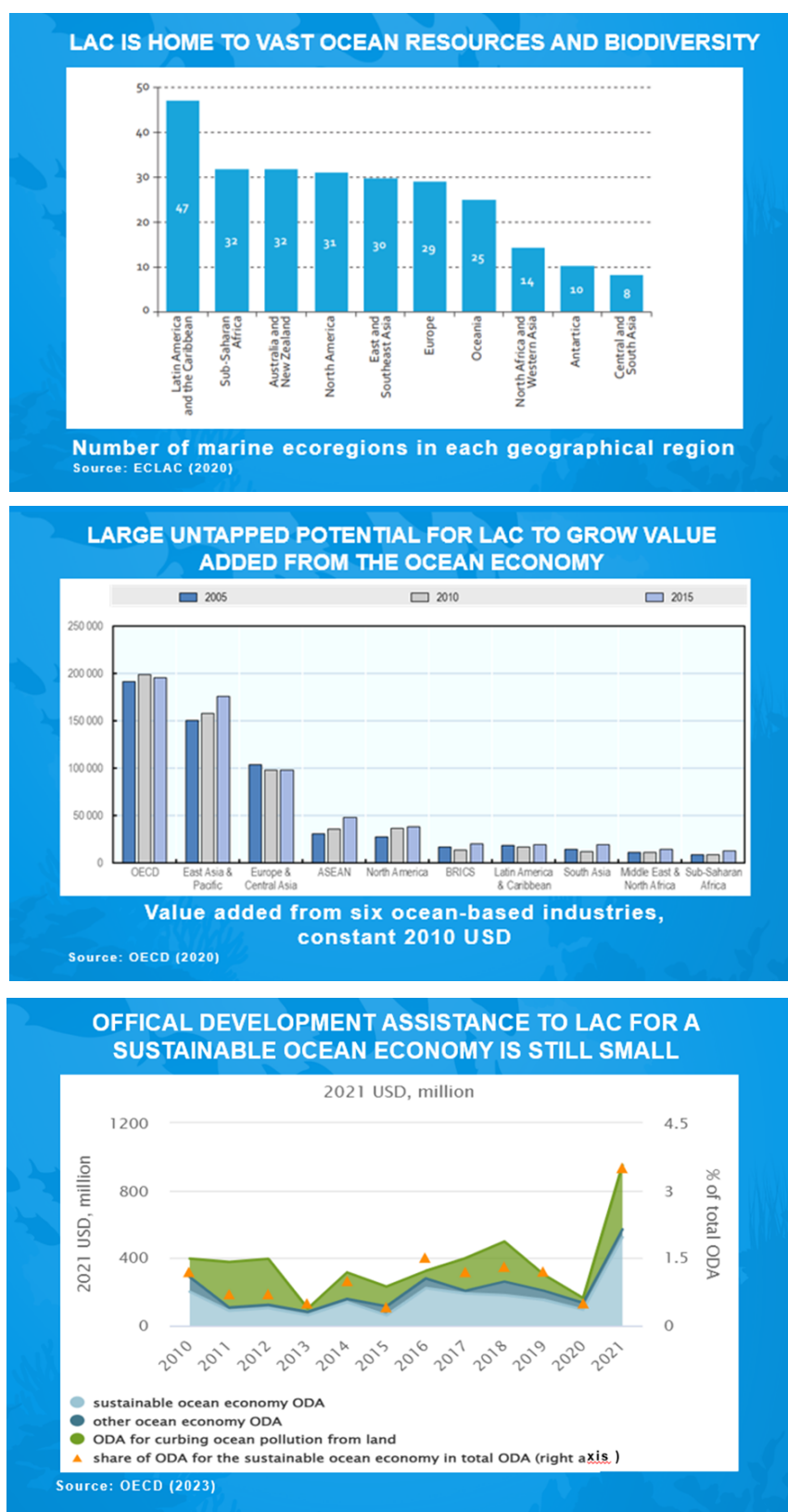
Policy Brief: Towards a Sustainable Ocean Economy in Latin America and the Caribbean

