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**How coastal strategic planning reflects interrelationships
between ecosystem services: a four-step method**

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3 4 **1. Introduction**

5
6 Coastal areas are difficult to manage because they involve dynamic natural systems that are
7 increasingly under pressure from expanding socio-economic systems (Turner, 2000). One
8 central challenge for coastal management and planning is to develop innovative approaches
9 for managing diverse uses of ecosystems through a range of activities (Lester et al., 2010). To
10 meet this challenge, an ecosystem services (ESs) approach has been increasingly adopted in
11 ecosystem-based coastal management, marine spatial planning and strategic environmental
12 assessment (e.g., Böhnke-Henrichs et al., 2013; Partidario & Gomes, 2013). The concept of
13 ESs helps us assess how these services benefit humanity and how human actions generally
14 impact ecosystems and the delivered ESs (Carpenter et al., 2009; MA, 2005). The
15 Millennium Ecosystem Assessment (2005) developed four broadly employed ES categories
16 to help understand the above question: provisioning, regulating, cultural and supporting
17 services.

18
19 A key difficulty in integrating these services into natural resource management and planning
20 is their complex and dynamic interrelationships in terms of trade-offs and synergies. Trade-
21 offs arise when the attempt to optimize a single service leads to reductions or losses of other
22 services (Holling & Meffe, 1996). A typical example would be a situation where offshore
23 wind farm development enhances energy production but simultaneously has negative impacts
24 on biodiversity (Busch et al., 2011). ES synergies often arise when multiple services are
25 enhanced simultaneously (Raudsepp-Hearne et al., 2010). For instance, marine protection
26 areas maintain habitats while also producing important a nursery function for certain fish
27 (Shen et al., 2011). These interrelationships usually emerge when several services respond to
28 a driver modified by human management or due to the interplay between ESs (Bennett et al.,
29 2009). It has been argued that more clarity on these interrelationships may reduce the risk of
30 negative trade-offs and enhance potential win-win scenarios (Bennett et al., 2009; Kelble et
31 al., 2013; Lester et al., 2013).

32
33 The consideration of ESs and their interrelationships in policy documents has been
34 increasingly studied in environmental and planning literature (Hansen et al., 2014; Sitas et al.,
35 2014; Turnpenny et al., 2014). In particular strategic plans are concerned with coordinating

36 diverse preferences and spatial uses of ESs within certain ecological and physical constraints.
37 Scholars have argued that strategic plans function as political documents that are important in
38 framing human-nature relationships and addressing anthropocentric pressures and ES
39 dynamics (Hansen et al., 2014; Wilkinson et al., 2013). Previous studies have shown that
40 there are trade-offs and synergies mentioned in strategic plans, which are usually in relation
41 to, for instance, competing/multiple spatial uses, nature conservation, and environmental
42 pollution (Piwowarczyk et al., 2013; Wilkinson et al., 2013). Strategic plans can restrict a
43 certain ES and in this way potentially eliminate conflicts (e.g. restrict tourism and leisure to
44 protect tranquility and biodiversity; Piwowarczyk et al., 2013), or refer to indirect and
45 multiple effects of preserving a kind of ESs. For instance, some plans have shown a favor of
46 protecting water supply and later recognized additional services such as recreation and
47 climate regulation (Wilkinson et al., 2013).

48
49 The literature confirms that activities, impacts, trade-offs and synergies are key elements
50 represented in many policy documents including strategic plans (e.g. Potts et al., 2014;
51 Turnpenny et al., 2014; Wilkinson et al., 2013). It has also been found that a clarification of
52 the integration of ES interrelationships may improve the quality of strategic plans and
53 decision-making processes (Piwowarczyk et al., 2013; Sitas et al., 2014). However, the
54 multiple ES-interrelations and ES trade-offs are often considered implicitly while making
55 decisions on planning and management (Lester et al., 2013). This is particularly true for
56 coastal strategic planning, especially when both land and sea uses that cause off-site and
57 long-term effects make ES interrelationships uncertain and complex (Halpern et al., 2008;
58 Rodríguez et al., 2006). To improve the ability of coastal strategic planning to be more
59 sustainable and adaptive, a structured method is needed to clarify the integration of ES
60 interrelationships in strategic planning documents.

61
62 Current approaches for measuring ES trade-offs and/or synergies can be broadly grouped into
63 four main approaches: mapping (e.g. Costanza et al., 1998; Crossman et al., 2013; Martínez-
64 Harms & Balvanera, 2012), modeling (e.g. Chisholm, 2010; Swallow et al., 2009), social-
65 survey analysis (e.g. Hauck et al., 2013; Potts et al., 2014), and content analysis (e.g.
66 Piwowarczyk et al., 2013; Wilkinson et al., 2013). In addition, a large number of recent
67 studies have used hybrid methods of mapping and modeling (e.g. InVEST and ARIES;
68 Nelson et al., 2009; Villa et al., 2009), or mapping and social-survey analysis (e.g. SolVES;
69 Sherrouse et al., 2011). Such approaches have also been employed in the field of coastal and

70 marine management to ascertain the influence of diverse activities on key ESs (e.g. Brown et
71 al., 2001; Busch et al., 2011; Martinet & Blanchard, 2009).

72
73 Among those approaches, content analysis could be an important starting point for evaluating
74 the quality of strategic plans concerning ES thinking (Wilkinson et al., 2013), as it can reveal
75 in a transparent manner which ES and their interrelationships have been included. Moreover,
76 content analysis may enable further discussion on the continuity of attention to ES
77 interrelationships within and between strategic plans. The analysis may also lead to a
78 discussion on links between awareness as presented in plans and operational processes
79 (Hansen et al., 2015). Previous content analysis approaches are mainly used for identifying
80 ESs themselves in policy documents. There is little systematic and aggregative analysis of
81 how ES interrelationships are framed in policy language, particularly in coastal planning
82 discourse.

83
84 The objective of this paper is therefore to present a four-step method, based on content
85 analysis, to assess ES interrelationships in coastal strategic planning documents. In this way,
86 this paper aims to clarify ES interrelationships formulated in policy language, and it aims to
87 provide insights into complex aspects of the coastal environment. Such clarification may
88 enable strategic planning to be more adaptive and sustainable in coastal areas. The following
89 section will explain the four-step method that we have formulated. Next, Jiaozhou Bay in
90 China is used as a case to show the application of the method in practice. Then we will reflect
91 on our method from an empirical perspective and a methodological perspective.

