



Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea



CONTRACT NUMBER
MARE/2012/07 - REF. NO 2

REPORT 1 - ANNEX 2.12

COUNTRY FICHE - ANNEX

TURKEY

JANUARY 2014



Contents

| | |
|-------------------------------------------------------------------------------------------------------------------|----|
| 1. Selection of the most important regions: breakdown of activities between Black Sea and Mediterranean Sea | 3 |
| 2. Indicative size of all marine and maritime activities | 4 |
| 3. Relative growth of all marine and maritime activities | 5 |
| 4. Assessment of future potential for all marine and maritime activities | 7 |
| 5. Growth drivers and barriers to growth | 8 |
| 5.1 Results of the benchmark analysis | 8 |
| 5.2 SWOT analysis..... | 12 |
| 6. Maritime strategies..... | 20 |

1. Selection of the most important regions: breakdown of activities between Black Sea and Mediterranean Sea

| Function/maritime economic activity | | % Mediterranean | % Black Sea | GVA Mediterranean (EUR, billion) | GVA Black Sea (EUR, billion) |
|-----------------------------------------------------------|----------------------------------------------------|-----------------|-------------|----------------------------------|------------------------------|
| 0. Other sectors | | | | | |
| 0.1 | Shipbuilding (excl. leisure boats) and ship repair | 82 | 18 | 0,402 | 0,088 |
| 0.2 | Water projects | 86 | 14 | 0,249 | 0,041 |
| 1. Maritime transport and shipbuilding | | | | | |
| 1.1 | Deep-sea shipping | 93 | 7 | 0,156 | 0,012 |
| 1.2 | Short-sea shipping (incl. Ro-Ro) | 93 | 7 | 0,538 | 0,040 |
| 2. Food, nutrition, health and eco-system services | | | | | |
| 2.1 | Catching fish for human consumption | 40 | 60 | 0,237 | 0,356 |
| 2.3 | Marine aquaculture | 90 | 10 | 0,113 | 0,013 |
| 4. Leisure, working and living | | | | | |
| 4.1 | Coastal tourism | 93 | 7 | 1,487 | 0,112 |
| 4.3 | Cruise tourism | 99 | 1 | 0,088 | 0,001 |
| TOTAL | | | | 3,270 | 0,663 |
| % | | | | 83% | 17% |

Source : elaboration EUNETMAR

This table shows the breakdown of activities between the Black Sea and the Mediterranean Sea for the major MEAs (the MEAs concerned represent 90% of the total GVA of all economic maritime activities).

2. Indicative size of all marine and maritime activities

| Function/activity | | GVA (EUR, billion) | Employment (*1000) | Score | Source & Reference year |
|-----------------------------------------------------------|------------------------------------------------------------------|-----------------------|--------------------------|-------|-------------------------|
| 0. Other sectors | | | | | |
| 0.1 | Shipbuilding and ship repair | 0.490 | 34.491 | 19.70 | EUROSTAT (2009) |
| 0.2 | Water projects | 0.290 | 15.530 | 9.22 | EUROSTAT (2009) |
| 1. Maritime transport | | | | | |
| 1.1 | Deep-sea shipping | 0.168 | 8.919 | 5.30 | EUROSTAT (2009) |
| 1.2 | Short-sea shipping (incl. Ro-Ro) | 0.578 | 30.723 | 18.25 | EUROSTAT (2009) |
| 1.3 | Passenger ferry services | 0.377 | 11.210 | 7.49 | EUROSTAT (2009) |
| 1.4 | Inland waterway transport | 0 | 0 | 0 | EUROSTAT (2009) |
| 2. Food, nutrition, health and eco-system services | | | | | |
| 2.1 | Fishing for human consumption | 0.593 | 37.750 | 21.84 | TUIK (2011) |
| 2.2 | Fishing for animal feeding | ---- | Not separately available | ---- | ---- |
| 2.3 | Marine aquaculture | 0.126 | 8.000 | 4.63 | TUIK (2011) |
| 2.4 | Blue biotechnology | n.a. | n.a. | n.a. | ---- |
| 2.5 | Agriculture on saline soils | ---- | ---- | ---- | ---- |
| 3. Energy and raw materials | | | | | |
| 3.1 | Offshore oil and gas | 0 | 0 | 0 | Testing phase |
| 3.2 | Offshore wind | 0 | 0 | 0 | Not applicable |
| 3.3 | Ocean renewable energy | 0 | 0 | 0 | Not applicable |
| 3.4 | Carbon capture and storage | 0 | 0 | 0 | Not applicable |
| 3.5 | Aggregates mining (sand, gravel, etc.) | n.a. | n.a. | n.a. | Not applicable |
| 3.6 | Marine minerals mining | n.a. | n.a. | n.a. | Not applicable |
| 3.7 | Securing fresh water supply (desalination) | n.a. | n.a. | n.a. | Not applicable |
| 4. Leisure, working and living | | | | | |
| 4.1 | Coastal tourism | 1.599 | 125.182 | 70.59 | EUROSTAT (2009) |
| 4.2 | Yachting and marinas | n.a. | n.a. | n.a. | ---- |
| 4.3 | Cruise tourism | 0.089 | 2.647 | 1.77 | EUROSTAT (2009) |
| 5. Coastal protection | | | | | |
| 5.1 | Protection against flooding and erosion | n.a. | n.a. | n.a. | Not applicable |
| 5.2 | Preventing salt water intrusion | n.a. | n.a. | n.a. | Not applicable |
| 5.3 | Protection of habitats | n.a. | n.a. | n.a. | ---- |
| 6. Maritime monitoring and surveillance | | | | | |
| 6.1 | Traceability and security of goods supply chains | n.a. | n.a. | n.a. | ---- |
| 6.2 | Prevent and protect against illegal movement of people and goods | 0.080 | 5.000 | 2.90 | ---- |
| 6.3 | Environmental monitoring | n.a. | n.a. | n.a. | ---- |