Key highlights

- **The ocean is vital for planetary health and a driver of socioeconomic development.** The ocean possesses enormous resources with the potential to put countries on track for a cleaner, greener, more equitable and resilient future. From offshore wind energy to sustainable aquaculture to marine biotechnologies, the ocean offers new opportunities to diversify economies sustainably. It can also enhance society's resilience to climate and coastal shocks, boost food security, and support livelihoods.
- However, **growing pressures - such as ocean warming, plastic pollution, ocean acidification, and overfishing - put at risk the LAC region's ocean resources and marine biodiversity** as well as the future expansion of economic sectors that depend on them. Mainstreaming marine conservation and sustainable use across all sectors of the ocean economy is essential. The commitments of the CBD COP15 on the Kunming-Montreal Global Biodiversity Framework (GBF) need to be turned into action in LAC. The benefits derived from healthy and resilient marine ecosystems are local, regional, and global in scale, and range from coastal and habitat protection to climate mitigation and food provisioning.
- **Evidence-based, cross-sectoral management of ocean resources that puts sustainability at the core holds the key for unlocking new sustainable development opportunities for LAC.** While many LAC countries already recognise the potential of the ocean for development and have crafted dedicated strategies, more evidence on the actual development prospects as well as the policy tools and financing opportunities that can be deployed and tapped into in each country are needed. This includes evidence on how to enhance the sustainability and resilience of existing ocean economy sectors that are increasingly paying the costs from climate change and ecosystem degradation, and how to move up on ocean economy value chains and develop new, sustainable ocean economy sectors, such as marine biotechnologies, off-shore renewable energy, etc.
- **A boost in international co-operation on the sustainable ocean economy is needed to accelerate domestic efforts and grow the benefits that a sustainable ocean economy can bring to all.** Stronger international co-operation can help facilitate access to the knowledge, science, policy advice and financing needed to accelerate progress. It can fund sustainable ocean economy activities, help mobilise private finance, and support the national policies and global arrangements to ensure the growth of the ocean economy response to sustainability criteria. However, official development assistance (ODA) for the ocean economy in 2021 accounted for only about 1% of total ODA. On average in 2020-21, Central America and the Caribbean (USD 298 million) and South America (USD 51 million) received smaller amounts of ODA for the ocean economy than other regions, such as Far East Asia (USD 920 million) and Sub-Saharan Africa (USD 648 million).

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Figure 1. Sustainable ocean economy – Key trends in Latin America and the Caribbean



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What's the issue?

Latin America and the Caribbean is endowed with extensive and unique marine resources and stands to benefit from a growing global ocean economy. The sea accounts for a larger share of territory than land for most Latin American countries, and for 75% of the total territory in the Caribbean. About 27% of the LAC's population and almost 100% of the population in the Caribbean lives in coastal areas. LAC is also home to the second largest barrier reef in the world and to the largest number of marine ecoregions: 47 out of the 258 marine regions globally.[1] While in recent years there has been a rapid acceleration of economic activities in the ocean or using ocean resources globally (i.e. the ocean economy), **LAC still captures a small share of the global value added from the globally expanding ocean economy:** between 6 to 8% depending on the industries included.[2] (See figure above). This is less than the share of coastal population in LAC countries compared to the world. This points to a vast untapped potential for ocean economy sectors in LAC.

Not all countries benefit equally from the ocean economy or are in a position to harness the significant opportunities for economic diversification, development and employment, reduced energy imports dependence, and building climate resilience, that a sustainable ocean economy can offer. In LAC, middle, low-income countries and Small Island Developing States (SIDS), capture a small share of global value added from the ocean economy. SIDS, together with coastal Least Developed Countries (LDCs) account for 0% of off-shore wind farming, the fastest growing sector of the ocean economy, and for 0.09% of aquaculture, the world's fastest growing food production. Simultaneously, many of these countries, and especially Caribbean SIDS, are disproportionately affected by ocean-related environmental risks (e.g. climate change, environmental degradation, etc).