92

93 **2. A four-step method to analyze ES interrelationships**

94

95 **Step 1: Selecting coastal strategic planning documents**

96

97 In the literature, other authors typically start a content analysis of strategic planning
98 documents with a demarcation of the research scope (Hansen et al., 2015; Sitas et al., 2014).
99 So which coastal strategic plans are taken as the focus of research, for which period and why?
100 In this context, previous studies have noted that a content analysis of coastal strategic
101 planning documents is conditioned by the fact that diverse sorts of plans often have been
102 developed within different government agencies (Piwowarczyk et al., 2013). Scholars have
103 also noted that the various involved government agencies usually have different foci of

104 interest and a restricted concern of ESs (Lester et al., 2013). In addition, previous studies
105 suggest that in particular strategic plans that have an overarching view concerning ESs, and
106 that therefore have a broad influence on more specific spatial plans, are helpful to analyze the
107 discursive representation of ESs (Hansen et al., 2015). Finally, previous studies usually focus
108 on a certain progressive period, within which ES-related thinking has appeared in policy
109 discourse; strategic plans that have been formulated within such a period are likely to embed
110 ESs, trade-offs and synergies (Turnpenny et al., 2014). To summarize, for this initial step of
111 demarcating the research scope, it is important to select documents based on the following
112 criteria: (1) documents that have been developed within different key sectors, including urban
113 planning, economic, environmental and water sectors; (2) documents that have an
114 overarching and influential view on the allocation of ESs (e.g. guide other sub-plans, or
115 related policies refer to these documents often); (3) documents that make efforts to involve
116 innovative thinking and arrangements for ES governance (e.g. promote innovative
117 instruments such as payment for ESs).

118 **Step 2: Identifying ESs**

120
121 Step 1 serves to formulate a database of relevant coastal strategic planning documents. Before
122 being able to analyze interrelationships among ESs, the identification of which ESs are
123 actually mentioned in the selected plans is an essential foundation (Hauck et al., 2013). It has
124 been argued that a poor identification of ESs often results in insufficient discussion for
125 uncovering trade-offs and realizing synergies (Hauck et al., 2013; Piwowarczyk et al., 2013).
126 Against this background, content analysis accompanied by text interpretation is generally
127 seen as a useful method to identify ESs (Hansen et al., 2015; Wilkinson et al., 2013). To
128 better understand the inclusion of ES interrelationships, the second step therefore aims at
129 identifying coastal ESs themselves by employing content analysis accompanied by text
130 interpretation.

131
132 According to Wilkinson et al. (2013), to enable coding consistency across different plans, it is
133 important to design a coding system. This paper proposes a ES coding system (Table 1) based
134 on the four standard classification system put forward in the Millennium Ecosystem
135 Assessment (MA, 2005). Considering the particular ESs produced by coastal and marine
136 ecosystems, the coding system has been specified and complemented with a range of
137 concepts and examples from other research (Li et al., 2015). There are several reasons for

138 choosing the MA classification. First, the four categories play a fundamental role because
139 other modified classification schemes have widely employed them as a foundation (e.g.
140 Atkins et al., 2011; Haines-Young & Potschin, 2010). Second, in order to qualitatively
141 identify how activities and ES interrelationships may be portrayed in strategic planning,
142 scholars generally hold the view that it is appropriate to adopt the MA typology which has
143 been used as a basis for prompting the discussion of social preference and values towards the
144 environment (Bryan et al., 2010). This classification would thus serve our research goals
145 better than others, which aim at valuing ESs (Atkins et al., 2011; Haines-Young & Potschin,
146 2010), uncovering the processes of delivering benefits (De Groot et al., 2002; Wallace, 2007),
147 analyzing spatial characteristics (Costanza, 2008), or distinguishing between ES excludability
148 and rivalness (Fisher et al., 2009).

149
150 A third reason to adopt the MA classification concerns the supporting services. Current
151 studies of valuation usually exclude supporting services or subsume them in the group of
152 regulating services to avoid double counting of ES values (Hein et al., 2006; Turner et al.,
153 2003). However, in our case, double counting of supporting services should not be an issue
154 since no valuation will be made in the method. Recent research (Hauck et al., 2013; Ring et
155 al., 2010) has suggested that it is important to consider supporting services and their
156 institutional environment, as some supporting services (e.g. habitat protection, biodiversity
157 and resilience maintenance) have become inherent to political discourses across the world.
158 Fourth and finally, to gain a broad view of how coastal and marine resources are used and
159 affected by human activities through strategic planning, some traditional abiotic services
160 (regardless of ecological production processes) are considered to be important and inclusive.
161 As the provisioning group under the MA classification shows flexible space for inclusion,
162 space for navigation, industrial development and infrastructure and offshore wind have been
163 added to this group and in this way also enrich the MA classification, following, for example,
164 Atkins et al. (2011).

165 <Insert Table 1>

166 Subsequently, each selected coastal plan can be examined sentence by sentence in order to
167 identify the coastal ESs listed in the coding system. If a phrase or a sentence is referred to in a
168 way that links it to the meaning of an ES concept or that contains any example stated in the
169 coding system (Table 2), it should be marked. For example, if a plan prescribes the
170 encouragement of overseas fishery or the establishment of an offshore fishing base, this
171 should lead to a code 'fishery and seafood' under the category of provisioning services. To

172 easily code and aggregate terms and phrases in documents, computer-aided tools for
173 qualitative data analysis such as NVivo software and Atlas.ti software can be used (Weitzman
174 & Miles, 1995). In any case, it is important to note and summarize references/codes to ESs
175 from the documents. This identification is helpful to “explore word usage or discover the
176 range of meanings that a word can have in normal use” (Hsieh & Shannon, 2005). The
177 occurrence counting of ESs could be conducted to understand the different extents of ES
178 emphases. However, the objective of this step is not quantifying ESs, but contextualizing ES
179 codes to analyze their trade-offs and synergies.

180

181 **Step 3: Identifying drivers, ESs and their effects**

182

183 The third step is aimed at answering the ‘how’ question, that is, identifying activities that act
184 as drivers, affect ESs and their links. This step typically focuses on coding texts on a more
185 aggregated level and creating themes to link and describe the underlying meanings
186 (Graneheim & Lundman, 2014). Screening and coding should thus focus on different types of
187 activities (i.e. key drivers) that refer to the ESs as identified in Step 2. Direct and indirect
188 effects between a type of activity and ESs can be coded and grouped into a theme, which can
189 then be named as one type of interrelationship.

