

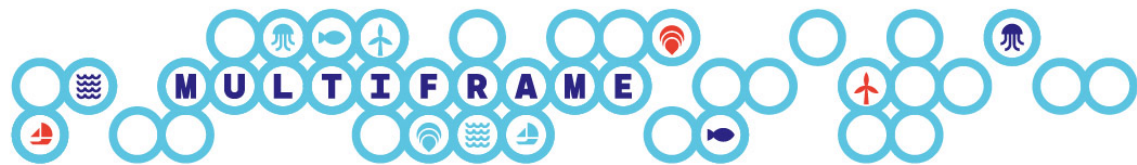


# MULTI FRAME

## FRENCH CASE STUDY - RESULTS

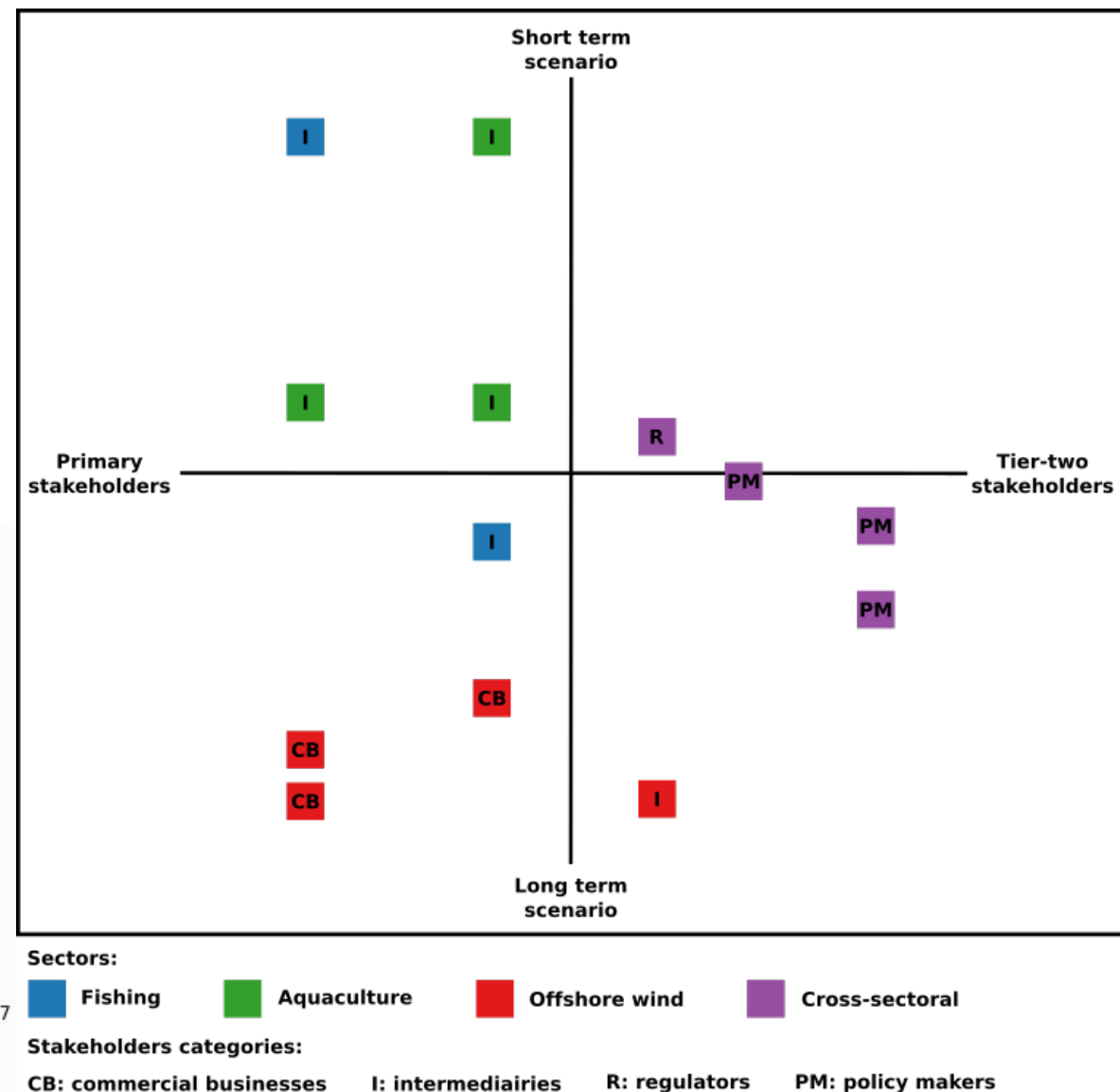
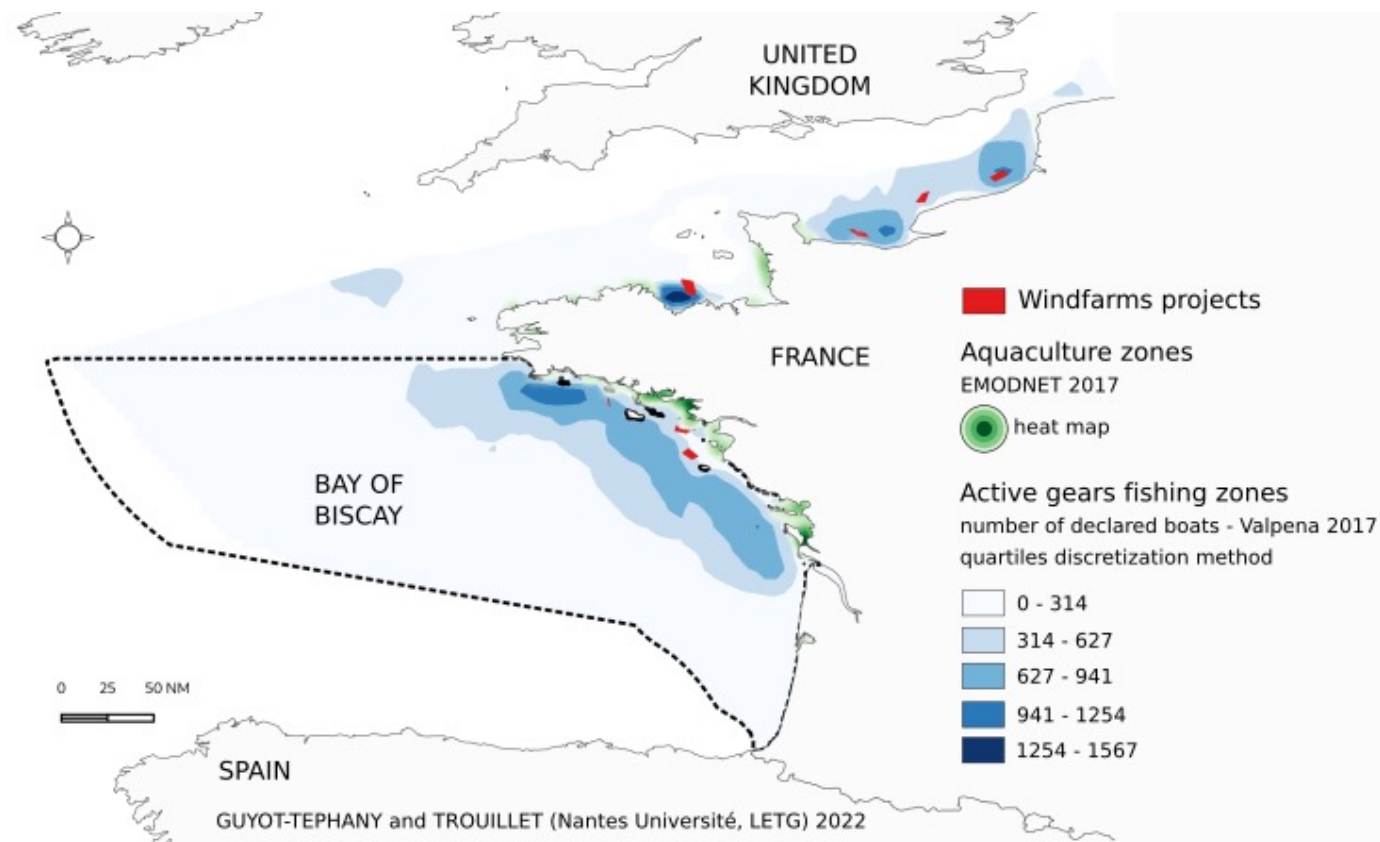
J. Guyot-Téphany & B. Trouillet (Nantes Université)