Urgent action is needed to address key pressures, such as marine plastic pollution, biodiversity loss and climate change. Plastic pollution is a critical issue, especially in vulnerable regions such as the Caribbean. It is an imminent threat not only for the ocean but also for the environment at large, impacting habitats and natural processes, reducing ecosystems' ability to adapt to climate change, and directly affecting environmental health. Based on 2019 data, while plastic use is comparatively not high in non-OECD LAC countries, 42% of plastic waste is mismanaged and uncollected and only about 10% recycled. Also, marine and coastal protected areas are less commonly designated in the LAC region and progress remains to be done. One of the targets under the CBD Kunming-Montreal Global Biodiversity Framework is to conserve and manage 30% of marine and coastal areas by 2030. To date already one LAC country (Chile) and four territories (part of France) have met this target[3]. Policies that promote marine spatial planning, marine protected areas, sustainable tourism and regulate harmful activities such as deep-sea mining and oil drilling can help safeguard marine ecosystems and species. Governments have a key role to play in putting in place an effective and coherent policy mix in the LAC region to ensure the achievement of SDG 14.

[1] M. Tambutti and J.J. Gómez (eds.), "The outlook for oceans, seas and marine resources in Latin America and the Caribbean: conservation, sustainable development and climate change mitigation", Project Documents (LC/TS.2020/167), Santiago, Economic Commission for Latin America and the Caribbean (ECLAC), 2020

[2] This figure refers to six ocean-based industries (OECD, 2020).

[3] OECD (2023), Environment at a Glance in Latin America and the Caribbean: Spotlight on Climate Change, OECD Publishing, Paris, <https://doi.org/10.1787/2431bd6c-en>.

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A transition to sustainable ocean economies is hindered by **a lack of data and consolidated evidence on how big their ocean economy is**, what potential and comparative advantages exist to expanding it sustainably, and what policy tools and financing instruments can be used to this end, based on international best practice. To advance efforts to grow sustainable ocean economies, **it is critical to increase countries' access to tailored evidence and policy support to promote a sustainable ocean economy, adopting a holistic, cross-sectoral approach to the ocean economy**, and focusing on promoting all sustainability dimensions: environmental, social and economic.

Mobilising additional finance to unlock ocean-related opportunities is a critical issue for LAC countries, especially those in the Caribbean, which are constrained by high debt levels. However, **the sustainable ocean economy also offers opportunities for financial innovations to be further tested and scaled up**, building for instance on the work to develop blue bonds in Barbados and Caribbean SIDS, the development of a parametric reef insurance in Mexico, and a debt-for-nature swap implemented in Belize and Ecuador. **ODA for the sustainable ocean economy, which is currently low in the LAC region (USD 523 million in 2021), could also be boosted and used more strategically to unlock new opportunities**, such as from renewable energies, marine biotechnologies, and other emerging sectors.

Specific steps need to be taken to grow the sustainability of existing ocean economy sectors, including fisheries and aquaculture, and the shipping sector. For instance, maritime transport can create economic value added, lower costs of export, and enlarge markets, but is also a contributor to environmental degradation and climate change. The **transition towards low-carbon shipping has started but needs to be accelerated by making zero-carbon fuels and energy sources for shipping at least as attractive as the current ship fuels**. This could be done via carbon pricing for shipping or a global fuel standard.

Establishing specific governance mechanisms to ensure policy coherence across ocean economy sectors and for localising the sustainable ocean economy at regional and city level **can also help reconcile trade-offs** on ocean use and establish the sustainable ocean economy as a driver of urban and regional development.

