Sustainable Blue Economy Partnership

Proposal for Additional Activities for Cycle 3 of the Partnership (2026-29)

Advancing Corporate Data Exchange in Support of a fit-for-purpose European Ocean Observing System

Deliverable 8.13

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Authors:

Katrín Jónsdóttir (Icelandic Center for Research), Julie Olivier (Research Center Jülich), Margherita Cappelletto (Italian Ministry of Universities and Research), George Petihakis (Hellenic Centre of Marine Research), Thorsten Kiefer (JPI Oceans), Manfred Zeiler (Federal Maritime and Hydrographic Agency), Alessandra Giorgetti (Istituto Nazionale di Oceanografia e di Geofisica Sperimentale), Ann-Katrin Lescrauwaet, Fien De Raedemaecker, Coco Koedooder (Flanders Marine Institute), Christian Riisager-Simonsen (DTU Aqua), Maurice Heral (ANR).

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Versions

Version	Person	Organisation	Date
1	Katrin Jonsdottir	Rannis	18.12.2025
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EXECUTIVE SUMMARY

As a cooperation instrument under the 9th EU Research and Innovation Framework Programme, the Sustainable Blue Economy Partnerships ("Partnership") aims at delivering innovative solutions to boost the green, digital and inclusive transition of all ocean-based economic sectors across European sea basins and the Atlantic front. By bringing together more than 70 partners (national ministries, research funding and performing organisations, providers of research infrastructures, innovation agencies, regional and public authorities) from 32 countries together with the European Commission, the Partnership promotes a holistic approach of ocean governance grounded in scientific-based marine knowledge.

With collaborative processes across sectors and borders, the Partnership contributes to the alignment of R&I programmes for the implementation of ocean-related policy goals and the development of a climate-neutral, resilient and regenerative blue economy for its communities. Alongside shared R&I priorities, all co-funded projects selected through Joint Transnational Calls contribute to enhancing data-driven ocean knowledge as the cornerstone of competitiveness, sustainability and security for thriving societies.

From data to evidence-based decision-making, the ocean observation value chain is a multi-stakeholder endeavor at the heart of sustainable ocean planning and management. Therefore, the Partnership also develops a range of additional activities, each of them contributing to advance a fit-for-purpose European Ocean Observing System (EOOS) with targeted action at specific levels of the ocean observation value chain, and especially with the optimization of the use of research infrastructures and the alignment of monitoring programmes.

Furthermore, the Partnership conducted a series of foresight workshops during its first cycle (2022-2024) to support the first update of the Strategic Research and Innovation Agenda. The workshop "Ocean Observation in the blue economy" (27 September 2023, Brussels, ref. D2.7_Report on the results of the co-design process_0.pdf) gathered key actors of the ocean observation seascape in Europe - from EMODnet and the European Commission, to Kongsberg Maritime, the OECD and EuroSea. The experts identified a range of strategic pathways for the Partnership to enhance ocean observation for and by the blue economy with a main conclusion: based on its unique constellation of partners and community of practice, the Partnership has a strategic role to play to advance a fit-for-purpose EOOS.

However, it was also made clear that because of its seven-year life cycle under Horizon Europe, the Partnership was not in an adequate position to promote the financial sustainability of EOOS. In that context, the Partnership established an EOOS Knowledge Hub with several partner organisations. The following deliverable is the result of the work of this task group during the second cycle (2024-2026), which identified the engagement of the private sector to foster corporate data exchange as a strategic actionable pathway for the Partnership to advance a fit-for-purpose EOOS. A complete record of this preparatory phase, including meetings and presentations, is provided in Annex I. These prelimimary engagements confirmed both the strategic relevance and practical feasibility of piloting corporate marine data sharing within the

Partnership framework, laying the groundwork for a structured implementation in the Partnership third cycle as well as reiforcing the portfolio of actions deployed in support of EOOS, including the cofunded projects targeting the Digital Twin of the Ocean, the transnational access to Research Infrastructures, the alignment of monitoring programmes and of thematic annual programming covering innovative monitoring and observation tools/system.