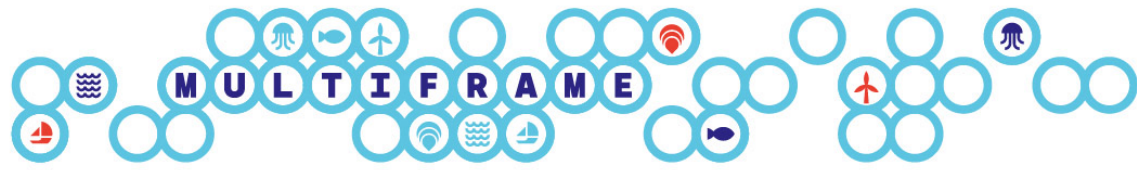
Multi-Frame Brazil Meeting – October, 3<sup>th</sup> 2022



# I. Corpus overview

- 13 interviews (excluding preliminary ones)



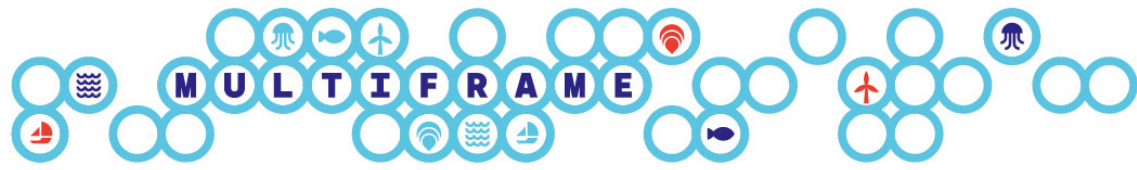


## II. Level of knowledge



- Interviewees **not very familiar with MU**, except offshore wind developers and policy makers
- **The French planning tradition is focused on co-activity** rather than MU
- Stakeholders related to the short-term scenario are **reluctant to include pescatourism into MU** (single user vs. multiple users)