3. Relative growth of all marine and maritime activities

| Function/activity | | Indicator 1 | 2008 | 2010 | Indicator 2 | 2008 | 2010 | Source | Score* |
|-----------------------------------------------------------|----------------------------------|-------------------------------------------------|---------|---------|------------------------------------------------------------------|---------|---------|-------------------|--------|
| 0. Other sectors | | | | | | | | | |
| 0.1 | Shipbuilding and ship repair | Export (million \$) | 2.647 | 1.109 | Employment | 26.910 | 21.449 | GISBIR | -22.39 |
| 0.2 | Water projects | Cargo handling (million t) | 314.577 | 348.690 | Number of ports | 178 | 182 | 1: TCS 2: TÜİK | 3.20 |
| 1. Maritime transport | | | | | | | | | |
| 1.1 | Deep-sea shipping | Import handling (million t) | 151.531 | 162.626 | Number of tankers passing through Istanbul Strait | 9,303 | 9,273 | TCS | 1.72 |
| 1.2 | Short-sea shipping (incl. Ro-Ro) | Cabotage handling (million t) | 39.056 | 37.996 | Ro-Ro lines transported vehicles (1000) | 330.100 | 322.804 | TCS | -1,24 |
| 1.3 | Passenger ferry services | Passengers transported (cruise excl.) (million) | 151.646 | 154.198 | Passenger miles (international transport not included) (million) | 848 | 848 | TÜİK | 0.42 |
| 1.4 | Inland waterway transport | ---- | ---- | ---- | ---- | ---- | ---- | ---- | ---- |
| 2. Food, nutrition, health and eco-system services | | | | | | | | | |
| 2.1 | Fishing for human consumption | Value of catches (million TRY) | 982.973 | 935.821 | Fishery workers | 45,872 | 46,361 | TÜİK | -0,95 |
| 2.2 | Fishing for animal feeding | included in 2.1 | ---- | ---- | included in 2.1 | ---- | ---- | ---- | ---- |
| 2.3 | Marine aquaculture | Value of production (million TRY) | 584.291 | 728.574 | Volume of production (million t) | 85.629 | 88.573 | TÜİK | 6.69 |
| 2.4 | Blue biotechnology | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |
| 2.5 | Agriculture on saline soils | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |
| 3. Energy and raw materials | | | | | | | | | |
| 3.1 | Offshore oil and gas | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |
| 3.2 | Offshore wind | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |

| Function/activity | | Indicator 1 | 2008 | 2010 | Indicator 2 | 2008 | 2010 | Source | Score* |
|----------------------------------------------------------------------------|------------------------------------------------------------------|--------------------------------------------------------------------------|-----------|-----------|---------------------------------------|-----------|-----------|--------|--------|
| 3.3 | Ocean renewable energy | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |
| 3.4 | Carbon capture and storage | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |
| 3.5 | Aggregates mining (sand, gravel, etc.) | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |
| 3.6 | Marine minerals mining | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |
| 3.7 | Securing fresh water supply (desalination) | ---- | 0 | 0 | ---- | ---- | ---- | ---- | ---- |
| 4. Leisure, working and living | | | | | | | | | |
| 4.1 | Coastal tourism | General tourism receipts (million \$) | 21,950.8 | 20,806.8 | Accommodation number of persons index | 102.5 | 99.6 | TÜİK | -2.03 |
| 4.2 | Yachting and marinas | Exports of yachts and other vessels for pleasure or sports (million TRY) | 324.2 | 315.4 | ---- | ---- | ---- | ---- | -1.37 |
| 4.3 | Cruise tourism | Number of cruise passengers | 1,605,372 | 1,719,098 | Number of cruise passengers | 1,605,372 | 1,719,098 | TCS | 3.48 |
| 5. Coastal protection | | | | | | | | | |
| 5.1 | Protection against flooding and erosion | ---- | ---- | ---- | ---- | ---- | ---- | ---- | ---- |
| 5.2 | Preventing salt water intrusion | ---- | ---- | ---- | ---- | ---- | ---- | ---- | ---- |
| 5.3 | Protection of habitats | ---- | ---- | ---- | ---- | ---- | ---- | ---- | ---- |
| 6. Maritime monitoring and surveillance | | | | | | | | | |
| 6.1 | Traceability and security of goods supply chains | ---- | ---- | ---- | ---- | ---- | ---- | ---- | ---- |
| 6.2 | Prevent and protect against illegal movement of people and goods | ---- | ---- | ---- | ---- | ---- | ---- | ---- | ---- |
| 6.3 | Environmental monitoring | ---- | ---- | ---- | ---- | ---- | ---- | ---- | ---- |
| * Score : arithmetic mean of CAGR for Indicator 1 and CAGR for Indicator 2 | | | | | | | | | |

4. Assessment of future potential for all marine and maritime activities

| Function | Activity | Innovativeness | Competitiveness | Employment | Policy relevance | Spill-over effects | Sustainability | Overall score |
|----------------------------------------------------|-------------------------------------------------------------------------|----------------|-----------------|------------|------------------|--------------------|----------------|---------------|
| 0. Other sectors | 0.1. Shipbuilding and ship repair | + | + | - | + | + | + | ++++ |
| | 0.2. Water projects | 0 | + | + | + | + | 0 | ++++ |
| 1. Maritime transport | 1.1 Deep-sea shipping | 0 | + | 0 | 0 | + | 0 | ++ |
| | 1.2 Short-sea shipping (incl. Ro-Ro) | 0 | + | - | 0 | + | 0 | + |
| | 1.3 Passenger ferry services | 0 | + | 0 | 0 | 0 | 0 | + |
| | 1.4 Inland waterway transport | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| 2. Food, nutrition, health and eco-system services | 2.1 Fishing for human consumption | 0 | + | 0 | 0 | + | 0 | ++ |
| | 2.2 Fishing for animal feeding | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 2.3 Marine aquaculture | 0 | + | + | + | + | + | +++++ |
| | 2.4 Blue Biotechnology | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 2.5 Agriculture on saline soils | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| 3. Energy and raw materials | 3.1 Offshore oil and gas | 0 | 0 | + | + | + | - | ++ |
| | 3.2 Offshore wind | 0 | 0 | 0 | + | 0 | + | ++ |
| | 3.3 Ocean renewable energy (wave, tidal, OTEC, thermal, biofuels, etc.) | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 3.4 Carbon capture and storage | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 3.5 Aggregates mining (sand, gravel, etc.) | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 3.6 Marine minerals mining | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| | 3.7 Securing fresh water supply (desalination) | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| 4. Leisure, working and living | 4.1 Coastal tourism | 0 | + | + | + | + | 0 | ++++ |
| | 4.2 Yachting and marinas | + | + | + | 0 | + | 0 | ++++ |
| | 4.3 Cruise tourism | + | + | + | 0 | + | 0 | ++++ |
| 5. Coastal protection | 5.1 Protection against flooding and erosion | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 5.2 Preventing salt water intrusion | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 5.3 Protection of habitats | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| 6. Maritime monitoring and surveillance | 6.1 Traceability and security of goods supply chains | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 6.2 Prevent and protect against illegal movement of people and goods | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |
| | 6.3 Environmental monitoring | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. | n.a. |