CONTEXT AND RATIONALE

The launch of the EU Ocean Pact at the 3rd UN Ocean Conference marked a significant milestone in strengthening ocean governance and advancing sustainability goals for a prosperous future. At the heart of the European ambition lies increased marine knowledge underpinned by robust data and made available to entrepreneurs, scientists, policy-makers and citizens across and beyond the European sea basins and the Atlantic front.

However, continuity and quality of marine data streams essential for a regenerative and sustainable blue economy, climate mitigation and adaptation, and coastal resilience are currently at risk. Critical components of the Global Ocean Observing System (GOOS), such as the Argo Programme, face considerable challenges and geopolitical uncertainty.

Meanwhile, surging amounts of data are currently being collected by the blue economy to achieve the net-zero target, restore marine biodiversity and foster global competitiveness. In this context, the need to leverage the value of industry data and to foster the integration of public and private ocean observing systems, has become both urgent and strategic.

In support of a fit-for-purpose EOOS, the Partnership proposes a pilot activity to advance corporate data exchange, building on the EU leadership role for data-driven marine knowledge and on the current global momentum to engage the private sector and unlock ocean data.

EU LEADERSHIP ROLE FOR DATA-DRIVEN MARINE KNOWLEDGE

While introducing a new unified framework for coherent and efficient action across all ocean-related policy areas, the Ocean Pact consolidates the European leadership on ocean science and innovation enabled by the progressive establishment over the past decades of a holistic data-driven marine knowledge ecosystem.

The EU Integrated Maritime Policy (COM (2007) 575) with the Marine Strategy Framework Directive (2008/56/EC) framed the need for cross-sectoral data as evidence for an ecosystem-based management approach to sea uses across regional sea basins. It also gave impetus for the

future European Marine Observing and Data Network (EMODnet) and the integration and coordination of EOOS.

Building on the Aarhus Convention (1998), the Open Access Movement and the INSPIRE Directive (2007/2/EC), which established transparency and interoperability as default principles for environmental and spatial data, the Marine Knowledge 2020 "*marine data and observation for smart and sustainable growth*" (COM(2010)461) promoted an operational marine data architecture. With the Maritime Spatial Planning Directive (2014/89/EU), Member States are required to „*organise the use of the best available data, and decide how to organise the sharing of information, necessary for maritime spatial plans*".

While the Sustainable Blue Economy Strategy (COM(2021)240) highlighted that "*reliable, high-quality and harmonised ocean data are the prerequisite for a sustainable transformation of the blue economy. Better knowledge of the ocean and its ecosystems, together with free access to data, will enable industry, public authorities and civil society to make informed decisions*", the Blue Growth Strategy (COM(2012) 494 final) with its staff working document "*Innovation in the Blue Economy realizing the potential of our seas and oceans for jobs and growth*" (SWD/2014/0149 final) directly tackled corporate data sharing: „*In nearly all Member States, companies applying for a license to construct or modify an offshore facility must handover to the authorities the data used in the assessment of its environmental impact or in any follow-up environmental monitoring of their activities. Up to now these data have only rarely been available for re-use. This is a missed opportunity, since such data could be used for other purposes. For instance it could improve the accuracy and reduce the cost of reporting the state of the environment*. "

More recently, the Data Governance Act (2022/868), the Data Act (2023/2854), the Open-Data Directive (2019/1024) and the Data Union Strategy (COM(2025)835) have modernized the framework for re-use and voluntary sharing of both public and private data to enhance digital productivity and data sovereignty towards the realization of the EU Data Union. Meanwhile, the Blue-Cloud initiatives have developed a thematic „marine and freshwater" data federation within the European Open Science Cloud (EOSC) linking observing data, models and analytics into open digital infrastructures, and preparing the ground for the realization of the European Digital Twin of Ocean (EDITO) under the EU Mission "Restore our Ocean and Waters by 2030".

