

Oceans, Sustainability and
Heritage

Oman's Blue Economy

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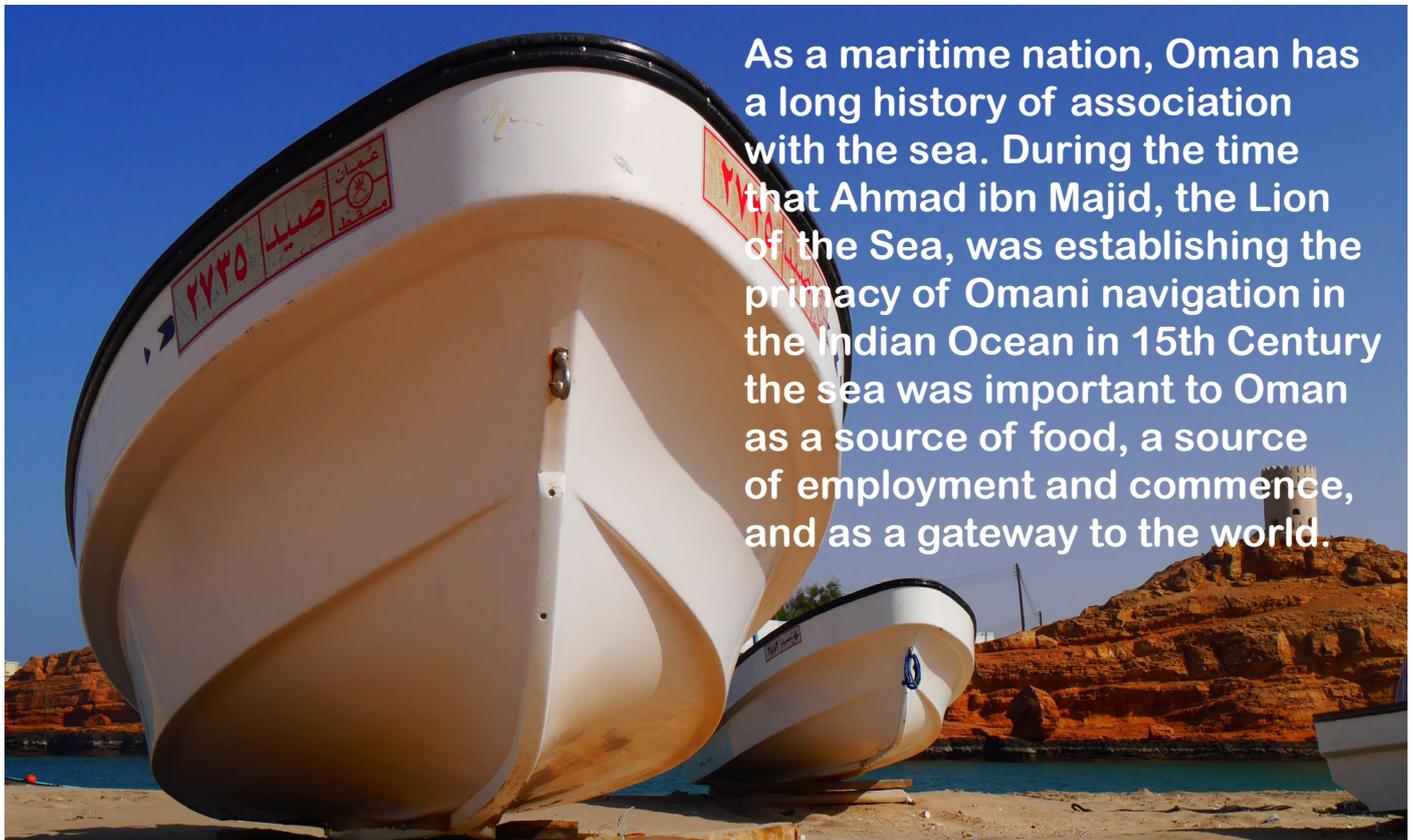
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INSIGHTS

Oman: A Sea of Opportunities

Dr Will Le Quesne, Cefas





As a maritime nation, Oman has a long history of association with the sea. During the time that Ahmad ibn Majid, the Lion of the Sea, was establishing the primacy of Omani navigation in the Indian Ocean in 15th Century the sea was important to Oman as a source of food, a source of employment and commerce, and as a gateway to the world.

As Oman turns its eye to economic development and achieving Vision 2040 the sea is as important to Oman now as it was in the days of ibn Majid.

