

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



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1. Selection of the most important regions

There is only one coastal NUTS-2 region in Slovenia.

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	0,0013	0,17	0,0915	EUROSTAT (2010)
0.2	Water projects	0,025	0,98	0,615	EUROSTAT (2010)
1. Maritime transport and shipbuilding					
1.1	Deep-sea shipping	0,024	0,35	0,295	EUROSTAT (2010)
1.2	Short-sea shipping (incl. Ro-Ro)	0,021	0,4	0,305	EUROSTAT (2010)
1.3	Passenger ferry services	0	0	0	EUROSTAT (2010)
1.4	Inland waterway transport	n.a.	n.a.	n.a.	EUROSTAT (2010)
2. Food, nutrition, health and eco-system services					
2.1	Fishing for human consumption	0,02	0,7	0,45	EU Member States DCF data submissions, EUROSTAT (2010)
2.2	Fishing for animal feeding	0	0	0	EU Member States DCF data submissions, EUROSTAT (2010)
2.3	Marine aquaculture	0,00007	0,03	0,01535	JRC (2010)
2.4	Blue biotechnology	n.a.	n.a.	n.a.	
2.5	Agriculture on saline soils	0,0014	0,24	0,127	EUROSTAT (2010)
3. Energy and raw materials					
3.1	Offshore oil and gas	0	0	0	EUROSTAT (2010)
3.2	Offshore wind	0	0	0	EWEA (2012)
3.3	Ocean renewable energy	0	0	0	
3.4	Carbon capture and storage	0	0	0	
3.5	Aggregates mining (sand, gravel, etc.)	0	0	0	EUROSTAT (2010) UEPG (2010)
3.6	Marine minerals mining	0	0	0	
3.7	Securing fresh water supply (desalination)	0	0	0	Global Water Intelligence (2011) and Report on Water Desalination Status in the Mediterranean Countries (2012)
4. Leisure, working and living					
4.1	Coastal tourism	0,05	1,97	1,235	EUROSTAT (2010)
4.2	Yachting and marinas	n.a.	n.a.	n.a.	
4.3	Cruise tourism	0,004	0,18	0,11	EUROSTAT (2010)
5. Coastal protection					
5.1	Protection against flooding and erosion	0,0012	0,01	0,011	Elaboration based on EUROSTAT (2010) and PRC (2009)
5.2	Preventing salt water intrusion	n.a.	n.a.	n.a.	
5.3	Protection of habitats	0,0001.	0,0009	0,0009	Own elaboration based on EUROSTAT (2010)
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	n.a.	n.a.	n.a.	
6.3	Environmental monitoring	n.a.	n.a.	n.a.	

3. Relative growth of all marine and maritime activities

Function/activity		GVA (CAGR, %)	Employment (CAGR, %)	Score	Source & Reference year
0. Other sectors					
0.1	Shipbuilding and ship repair	-77,59%	-57,18%	-67,38	EUROSTAT (2010)
0.2	Water projects	-16,43%	-7,14%	-11,785	EUROSTAT (2010)
1. Maritime transport and shipbuilding					
1.1	Deep-sea shipping	16,39%	-2,26%	7,065	EUROSTAT (2010)
1.2	Short-sea shipping (incl. Ro-Ro)	26,31%	-1,39%	12,460	EUROSTAT (2010)
1.3	Passenger ferry services	0	0	0	EUROSTAT (2010)
1.4	Inland waterway transport	n.a.	n.a.	n.a.	EUROSTAT (2010)
2. Food, nutrition, health and eco-system services					
2.1	Fishing for human consumption	-11,81%	4,07%	-3,87	EU Member States DCF data submissions, EUROSTAT (2010)
2.2	Fishing for animal feeding	0	0	0	EU Member States DCF data submissions, EUROSTAT (2010)
2.3	Marine aquaculture	-49,93%	0,05%	-24,940	JRC (2010)
2.4	Blue biotechnology	n.a.	n.a.	n.a.	
2.5	Agriculture on saline soils	1,44%	-3,20%	-0,880	Eurostat (2010)
3. Energy and raw materials					
3.1	Offshore oil and gas	0	0	0	EUROSTAT (2010)
3.2	Offshore wind	0	0	0	EWEA (2012)
3.3	Ocean renewable energy	0	0	0	
3.4	Carbon capture and storage	0	0	0	
3.5	Aggregates mining (sand, gravel, etc.)	0	0	0	EUROSTAT (2010) UEPG (2010)
3.6	Marine minerals mining	0	0	0	
3.7	Securing fresh water supply (desalination)	0	0	0	Global Water Intelligence (2011) and Report on Water Desalination Status in the Mediterranean Countries (2012)
4. Leisure, working and living					
4.1	Coastal tourism	-8,26%	3,41%	-2,425	EUROSTAT (2010)
4.2	Yachting and marinas	n.a.	n.a.	n.a.	
4.3	Cruise tourism	17,08%	-1,40%	7,840	EUROSTAT (2010)
5. Coastal protection					
5.1	Protection against flooding and erosion	-0,03%	-0,03%	-0,03	Elaboration based on EUROSTAT (2010) and PRC (2009)
5.2	Preventing salt water intrusion				
5.3	Protection of habitats	9,7%	9,7%	9,7	Own elaboration based on EUROSTAT (2010)
6. Maritime monitoring and surveillance					
6.1	Traceability and security of goods supply chains	n.a.	n.a.	n.a.	
6.2	Protect against illegal movement of people and goods	n.a.	n.a.	n.a.	
6.3	Environmental monitoring	n.a.	n.a.	n.a.	