Together with Copernicus Marine Service, EMODnet is the main foundational data source for the EDITO data lake. Since its creation in 2009, EMODnet has evolved into the EU's reference public service for in-situ marine data. As a world-class operational infrastructure emboyding the FAIR principles (Findable, Accessible, Interoperable, Reusable), EMODnet demonstrates Europe's leadership role in transparent, open and trusted digital knowledge systems.

With its „Vision 2035", EMODnet foresees the extension of its services, including increased engagement with the private sector, in order to deliver on the international leg of the EU Ocean Pact, which builds upon the EU's International Ocean Governance agenda and strives to address the many challenges stemming from the ocean's multidimensional and interconnected role.

GLOBAL MOMENTUM FOR ADVANCING CORPORATE DATA SHARING

From the local to the global scale of the ocean, strenghtening Europe‘s leadership role in data diplomacy supports the external dimension of EU policy instruments for the implementation of the Global Agenda 2030 for Sustainable Development, and in particular SDG 14 dedicated to *„conserve and sustainably use the oceans, seas and marine resources for sustainable development*“. Robust data underpinns *„the science we need for the ocean we want*“ following the motto of the UN Decade of Ocean Science for Sustainable Development (2021-2030).

Through its „Vision 2030 Process“, the Ocean Decade has advocated for the identification of *„pathways to unlock key existing but unavailable data and making it FAIR*“ and for “*partnerships across the public and private sectors which combined have shared and strengthened responsibilities for ocean observing*“. Under Challenge 7 *„Sustainably Expand the Global Ocean Observing System*” and reflecting the 2030 GOOS Strategy towards *„a global ocean observing system truly responsive to the needs of end users, able to mitigate mounting pressures on the ocean and enable resilient and sustainable blue economies*“, the Ocean Decade also states that *„dialogue between sectors (academic, government, industry, etc.) can help accelerate the development of efficient resilient ocean observing infrastructure and user services*.“ Furthermore, *„within the private sector, ocean observations will be especially relevant and vital for the offshore and wind industry, for shipping, ocean renewable energy industries, insurance and reinsurance industry, blue carbon industry, and the marine Carbon Dioxide Removal (CDR) industry [...]*.“

Indeed, the first milestone identified under Ocean Decade Challenge 4 *„Develop a sustainable, equitable and resilient ocean economy*“ is to *„enhance the integration and accessibility of priority datasets to inform sustainable and equitable economic decisions*“ with the *„contribution of private sector entities to the data ecosystem*“ as a key indicator.

“*Enhancing ocean observation data collection*” with “*better public and private ocean data accessibility policies*” is also a priority identified by the Organization for Economic Co-operation and Development (OECD) to enhance science-based decision-making and resource management, to expand the use of new digital technologies for productivity and competitiveness, and ultimately to leverage the full potential of a sustainable ocean economy. Besides, the OECD promotes the development of ocean accounting, and understanding of the economics of open data with studies on the value chains of public marine data.

While the global ocean economy grew at an annual average rate of 2.8% between 1995 and 2020, experts also recognize that about two-thirds of the marine-centred climate change economy relies on Ocean Observation Data (ODD) and that *„as industries scale to help meet urgent climate change mitigation goals and monitor the security, viability and effectiveness of their operations [...], their reliance on OOD will likely grow to 100%*“.

In that context, the recent adoption by the IOC/UNESCO Member States of the IOC-wide Strategy on Sustainable Ocean Planning and Management (2025-2030), is very timely, since it enhances the “*integration of ocean observation, data and knowledge in decision-making*“ by *„facilitating*

exchange and coordination across ocean data, monitoring and management communities, including [...] the private sector". With the Decision A-33/3.4.2, the IOC/UNESCO Member States also formally recognized that "*the private sector holds and is actively collecting a vast reservoir of valuable ocean data*", affirmed "*that sustainable ocean management requires unlocking the large volume of ocean data collected and held by private industry for collective benefit to scientific research, policy making and industry operations*", and committed "*to collaborate with industry, research and other data infrastructure stakeholders to standardise ocean data sharing practices through the establishment of national data-sharing policies, regulations and permissions for all ocean-related activities*."