190

191 To better identify the effects and properly manage trade-offs and synergies, various scholars
192 have argued that it is critical to understand the cause of the relationships, that is, the cause-
193 effect mechanisms (Bennett et al., 2009; Gari et al., 2015; Nelson et al., 2009). The
194 aggregation of the interrelationships should rely on a clear cause-effect mechanism. In this
195 context, the typology promoted by Bennett et al. (2009) makes the following distinction: (1)
196 “effects of drivers on multiple ESs”; (2) “interactions among ESs”. These mechanisms cover
197 a variable relationship which goes beyond a linear relationship between ecosystem structure
198 (e.g. land cover) and ESs. The typology of Bennett et al. (2009) has become widely accepted
199 in the literature, and offers a useful way to further substantiate Step 3. Specifically, the
200 typology indicates that the direction of the effect is either from drivers to ESs or from ES to
201 ES, that is, bidirectional or unidirectional. This may be interpreted through the certain texts.
202 Generally, words such as “cancel,” “forbidden,” “limit,” “control,” “reduce”, or “avoid” can
203 be considered as negative effects. Narratives that include words such as “enhance,”
204 “stimulate,” “provide,” “explore,” “preserve,” “restore,” “create,” “improve,” “benefit”, and
205 “guarantee” indicate typical positive effects. For instance, if a plan prescribes that measures

206 for restoring natural properties of aquaculture ponds should be taken to guarantee sea water
207 quality, this will lead to a negative effect of the measures on the provisioning service of
208 seafood. Meanwhile, the reduction of seafood from aquaculture may be interpreted as a
209 positive influence on the service of water purification.

210

211 However, when carrying out a content analysis it is first of all important to keep in mind that
212 this involves normative judgments on whether a word is interpreted as indicating positive
213 effects or negative effects on ESs. It is impossible and undesirable for a content analysis not
214 to involve subjectivity based on the researcher's own knowledge and view. The key point
215 here is that "the researcher must 'let the text talk' and not impute meaning that is not there"
216 (Graneheim & Lundman, 2004). For instance, in the case of creating industrial areas in a
217 spatial plan, "create" directly means a promotion of using the provisioning service of spatial
218 resource for industrial production. "Create" here may also be perceived as negative impacts
219 on supporting and regulating services. If the texts did not mention the impacts on other
220 services, however, the latter negative judgement should be avoided. A second key point to
221 keep in mind is that the importance of coding the relationships between drivers and ESs lies
222 not in quantitative results (e.g. the number of times the relationships appear). Rather, the
223 aggregated-level coding process focuses on specific concepts of services, words and terms
224 regarding impacts, and sentence constructions. The aim here is to represent the latent content
225 concerning drivers and ES interrelationships, which can be seen as the "relationship aspects"
226 of codes in content analysis (Graneheim & Lundman, 2004). Therefore it is more appropriate
227 to show the conceptual and aggregated relationships in a qualitative manner.

228

229 **Step 4: Constructing relational diagrams**

230

231 Although previous studies employed diverse quantitative and qualitative methods to analyze
232 cause-effect mechanisms, the majority of these studies proved that it is useful to present the
233 results of the interrelationships in various graphical ways (e.g. King et al., 2015; Martín-
234 López et al., 2014; Nelson et al., 2009). It has been argued that visualization can offer a
235 structured and straightforward approach to diverse actors for understanding ES interactions,
236 communicating conflicting interests and discussing solutions (King et al., 2015; Raudsepp-
237 Hearne et al., 2010). Therefore, the fourth step is aimed at depicting the identified
238 interrelationships from Step 3 in a graphical way.

239

240 While the mechanisms of Bennett et al. serve as a guidance for Step 3, Step 4 aims to
241 establish relational diagrams following the way in which Bennet et al. (2009) proposed to
242 structure driver-ESs and ES-ES mechanisms. These relational diagrams use symbols to
243 indicate drivers, effects and services (Bennett et al., 2009). Figure 1 shows some examples of
244 relational diagrams, consisting of basic symbols to structure ES relationships. In each
245 relational diagram, a topmost rectangle can be used to show the driver affecting ESs and the
246 rectangles below are ESs; the solid arrow can indicate a positive influence, while the dotted
247 arrow can indicate a negative effect; arrows may illustrate the directions of effects.

248 Interrelationships can be further classified in terms of the attributes of a driver (the horizontal
249 axis) and the degree of ES interactions (the vertical axis). The set of coordinates formulated
250 by Bennett et al. (2009) is useful to show the attributes of drivers and interconnections.

251 Specifically, drivers can be categorized into two groups (see Figure 1): a shared driver that
252 directly affects multiple ESs; and an independent driver, which has direct impact on one
253 service and indirect impacts on other services. The judgment of the degree of interactions is
254 general, namely the more ESs involved, the more and stronger the interactions will be.

255 <Insert Figure 1>

256 To better understand trade-offs and synergies among a range of identified interrelationship
257 themes, relational diagrams can be demonstrated in two groups. A trade-off group can consist
258 of diagrams about managing services that may co-vary negatively (more of one means less of
259 another; Ring et al., 2010), while a synergy group can involve co-varying positively (more of
260 one means more of another; Ring et al., 2010) as a result of certain activities.

262 **3. The application of the four-step method to Jiaozhou Bay**

263
264 The four-step method was applied to the case of Jiaozhou Bay in China to assess its related
265 coastal strategic plans. Jiaozhou Bay is located on the southern coast of Shandong Peninsula
266 in East China (Figure 2). The case is well-known for the diverse ESs for regional
267 development and the severe conflicts of natural resources caused by intensive and long-term
268 anthropogenic pressures (Ge & Zhang, 2011; Zhao et al., 2005). There are various policy
269 documents and scientific reports available for a better understanding of how ES
270 interrelationships are presented in coastal strategic plans.