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	+	0	--
	0.2 Water projects	0	0	-	0	0	+	0
1. Maritime transport	1.1 Deep-sea shipping	0	+	+	+	+	-	+++
	1.2 Short-sea shipping (incl. RoRo)	+	+	+	+	+	-	++++
	1.3 Passenger ferry services	0	0	0	0	0	0	0
	1.4 Inland waterway transport	?	?	?	?	?	?	?
2. Food, nutrition, health and eco-system services	2.1 Fishing for human consumption	-	-	-	-	-	-	-----
	2.2 Fishing for animal feeding	0	0	0	0	0	0	0
	2.3 Marine aquaculture	0	-	-	0	0	0	--
	2.4 Blue Biotechnology	+	+	0	+	+	+	+++++
	2.5 Agriculture on saline soils	0	0	0	0	0	+	+
3. Energy and raw materials	3.1 Offshore oil and gas	?	?	?	?	?	?	?
	3.2 Offshore wind	?	?	?	?	?	?	?
	3.3 Ocean renewable energy (wave, tidal, OTEC, thermal, biofuels, etc.)	?	?	?	?	?	?	?
	3.4 Carbon capture and storage	?	?	?	?	?	?	?
	3.5 Aggregates mining (sand, gravel, etc.)	?	?	?	?	?	?	?
	3.6 Marine minerals mining	?	?	?	?	?	?	?
	3.7 Securing fresh water supply (desalination)	?	?	?	?	?	?	?
4. Leisure, working and living	4.1 Coastal tourism	+	+	+	+	+	-	++++
	4.2 Yachting and marinas	?	?	?	?	?	?	?
	4.3 Cruise tourism	+	0	+	0	+	-	++
5. Coastal protection	5.1 Protection against flooding and erosion	?	?	?	+	?	+	++
	5.2 Preventing salt water intrusion	?	?	?	?	?	?	?
	5.3 Protection of habitats	?	?	0	+	?	+	++
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	?	?	?	?	?	?	?

5. Growth drivers and barriers to growth

5.1 Results of the benchmark analysis

BLUE BIOTECHNOLOGY ¹	Growth drivers	Barriers to Growth
Maritime research	No drivers identified	Very few research facilities in comparison with other countries
Development and innovation	There is a certain degree of participation in international networks	Other countries are at a more advanced stage
Access to finance	A few private equity and venture capital firms are operating in Slovenia, inter alia, in the fields of pharmaceuticals, healthcare, and life sciences (3TS Capital Partners, Darby Private Equity, Gilde Healthcare Partners, Enterprise Investors, Pontis Capital, Royalton Partners, Syntaxis)	No barriers identified
Smart infrastructure	No drivers identified	No drivers identified
Maritime clusters	Ljubljana's Technology Park includes several different areas of expertise, which is fertile ground for the development of blue biotechnology	Clusters in Northern Europe are at a much more advanced level of cooperation.
Education, needs in training and skills	No drivers identified	Universities abroad have a long-standing tradition in the field.
Maritime spatial planning	<i>Not relevant</i>	<i>Not relevant</i>
Integrated local development	<i>Not possible to assess. Sector still too small</i>	<i>Not possible to assess. Sector still too small</i>
Public engagement	Biotechnology and marine biotechnology are recognised as areas of interests	The level of public engagement is incomparable with EU best practices in the sector

¹ The benchmark instance is "Blue biotechnology in Schleswig-Holstein (Germany)".