One pathway is to "*include mandatory conditions into offshore licensing agreements and permitting*" in line with recommendations from the Ocean Decade Corporate Data Group, which has been instrumental in building global momentum for corporate data sharing with the success story of the engagement of the private sector speeding up seabed mapping. With the Decade Coordination Office for Ocean Data Sharing (DCO-ODS) hosted by the International Oceanographic Data and Information Exchange (IODE), data-sharing guidelines on bathymetric and marine megafauna data have been recently published to support companies in sharing their ocean data.

Despite the strong growth trajectory of emerging and transitioning marine-based industries that rely on marine data to foster a regenerative, climate-smart, and competitive blue economy, corporate data exchange remains the exception. Therefore, together with the EU Ocean Pact and its Ocean Observation initiative, this momentum at global level offers an opportunity to advance corporate data sharing.

PILOT ACTIVITY TO ADVANCE CORPORATE DATA EXCHANGE IN SUPPORT OF EOOS

As a cooperation instrument with thirty-four countries pooling resources together with the European Commission to align research and innovation (R&I) priorities and advance knowledge-based innovation for a sustainable ocean, the Partnership contributes to enhance the ocean information value chain. Therefore, in addition to the implementation of six joint transnational calls for R&I projects, additional activities include the alignment of monitoring programmes and the access to research infrastructures. With this proposed pilot, the Partnership intends to leverage its multi-stakeholder community across the EU Blue Economy to advance corporate data exchange in support of an integrated EOOS.

In short, this pilot action supports the Partnership's overarching goals by:

- Strengthening resilience and inclusiveness of the ocean data ecosystem;
- Enhancing strategic data access across sectors and Member States;
- Promoting international cooperation and sustainable innovation;

- Supporting evidence-based marine policy and economic development.

Building on the existing landscape of challenges and priorities identified to promote corporate data exchange (e.g. Roadmap „*Maturing the Ocean Enterprise to Deliver Essential Societal, Economic, and Environmental Benefits*" under the "GOOS Dialogues with the Industry"; recommendation for „*Enabling Data and Knowledge Sharing in the Marine Space*" by the UN Global Compact Ocean Stewardship Coalition's working group „Ocean Business Leadership for Sustainable Ocean Management"), the Partnership will pursue strategic alignment and collective action with relevant stakeholders and intiatives to maximize impact.

Following an impact pathway approach, the pilot activity will be co-designed and co-developped alongside the following phases:

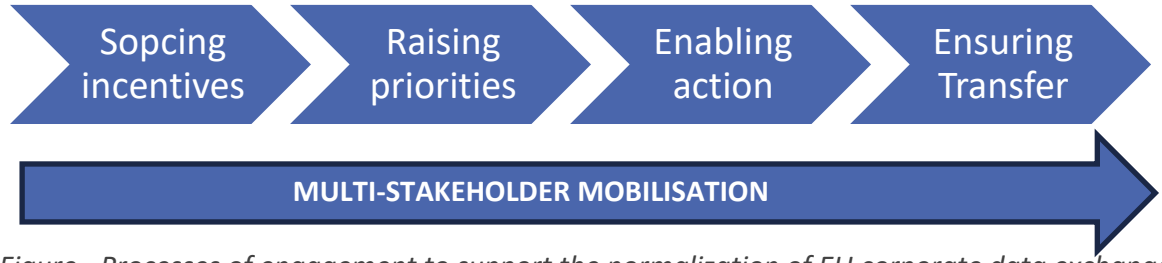

Figure - Processes of engagement to support the normalization of EU corporate data exchange