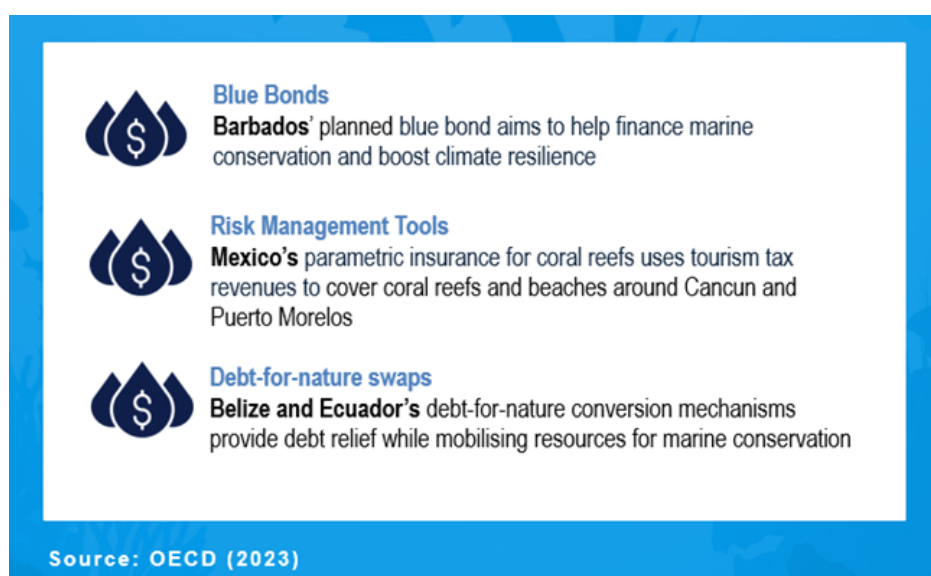
Examples of OECD work relevant to Latin America and the Caribbean

- **Supporting middle, low-income and SIDS to benefit from a sustainable ocean economy:** In 2019, the OECD established the Sustainable Ocean for All Initiative, with the aim to support a global transition to sustainable ocean economies that benefits all countries. The Initiative provides tailored evidence and policy support to promote a sustainable ocean economy, it adopts a holistic, cross-sectoral approach to the ocean economy, and it focuses on promoting all sustainability dimensions: environmental, social and economic. In LAC, the Initiative contributed to inject data and evidence in several events, including a recent event at the presence of the Vice President of Colombia (“Trends for the sustainable use of the oceans in Colombia and in the world”). It carried out case studies in Antigua and Barbuda and Grenada and contributed to the establishment of the Center of Excellence on Oceanography and the Blue Economy in Antigua and Barbuda.

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- **Integrated, cross-sectoral evidence and advice on the sustainable ocean economy:** As part of the Sustainable Ocean for All Initiative, the OECD conducts Sustainable Ocean Economy Country Diagnostics, which employ a cross-sectoral, integrated lens to review a country's ocean economy with a focus on three pillars: economic trends and sustainability stressors; policy instruments to enhance sustainability; and financing. The analysis helps identify key opportunities to grow a country's ocean economy sustainably. Such studies have already been conducted in Indonesia, Cabo Verde, Fiji, and Samoa, as well as seminal work in Antigua and Barbuda and Grenada. For Caribbean SIDS and LAC countries this work highlighted the large vulnerabilities stemming from small, undiversified economies increasingly exposed to the impacts of climate change and environmental degradation, and it identified policy tools and financing options to harness new opportunities in renewable ocean energy, sustainable tourism, and marine biotechnologies.
- **Unlocking finance for a sustainable ocean economy:** The OECD Sustainable Ocean for All Initiative tracks development finance in support of ocean economies to enhance the transparency of these flows and help identify replicable investments. In LAC, these estimates show that ocean-related Official Development Assistance peaked in 2021 and that 91% of it is focused on enhancing sustainability of ocean sectors. Yet, ODA is heavily concentrated in only three sectors (i.e. maritime transport, fisheries, and marine conservation), suggesting that a more strategic use of these resources could be made to unlock new opportunities, such as from renewable energies, marine biotechnologies, and others. The Sustainable Ocean for All Initiative also examines innovative financing mechanisms – such as blue bonds, blue carbons, debt-for-ocean swaps, etc – as well as tools to mainstream sustainability in standards investments. In LAC, recent work to develop blue bonds in Barbados and Caribbean SIDS, on parametric reef insurance in Mexico, and on debt-for-nature swaps in Belize and Ecuador could be further developed to help countries in the region ease their financing constraints and mobilise more finance to invest in ocean economy sectors with the potential to generate benefits across the broader economy.