5. Growth drivers and barriers to growth

5.1 Results of the benchmark analysis

| COASTAL TOURISM ¹ | Growth drivers | Barriers to Growth |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maritime research | Some (limited) maritime research linked to Coastal tourism in universities Specific focus of Tourism Strategy 2023 on R&D | Lack of data that can be used as input in the tourism policy making process |
| Development and innovation | Unutilised potential R&D encouraged through Tourism Strategy 2023 | Insufficient diversification of the tourist offer Environmental problems |
| Access to finance | Support of government to investments in terms of planning and land allocation Investment incentives via the Law on Encouragement of Tourism | Low access to credit in some regions |
| Smart infrastructure | Effective port and airport system | Infrastructure problems in densely populated and fast growing tourism centers Limited number of airport with developed international connections |
| Maritime clusters | Marine tourism represented in the Turkish Chamber of Shipping cluster | Coastal tourism actors poorly represented in the cluster |
| Education, needs in training and skills | Well-trained workforce Tourism and hotel management programmes in several universities | Institutions offering vocational education on tourism need capacity reinforcements with improvements in quality and content of their curricula Need to raise awareness on existence and protection of national tourism assets and resources |
| Maritime spatial planning | No drivers identified | Holistic legal frameworks for ICZM and institutional mechanisms have not yet been established in Turkey Lack of physical planning practice |
| Integrated local development | Decentralized approach to tourism development 9 thematic development zones and 10 new "tourism cities" have been described in the National Strategy | SMEs insufficiently involved in development projects Tourism potential not used in a rational manner |
| Public engagement | Engagement of the government through Tourism Strategy 2023 which aims at boosting the cooperation between public and private sectors of tourism | Lack of technical support personnel Insufficient international cooperation |

| MARINE AQUACULTURE ² | Growth drivers | Barriers to Growth |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maritime research | Significant number of research programs focused on aquaculture Significant know-how and research capacity in aquaculture R&D facilities in private hatcheries | Research capacity not well organised |
| Development and innovation | Significant aquaculture support services (feed plants, equipment providers/distributors, technical consultants), especially in the West (seabream/seabass farming area) The new "Renting Water and Water Areas for Aquaculture Production in Seas and Inland Water's Regulation" (2011) has shortened the duration of the bureaucratic process and allowed longer lease periods | Insufficient capacity of processing and producing value added products Licensing process still needs to be simplified Prejudiced approach to aquaculture products vs. catch products from domestic consumer |
| Access to finance | A few large companies, mainly producing | Characterization of industry as high risk making |

¹ The benchmark instance is "Coastal Tourism in Sardinia (Italy)".

² The benchmark instance is "Marine aquaculture in Greece".

| MARINE AQUACULTURE ² | Growth drivers | Barriers to Growth |
|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| | seabream/seabass, with investment capacity | insurance costs high |
| Smart infrastructure | High capacity modern hatcheries Strong ancillary support services (cage, net, tanks, ...) | Adaptation to EU laws and standards not completed (traceability, water quality measures, ...) |
| Maritime clusters | Effective regional association (Muğla Fish Farmers' Association) | No related maritime cluster |
| Education, needs in training and skills | 13 fisheries faculties and 5 departments at agriculture faculties providing undergraduate and graduate education in fisheries (including aquaculture) | Unavailability of experienced labour (cheap labour highly available when experience is unnecessary) |
| Maritime spatial planning | Implementation of coastal zone management is a priority FAO Project for developing a Roadmap for Turkish Marine Aquaculture Site Selection and Zoning Using an Ecosystem Approach to Management | Conflict of users with tourism, summer house owners and small-scale fishermen |
| Integrated local development | National Marine Aquaculture Development Plan (NMADP) set out to provide stable ground for the future growth of the aquaculture sector | Environmental monitoring of fish farms uncompleted |
| Public engagement | Government policy of support (export subsidies, free supply of turbot fry to farms, ...) | International cooperation limited |

| SHIPBUILDING AND SHIP REPAIR ³ | Growth drivers | Barriers to Growth |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maritime research | Ship model testing laboratory in the Faculty of Naval Architecture and Ocean Engineering (Istanbul Technical University) | Insufficient R&D No direct R&D support to the shipbuilding industry |
| Development and innovation | Capacity increase in maintenance and repair Largest ship recycler outside Asia | Orderbook in decrease Impact of the 2008 financial crisis China's competition |
| Access to finance | Export credit assistance provided by the State | Long-term investments needed Some shipyards have suspended or cancelled their modernization or extension projects because of the sanctions applied by the banks |
| Smart infrastructure | Modern quality-certified shipyards Development in alignment with international rules (sustainability) Facilities of the ship dismantling industry in Aliğa have been named as the most environment-friendly facilities throughout the world Piri Reis University in Tuzla accredited by the BREEAM Certificate Leading position in Europe for ship breaking and recycling activities | Lack of references for offshore platforms, LPG and LNG carriers Insufficient rationalisation of the industry (economies of scale to be found) |
| Maritime clusters | Shipyards well represented in the Turkish Chamber of Shipping cluster Long-established Turkish Shipbuilders' Association (GISBIR) Ship Recyclers' Association (GEMISANDER) High concentration of shipyards in Tuzla Bay | Lack of international cooperation |
| Education, needs in training and skills | 4 universities with shipbuilding departments Piri Reis University recently established in Tuzla 31 high schools operating ship construction departments | Not enough training vessels Apprenticeship schemes to develop |
| Maritime spatial planning | ---- | Holistic legal frameworks for ICZM and institutional mechanisms have not yet been established in Turkey |
| Integrated local development | ---- | Shipyards need vast coastal areas |
| Public engagement | Strategic sector for the government (security, defence, important generator of employment) Investment Encouragement Program | No barriers identified |