271 <Insert Figure 2>

272 **3.1 Selecting strategic plans**

274

275 The first step was undertaken by focusing on coastal strategic plans that were formulated
276 during the period 2008 – 2013, which is known to be a progressive period in which
277 ecological issues and initiatives have been increasingly emphasized in the Jiaozhou Bay area.
278 Attention was also paid to government agencies that have developed influential plans
279 regarding ESs, such as the Urban Planning Bureau, the Development and Reform
280 Commission, and the Municipal Government. Finally, four strategic plans for Jiaozhou Bay
281 were chosen and collected from different official websites and responsible authorities. The
282 “Conservation and Development around Jiaozhou Bay” Strategy of Qingdao (Plan 1) in 2008
283 was the first of these plans to promote the concept of integrating ecological protection with
284 industrial development for Qingdao City. It was an important urban space development
285 strategy that enabled Qingdao to be part of The Development Plan of Shandong Peninsula
286 Blue Economic Zone (Plan 2). This plan is the first national sustainable development strategy
287 with a marine economy theme that highlights optimizing both seascape and landscape,
288 producing modern marine industrial systems and enhancing marine ecological civilization.
289 Two statutory urban strategic plans – The Twelfth Five-Year National Economic and Social
290 Development Plans of Qingdao (Plan 3) and The Overall Urban Plan of Qingdao (2011-2020)
291 (Plan 4) – also reflect the role of coastal and marine resources in Jiaozhou Bay in improving
292 citizens’ well-being and the urban economy.

293

294 **3.2 Identifying ESs**

295

296 Subsequently, following the process described in Step 2, the four strategic plans were
297 analyzed. In total, 356 pages were screened by employing NVivo software. According to the
298 coding system, a range of well-established coastal ESs could be identified. Explicit and
299 implicit terms/references concerning coastal ESs could be recorded and summarized (see for
300 more information about this step also Li et al., 2015). This second step thus provided
301 information about different extents of ES inclusion in the four strategic planning documents
302 (i.e. Table 2). Results show that provisioning services and cultural services were more widely
303 discussed than regulating and supporting services. In this case, ESs that were most frequently
304 discussed by all plans were the provision of coastal space for industrial development and the
305 cultural service of cognitive values. This consistent ES focus may be due to an overarching
306 influence from the high demands of coastal industries and the increasing research need for
307 marine production and safety. By contrast, regulating services of seawater intrusion and algal

308 blooms were only mentioned in one coastal strategic plan, which may indicate that different
309 planning objectives and themes caused diverse ES focuses.

310 <Insert Table 2>

311

312 **3.3 Inclusion of drivers and ESs**

313

314 The third step is aimed at identifying drivers, relevant ESs and their relationships on a more
315 aggregated level. For this purpose, various activities (i.e. drivers) were identified involving
316 ESs that were considered to be managed. Subsequently, these codes were grouped into a
317 theme in relation to the same activity. Each theme was named as a relational type.

318 Consequently, Table 3 demonstrates ten typical activities with related ESs, which can be
319 aggregated as ten types of interrelationships. These ten types of interrelationships consist of
320 four trade-off relationships and six synergy relationships. Examples of the document quotes
321 with respect to each type of interrelationship are presented in the final column of Table 3.

322 The key words (e.g. “create” and “limit”) that indicate positive or negative effects are
323 underlined. The text passages in which these key words are embedded are helpful for
324 identifying whether the relationship involves a driver-ES form or a ES-ES form. The
325 “category” columns in Table 3 show to which category each service involved belongs; this
326 may facilitate a more general awareness about which categories of ESs have been actively
327 involved in trade-offs and synergies.

328 <Insert Table 3>

329 Results of the Jiaozhou Bay case show that the provisioning services were most often
330 regarded to be under direct management, causing changes to other services. For instance,
331 Plan 4 (Type 4) acknowledged that controlling the use of coastal spatial resource for
332 construction projects could affect “marine hydrodynamic conditions and self-purification
333 capacity” (Plan 4, p.29). Cultural, regulating and supporting services more often appeared as
334 positively co-varying services where synergies were concerned. Examples include tourism,
335 marine culture, landscape, water purification, storm surge prevention and maintenance of
336 biodiversity and wetland habitats (Table 3). Moreover, the results also allow for an
337 assessment of the continuity of attention to drivers, trade-offs and synergies within and
338 between the coastal strategic plans under study. Specifically, the four plans all referred to
339 three drivers and their effects on ESs (i.e. controlling reclamation, restoring natural shoreline,
340 and building wetlands park/reserve). There are different focuses among the plans with regard
341 to the mentioning of other drivers and related ESs. For example, regarding Type 10, only

342 Plan 1 and Plan 3 dramatically highlighted the construction of new towns for stimulating
343 multiple ESs.

344

345 **3.4 Visualizing the ten relational types of drivers and ESs**

346

347 After the identification of drivers and ESs, the final step of framing diagrams was conducted.
348 First, each type of interrelationship listed in Table 3 was structured by using the symbols of
349 rectangle, dotted arrow and solid arrow (see for an explanation Step 3). Then ten small
350 diagrams were formulated and grouped into two big diagrams by separating trade-offs from
351 synergies (Figure 3 and Figure 4). For each group, small diagrams were illustrated according
352 to the attribute of drivers and the degree of ES interactions.

353 <Insert Figure 3>

354 <Insert Figure 4>

355 As a result, the graphical presentation facilitates an easy way to identify the emphasized
356 drivers and their direct and indirect effects, particularly with regard to the regulating and
357 supporting services. It is now possible to identify which key and potential links may have
358 been overlooked. For instance, in Type 1, defining an island protection area could maintain
359 the habitat function for the increase of biodiversity (supporting service), while the
360 habitat/nursery function of the reserve also provides a spillover effect that is important for
361 commercial fishery (provisioning service) (Grafton & Kompas, 2005; Shen et al., 2011).
362 However, the indirect influence on fishery provision was not mentioned in any of the
363 analyzed plans. For other types, interrelationships pertaining to some regulating services, e.g.
364 carbon storage, algal blooms prevention, and erosion control were also generally
365 underappreciated.

366

367 In addition, the diagrams show that the selected strategic plans put little emphasis on
368 temporal and spatial issues that were crucial for ES interrelationships. Regarding the spatial
369 aspect, one example is the wetlands park (Type 9), which could be influenced by pollution
370 from the upper reaches outside administrative boundaries – its management plan was
371 restricted to the local scale rather than a cross-border view. The frequency of activities
372 relative to ecosystems' temporal dynamics is also critical for a better understanding of how a
373 particular activity influences ES changes (Halpern et al., 2008). However, only the
374 management of reclamation restriction in the bay (Type 4) indicated an awareness of the need

375 to control long-term severe cumulative impacts. There was no other mention of such
376 awareness in the plans.