Figure 2. Selected examples of innovative blue finance instruments in the LAC



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- **Promoting impactful co-operation in support of sustainable ocean economies:** The OECD Sustainable Ocean for All is developing guidance for development cooperation in support of sustainable ocean economies. The purpose of the guidance is to establish common principles, promote good practices and support more coherent and coordinated support. The development of the guidance will provide a space for countries and institutions to discuss, share and scale up innovative approaches and good practices. Active engagement with LAC countries, many of whom are not only ODA-eligible but also partners in South-South and Triangular Co-operation, is critical for developing effective and relevant guidance. It will also be essential to better understand LAC views on key priorities for cooperation on the sustainable ocean economy and current key obstacles in accessing support.
- **Measuring the ocean economy for better policymaking:** Policymakers need a better understanding of the ocean's contribution to their countries' economies to make the most of the opportunities associated with a sustainable ocean economy while ensuring a healthy marine environment. This is true in all countries, including those in Latin America and the Caribbean (LAC). The OECD STI Ocean Economy Group is developing cross-country coherent statistics on ocean economic activities measuring important variables such as value added and employment. When combined with environmental information, the resulting indicators aim to support countries in identifying the contribution of ocean economic activities to sustainable economic growth, the risks and uncertainties surrounding their development, the kinds of innovations required to support their progress, and the resulting policy implications for the management of their overall ocean economy. Ongoing work includes the production of new time series for all OECD countries and other countries, building on the [Blueprint for improved measurement of the international ocean economy: An exploration of satellite accounting for ocean economic activity](#). As part of the OECD foresight project "The Ocean Economy in 2045", economic projections using these new indicators will be done based on different scenarios. For countries in the LAC region, some OECD economic indicators for six ocean-based industries by country, region and income groups have been produced in the past. Much more evidence could be developed in close cooperation with countries in the region should they wish to become involved in this OECD activity.
- **Science, technology and innovation for the ocean:** A flourishing and sustainable ocean economy is more likely to be achieved if the advantages generated by well-functioning systems of ocean science and innovation are exploited to their fullest. The STI Ocean Economy Group is working closely with different research communities and innovative ocean industries to track developments in ocean technologies that target more sustainable ocean economies. As the cornerstone of most ocean STI is marine data (much of it collected through different types of ocean observing systems), the STI Ocean Economy Group is collaborating with different ocean observing communities to improve knowledge on the value of the benefits generated from sustained publicly funded ocean observations. Three case studies based on surveys in the United Kingdom, Portugal and Belgium/Flanders have been produced. In parallel, work on ocean science-related indicators is ongoing as an OECD input for the United Nations Decade on Ocean Science for Sustainable Development. For countries in the LAC region, many of which possess unique marine ecosystems, this work should help inform ocean management strategies so that targets to conserve and sustainable use the ocean can be realised.