The Tanfeedh Programme identified 5 sectors of the economy to drive economic diversification, these are logistics, fisheries (including aquaculture), tourism, manufacturing and mining. Each of these pillars is intimately connected with the sea. The connection of fisheries to the seas is obvious, and similarly for tourism many tourists are drawn to Oman for its beautiful coastlines and rich marine biodiversity. The logistics sector relies on the sea as a gateway to the world, and while the manufacturing and mining sectors do not directly rely on the sea they are dependent on port facilities and shipping routes to connect to global markets.

With a marine Exclusive Economic Zone covering more than half a million km² of sea and a coastline stretching over 1,700 km the focus of the Tanfeedh provides Oman with a sea of opportunities. This is demonstrated by the major investments in port facilities in Sohar, Duqm and Salalah showing how Oman is capitalising on its geostrategic location on the shipping routes between Asia, Africa and Europe. There is similar investment and growth in the fisheries sector with aquaculture and industrial fishery produc-

tion growing by over 2000% in the three years from 2017-2019.

As well as a location for economy and enterprise, Oman's sea and coasts are home to highly productive marine ecosystems and globally important biodiversity. Situated at the northern end of the Indian Ocean, the coasts of Dhofar, Al Wusta and Sharqiyah are some of the world's most important upwelling areas – these are areas where nutrient rich waters from deep in the ocean come to the surface and fuel vastly productive marine ecosystems. It is this feature, which turbo-charges Oman's marine environment, that means that Oman is blessed with such a rich and diverse marine environment. This supports productive fisheries and globally important marine biodiversity including turtle and whale populations. In addition to nutrient rich waters offshore, Oman's coastline provides a home for a wide range of species and habitats, including the regionally critical shorebird feeding areas of Barr al Hikman in al Wusta.

If you ask someone to picture Oman's coastline the typical image they have is of long sparsely populated shores and sandy beaches. Throughout history and still, just, today this is an accurate image of Oman's coast. However, with population growth and economic development this pic-

ture is changing, and Oman's coasts and sea is rapidly becoming busy. This is causing increasing environmental impacts and leading to conflict over allocation of space between sectors, and these pressures will only increase over time.

Fisheries are not limitless; tourist resorts cannot be co-located with industrial harbour facilities, and coastal development of any nature can damage coastal habitats such as turtle nesting beaches. Human activities and development along the coasts and in the sea both impacts the marine environment and can depend on the condition of the marine environment. Fisheries critically rely on productive fish populations but also impact these species and wider marine biodiversity. Aquaculture relies on clean waters and coastal tourism depends on clean waters, litter free beaches and abundant marine wildlife for nature watching.

ecological changes that are directly and indirectly impacting biodiversity and society. The most obvious impacts are increased cyclones (due to increased seawater temperature) and long-term sea level rise. Cyclone Gonu in 2007 caused over 50 deaths and economic damaged estimated at over 3% of GDP. Since then there has been an increasing series of cyclones affecting the Omani coasts including Cyclones Phet, Mekunu, Hikaa and Kyarr. Climate predictions suggest that the intensity of cyclones will increase, and they may travel further north towards the more populated coasts of Muscat Governorate.

The physical impacts of climate change are not the only driver of marine climate change with adverse societal impacts. As waters warm and sea conditions change this affects fish and wildlife that are adapted to living within certain conditions, which in turn affects fisheries production



It is obvious how coastal industry can impact the environment, but it can also be affected by the environment; climate change and fishing are leading to an increase in jellyfish and algae blooms which can block and disrupt the seawater intakes of desalination plants and cooling water intakes of coastal industry. This has affected coastal facilities from Sohar to Sur and can cause millions of Rials in costs due to clogged filters and interrupted operations. The development of Oman's coastline is occurring during a period of rapid climate change. Climate change is causing a number of physical, chemical and

and biodiversity. As noted above increasing jellyfish and algae blooms can also affect coastal industry and desalination plants.

At this time of major investment in the marine and coastal sectors, much of which is committing to establishing long-term fixed infrastructure, this is an important moment to consider long-term sustainability and resilience if Oman wants to follow a pathway of maintaining a bio-diverse and productive marine environment that benefits current and future generations. Planning for long term economic prosperity and sus-



tainable development requires strategic assessment of the multiple societal benefits generated by the sea and the trade-offs between different sectoral developments and conservation. This strategic planning needs to be coupled with a dedicated focus and investment in fostering adaptation and building resilience to climate change to maintain the abundant benefits that Oman's sea provides.