377

378 **4. Discussion**

379

380 **4.1 Empirical reflection**

381

382 The case study results demonstrate how the four-step method presented in this paper could be
383 useful in identifying a range of drivers and ES interrelationships implicitly considered by
384 planners and policy-makers.

385

386 The four-step method that has been developed uncovers that different attention is being paid
387 to the four categories of ESs when talking about trade-offs and synergies. Trade-offs are
388 frequently linked to provisioning services, while synergies often involve other categories of
389 services (see Section 3.3). To put this understanding in a further international context, Table
390 4 illustrates a range of international case studies on ES interrelationships using different
391 approaches. These cases confirm that trade-off decisions, as perceived by decision-makers,
392 experts, researchers and communities, show a general preference for provisioning services.
393 One reason could be that provisioning services are utilized in regard of exclusive types of
394 spatial use (i.e. landscape or seascape), and another reason is that they are highly tangible and
395 always directly identified (Carpenter et al., 2006; Hauck et al., 2013; Rodríguez et al., 2006).
396 Diverse approaches reveal that regulating and supporting services are more likely to shape
397 synergistic links in various study areas (Table 4), because they work as functional services
398 and profoundly influence ecosystem resilience (Bennett et al., 2009; MA, 2005). Overall, the
399 application of the four-step method to the empirical case of Jiaozhou Bay shows that the
400 findings (Table 3) accord with these general assumptions and reported findings.

401

<Insert Table 4>

402 Results of the application also include the identification of overlooked links, temporal and
403 spatial issues, and the continuity of plans' attention to ESs (see Sections 3.3 and 3.4). These
404 findings illustrate the added value of the four-step method in empirical studies compared to
405 other methods. First, it is useful to expose which intangible links (particularly concerning
406 regulating and supporting services) are not addressed in strategic planning discourse. It will
407 remind policy-makers of the need to focus on intangible, vulnerable services and indirect
408 impacts. Second, by focusing on specific drivers and the scope of effects on ESs, it is

409 possible to find that there is little emphasis in strategic plans on temporal and spatial issues. It
410 will remind policy-makers of the uptake of temporal and spatial perspectives, which are
411 crucial for managing ES interrelationships (Halpern et al., 2008; Rodríguez et al., 2006).
412 Third, content analysis is capable of revealing whether strategic plans lack continuity of
413 attention to ESs (Wilkinson et al., 2013). The findings of the Jiaozhou Bay case confirm that
414 the four-step method has such capacity (Section 3.2) and brings the continuity assessment
415 forward to drivers, trade-offs and synergies (Section 3.3). Furthermore, a potential
416 contribution of this four-step method is worth to mention here. Clarifying the
417 interrelationships framed in plans could facilitate a comparison with implementation, finding
418 which links have not been reformed into daily decision-making.

419
420 Overall, the outcomes reported give planners and policy-makers insights into the importance
421 and possible ways of assessing and managing ES interrelationships. However, it is also
422 important to recognize that such clarification is not a simple task in practice. The integration
423 of ES interrelationships in policies is considerably influenced by complex institutional
424 contexts (e.g. fragmented governance structures and market-oriented preferences). There are
425 challenges that strategic planning will face: for instance, how ES interrelationships can be
426 comprehensively interpreted, when it is necessary to broadly balance different ESs, and how
427 governance can maintain a grip on ES trade-offs and synergies.

428 429 **4.2 Methodological reflection**

430
431 The four-step method presented in this paper mainly draws on content analysis and clear
432 cause-effect mechanisms. Content analysis has helped to establish straightforward and
433 detailed qualitative insights of a specific policy situation. Its advantage is to offer a
434 contextual understanding of how ES thinking has been shaped and thereby enhancing
435 decision-making on ES trade-offs and synergies through planning processes (Piwowarczyk et
436 al., 2013; Wilkinson et al., 2013). Comparing with the other three existing groups of
437 approaches (i.e. mapping, modeling and social-survey analysis), a whole range of ESs can be
438 taken into account through the coding system. This expanding perspective enables more
439 comprehensive discussions on interrelationships than other single-issue ways. Although this
440 method used a broad and perhaps partly inexplicit ES definition and classification promoted
441 by the MA (2005) to create the coding system, its flexibility leaves sufficient space for
442 further detailed mechanism analysis and, more importantly, an understanding among multiple

443 stakeholders about ES concepts and classifications. The typology promoted by Bennett et al.
444 (2009) provides a more causal description of ES interrelationships than the modeling and
445 mapping methods (Lautenbach et al., 2010). By adopting this typology, the method presented
446 in this paper provides a step towards an explicit distinction among the cause of relationships,
447 namely, an expanding set of policy interventions (i.e. drivers) and interactions among
448 services.

449
450 The scope of the findings suggests that the four-step method and the other three groups of
451 approaches could cross-fertilize each other. Apart from the contextual information and the
452 broad scopes informed by the method presented, its qualitative understanding about the way
453 of implicitly managing ES interrelationships is likely to enhance non-scientific audiences'
454 acceptance of ES quantification approaches (Kelble et al., 2013). In turn, the content analysis
455 concerning ES mechanisms requires for spatial, biophysical, economic and social-value data
456 to enhance its explicitness and accountability. In particular, perspectives of stakeholders
457 could be investigated through social methods to help with finding indirect interrelationships
458 that have been ignored in plans. Therefore, links would be clearer between drivers and actors'
459 benefits from ES changes. It may provide a way of translating social values back into
460 strategies or even abstract goals for ES governance, and ultimately creates space for solutions.

461
462 The method formulated in this paper could also facilitate planning processes. For instance,
463 when planners define the goals and scope, the method may inform a balance in social-
464 economic and ecological goals that affect drivers and related ESs. During the stage of
465 designing strategies, the visualized causal description could make the proposal explicit and
466 understandable for actors, reminding them overlooked links. In the stage of revision and
467 approval, suggestions on managing key drivers and their indirect, cumulative impacts to
468 reduce conflicts could be put forward based on this method. Finally, the method may also be
469 helpful to assess whether the implementation processes produced outcomes that are
470 synchronized with the consideration of interrelationships as presented in plans.