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Environmental policies for the ocean: The OECD Environment Directorate works on positive incentives for the conservation and sustainable use of biodiversity and reducing threats to biodiversity which are directly relevant to the ocean. The OECD Database on Policy Instruments for the Environment (PINE) provides information on policy instruments relevant for environmental protection and natural resource management in more than 130 countries globally, including eight countries in LAC (Argentina, Brazil, Chile, Costa Rica, Ecuador, Mexico, Panama and Peru) on ocean-related instruments (for instance, ocean-related taxes, such as taxes on fisheries, maritime transportation or marine pollution). This work can support LAC governments by providing policy insights on marine conservation and sustainable use of ocean resources, as well as managing and preventing water pollution. Furthermore, experiences addressing marine pollution in other countries, such as in the USA, Japan and Indonesia, as part of the recent OECD 2023 Environmental Performance Review (EPR) of the US and its multi country focus, could inspire the LAC countries to develop and implement the policies to tackle marine litter.

Curbing plastic pollution: Global plastics production has increased from virtually nothing in 1950 to more than 400Mt in 2015. Plastic is present in all the world's ocean basins, including around remote islands, the poles and in the deep seas. The scenario analysis developed in the 2022 OECD Global Plastics Outlook shows that by 2060 with a policy package of measures addressing plastics throughout its lifecycle, global plastic use can decline by 1/3 below the baseline and plastic leakage to the environment can almost completely be eliminated and 60% of plastics recycled[4]. For the LAC region, an estimated 19 Mt of plastic have already accumulated in aquatic environments (rivers, lakes and oceans) in 2019, and without additional policy action, this number would rise to 51 Mt by 2040[5].

Fisheries and aquaculture: The OECD Committee on Fisheries (COFI) conducts analytical work on sustainable fish stock management, support to sustainable fisheries, and eliminating government support to illegal, unreported and unregulated (IUU) fishing. This work points to the importance for the LAC region to invest in science-based stock assessments to understand the health and productivity of fish stocks and to adopt rebuilding plans and review fish stock management strategies when stocks fall below sustainability standards. OECD analysis also notes the need for LAC to continue strengthening the fight against IUU fishing, through collective action at the regional level, by reinforcing monitoring, control, and surveillance, improving transparency along the value chain, and ensuring that support from government budgets is not inadvertently benefitting illegal fishing activities. Finally, in the context of constrained budgets and competing demands from the ocean economy, ensuring the best use of public money is a priority for LAC. Government support needs to be withdrawn from activities that present a risk of encouraging unsustainable fishing practices, notably subsidies that directly lower the cost of fishing or increase benefits. Instead, money should be redirected to sustainable fisheries management, law enforcement, and research related to the health of fish stocks and the impact of climate change. LAC countries who are not yet working with the COFI are welcome to participate in the OECD initiatives to build transparency on fisheries management and support policies, and contribute data to the OECD Fisheries Support Estimate and Fisheries Management Indicators databases, which can serve as a basis to better understand policy impacts, tailor reforms to evolving situations and needs, and enhance regional co-operation to ultimately improve the resilience and sustainability of fisheries in the region.

[4] OECD (2022), Global Plastics Outlook: Policy Scenarios to 2060, OECD Publishing, Paris, <https://doi.org/10.1787/aa1edf33-en>.

[5] OECD (2022), Global Plastics Outlook database, <https://doi.org/10.1787/c0821f81-en>.