Oman's sea and coasts do indeed provide a sea of opportunities, but they are no longer open to unconstrained growth and without strategic planning and management there will be stormy seas ahead.

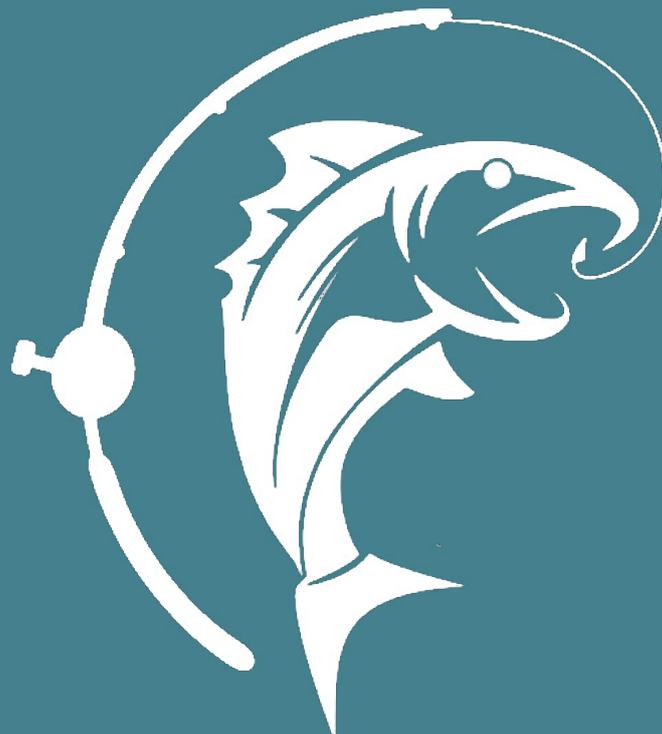
About Dr Le Quesne

Dr Will Le Quesne, is a Principal Marine Ecologist at [Cefas](#), the UK Government's marine science advisory agency, and is leading Cefas' collaboration with the Ministry of Agriculture, Fisheries and Water Resources and the Environment Authority. In partnership with HSBC, Cefas have recently conducted a climate change risk assessment of Oman's fisheries and aquaculture sector.

INSIGHTS

Fisheries in Oman

David Elliott , MacAlister Elliott & Partners



Oman has a coastline of 1,700 km stretching from the Yemeni border in the South to Musandam on the Straits of Hormuz in the North. Fishing is a well established activity providing food as well as a livelihood for a significant percentage of the population.



Omani Fishing Dhow

Traditionally small wooden skiffs and dhows would fish the Al Batinah and the Arabian Sea coasts but in the second half of the twentieth century the introduction of glass fibre open skiffs with outboard motors and mechanised dhows has fuelled a huge expansion in fishing activities. The heritage aspects of the fishing villages and ports do of course have immense spinoff benefits to the tourism industry and add local colour to the coastal areas.

Omani fish also have an excellent reputation in the Gulf States and Saudi Arabia and have been exported to European countries. Principle species are pelagics such as sardine and mackerel, large tunas and demersal fish include groupers, emperor, ribbon fish and croaker. In addition, high value shrimp, rock lobster and abalone are harvested.

In the late seventies and eighties an industrial fishery of foreign-flagged trawlers harvested large quantities of fish whilst damaging the marine environment, most of this catch was exported with little benefit to Oman. In the late nineties, under the stewardship of Hamed Al Oufi, then the Director of Fisheries, bottom trawling was banned. This farsighted initiative benefited the stocks and should safeguard the fisheries for future generations.

Whilst much of the artisanal catch is still landed on beaches considerable investment by the Government of Oman in ports and fish markets and private sector investment in vessels and current

initiatives in the Duqm fishing port and fisheries industrial park will be functioning in the near future. Any visitor to Muscat should take in the new fish market where an eclectic mix of species can be seen and purchased.

Whilst the Omani Government has identified fisheries as a growth area for investment, resource management, data collection and surveillance of fishing activities as well as landings are vital to ensure long term sustainability.

Current Status of Fisheries

Today, the fisheries in Oman continue to be dominated by the artisanal sector, operating through thousands of fibreglass beach landing vessels, which are collectively responsible for 96% of the countries catch (reported at 580,240 Tonnes in 2019). It is also true to say that this production has grown significantly in recent years (it was 217,000 Tonnes in 2016). The accuracy of the landing data is questionable, and the sustainability of some species may be in doubt if catches continue to increase without enhanced fisheries management and surveillance.