471
472 The four-step method is only a preliminary step towards incorporating ES trade-offs and
473 synergies into coastal strategic planning, and there are challenges facing implementation.
474 First, different planning contexts determine which and to what extent diverse ESs can be
475 acknowledged within a coastal area. Sometimes, the interpretation of policy documents is not
476 straightforward, making it hard to code and quantify ESs. Second, given the guiding role

477 played by strategic planning, only a few detailed ES interrelationships could be described.
478 Third, a dominant activity (one with an intensive or frequent influence) co-exists with other
479 activities that have relatively minor effects (Halpern et al., 2008). This fact adds complexity
480 to ES interrelationships and the long-term cumulative impacts analysis. Thus, it is a real
481 challenge to identify and manage all possible drivers and the different extents of their impacts.
482 Moreover, quantifying ESs across landscapes or seascapes and through time, and monitoring
483 small changes in the interrelationships are also difficult (Bennett et al., 2009), but it would
484 further refine the approach.

485

486 **5. Conclusion**

487

488 This paper argued that a more explicit and integrated inclusion of trade-offs and synergies
489 among ESs will make coastal strategic planning more adaptive and sustainable, and that a
490 structured method to assess this inclusion is needed. A four-step method is formulated in this
491 research that depends on content analysis with a focus of ES-interrelationship mechanisms.
492 The application in a case study showed that the method is useful to identify which drivers and
493 ES interrelationships may be formulated in policy language in coastal strategic plans. It can
494 reveal critical information in agreement with other studies and add values with regard to
495 identify overlooked interrelationships, temporal and spatial issues, and the continuity of
496 plans' attention. The four-step method distinguishes itself among other approaches by
497 informing contextual information, identifying a wide scope of drivers and ESs and their
498 consequences based on a more causal mechanism. It has potentials of cross-fertilizing other
499 approaches. These efforts may broaden strategic planning discussions, make ES integration
500 more explicit, and inform practical planning processes in different ways. Therefore, this four-
501 step method is a worthwhile starting point to inform better understanding of how current
502 coastal strategic plans may frame ES interrelationships.

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Table 4. Common ES trade-offs and synergies of different types of ecosystems and methods

Table 1. Coastal ecosystem services related to coastal spatial planning (Li et al., 2015).

Category	ES & Examples
Provisioning	Fish & seafood
	Energy production (biomass fuel, offshore oil and gas, wind, tide and wave power)
	Biochemical and pharmaceutical uses
	Transport and navigation (use of waterways for shipping)
	Coastal space for industrial development and infrastructure
	Residential and industrial water supply (abstraction of water for residential and industrial purposes)
	Urban ecological intervals (dividing different developing groups/function zones)
Regulating	Prevention of floods, storms, tsunamis and typhoons (protection by biogenic structures)
	Seawater intrusion
	Algal blooms
	Erosion and siltation control (maintenance of productive sediments, mitigating the effects of sea-level rise)
	Water purification and waste treatment
	Climate regulation (balance and maintenance of the atmosphere)
Cultural	Tourism and recreation (beach tourism, sunbathing, diving, windsurfing and kite-surfing, fishing, spas and wellness centers, bird-watching)
	Cognitive values (education and research arising from the marine environment, school excursions, monitoring global environmental change and indicators of ecosystem health, long-term environmental records)
	Esthetic beauty (landscape)
	Cultural heritage and identity (value associated with the marine environment itself)
	Sea sports (competitive sailing, yacht races and other seawater competitions)
Supporting	Maintenance of biodiversity
	Maintenance of habitats
	Resilience of ecosystems (ability to cope with natural and anthropogenic change)
	Soil formation

Table 2 Coastal ecosystem services presented in coastal strategic documents for Jiaozhou Bay
(Li et al., 2015).

Category	Plan 1	Plan 2	Plan 3	Plan 4	Sum	%
Four services sum					162	100
Provisioning					64	39.5
-Fishery and seafood	0	3	5	2	10	6.2
-Energy production	1	2	1	1	5	3.1
-Biochemical and pharmaceutical use	1	3	5	2	11	6.8
-Transport and navigation	2	2	3	2	9	5.6
-Coastal space for industrial development and infrastructure	4	6	6	5	21	13.0
-Space for urban ecological space	1	0	0	3	4	2.5
-Residential and industrial water supply	0	1	1	2	4	2.5
Regulating					20	12.3
-Flood, storm, tsunami & hurricane prevention	0	2	1	2	5	3.1
-Seawater intrusion	0	2	0	0	2	1.2
-Algal blooms	0	1	0	0	1	0.6
-Erosion and siltation control	0	1	1	0	2	1.2
-Water purification and waste treatment	1	2	3	2	8	4.9
-Climate regulation	1	1	0	0	2	1.2
Cultural					49	30.2
-Tourism and recreation	5	3	3	3	14	8.6
-Sea sports	0	1	2	1	4	2.5
-Cognitive values	1	7	6	6	20	12.3
-Aesthetic beauty	2	0	0	2	4	2.5
-Cultural heritage and identity	0	0	4	3	7	4.3
Supporting					29	17.9
-Maintenance of biodiversity	2	4	1	1	8	4.9
-Maintenance of habitats	3	4	5	9	21	13.0
-Ecosystem resilience	0	0	0	0	0	0.0
-Soil formation	0	0	0	0	0	0.0

Table 3. Drivers and ESs of trade-offs and synergies included in strategic planning for Jiaozhou Bay

Driver	Service A	C*	Service B	C	Service C	C	Service D	C	Service E	C*	Examples of document quotes*
Trade-off											
1	Defining an island protection zone	P	Economic development that changes topography and geomorphology	Biodiversity	S						Plan 2, p.23: “designate island protected areas, in which any economic development that may change the island’s topography and geomorphology is <u>forbidden</u> for <u>saving</u> rare wild animals and marine species” ; “defining an island’s protected area can <u>preserve</u> natural conditions for biodiversity”
2	Development of estuarial wetlands	P	Modern manufacturing industry	Wetlands	S						Plan 1, p.4: “when developing the estuarial wetlands of Yang river, local modern manufacturing industries should be <u>controlled</u> in terms of spatial allocation, <u>giving priority</u> to the preservation of wetlands in planning” Plan 4, p.26: “ <u>limit</u> the scale of land use of industrial development in coastal cities and <u>guide</u> the establishment of ecological intervals (e.g. wetlands and rivers)”
3	Natural shoreline restoration	P	Intertidal/pond aquaculture	Coastal aesthetic sense and landscape	C	Water purification	R				Plan 1, p.9: “strengthen efforts to protect the coastline by <u>stopping</u> intertidal/pond aquaculture to <u>restore</u> its natural coastal condition” Plan 2, p.8: “restore natural shorelines and beautify artificial shorelines with a focus on Jiaozhou Bay, Shidao Bay, Weihai Bay, Zhifu Bay and Laizhou Bay in order to <u>optimize</u> their natural landscape” Plan 4, p.5: “increase efforts to protect coastline, actively promote the legislation of Jiaozhou Bay, <u>stop</u> pond aquaculture to <u>restore</u> natural coastal landscape and to <u>improve</u> the governance of pollution sources, guarantee no more water areas would be shrunk due to reclamation”