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- **Shipping:** Options for transitioning to green shipping and their merits have been analysed in the 2022 OECD/ITF publication “Carbon pricing in shipping”. Various countries have been hesitant to agree to a global carbon pricing scheme for shipping, as they are concerned about possible adverse trade effects. Current OECD/ITF work is focusing on mapping the economic development potential of the transition to zero-carbon ship fuels and energy sources. Countries in the LAC region are welcome to engage in the OECD’s work on the economic development potential of zero-carbon transition in shipping.
- **Localising the blue economy:** The OECD Cities and Regions for a Blue Economy project supports cities, regions and basins to unlock the potential of resilient, inclusive, sustainable and circular blue economies, zooming in on the link between the blue economy and water security and highlighting the need for an integrated city-basin approach to address land and water pollution. As a first step, the OECD carried out a Survey on Localising the Blue Economy across 76 cities and regions from 33 countries, including Brazil, Chile, Colombia, Panama, Uruguay to inform a synthesis report that will be published in April 2024.
- **Policy coherence for the ocean economy:** Ongoing OECD work at country level with Malta and Portugal applies the OECD Recommendation on Policy Coherence for Sustainable Development (PCSD) to support governments in strengthening their ocean economy strategies and related governance arrangements by applying an integrated and coherence approach. Opportunities to diversify ocean economies sustainably while delivering on global commitments such as the SDGs can be enhanced if governments are well equipped to identify critical trade-offs among ocean activities and manage them. The thematic chapter “Developing policy coherence frameworks for a sustainable use of ocean resources” of the new OECD Report on Driving Policy Coherence provides governments and stakeholders with a set of concrete governance mechanisms, processes and tools, to better manage risks related to the unsustainable use of ocean resources and strengthen the resilience of societies that rely on them.
- **Innovative Ocean in the EU Outermost Regions and the Caribbean:** The OECD Development Centre’s project, the Innovative Ocean in the EU Outermost Regions, aims to facilitate knowledge sharing and provide policy recommendations to spur sustainable development in the region. The project also emphasises cooperation between EU ORs and neighbouring countries on the ocean economy. The 21st Plenary Meetings of the OECD Initiative for Global Value Chains will be hosted by Costa Rica on 2-3 October. These meetings will further explore the Innovative Ocean’s impact on global value chains in the LAC region.



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Suggested policy actions

- Develop and use integrated, cross-sectoral evidence to guide the development and implementation of sustainable ocean economies strategies and policies that consider the complexity of inter-sectoral interactions and integrate environmental, social and economic objectives.
- Scope the potential of innovative financial mechanisms - such as blue bonds, blue carbon credits and others - to mobilise additional finance to invest in sustainable ocean economy activities.
- Participate in global efforts to mainstream ocean sustainability requirements in all investments, for instance through the adoption of the Sustainable Blue Economy Finance Principles and the integration of ocean sustainability requirements into traditional financial services and investments, whether in financial markets (e.g. stocks and bonds), credit markets (e.g. loans or bonds) and including all ODA spending.
- Participate in global efforts to identify good practices and set standards for impactful development co-operation in support of sustainable ocean economy, for instance by participating in the development of the OECD Guidance for Impactful Development Cooperation for Sustainable Ocean Economies.
- Continue to improve science-based fisheries management and invest in fish stock assessment, strengthen mechanisms of monitoring, control and surveillance to tackle IUU fishing.
- Promptly ratify the WTO Agreement on Fisheries Subsidies and start implementing its key provisions, notably by eliminating government support to IUU fishing, and actively engage in the second phase of WTO negotiations aiming to discipline subsidies that contribute to overcapacity and overfishing.
- Strengthen regulations on plastic waste in order to achieve net zero plastic leakage by developing national strategies/action plans on marine litter for entire plastic life cycle and integrated monitoring systems for plastic throughout the value chain as well as further improving waste management systems, boosting innovation for a more circular plastics lifecycle and reinforcing international cooperation.
- Eliminate the indiscriminate dumping of pollutants into coastal and marine ecosystems in the LAC region, including the dumping of sewage and solid waste, particularly plastics, toxic substances, and nutrients leached from agricultural activities.
- Establish and expand marine protected areas (MPAs) to protect and conserve marine biodiversity.
- Invest in coastal infrastructure resilience and enhance natural coastal defences.
- Introduce regulation and promote innovation for sustainable fishing, including novel practices and technologies that reduce the environmental impact of fishing and for the protection of marine biodiversity. Few fishing activities are fully sustainable, from pollution vessels to illegal fishing, overexploitation of resources, untreated waste dumping, and by catch.