³ The benchmark instance is "Shipbuilding and Ship repair in Germany".

| SHIPBUILDING AND SHIP REPAIR ³ | Growth drivers | Barriers to Growth |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|
| | <p>Turkish Shipyards Master Plan</p> <p>Orders of the Turkish government (military vessels)</p> <p>Positive impact of EU LeaderSHIP 2020 on Turkey</p> | |

| CRUISE TOURISM ⁴ | Growth drivers | Barriers to Growth |
|------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maritime research | Participation to EU-funded projects: e.g. Marmara Research Center participated in MC WAP project, which aimed at the application of Molten Carbonate Fuel Cells (MCFC) technology on-board large ships such as cruise ships | Limited research on cruise tourism No assessment of cruise tourists' expenditures |
| Development and innovation | Great efforts being exerted to open Istanbul to cruise tourism services 7 new cruise ports are planned, out of which 3 as home ports | Some worries concerning security on cruise ships Absence of marketing tools or know-how to develop cruise potential of the ports |
| Access to finance | No drivers identified | ---- |
| Smart infrastructure | Suitable region for cruising Development of website to advertise Turkish Cruise Platform abroad and domestically | In Istanbul port quays have to be strengthened to become resistant to the potential earthquakes and in compliance with the current earthquake regulations |
| Maritime clusters | Turkish Cruise Platform brings together institutions and companies of 13 port cities interested in cruise tourism | Lack of coordination and cooperation between ports in coastal regions |
| Education, needs in training and skills | Vast network of faculties of maritime studies and maritime high schools | Limited dedicated cruise programs at higher level of education |
| Maritime spatial planning | No drivers identified | No spatial planning policies related to cruise activity |
| Integrated local development | The decision to implement the project Turkish Cruise Platform has been taken by the general managers of the ports, heads of chambers of commerce, municipality authorities and representatives of the governors' offices in the 13 cities of Turkey | No services to oversee the quality of services provided to cruise ships in the Turkish ports |
| Public engagement | Tourism Strategy 2023 will allow further strengthening of cruise ports infrastructures Involvement of Turkish Chamber of Shipping and public authorities in the development of the new cruise port in Istanbul | No barriers identified |

| SHORT-SEA SHIPPING ⁵ | Growth drivers | Barriers to Growth |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| Maritime research | <p>Research in universities (e.g. Piri Reis University in Tuzla)</p> <p>Active participation and contributions regarding shipping in EU-FP7 and Horizon 2020 projects</p> <p>A Centre for Shipping Industry Technology Research & Development will be set up</p> | ---- |
| Development and innovation | <p>Very dynamic port sector</p> <p>Large projects launched to increase port capacity</p> | Funds are decreasing due to the economic crisis. |

⁴ The benchmark instance is "Cruise Tourism in Italy".

⁵ The benchmark instance is "Short-Sea Shipping in the Netherlands".

| SHORT-SEA SHIPPING ⁵ | Growth drivers | Barriers to Growth |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Turkish Maritime Centre of Excellence will be established to increase maritime safety | |
| Access to finance | No drivers identified | Ports are in a dynamic development, growth and renewing trend to cover expectations and demands of partners in the system but this trend has come to a halt because of the economic crisis and led some port operators to suspend their investments |
| Smart infrastructure | 50% of the Turkish ports open to international traffic are planned to have a “Green Port” certificate in 2023 Turkish Shipping Sector has established the Turkish Marine Environment Protection Association (TURMEPA) in 1994 in order to contribute to the cleanliness of Turkish seas and to the training of young generations in this field | Development of intermodal infrastructures is missing Rail connections are insufficient/inefficient Turkish ports should go into an expertising process on certain types of cargoes and/or new port projects for container handling so as to become more competitive in the Mediterranean and Black Sea markets |
| Maritime clusters | Turkish Chamber of Shipping (TCS) is the main professional institution of the whole Turkish maritime sector TCS is member of the International Chamber of Shipping | ---- |
| Education, needs in training and skills | Strong support of Turkish Chamber of Shipping to the maritime education (creation of Turkish Maritime Education Foundation in 1993) Priority given to training of officers and maritime operators | Lack of officers |
| Maritime spatial planning | Turkey involved in PEGASO project UNDP/GEF project to facilitate expansion of the national system of marine and coastal protected areas and to improve its management effectiveness | Legal frameworks for ICZM and institutional mechanisms have not yet been established in Turkey There is no specific law to regulate MSP |
| Integrated local development | Turkish Chamber of Shipping has representations all over the Turkish coast (Izmir, Bodrum, Marmaris, Antalya, Iskenderun, Fethiye, Karadeniz Ereğli, ...) and covers the Sea of Marmara as well as the Aegean Sea coast, the Mediterranean coast and the Black Sea coast | Imbalance among the different transport modes |
| Public engagement | Strong engagement especially through the development of ports operated by the Turkish Maritime Administration | ---- |

| YACHTING AND MARINAS ⁶ | Growth drivers | Barriers to Growth |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|
| Maritime research | R&D in some universities (e.g. Istanbul Technical University) | No barriers identified |
| Development and innovation | Closeness to international markets Appropriate climate | Long bureaucratic procedures during the registering operations |
| Access to finance | Compared to shipbuilding industry less investments are needed | High taxes collected from recreational boats |
| Smart infrastructure | Production quality in accordance with international standards Adequate sub-industry with quality Inclusion of mega-yacht mooring places in the projects | Some marinas need modernization of structures and services |