4	Shoreline division for reclamation control, industrial development, petrochemical zone control	Land use for industry, agriculture, port development	P	Environmental capacity within the bay, self-purification capacity	R	Landscape resource	C	Plan 4, p.28: “in the important coastal scenic tourist areas, intertidal aquaculture and pond aquaculture should be <u>canceled</u> to <u>restore</u> natural coastal landscape”
Plan 3, p.26: “divide a controlling line of reclamation in Jiaozhou Bay to <u>ensure</u> that the proportion of the natural coastline will not decrease; thereby <u>avoiding</u> any change of the seabed topography and the destruction of the natural landscape, as well as the reduction of environmental capacity caused by the change of shoreline shape”								
Plan 4, p.3: “the Huangdao heavy petrochemical area should be strictly <u>restricted</u> to the planning area, <u>emphasizing</u> environmental protection and pollution reduction to the bay”; “during the planning period, if there is a need for industrial expansion, any reclamation is <u>not allowed</u> in Jiaozhou Bay”								
Plan 4, p.29: “ <u>controlling</u> the coastal development and construction projects around Jiaozhou Bay will <u>limit</u> the erosion of the bay area and water quality, thereby <u>protecting</u> the marine hydrodynamic conditions and self-purification capacity”								
Plan 4, p.28: “industrial and port businesses should <u>not be allowed</u> to occupy high-quality beaches and shoreline”								
Plan 4, p.5: “strictly <u>control</u> the urban land-use scale surrounding the central wetland reserve, <u>creating</u> conditions for the ecological restoration of natural wetlands’ functions”								
Synergy								
5	Special agriculture	Marine food	P	Leisure and	R	Landscape resource	C	Plan 2, p.10: “developing high-efficiency agriculture in coastal areas within a leisure and tourism corridor to <u>produce</u> high-quality vegetables, fruit and

constructi on supply tourism

crops”; “promoting certification for pollution-free agricultural products, green food and organic food and cultivating brand products through tourism to enhance agriculture”

Plan 3, p.50: “actively expand the agricultural function through cooperative development of tourism, cultural science, experience participation, leisure and other characteristic industries”

Plans 4, p.14: “accelerate the cultivation of modern agricultural industry system by emphasizing the research of high-quality species, as well as the establishment of aquaculture base and demonstration area of offshore marine pasture together with leisure, sightseeing and tourism agriculture”

6 Upgrading port function Shipping P Port tourism C

Plan 1, p.4: “focus on creating a tourism industry that features a large industrial port in Tuandao, introducing cruise port and tourism industry, forming a new port economy pattern, and building port economic service area; meanwhile, stimulating the development of tourism, business and leisure industries and shaping the beautiful bay mouth skyline”

Plan 1, p.5: “make the west coast form an industrial tourism that is characteristic of a large-scaled industrial port, targeting at the integration and upgrade of Jiaozhou Bay tourism resources”

7 Excavating artificial river, restoring natural waterways Protection from flood and storm surge R Water purification R The landscape of ecology island chain C

Plan 1, p.3: “excavate the artificial river and restore the natural waterways in Hongdao area for creating a chain of ecological islands in northern Jiaozhou Bay”; “enhancing the capabilities of urban areas to prevent damage from flooding, drainage and storm surges”; “increasing the environmental capacity for better water quality”

8	Constructing regional industrial cultural clusters	Marine culture	C	Tourism	C	Technology	C				Plan 3, p.85: “ <u>promote</u> a deep <u>integration</u> of marine culture, history, economy, science, technology and tourism in terms of <u>accelerating</u> the construction of regional industrial cultural clusters”; “vigorously develop new cultural formats, enhance the level of creation industries, and enable the added value of marine cultural industry to achieve at least 10% of the city's total GDP” Plan 3, p.36: “establish a range of comprehensive regional clusters that <u>feature</u> modern fisheries, coastal business tourism, port logistics, modern equipment manufacturing, island protection and sustainable utilization, and popular science education”	
9	Building wetlands park or wetlands reserve	Habitat protection	S	Ecotourism	C	Biodiversity	S	Urban air and water purification	R	Urban spatial landscape	C	Plan 1, p.3: “ <u>protect</u> the tidal flat wetlands in Moshui River, Dagu River and Yang River though the <u>establishment</u> of wetlands park with a function of eco-tourism” Plan 2, p.22: “ <u>implement</u> the protection and restoration of typical habitats such as tamarix forests, seagrass beds and coastal wetland... to <u>strengthen</u> the protection of marine biodiversity, critical marine ecological environment, and landscape...to <u>maintain</u> the coastal ecological health and functions” Plan 3, p.26: “accelerate the development of urban wetlands parks to <u>improve</u> waterfowl habitat restoration and biodiversity conservation; by doing so, ‘a city’s green kidney’ can be created to increase its capacity of environmental regulation”; “make full use of the landscape value and cultural attributes of wetlands to <u>enrich</u> residents' leisure activities”
10	New town construction	House	P	Tourism	C	Wetlands	S	Business	P	Marine scientific research,	C	Plan 1, p.5: “to <u>achieve</u> functional complementarity and mutual development, the new urban areas of Shaohai in Jiaozhou City should be in accordance with multi-functional requirements: <u>aggregating</u> the construction