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Further reading and links

- OECD Ocean Portal: <https://www.oecd.org/ocean/>
- OECD Ocean brochure: <https://www.oecd.org/ocean/OECD-work-in-support-of-a-sustainable-ocean.pdf>

Sustainable Ocean for All Initiative

- OECD (2020), Sustainable Ocean for All: Harnessing the Benefits of Sustainable Ocean Economies for Developing Countries, The Development Dimension, OECD Publishing, Paris, <https://doi.org/10.1787/bede6513-en>.
- Data Platform on Development Finance for the Sustainable Ocean Economy, <https://oecd-main.shinyapps.io/ocean/>
- OECD (2022), Recovering from COVID-19: How to enhance domestic revenue mobilisation in small island developing states, OECD Policy Responses to Coronavirus (COVID-19), OECD Publishing, Paris, <https://www.oecd.org/coronavirus/policy-responses/recovering-from-covid-19-how-to-enhance-domestic-revenue-mobilisation-in-small-island-developing-states-45f29680/>
- Agnelli, A. and P. Tortora (2022), "The role of development co-operation in tackling plastic pollution: Key trends, instruments, and opportunities to scale up action", OECD Environment Working Papers, No. 207, OECD Publishing, Paris, <https://doi.org/10.1787/721355cb-en>.
- OECD (2021), COVID-19 pandemic: Towards a blue recovery in small island developing states, OECD Policy Responses to Coronavirus (COVID-19), OECD Publishing, Paris, <https://www.oecd.org/coronavirus/policy-responses/covid-19-pandemic-towards-a-blue-recovery-in-small-island-developing-states-241271b7/>

Environmental policies for the ocean

- OECD (2023), Environment at a Glance in Latin America and the Caribbean: Spotlight on Climate Change, OECD Publishing, Paris, <https://doi.org/10.1787/2431bd6c-en>.
- OECD (2022), Global Plastics Outlook: Economic Drivers, Environmental Impacts and Policy Options, OECD Publishing, Paris, <https://doi.org/10.1787/de747aef-en>.
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- OECD (2017), The Political Economy of Biodiversity Policy Reform, OECD Publishing, Paris. <http://dx.doi.org/10.1787/9789264269545-en>
- OECD (2021), Adapting to a changing climate in the management of coastal zones, OECD Environment Policy Papers, No. 24, OECD Publishing, Paris, <https://doi.org/10.1787/b21083c5-en>
- Sustainable Ocean Economy, <https://stats.oecd.org/index.aspx?datasetcode=OCEAN>

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Fisheries and aquaculture

- OECD Review of Fisheries 2022, https://www.oecd-ilibrary.org/agriculture-and-food/oecd-review-of-fisheries-2022_9c3ad238-en
- OECD Fisheries Support Estimates (FSE) dataset , https://stats.oecd.org/Index.aspx?DataSetCode=FISH_FSE
- Managing fish stocks sustainably: [ENG](#), [SPA](#) and [PRT](#)
- Supporting sustainable fisheries : [ENG](#), [SPA](#) and [PRT](#)
- Eliminating government support to IUU fishing: [ENG](#), [SPA](#) and [PRT](#)
- OECD Fisheries Portal: <https://oe.cd/fish>

Shipping

- Carbon pricing in shipping” (2022): <https://itf-oecd.org/carbon-pricing-shipping>

Policy coherence for the ocean economy

- OECD (2023), “Developing policy coherence frameworks for a sustainable use of ocean resources” in Driving Policy coherence for sustainable development, <https://doi.org/10.1787/786d7c13-en>

Innovative Ocean in the EU Outermost Regions and the Caribbean

- OECD (2023), Production Transformation Policy Review: Spotlight on the Azores’ Internationalisation, OECD Development Pathways, OECD Publishing, Paris, [Carbon pricing in shipping” \(2022\): https://itf-oecd.org/carbon-pricing-shipping](#).
- Innovative Ocean: drivers of internationalisation for the EU Outermost Regions: [ENG](#)