⁶ The benchmark instance is “Yachting and marinas in Italy”.

| YACHTING AND MARINAS ⁶ | Growth drivers | Barriers to Growth |
|------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| | planned (especially in Ataköy and Zeytinburnu) | |
| Maritime clusters | <p>Marina operators, ship-yacht builders and ship-yacht equipment and repair service suppliers are members of the Turkish Chamber of Shipping (TCS)</p> <p>TCS is member of TYHA (The Yacht Harbour Association) and ICOMIA (International Council of Marine Industry Associations)</p> <p>DENTUR (Turkish Marine Industry Association) created in 2000</p> <p>YATEF (Federation of Yacht and Boat Industries) created in 2004</p> | No cluster related to yachting and marinas Projected "Muğla Yacht Building and Yacht Tourism Cluster" not yet in activity |
| Education, needs in training and skills | Educated and skilled labour | No barriers identified |
| Maritime spatial planning | Compared to shipbuilding industry less coastal areas are needed Marinas and berthing facilities in Turkey are mostly located in Aegean and Mediterranean regions, there are no marinas or related facilities in operation in Eastern Mediterranean and Black Sea Coasts, where potential exists | Underdevelopment of Yachting and marinas in the Black Sea |
| Integrated local development | DENTUR has taken an active part in the formation of five regional boat and yacht builders' associations in various parts of the country (Bodrum, Antalya, Izmir, ...) | No barriers identified |
| Public engagement | Tourism Strategy 2023 | No barriers identified |

5.2 SWOT analysis

| Coastal tourism | | |
|-----------------------------------|-------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| Maritime Research | Strengths | Weaknesses |
| | There is some maritime research linked to coastal tourism in universities | There is a lack of data that can be used as an input in the tourism policy making process. |
| | Opportunities | Threats |
| | There is a specific focus of the national Tourism Strategy 2023 on research and development | No threats identified |
| Development and innovation | Strengths | Weaknesses |
| | No strengths identified | Insufficient diversification of the tourist offer |
| | Opportunities | Threats |
| | There is unutilized development potential, especially on the Black Sea coast | Environmental problems in some areas could curb the development |
| Access to finance | Strengths | Weaknesses |
| | Support of government to investments in terms of planning and allocation | Low access to credit in some regions |
| | Opportunities | Threats |
| | No opportunities identified. | Investors may be tempted to invest in more profitable markets with a faster and higher return. |
| Smart infrastructure | Strengths | Weaknesses |
| | There is a good port and airport infrastructure | Infrastructure problems in densely populated and fast growing tourism centers |
| | Opportunities | Threats |
| | Tourism Strategy 2023 can be an opportunity to modernise the existing infrastructure. | Limited number of airports with developed international connections |
| Maritime clusters | Strengths | Weaknesses |
| | Marine tourism stakeholders and associations are represented in the Turkish Chamber of Shipping | There is no specific maritime cluster. |

| Coastal tourism | | |
|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| | Opportunities There is the possibility to set up a cluster focusing on blue tourism (coastal tourism, cruise tourism, yachting tourism) | Threats No threats identified |
| Education, training and skills | Strengths There are tourism and hotel management programmes in several universities | Weaknesses Quality and content of curricula in institutions offering vocational education on tourism are sometimes insufficient |
| | Opportunities Development of relations/exchanges with universities in other major tourism countries | Threats Awareness on existence and necessary protection of national tourism assets is not shared by all people |
| | Strengths No strengths identified. | Weaknesses Lack of physical planning practice No specific law to regulate MSP Uncoordinated management as regards coastal planning |
| Maritime spatial planning/Integrated Coastal Zone Management | Opportunities Turkey has taken part in the development of and signing of several international agreements and conventions concerning ICZM. | Threats Holistic legal frameworks for ICZM and institutional mechanisms have not yet been established |
| | Strengths No strengths identified. | Weaknesses SMEs are insufficiently involved in development projects |
| | Opportunities Decentralized approach to tourism development is put forward in the National Tourism Strategy | Threats Tourism potential is not used in a rational manner |
| Integrated local development | Strengths Engagement of the government through Tourism Strategy 2023 which aims at boosting the cooperation between public and private sectors of tourism | Weaknesses There has been no resolution to the decades-old conflict over the partition of Cyprus |
| | Opportunities The government policy is likely to increase the opportunities for investment in privatized state firms | Threats No threats identified |
| | Strengths No strengths identified. | Weaknesses SMEs are insufficiently involved in development projects |
| Public engagement | Opportunities Decentralized approach to tourism development is put forward in the National Tourism Strategy | Threats Tourism potential is not used in a rational manner |
| | Strengths Engagement of the government through Tourism Strategy 2023 which aims at boosting the cooperation between public and private sectors of tourism | Weaknesses There has been no resolution to the decades-old conflict over the partition of Cyprus |
| | Opportunities The government policy is likely to increase the opportunities for investment in privatized state firms | Threats No threats identified |

| Marine aquaculture | | |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Maritime Research | Strengths R&S facilities in private hatcheries Significant know-how and research capacity | Weaknesses Research capacity not well organized |
| | Opportunities Significant number of research programs focused on aquaculture | Threats No threats identified |
| | Strengths Development of the offshore sector | Weaknesses The marine aquaculture industry focuses on two mass-produced species |
| Development and innovation | Opportunities Initiatives towards product differentiation, improved packaging and branding might add value to the production | Threats Fiercer international competition and price war could confine Turkey to the market of low-added-value products |
| | Strengths There are a few large companies, mainly producing seabass and seabream, with sustainable and durable financial performance and investment capacity | Weaknesses The aquaculture sector is characterized as a high risk industry, which makes insurance costs high |
| | Opportunities Facilities offered by the government (export subsidies, free supply of turbot fry to farms) make financial equilibrium of companies easier to achieve | Threats The discontinuation of export subsidies would weaken some companies on the international market |
| Access to finance | Strengths High capacity modern hatcheries | Weaknesses Adaptation to EU laws and standards not completed, in particular as regards traceability and water quality measures |
| | Opportunities Growing international demand for sea-farmed products | Threats Scarcity of experienced labour |
| | Strengths Effective regional association in the Aegean Sea (main sea fish | Weaknesses There is no specific maritime cluster focusing on |
| Maritime clusters | Strengths Effective regional association in the Aegean Sea (main sea fish | Weaknesses There is no specific maritime cluster focusing on |