SHORT-SEA SHIPPING ²	Growth drivers	Barriers to Growth
Maritime research	The port of Koper has its own study centre, where research activities on the sector are carried out. Local universities are also involved in maritime research on short-sea shipping.	Competition from more established Universities
Development and innovation	Sector trends in line with the best practices	Lower performances expected due to the economic crises
Access to finance	Luka Koper (management company of the port) has excellent operating results, and access to finance should be relatively easier for them.	Limited resources compared to the ports in Northern Europe
Smart infrastructure	Infrastructure compatible with the dimension of the port and of the country	Some improvement works are proceeding slowly
Maritime clusters	No drivers identified	Lack of critical mass to compete with larger clusters
Education, needs in training and skills	The University of Ljubljana offers specialised courses.	Education level still not on par with EU's best practices
Maritime spatial planning	Competition from other sectors is not to be considered dangerous	Not regulated specifically
Integrated local development	The port can be considered as a paramount driver for development in the area, in that it favours the growth of other related maritime activities, and is the engine of important transformation in the social, economic, and urban context.	No barriers identified
Public engagement	Very high level of public engagement in line with EU best practices	International presence still limited

² The benchmark instance is "Short-Sea Shipping in the Netherlands".

COASTAL TOURISM ³	Growth drivers	Barriers to Growth
Maritime research	No drivers identified	No barriers identified
Development and innovation	Coastal tourism is a very mature sector. A brand has been created "I Feel SLOVEnia" to increase the recognisability of the country as a tourist destination. This is common to several EU best practices.	Integrated promotion of the territory is lagging behind with respect to EU best practices.
Access to finance	SPIRIT, a dedicated agency has been established to support business and facilitate access to finance	Discouraging investment environment for capital
Smart infrastructure	The port infrastructure is adequate to the size of the coastal areas	Insufficient airport infrastructure
Maritime clusters	No drivers identified	No barriers identified
Education, needs in training and skills	No drivers identified	No barriers identified
Maritime spatial planning	No drivers identified	Not specifically regulated
Integrated local development	Current local development policies seem well aware of the local context	Much emphasis is placed on non-coastal areas
Public engagement	A Slovenian Tourist Board has been established	Inefficient inter-ministerial coordination.

³ The benchmark instance is "Coastal Tourism in Sardinia (Italy)".

DEEP-SEA SHIPPING ⁴	Growth drivers	Barriers to Growth
Maritime research	The port of Koper has its own study centre, where research activities on the sector are carried out. Local universities are also involved in maritime research on deep-sea shipping.	Competition from more established Universities
Development and innovation	Sector trends in line with the best practices	Lower performances expected due to the economic crises
Access to finance	Luka Koper (management company of the port) has excellent operating results, and access to finance should be relatively easier for them.	Limited resources compared to the ports in Northern Europe
Smart infrastructure	Infrastructure compatible with the dimension of the port and of the country	Some improvement works are proceeding slowly
Maritime clusters	No drivers identified	Lack of critical mass to compete with larger clusters
Education, needs in training and skills	The University of Ljubljana offers specialised courses.	Education level still not on par with EU's best practices
Maritime spatial planning	Competition from other sectors is not to be considered dangerous	Not regulated specifically
Integrated local development	The port can be considered as a paramount driver for development in the area, in that it favours the growth of other related maritime activities, and is the engine of important transformation in the social, economic, and urban context.	No barriers identified
Public engagement	Very high level of public engagement in line with EU best practices	International presence still limited

⁴ The benchmark instance is "Deep-Sea Shipping in Greece".

CRUISE TOURISM ⁵	Growth drivers	Barriers to Growth
Maritime research	No drivers identified	Research in the sector virtually inexistent
Development and innovation	No drivers identified	No barriers identified
Access to finance	No drivers identified	Insufficient financial support in comparison with other countries
Smart infrastructure	No drivers identified	Infrastructure level still insufficient compared with popular cruise destinations
Maritime clusters	No drivers identified	More popular cruise destinations can benefit from powerful clusters
Education, needs in training and skills	No drivers identified	No barriers identified
Maritime spatial planning	No drivers identified	Not regulated specifically
Integrated local development	Cruise tourism establishes synergies with the Hotel & Restaurant sector, as well as with the culture industry.	Lack of coordination between the actors limits local development
Public engagement	Port Authorities have incentives to develop activities and adopt environmental responsible practices	Foreign markets can take advantage of stronger public support

⁵ The benchmark instance is "Cruise Tourism in Italy".