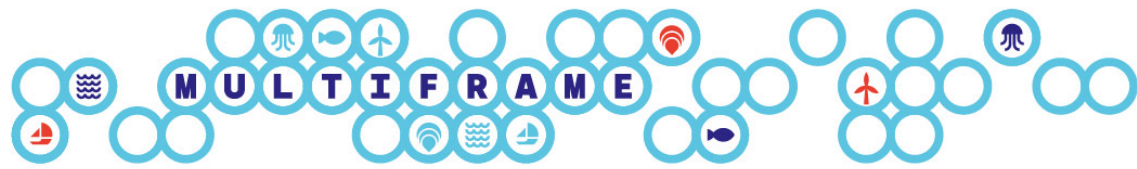




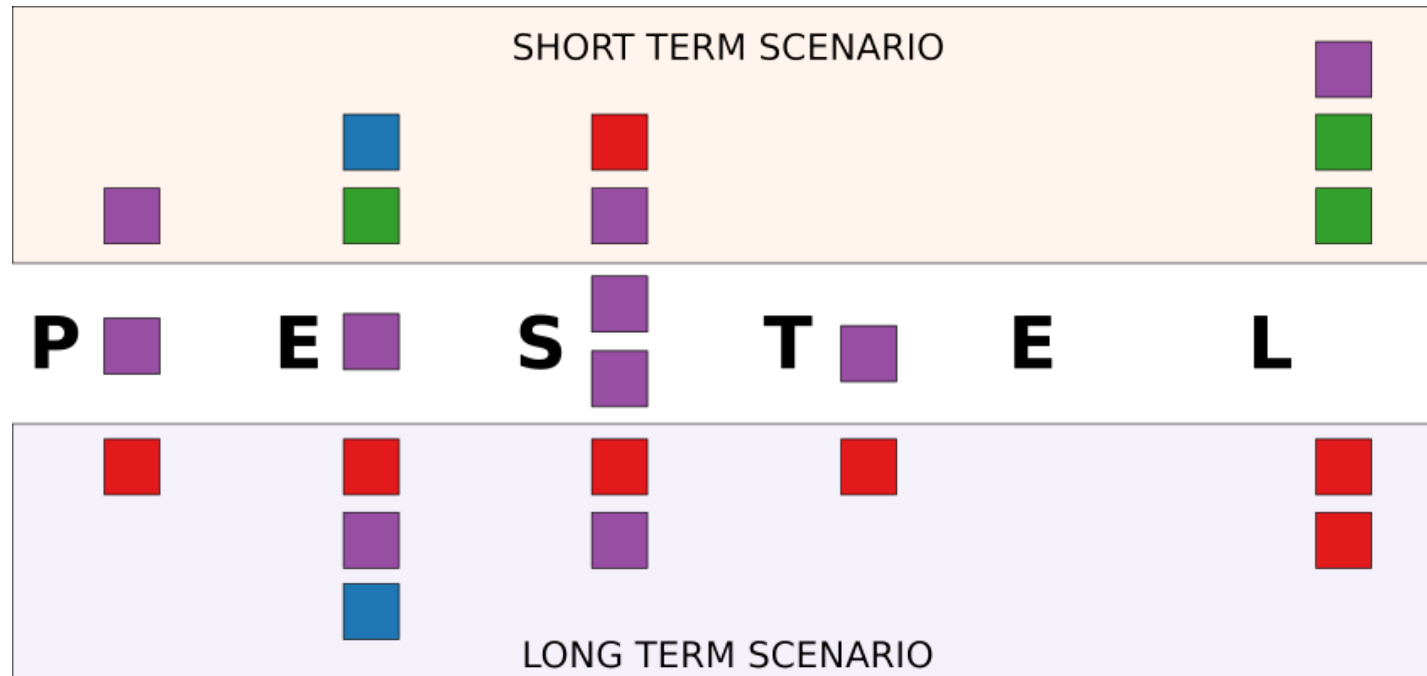
## III. MU cases, projects and trends

**MU dynamics depends both on scenarios and activities**

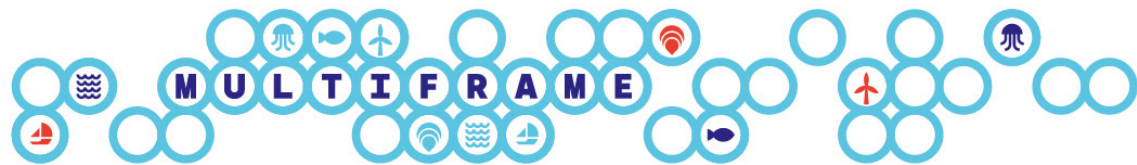
- **Short-term scenario** : implemented, but low potential
  - fishing tourism have declined in France over the last decade
  - aquaculture based tourism have developed over the last decade, at least in Arcachon
- **Long term scenario** : not implemented
  - offshore wind and fishing : cases but no synergies
  - offshore wind and aquaculture : disappointing pilots cases
  - possible combinations with other uses such as tourism, recreational boating, environmental monitoring, art, etc.



## IV. PESTEL



- The importance of **economic and social aspects** reflect MU narratives
- **Legislation** is often considered as a **constraint** and **policy as a tool**
- **No interviewee focused on environmental aspects**



## V. SHORT-TERM SCENARIO

### FISHING AND TOURISM

**Opportunities:**

- interest of the general public in fishing
- local demand

**Benefits:**

- diversifying incomes
- promoting fishing

**Risks:**

- safety risks

**Constraints:**

- getting permits

### AQUACULTURE AND TOURISM

**Opportunities:**

- interest in aquaculture
- local demand
- support of local authorities

**Benefits:**

- diversifying revenues
- have new clients
- promoting aquaculture
- attracting workers
- resist external shocks

**Risks:**

- safety risks

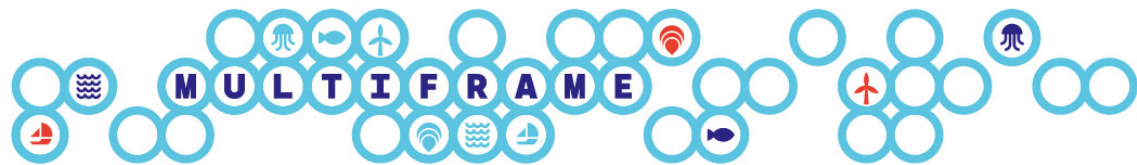
**Constraints:**

- getting permits