The most significant change in the current fisheries sector though has been the growth of the industrial small pelagic fishery, led by Al Wusta Fisheries (AWF), owned by the Omani Sovereign Wealth fund. AWF commenced fishing in 2018 for scad and mackerel (both small pelagic species like sardines but found further offshore) with industrial sized (95 metre) mid-water trawl-

ers. Results have been impressive since with large previously unexploited stocks identified off the Al Wusta coast and other operators are considering joining this fishery.

verification away from the oil and gas sector. The sectors currently contribute around 0.8% of GDP but it is believed that this could be increased substantially to over 5% in the next decade.



Currently, most of this fish is exported to Africa and it is estimated that a total sustainable catch of 250,000 Tonnes may be available to these (and other vessels) in the future within the Omani Exclusive Economic Zone (EEZ). It is therefore this area of the current fisheries which is most likely to see future growth in Oman.

Aquaculture

Aquaculture is still in its infancy in Oman but is clearly a growth area for the Sultanate and will without doubt show large production increases over the next decade. Certainly, to date, the uptake in new facilities has been limited by financial concerns of investors and a variety of red tape associated with the licensing process. Potential species include sea bream, shrimp, abalone and sea cucumber as well as the potential of tuna ranching.

Vision For the Future

The Oman 2040 Vision and 10th Five Year Development Plan both clearly identify the Fisheries and Aquaculture Sectors as key pillars for growth in the Sultanate and for helping the country's di-

The development of a new small pelagic industrial fishery in Oman represents the biggest material change to the fishery since the 1970s and does present an opportunity for future growth when also coupled with potential increases in aquaculture production. The Government are also currently considering how better to position Oman within the wider Indian Ocean tuna fishery (which is globally of great importance). To date, Omani involvement in this fishery has been limited to coastal activity within the Omani EEZ and has been dominated by the European Union distant water fleets. Oman and other coastal states see this situation as justifiably unfair and so discussion on how to rectify this imbalance are ongoing in the region.

However, some significant challenges also exist for the sector, mainly around maintaining catches (particularly in relation to Sardines) at sustainable levels into the future so that this resource can continue to benefit Oman for decades to come.

About

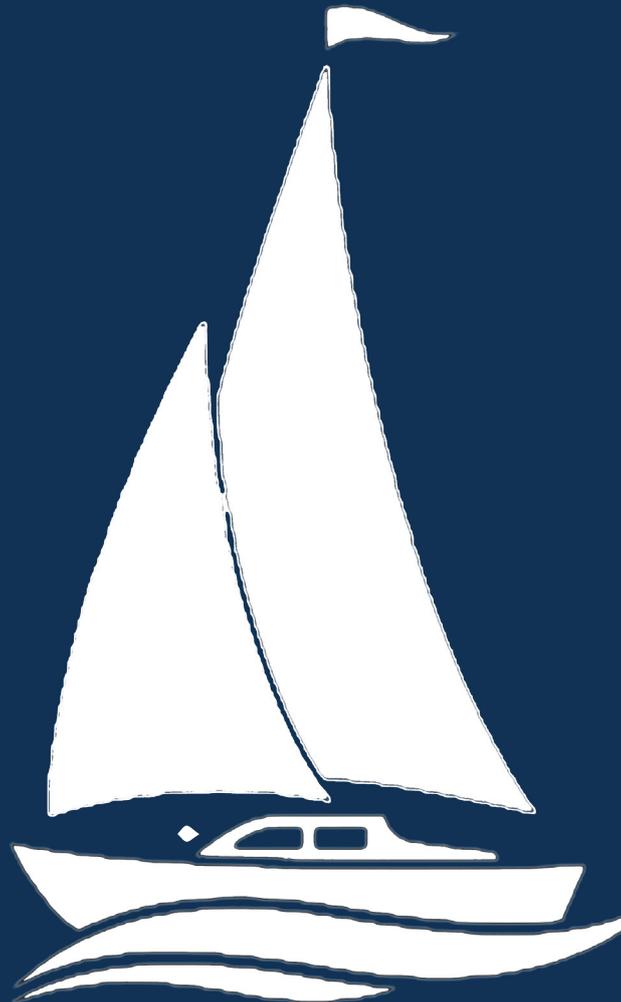
MacAlister Elliott & Partners is a UK based fisheries and aquaculture consultancy who have been active in Oman since the 1980s. Recent work has included feasibility studies in both the fisheries and aquaculture sectors.