5.2 SWOT analysis

Blue biotechnology		
Maritime Research	Strengths	Weaknesses
	Two national institutes active in the field. The number may appear low, but it should put into the context of an extremely small country, with a limited coastline.	Blue biotechnology is only a small fraction of research activities. The sector is still very small and it is not to be taken for granted that it will constitute a sufficient critical mass.
Maritime Research	Opportunities	Threats
	The momentum that the EU Commission and Blue Growth are creating on blue biotechnology may give rise to several opportunities that can favour the development of the sector. The focus on Key Enabling Technologies and on the forthcoming Horizon 2020 Programme can contribute to the sector take-off.	The main threat may be found in the competition from other countries, which are larger, receive more funding, and have a longer-standing sector. The presence of big players abroad may hamper the development of an internal sector, in that it would constitute an incentive for specialised workforce to find better opportunities abroad.
Development and innovation	Strengths	Weaknesses
	The sector is very innovative per se.	Being in an early stage of development, the sector has not yet reached sufficient critical mass.
Development and innovation	Opportunities	Threats
	The momentum that blue biotechnology has gained thanks to Blue Growth may well help a nascent sector to take off, especially by taking advantage of the new financial framework 2014-2020.	Other countries, albeit still nascent, have better developed and longer established marine biotechnology sector. This may be an incentive for the Slovenian sector (researchers, students, entrepreneurs, etc.) to look for better opportunities abroad, especially in countries where, also due to their size, the sector is gaining critical mass.
Access to finance	Strengths	Weaknesses
	Research in biotechnology is adequately subsidised in Slovenia. This should be considered as a strength, because, being blue biotechnology in an early development phase, it is paramount that it receives adequate support by the public sector, also from the financial point of view. Until it reaches sufficient critical mass, it is believed that blue biotechnology in Slovenia cannot rely solely or mainly on private investments, as the sector is still not profitable and needs receiving adequate protection.	Private investment is still low, and there is a generalised difficulty for entrepreneurs to access credit from banks.
Access to finance	Opportunities	Threats
	The new financial framework (especially Horizon 2020) can certainly represent a key opportunity to obtain an increased access to credit. In addition, this being an innovative and nascent sector, it could be possible to attract venture capitalists and business angels.	Other types of investors such as venture capitalists, and business angels may prefer to invest in the blue biotechnology sector of other countries, where the sector can more easily reach a critical mass.
Smart infrastructure	Strengths	Weaknesses
	The initial infrastructure endowment is satisfactory for an early developing sector, and should be considered adequate.	No weaknesses identified.
Smart infrastructure	Opportunities	Threats
	Even in this case a good opportunity could be to take advantage of the new financial framework as well as of the momentum of blue biotechnology, to increase the smart infrastructure endowment in view of future growth.	No threats identified.
Maritime clusters	Strengths	Weaknesses
	The technology park in Ljubljana is not strictly speaking a maritime cluster, yet its presence is important for the development of marine biotechnology in the sector, as it helps creating a network with other potential target industries.	Ljubljana's technology park is not a maritime cluster. This can be acceptable in the early development phase of the sector, but the absence of a maritime cluster constitutes a barrier to future growth.
Maritime clusters	Opportunities	Threats
	No opportunities identified.	Central European countries (e.g. German) have already developed maritime cluster that include blue biotechnology.
Education, training and skills	Strengths	Weaknesses
	Current workforce is adequate in terms of quantity and education of staff considering the early stage of development.	There is no dedicated university training.
Education, training and skills	Opportunities	Threats
	The new strategies under preparation favour education in scientific subject, such as biotechnology.	Universities abroad can offer better opportunity for education, as they have a longer-standing tradition in the field.
Maritime spatial planning/Integrated	Strengths	Weaknesses
	<i>Not relevant.</i>	<i>Not relevant.</i>

Blue biotechnology		
Coastal Zone Management	Opportunities	Threats
	<i>Not relevant.</i>	<i>Not relevant.</i>
Integrated local development	Strenghts	Weaknesses
	<i>Not possible to assess. Sector still too small.</i>	<i>Not possible to assess. Sector still too small.</i>
	Opportunities	Threats
	<i>Not possible to assess. Sector still too small.</i>	<i>Not possible to assess. Sector still too small.</i>
Public engagement	Strenghts	Weaknesses
	Biotechnology in general receives good level of public attention in terms of policies, strategies and funds.	A specific focus on blue biotechnology (as in many other countries) is missing.
	Opportunities	Threats
	“Blue Growth” can be considered as the main opportunity for the sector to receive further attention from the public sector. It is expected that Blue Growth will help to focus on blue biotechnology in particular, and not simply on biotechnology as a whole.	A specific focus on blue biotechnology (as in many other countries) is missing.