| Marine aquaculture | | |
|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| | farming area) | aquaculture |
| | Opportunities | Threats |
| | Stronger involvement in international professional associations or clusters might make some improvements/diversifications easier | No threats identified |
| Education, training and skills | Strengths | Weaknesses |
| | Several fisheries faculties provide undergraduate and graduate education in aquaculture | Unavailability of experienced labour |
| | Opportunities | Threats |
| | Companies now aware of the obligation of clean environment and sustainability | Unavailability of experienced labour |
| Maritime spatial planning/Integrated Coastal Zone Management | Strengths | Weaknesses |
| | A spatial planning policy has been introduced with the development of a National Marine Aquaculture Development Plan in 2008 | Some conflicts of users still exist with coastal tourism and small-scale fishermen |
| | Opportunities | Threats |
| | Implementation of coastal zone management often presented as a priority | Holistic legal frameworks for ICZM and institutional mechanisms have not yet been established |
| Integrated local development | Strengths | Weaknesses |
| | To minimize conflicts integrated coastal zone management models have been developed and implemented and from 2009 inshore marine farms have been moved to new allocated offshore zones | Environmental monitoring of fish farms is not completed |
| | Opportunities | Threats |
| | Stable grounds for future growth and integrated development have been provided by the National Marine Aquaculture Development Plan | No threats identified. |
| Public engagement | Strengths | Weaknesses |
| | The government gives active support to the aquaculture, e.g. through export subsidies | International cooperation is limited |
| | Opportunities | Threats |
| | The new regulation "Renting water and water areas for aquaculture production in seas and inland waters" is likely to shorten the duration of bureaucratic processes and allow longer lease periods | No threats identified. |

| Shipbuilding and ship repair | | |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Maritime Research | Strengths | Weaknesses |
| | Some good R&D facilities in universities (e.g. ship model testing laboratory in the Faculty of Naval Architecture and Ocean Engineering of Istanbul Technical University) | Insufficient R&D effort |
| | Opportunities | Threats |
| | More cooperation on maritime research could be searched at international level | No direct R&D support to the shipbuilding industry |
| Development and innovation | Strengths | Weaknesses |
| | Recent capacity increase in maintenance and repair | Order book in decrease following the 2008 financial crisis |
| | Opportunities | Threats |
| | Turkey is the largest ship recycler outside Asia, which is a comparative advantage in Europe | The economic crisis and its consequent reduction of shipping represent the major threat to shipbuilding |
| Access to finance | Strengths | Weaknesses |
| | Export credit assistance provided by the State | Some shipyards have suspended or cancelled their modernization or extension projects because of the sanctions applied by the banks |
| | Opportunities | Threats |
| | Some encouragement measures (exemption from customs duties, VAT exemption for imported and domestically purchased machinery and equipment, credit allocation for investments aiming at regional development) are available from the Investment Encouragement Programme | Long-term investments are needed in this sector. The general economic situation and the level of the order book do not encourage banks to lend |
| Smart infrastructure | Strengths | Weaknesses |
| | Modern quality-certified shipyards Production and export of tugboats powered by LNG machinery to Norway | Insufficient rationalisation of the industry (economies of scale to be found) |

| Shipbuilding and ship repair | | |
|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Opportunities | Threats |
| | Leading position in Europe for ship breaking and ship recycling activities | Turkish shipyards lack references in the growing segments of the sector (ships for offshore platforms, LPG and LNG carriers) |
| Maritime clusters | Strengths | Weaknesses |
| | Long-established Turkish Shipbuilders' Association High concentration of shipyards in Tuzla Bay | Lack of international cooperation |
| | Opportunities | Threats |
| | The Shipbuilders' Association has established relations and cooperation protocols with several universities (Piri Reis University, Okan University, ...) | No threats identified |
| Education, training and skills | Strengths | Weaknesses |
| | 4 universities with shipbuilding departments | Not enough training vessels |
| | Opportunities | Threats |
| | A university (Piri Reis University) has recently settled in Tuzla, main shipyard complex in Turkey | Exchanges with universities of other major shipbuilding countries are limited |
| Maritime spatial planning/Integrated Coastal Zone Management | Strengths | Weaknesses |
| | No strengths identified | Shipyards areas have been established – until now – without ICZM plans |
| | Opportunities | Threats |
| | Implementation of coastal zone management often presented as a priority | Holistic legal frameworks for ICZM and institutional mechanisms have not yet been established |
| Integrated local development | Strengths | Weaknesses |
| | Shipyards need an important subcontractors' industry and therefore enhance the development of other related activities | Shipyards need vast coastal areas |
| | Opportunities | Threats |
| | Dynamic shipbuilding centres with high capacity (Tuzla, Yalova, Izmit) | Risk of hampering the development of other activities (marine aquaculture, coastal tourism, yachting) |
| Public engagement | Strengths | Weaknesses |
| | Regular Development Plans produced by the Government | No weakness identified. |
| | Opportunities | Threats |
| | The sector is strategic for the government (security, defence), which is likely to secure a certain amount of orders | A potential threat could be seen in the fact that policy makers could consider that a lot of public money has been invested in a declining industry and consequently decide to put effort on a most promising sector |