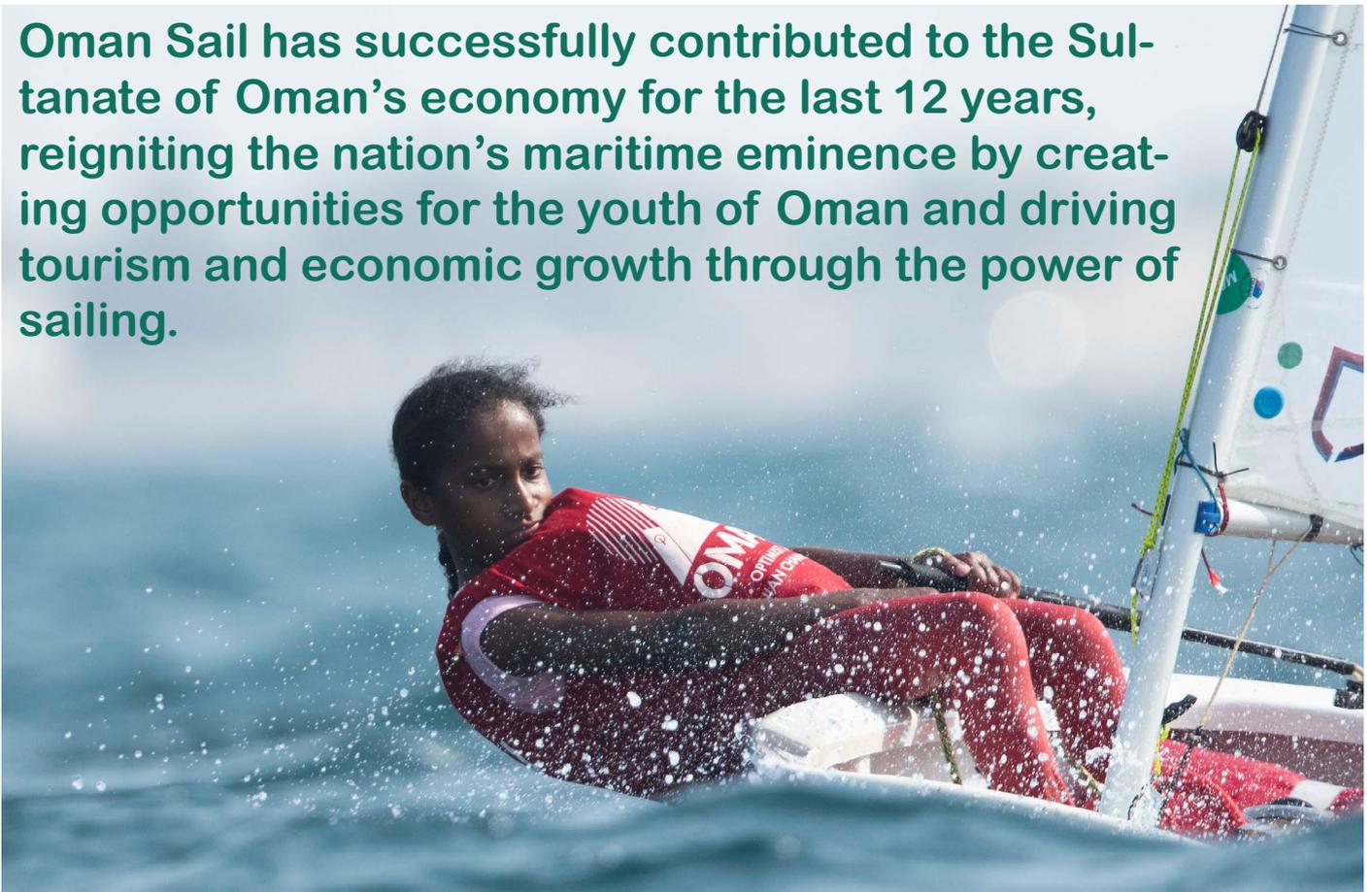
The traditional artisanal fishing vessels that dominate the Omani fleet

INSIGHTS

Empowering the Youth of the Nation
Oman Sail



Oman Sail has successfully contributed to the Sultanate of Oman's economy for the last 12 years, reigniting the nation's maritime eminence by creating opportunities for the youth of Oman and driving tourism and economic growth through the power of sailing.