1.1 Multi-stakeholder mobilisation (JPI O)

This transversal phase aims at mobilizing data stakeholders on corporate data exchange for a sustainable and competitive blue economy. Public communication, visibility at relevant events and specific outreach will contribute to raise awareness in strategic coalitions and foster corporate engagement. Leveraging its unique constellation of actors with partners from national ministries, research organisations, and governmental agencies, as well as its broad cross-sectoral community of practice, the Partnership will promote an adequate story-telling based on success stories, use cases and best practices to incentivize and to provide guidance. In particular, two main products will be disseminated: a flyer (DELIVERABLE) targeting the private sector on why and how sharing their data, and a policy brief (DELIVERABLE) informing ministerial representatives on the urgent and strategic need to foster integration of the public and private ocean observing systems.

1.2 Scoping incentives (FZJ)

This initial phase will assess corporate data exchange under the framework of the EU Ocean Pact. With a literacy review, exploratory interviews, the Partnership's foresight workshop, outreach to the Community of Practice, and further relevant engagement, including with the Ocean Decade Corporate Data Group and the Decade Coordination Office for Ocean Data Sharing, this scoping

exercise (MILESTONE: Report) will address a range of questions related to data needs across blue economy sectors, data exchange practices, and the value of (shared) data.

1.2.1 Data needs

i. Which non-sensitive datasets should be prioritized to fulfill existing and future user needs?

ii. Which blue economy sectors should be targeted for scaling corporate data exhange?

1.2.2 Exchanging data

iii. What are the mechanisms to authorize sharing of ocean data collected by the private sector in Exclusive Economic Zones, current regulatory barriers alongside licensing and permitting within national ocean observing and monitoring systems (e.g. in Belgium, Denmark, Greece, Italy, Germany), and what are best practices outside Europe (e.g. IMOS in Australia, Marine Data Exchange in the UK, IOOS in the USA, MSDI in Canada, MAREANO in Norway)?

iv. What are key priorities to foster standardization of industry marine data according to the FAIR principles?

iv. What are current and future innovative data-exchange models involving startups, investors and insurers?

vi. Which specific incentives, use cases and success stories should be promoted to foster the engagement of the private sector, and what are business requirements to foster structured, secure and transparent cross-sectoral collaborative frameworks for FAIR data management and accessible data products towards systematic corporate data submissions and integration to EU marine knowledge services and the European Digital Twin of Ocean?

1.2.3 Value of data

vii. What are the different perceptions of the value of data across policy, research, finance and business, and how to bridge them?

viii. To which extend is open data limited by the geopolitical context?

ix. What are approaches to marine data valuation, and how do metrics contribute to improve measurement of the marine nature capital and ecosystem services to foster standardized ocean accounting?

x. To which extent can corporate data sharing strengthen interoperability between sustainability-related disclosure frameworks to support corporate governance and ocean stewardship?

1.3 Raising priorities (HCMR)

The outcomes of the scoping phase will contribute to: a) to deliver a first set of strategic recommendations (MILESTONE: Political recommendations) to inform specific processes under the implementation of the EU Ocean Pact, and b) identify and prioritize actionable solutions to be implemented at the level of the Partnership (MILESTONE: list and assessment of actionable solutions at the Partnership's level) to foster action towards systematic corporate data exchange.

1.4 Enabling action (FZJ)

Identified prioritized actionable solutions will be tested with available funding for multi-stakeholder projects and/or for relevant analyse of the value proposition of shared industry data. On the basis of a potential call for expression of interest, this implementation phase will go beyond data integration into EMODnet. While enabling practical assessment of current obstacles and solutions, this strategic action will support the co-design of appropriate solutions responding to both private and public interests for data exchange (MILESTONE: assessment report of the implementation phase) and be leveraged for mobilization towards scaling corporate data exchange.