| Cruise tourism | | |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Maritime Research | Strengths | Weaknesses |
| | Participation in EU-funded projects : Marmara Research Center participated in MC WAP Project, which aimed at the application of MCFC (Molten Carbonate Fuel Cells) technology on-board large ships such as cruise ships | Research in the sector is very limited |
| | Opportunities | Threats |
| | Opportunities could be found in liaising with international universities, which have an established tradition in the field. Turkish Cruise Platform aims at conducting research for development of cruise tourism activities. | Cruise tourism is more considered as a part of coastal/marine tourism than a sector in itself |
| Development and innovation | Strengths | Weaknesses |
| | Turkey is ideally suited for cruise tourism (natural and cultural attractions of seashore and hinterland) | Absence of marketing tools or know-how to develop cruise potential of the ports |
| | Opportunities | Threats |
| | The Eastern Mediterranean is getting more and more attention from global cruise companies since it provides alternative itinerary combinations to meet the global cruise market demand and offers a competitive answer to currently West Med congested cruise destinations | Some worries concerning security on cruise ships |
| Access to finance | Strengths | Weaknesses |
| | No strength identified | No specific public financial support |
| | Opportunities | Threats |
| | Turkish Cruise Platform aims (i.a.) at solving finance problems of the cruise sector | No threats identified. |

| Cruise tourism | | |
|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Smart infrastructure | Strengths | Weaknesses |
| | Big efforts have been made in the last years to transform cruise ports in recreation areas | Efforts are constantly being made on the boats and in the ports of call to reduce environmental impacts but the sector cannot be considered as sustainable yet |
| | Opportunities | Threats |
| | Great efforts are currently being made by Istanbul authorities to develop infrastructures and boost cruise tourism | Danube pollution jeopardizes development of cruise tourism in the Black Sea |
| Maritime clusters | Strengths | Weaknesses |
| | A platform bringing together institutions and companies interested in cruise tourism (Turkish Cruise Platform) has been set up in July 2002 in an attempt to determine common strategies related to cruise tourism and to lead to the development of cruise tourism in Turkey | Lack of coordination and cooperation |
| | Opportunities | Threats |
| | There is the possibility to set up a cluster focusing on blue tourism (coastal tourism, cruise tourism, yachting tourism) | No threats identified |
| Education, training and skills | Strengths | Weaknesses |
| | Vast network of faculties of maritime studies and maritime high schools | Limited dedicated cruise programmes at higher level of education |
| | Opportunities | Threats |
| | Development of relations/exchanges with universities in other major tourism countries | No threats identified |
| Maritime spatial planning/Integrated Coastal Zone Management | Strengths | Weaknesses |
| | No strengths identified. | Lack of physical planning practice No specific law to regulate MSP Uncoordinated management as regards coastal planning |
| | Opportunities | Threats |
| | Turkey has taken part in the development of and signing of several international agreements and conventions concerning ICZM | Holistic legal frameworks for ICZM and institutional mechanisms have not yet been established |
| Integrated local development | Strengths | Weaknesses |
| | No strengths identified | No services to oversee the quality of services provided to cruise ships in the Turkish ports |
| | Opportunities | Threats |
| | The decision to implement the projects Turkish Cruise Platform has been taken by the general managers of the ports, heads of chambers of commerce, municipality authorities and representatives of the governor's offices in 13 cities of Turkey | No threats identified |
| Public engagement | Strengths | Weaknesses |
| | Tourism Strategy 2023 will allow further strengthening of cruise port infrastructures | Cruise tourism is not specifically mentioned in strategy and policy documents |
| | Opportunities | Threats |
| | Involvement of Turkish Chamber of Shipping and public authorities in the development of the new cruise port in Istanbul | No threats identified |

| Short-sea shipping | | |
|--------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
| Maritime Research | Strengths | Weaknesses |
| | Research activities on short-sea shipping in some universities (e.g. Piri Reis University in Tuzla) | Lack of international cooperation with other universities |
| | Opportunities | Threats |
| | Benefits would certainly occur if more research could be dedicated to intermodality-related issues | No threats identified |
| Development and innovation | Strengths | Weaknesses |
| | Very dynamic port sector Vast network of ports World shipping demand | Insufficient intermodal infrastructures |
| | Opportunities | Threats |
| | Motorways of the Sea promotes the growth of maritime transport in the Eastern Med area and the Black Sea Large projects have been launched to increase port capacity, particularly in the Black Sea | Slowing down of investments |
| Access to finance | Strengths | Weaknesses |
| | Self-financing capacity of the sector | Increasing difficulties to raise capital because of the world financial crisis |
| | Opportunities | Threats |
| | Engagement of the government through development and modernization of ports Discussions on financing with some governments (Norway, Netherlands, Japan) | Port development and world shipping demand are in a dynamic trend but the crisis has led some operators to suspend their investments |
| Smart infrastructure | Strengths | Weaknesses |
| | As of 2009 Turkey has moved from Grey List to White List of Paris Memorandum of understanding on Port State Control; Several EU-financed projects have been implemented in the last years in the field of maritime safety, transportation of the disabled, control of ship-based emissions and training of seafarers. | Container handling sometimes little competitive Effects of traffic on Istanbul population (shipping emissions) |
| | Opportunities | Threats |
| | Important international maritime exhibition "Exposhipping Europort Istanbul" puts Turkey in the limelight | The development of intermodal infrastructures is missing and can jeopardize the development of shipping in some areas Overaged fleet |
| Maritime clusters | Strengths | Weaknesses |
| | Turkish Chamber of Shipping, which gathers most major stakeholders of the sector, is quite active | No weakness identified |
| | Opportunities | Threats |
| | Active participation of TCS in international clusters | The main threat could come from EU ports which have been cooperating for a long time with maritime clusters in their countries of origin |
| Education, training and skills | Strengths | Weaknesses |
| | SAFEMED funded scholarships for MSc studies in IMLI (International Maritime Law Institute) and WMU (World Maritime University) 413 staff attended EMSA training programme in the last 5 years | Insufficient number of officers Further cooperation needed with EMSA |
| | Opportunities | Threats |
| | Strong support of the Turkish Chamber of Shipping to maritime education, through TUDEV (Turkish Maritime Foundation) and TURMEPA programme (Turkish Marine Environment Protection Association) | Shortage of officers |
| Maritime spatial planning/Integrated Coastal Zone Management | Strengths | Weaknesses |
| | Turkey involved in some international initiatives related to ICZM and MSP, in particular in some EU-funded projects (PEGASO) | MSP and ICZM are not specifically regulated at national level |
| | Opportunities | Threats |
| | Implementation of coastal zone management often presented as a priority | Legal frameworks for ICZM and institutional mechanisms have not yet been established |
| Integrated local development | Strengths | Weaknesses |
| | Many ports are involved in short-sea shipping and favour the growth of other related maritime activities | SMEs are insufficiently involved in local development projects |
| | Opportunities | Threats |
| | Turkey has for objective to become a centre for transit cargoes in the region | Risk of hampering the development of other activities (marine aquaculture, coastal tourism, yachting) |