Under the leadership of the royally appointed CEO, Dr Khamis Al Jabri, it remains committed to enhance its sailing and experiential programmes, to further empower the youth and to protect Oman's marine environment. With its goals acutely aligned to the national priorities set within Oman's Vision 2040, it envisions Oman as a leader within world sailing, offering equal opportunities to men and women of all abilities to excel in careers inshore and offshore.

Since its inception, Oman Sail has been an undoubted national success story, capturing three World Records for Oman. Its internationally qualified four sailing schools located along the coastline in Al Mouj Muscat, Marina Bander Al Rowdha, Sur and Mussanah, are 100% managed by Omanis and have introduced over 22,000 young Omanis to sailing. Oman Sail's talented youth teams have become a force to be reckoned with in regional youth tournaments. With 239 international recognised sailing qualifications and 79 medals, their aspiration is for the Omani youth sailors to progress through to senior level and form the backbone of national teams across all classes for years to come.

Oman Sail has historically enjoyed outstanding success as hosts of major international events including world and continental championships. Through the hosting of global events, it has leveraged the international exposure linked to the sailing competition to showcase the country's natural beauty. These events have also acted as platforms for Omani sailors to demonstrate their skills on a global stage, inspiring the nation to what can be achieved through the sport of sailing.

Progress on the water continues to shine in 2021 with Oman's 49er team currently on track to qualify for the rescheduled Tokyo Olympic Games. Oman's elite sailors have achieved podium finishes at GCC and Asian level and using this foundation of success, the long-term goal of winning an Olympic medal in sailing is now a realistic target.

Excitingly, Oman has been awarded the honour to host the upcoming 2021 49er, 49erFX, and Nacra 17 World Championships (October) and Asian Windsurfing Championships (November), that together will attract more than 500 athletes and their supporting families. The hosting of these events will play a significant role in attracting inbound tourism.

In addition, Oman Sail's regular calendar of their own events will further expose Oman in the global sailing and sports media, cementing the country's reputation as a world class host of high-profile events.

Oman Sail's multiple achievements has led directly to a greater understanding and appreciation globally for Omani culture and hospitality especially within the country's important target tourism markets. In relation, it has also over the years played a major role in the growth of Oman's tourism sector by encouraging a new sports and adventure clientele to visit the country, leading to the organisation and international promotion of prestigious global events held in the region. This has included the annual Al Mouj Muscat Marathon that Oman Sail took over management in 2017 from the Muscat Road Runners and last year successfully registered in excess of 10,000 runners from over 100 countries. Oman Sail has planted the seeds of growth for this event, nurturing its appeal with recognised international standards and based on a commitment to benefit the local private sector is in the process of handing it over to a sports entity.

Key to the future of Oman's development, both in sailing and beyond, is the drive to create a di-

verse and inclusive society. In late 2019, Oman Sail in partnership with BP Oman launched the region's first para-sailing programme, SailFree, allowing persons with disabilities to equally learn to sail and compete on the water, a model for other nations to follow. The ultimate goal for the programme is to form a national Paralympic team to represent Oman in regattas across the world and compete at the Paris Paralympics in 2024.

To broaden economic and social impact on the nation, Oman Sail established two commercial business units inspired by their sailing experiences. Zimam, delivers bespoke sailing and competency based indoor and outdoor experiential learning activities and has trained over 4,200 Omani senior management participants. In comparison, SeaOman caters to the growing maritime tourism demand in Mussanah and Muscat, it has a 5-star Trip Advisor rating and certificate of excellence, for its luxury charter adventures and multiple tour packages to explore Oman's coastline, learn to sail, fish and dive.

Oman Sail's established brands and various activities present a unique exposure opportunity to position sailing and maritime related activities as economic drivers, playing an essential role in attracting inbound tourism, raising awareness of



culture, health and the environment as well as inspiring excellence and national pride. Oman Sail will continue to nurture and establish strategic alliances, creating unique platforms for collaboration and enhanced value for both national and international brands.

About Oman Sail

Oman Sail's vision is to create monumental experiences powered by the sea, so that together we inspire excellence and contribute to the sustainable prosperity of the nation.

For further information on Oman Sail please visit www.omansail.com or contact Assim Al Saqri assim@omansail.com for business opportunities.