While fishing-based tourism may already belong to the past, **aquaculture-based tourism seems to be quite successful**. However, it can't be scaled up :

- Aquaculture-based tourism is often **part of broader profesional and territorial strategies**



## VI. LONG-TERM SCENARIO

### FISHING AND OFFSHORE WIND

#### Opportunities:

- park designs allowing fishing activities
- both sectors are aware they have to collaborate

#### Benefits:

- prove both activity can co-exist in the long run

#### Risks:

- getting permits
- insurance costs
- safety risks
- versatile relationships between both sectors

#### Constraints:

- no feedback
- no incentives
- competitiveness (OWE)
- reduced areas (FSH)
- fishing crisis
- concerns about floating wind farms

### AQUACULTURE AND OFFSHORE WIND

#### Opportunities:

- space for mariculture

#### Benefits:

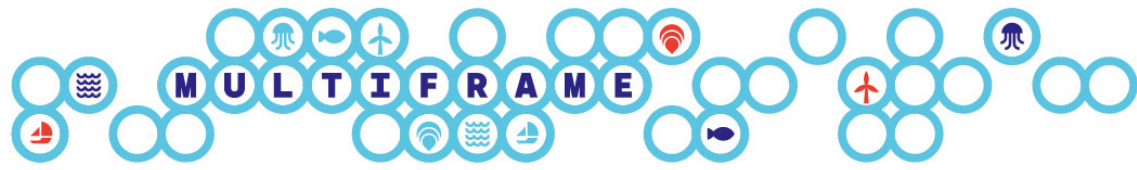
#### Risks:

- safety risks
- economic risks
- fuel costs
- unfair competition with small businesses

#### Constraints:

- disappointing pilots
- no mature technology





## VI. Long-term scenario

The multi-use concept seems more adapted to countries of Northern Europe than **France where the co-activity approach seems to satisfy everyone**

However, the effects of renewable energies objectives are **very uncertain** :

- encourage stakeholders to **collaborate further** (towards MU solutions)
- end up in a **conflict** between offshore developers and fishers
- **floating wind farms** may make fishing more difficult
- Etc.

Despite many questions and concerns, **most of stakeholders are interested in meeting each other to discuss MU opportunities and challenges**

## Our Partners



Thank you!