| Short-sea shipping | | |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Public engagement | Strengths | Weaknesses |
| | Involvement of the State through the 9th Development Plan Strong engagement especially through the development of ports operated by the Turkish Maritime Administration | No weakness identified |
| | Opportunities | Threats |
| | As Turkey's strategic position at the intersection of East-West and North-South international transport corridors is increasing again with pipelines like Baku-Ceyhan and projects like Nabucco Gas Pipeline, the State will more than ever consider short-sea shipping as a strategic sector for Turkey's economy | Despite the use of latest technology to monitor ships, the passage of huge tankers through the Bosphorus poses a risk to Istanbul's safety, as the Montreux convention regarding the regime of straits makes the presence of a maritime pilot while navigating the channel optional |

| Yachting and marinas | | |
|--------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Maritime Research | Strengths | Weaknesses |
| | There is some maritime R&D linked to yachting and marinas tourism in some universities (e.g. Istanbul Technical University) | There is a lack of data that can be used as an input in the tourism policy making process |
| | Opportunities | Threats |
| | There is a specific focus of the national Tourism Strategy 2023 on research and development | No threat identified |
| Development and innovation | Strengths | Weaknesses |
| | Turkey is an ideal place for yachting tourism (climate, protected bays, cultural and environmental resources) | Significance of Turkish sector far behind Western Mediterranean countries (Italy, France, Spain) |
| | Opportunities | Threats |
| | Growing international demand for yachting tourism Significant investments and development plans for marinas | More considered as a part of coastal/marine tourism than as a sector in itself |
| Access to finance | Strengths | Weaknesses |
| | Major operators of marina sector with self-financing capacity | Limited support from private banks |
| | Opportunities | Threats |
| | Build-Operate-Transfer system (already used for 11 marinas) | High taxes are collected from recreational boats |
| Smart infrastructure | Strengths | Weaknesses |
| | Turkey has gained wide recognition for expertise in mega-yacht building | Some marinas need modernization of structures and services Limited number of berth places compared to West Med countries |
| | Opportunities | Threats |
| | Tourism Strategy 2023 can be an opportunity to modernise the existing infrastructure | Small-size yacht builders lack infrastructure and technology |
| Maritime clusters | Strengths | Weaknesses |
| | Marina operators, ship-yacht builders and ship-yacht equipment and repair service suppliers are all members of the Turkish Chamber of Shipping | There is no specific cluster for yachting and marinas |
| | Opportunities | Threats |
| | There is the possibility to set up a cluster focusing on blue tourism (coastal tourism, cruise tourism, yachting tourism) A Yacht Building and Yacht Tourism Cluster is projected in the Muğla region | No threat identified |
| Education, training and skills | Strengths | Weaknesses |
| | There are tourism management programmes in several universities | No specific vocational programmes focusing on yachting and marinas |
| | Opportunities | Threats |
| | Competitive labour force is available, for both blue collar technical personnel and engineers "Port and Marina Management" and "yacht Management" departments should open shortly in Piri Reis University | No threats identified |
| Maritime spatial planning/Integrated Coastal Zone Management | Strengths | Weaknesses |
| | Good presence of marinas and berthing facilities in the Aegean and Mediterranean regions | There are currently no marinas or related facilities in operation in Eastern Mediterranean and Black Sea coasts |
| | Opportunities | Threats |
| | Existing potential in the Black Sea | Legal frameworks for MSP-ICZM and institutional mechanisms have not yet been established |
| Integrated local development | Strengths | Weaknesses |
| | Development actions have engaged at regional level: DENTUR has supported the formation of regional yacht builders' associations | SMEs are insufficiently involved in development projects |

| Yachting and marinas | | |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Opportunities | Threats |
| | Decentralized approach to tourism development is put forward in the National Tourism Strategy | Tourism potential is not used in a rational manner |
| Public engagement | Strengths | Weaknesses |
| | Engagement of the government through Tourism Strategy 2023 | Even if Turkish authorities consider the development of marinas as vital for ensuring that Turkey will be able to compete with other Mediterranean destinations such as Italy and France, there is no specific policy or strategy focusing on yachting and marinas |
| | Opportunities | Threats |
| | The government plans a large development of marinas and foresees a doubling of the number of mooring berths by 2023 | No threats identified |

6. Maritime strategies

| Title of the official document | Level (regional, national, cross-national, EU level) | Responsible body | Maritime Strategy concerned | Kind of Strategy document and publishing date |
|----------------------------------------------------------------|------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Tourism Strategy of Turkey 2023 | National | Ministry of Culture and Tourism | Coastal tourism Yachting and marinas Cruise tourism Passenger ferry services | Overarching strategy that includes 16 strategies for strengthening the tourism published on 02/03/2007 |
| Turkish Industrial Strategy Document 2011-2014 | National | Ministry of Industry and Trade | Shipbuilding Water projects Offshore wind Ocean renewable energy | Strategy paper published in 2010 |
| Ninth Development Plan 2007-2013 | National | State Planning Organisation (reorganized as the Ministry of Development in June 2011) | Shipbuilding Water projects Short-sea shipping | Strategic document published in 2006 (approved on 28/06/2006) |
| Transport Operational Programme 2007-2013 | National | Ministry of Transport, Maritime Affairs and Communications | Water projects Short-sea shipping | Policy document under IPA |