<p>on</p>	<p>history & culture</p>	<p>of wetlands ecology, shoreline leisure, high-grade residential area, tourism, history, culture and business in one urban waterfront area; using ecological corridors as a skeleton (e.g. water system, greenspace and roads); taking the large water body of the city as a core”</p> <p>Plan 1, p.6: “the new town of Hongdao would <u>rely</u> on its good ecological environment and landscape resources to <u>develop</u> functions of exhibition business, residential leisure, tourism and commerce, marine scientific research, aiming at becoming an important international exhibition center and an administrative and cultural center”</p> <p>Plan 3, p. 18: “gradually integrate the new town construction of Shaohai with the development of the new industrial district in Jiaozhou Bay”; “cooperatively speed up the construction of residential landscape, tourism, urban commercial area, ecological wetlands and other functional areas to create a modern service industry and a high-end manufacturing industry for the new town”</p>
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C*: Category: P-provisioning service, R-regulating service, S-supporting service, C-cultural service

Examples of document quotes*: the words that can indicate positive/negative impacts in terms of drivers-ES and ES-ES are underlined

Table 4 Common ES trade-offs and synergies of different types of ecosystems and methods

Source	Type of ecosystems	Study areas	Drivers	Trade-offs (vs.)	Synergies (&)	Methodology
Piwowarczyk et al., 2013 ^a	Coastal	Polish coastal municipalities	No specific	<ul style="list-style-type: none"> • (P-C) ports and fishery vs. beaches recreation • (S-C) biodiversity vs. leisure • (C-C) tourism vs. landscape 		Content analysis
Wilkinson et al., 2013 ^b	Urban	Melbourne and Stockholm	Land use change	<ul style="list-style-type: none"> • (P-R) timber production vs. freshwater supply 	<ul style="list-style-type: none"> • (P-C) agriculture and forestry production & recreational services 	Content analysis
Salzman et al., 2001 ^c	Watershed	USA	Water management	<ul style="list-style-type: none"> • (P-S, P-R) agricultural food vs. soil erosion, flood protection and protection of species 	<ul style="list-style-type: none"> • (R-R) watershed preservation & flood control 	
Hauck et al., 2013 ^d	Agriculture, forestry, water	Finland, Germany, and Poland	No specific	<ul style="list-style-type: none"> • (P-S, P-R) industrial forestry vs. biodiversity, erosion, natural flood protection, purification of groundwater and natural carbon sinks 	<ul style="list-style-type: none"> • (S-P, C-P) biodiversity and tourism & organic agriculture • (R-R, R-S) flood protection & water purification, erosion prevention, climate regulation and biodiversity 	Survey, interview, focus group discussion
Holt et al., 2011 ^e	Estuary wetland	UK	No specific	<ul style="list-style-type: none"> • (P-C, P-R, P-S) fishing and farming vs. recreation, algae and biodiversity maintenance 	<ul style="list-style-type: none"> • (C-C) aesthetic enjoyment & natural heritage 	Workshop, content analysis
Potts et al., 2014 ^f	Marine	UK	Marine Protected Areas management		<ul style="list-style-type: none"> • (S-C) species & cultural wellbeing and tourism/nature watching • (S-S, S-R, S-P, S-C) habitats & supporting, regulating, provisioning 	Expert workshop

					and cultural services	
Busch et al., 2011 ^g	Coastal	Schleswig-Holstein, Germany	Offshore wind farm construction	• (P-C, P-S) offshore wind vs. recreation and habitat	• (P-R, P-P, P-C) renewable energy production & climate regulation, fishery and marine culture	Questionnaire, researchers workshop
Martín-López et al., 2012 ^h	Territorial	Spain, the Iberian Peninsula	No specific	• (P-R, P-C) provisioning vs. regulating and almost all cultural services		Questionnaire, statistical analysis
Butler et al., 2013	Floodplain	Tully–Murray catchment, Australia	No specific	• (P-R) food and fibre production vs. water quality	• (R-C) water quality & floodplain recreational and commercial fisheries	Statistical analysis
Raudsepp-Hearne et al., 2010	Pre-urban agricultural	Quebec, Canada	No specific	• (P-R, P-C) crop and pork production vs. both regulating and cultural services		ArcGIS, ES proxies
Turner et al., 2014	Territorial	Denmark	No specific	• (P-C, P-R) crop production vs. sense of place, carbon storage, and wetland water purification	• (R-C) carbon storage & sense of place and nature appreciation • (P-P) crop production & livestock production	ArcGIS, ES proxies
Nelson et al., 2009	Watershed	Willamette Basin, Oregon	Land use change	• (P-R, P-S) agricultural crop products, timber harvest, and rural–residential housing vs. hydrological services, soil conservation, carbon sequestration, and biodiversity conservation	• (S-R, S-P, S-C) biodiversity conservation & other ES	InVEST
Eigenbrod et al., 2009	Watershed	Lake Victoria Basin, East Africa	No specific	• (P-R) agricultural production vs. sediment control		Biophysical models and GIS

Gee, K Burkhar, 2010	Forrest	Jonkershoek Valley, South Africa	Afforestation	<ul style="list-style-type: none"> • (P-R) timber production vs. water supply 	<ul style="list-style-type: none"> • (R-P) carbon sequestration & timber production 	Ecological-economic model
Haase et al., 2012	Rural-urban	Leipzig-Halle region, Germany	Soil sealing; brownfield restoration	<ul style="list-style-type: none"> • (P-C) food supply vs. recreation potential • (P-R) food supply vs. climate regulation • (C-R) recreation vs. carbon storage 	<ul style="list-style-type: none"> • (S-C) bird species diversity & recreation • (P-R) food supply & carbon storage • (S-R) biodiversity potential & carbon storage 	Biophysical models, mapping
Van der Biest et al., 2014	Watershed	Grote Nete Basin, Belgium	No specific	<ul style="list-style-type: none"> • (P-R) food production vs. climate regulation • (P-R) wood production vs. climate regulation 		Model and mapping

a, b, c: ES trade-offs and synergies perceived by decision-makers and planners

f, g: ES trade-offs and synergies perceived by experts or researchers

d, e, h: ES trade-offs and synergies perceived by stakeholders (e.g. fishers, NGOs, planners, sectoral workers and local communities)

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Figure 4. Relational diagrams of ES synergies identified from the Jiaozhou Bay strategic plans (the topmost rectangle is the driver; the rectangles below are ESs; the solid arrow indicates a positive influence; the dotted arrow indicates a negative effect; arrows illustrate the directions of effects; the horizontal axis means the attributes of a driver; the vertical axis shows the degree of ES interactions)