1.5 Ensuring transfer (VLIZ)

Building upon the implementation phase, future pathways will be informed with appropriate recommendations (MILESTONE: strategic recommendations for further action) under the EU Ocean Act:

1. Policy transfer will be ensured with a potential final event to help unlock regulatory barriers to data exchange.
2. R&I transfer will be timely ensured with the next Horizon Europe's R&I Framework Programme as well as the future moonshot "ocean observation".
3. Transfer to the private sector will be ensured and the community of practice established by the Partnership shall be leveraged as a multiplier to boost corporate data exchange.

ANNEX I – RECORD OF ENGAGEMENT AND TASK VISIBILITY, INCLUDING MEETINGS, PRESENTATIONS AND STRATEGIC EXCHANGES

Date	Engagement / Platform	Type	Key Outcome / Relevance
27 September 2023	SBEP Foresight Workshop "Ocean Observation"	Workshop	Deliverable informing the follow-up
30 Apr 2024	SBEP WP8 Task 8.5 Meeting	Presentation /Internal scoping	First structured discussion; Task narrative introduced across WP8 partners; link to EOOS
25 Jun 2024	SBEP General Assembly – Task mention	Presentation	Task 8.5 acknowledged at governance level
20 November 2024	EOOS Knowledge hub	Strategic scoping and conceptual alignment meeting	Early input shaping Task 8.5 focus on EOOS coordination and public–private ocean data integration
25 Nov 2024	SBEP General Assembly meeting – Additional Activities Session	Policy framing presentation	Task linked to Ocean Pact & data marketplace vision
02 Dec 2024	SBEP WP8 Task 8.5 Meeting	Strategic realignment	Shift towards data-sharing governance focus
06 Dec 2024	SBEP Steering Committee	Strategic presentation	Positioning within EOOS governance debate
31 Jan 2025	SBEP WP8 Task 8.5 Meeting	Scope refinement	Incentives, SME focus, regulatory models discussed
14 Mar 2025	SBEP ExComm Meeting	Executive presentation	Task framed as strategic pilot for Cycle 3 in the framework of Additional Activities

Date	Engagement / Platform	Type	Key Outcome / Relevance
Apr 2025	EMODnet Collaboration Briefing	Institutional presentation	Exploration of EMODnet engagement in scoping for API/data pathways
16 May 2025	Exchange with Kongsberg	Industry dialogue	Inputs on dual-use infrastructure & incentives
11 Jul 2025	SBEP WP8 Task 8.5 Meeting	Internal consolidation	Implementation sequence agreed
30 Sep 2025	Exchange with Fugro	Exploratory interview	Engagement of the private sector
7 Oct 2025	SBEP WP8 Task 8.5 Meeting	Internal expert session	Dataset priorities and terminology clarified
10 Oct 2025	PtJ + BSH Presentation to Task Partners	Expert-level presentation	Dataset/API narrative defined with institutional observers
16 Oct 2025	Ocean Decade Exchange	Exploratory interview	Alignment withOcean Decade Corporate Data Group and Decade Coordination Office for Ocean Data Sharing
7 November 2025	Exchange with DG RTD and DG MARE	Strategic co-design	Alignment with future EU Ocean Observation Initiative
7 November 2025	Exchange with EATIP	Exploratory interview	Engagement of the aquaculture sector
10 November 2025	Exchange with World Ocean Council	Exploratory interview	Engagement of SBEP co-funded project and of the private sector
25 November 2025	EMODnet Conference	Panel intervention	Awareness-raising for corporate data exchange
5 December 2025	Exchange with RGI	Exploratory interview	Engagement of the private sector
9 December 2025	Exchange with NORCE	Exploratory interview	Engagement of the aquaculture sector

Date	Engagement / Platform	Type	Key Outcome / Relevance
12 December 2025	Task Team Meeting	Internal alignment	Finalisation of the concept note and preparation of 3rd cycle
13 January 2026	SBEP - Steering Committee Meeting	Presentation together with Tasks 8.3 und 8.4	Positioning of SBEP additional activities alongside the EU Ocean Observation Value Chain

More information on the Sustainable Blue Economy Partnership:

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