Short Sea Shipping		
Maritime Research	Strengths	Weaknesses
	The port of Koper has its own study centre, where research activities on the sector are carried out. Local universities are also involved in maritime research on short-sea shipping.	No weaknesses identified.
	Opportunities	Threats
	The programme Motorways of the Sea is expected to increase the focus on short-sea shipping, and consequently favour research in the sector, also paying attention to intermodality-related aspects.	The sector is still relatively new in Slovenia. Universities in central and northern EU countries have been carrying out research in the field from a longer time.
Development and innovation	Strengths	Weaknesses
	Short-sea shipping is a mature and well-established sector. Fundamental innovations (logistics, containers, supply chain management) have been introduced years ago now, and the port of Koper is in this sense an innovative port.	Being this a mature sector, it is expected that innovation is not going to play a major role in the next few years, as development will probably be based mainly on the increase of transported goods.
	Opportunities	Threats
	Motorways of the Sea has opened new scenarios for the sector, fostering a better-focused approach on intermodality, and promoting the growth of maritime transport in the area.	The economic crisis and its consequent reduction of international trade represent the major threat to short-sea shipping.
Access to finance	Strengths	Weaknesses
	The main strength can be found in the fact that the Luka Koper group (the company in charge of managing the port of Koper) is a public company with excellent operating results, therefore does not seem to have particular difficulties in accessing both public and private credit, despite the financial crisis.	No weaknesses identified.
	Opportunities	Threats
	The EU financial framework (current and future) represent a further opportunity for accessing financial resources. Several infrastructural projects have been financed through EU projects, and there is more than one reason to believe that the trend is not going to stop during the forthcoming financial period.	As a matter of fact, ports in central and northern Europe can count on a much larger critical mass, which enables them to mobilise more financial resources. This could put Koper at a disadvantage.
Smart infrastructure	Strengths	Weaknesses
	The port of Koper can count on relatively modern infrastructure that is currently being enlarged and improved to better support the increased demand for short-sea shipping. Furthermore, great attention is placed to environmental sustainability.	Despite general infrastructure improvements (some of which are still being implemented), there remain missing linkages between the port of Koper and the hinterland. The train and railroad infrastructure of the country is not on par with the increasing role of the port.
	Opportunities	Threats
	Once again Motorways of the Sea can be of pivotal importance in moving the focus on the infrastructural improvements needed in Slovenia.	Other ports in the same area can benefit from more efficient road and railroad infrastructure.
Maritime clusters	Strengths	Weaknesses
	The port has reached such an importance that is a believed to constitute a cluster per se.	Slovenia is a very small country with a very limited coastline: a fully developed maritime cluster as such does not exist in the country, and it cannot be taken for granted that the port alone will be able to absorb all the function that fully-fledged maritime clusters do.
	Opportunities	Threats
	The port of Koper has an extensive international network, and the presence of several maritime clusters associations in Europe can be of help to promote the transformation of the port in a fully developed maritime cluster that can encompass several other maritime activities, besides those strictly related with maritime transport.	Once again, the main threat is coming from other EU port which have been cooperating with maritime clusters in their countries of origin for quite a while.
Education, training and skills	Strengths	Weaknesses
	Workforce skills are considered adequate, probably also due to the fact that the University of Ljubljana offers specialised courses.	No weaknesses identified.
	Opportunities	Threats
	Exchange programmes such as the Erasmus Mundus for seafarers and people who is interested in working at	No threats identified.

Short Sea Shipping		
	sea can be an opportunity to increase educational and training levels.	
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Much attention is placed on traffic separation schemes, but apart from that, from the point of view of short-sea shipping, it is believed that sector is not going to face much competition from other maritime activities, since there is strong public involvement in maritime transport.	MSP and ICZM are not specifically regulated.
	Opportunities	Threats
	EU pressure on the need for MSP and ICZM will probably lead to the adoption and implementation of specific and better focused MSP and ICZM plans.	No threats identified.
Integrated local development	Strengths	Weaknesses
	The whole Coastal Karst is benefitting from the expansion of short-sea shipping and Koper as well. The port can be considered as a paramount driver for development in the area, in that it favours the growth of other related maritime activities, and is the engine of important transformation in the social, economic, and urban context.	No weaknesses identified
	Opportunities	Threats
	Once again Motorways of the Sea can be seen as an important opportunity for integrated local development as well, in that it can favour the improvement of essential road and railroad infrastructure in the region, as well as in the whole country.	If on the one hand the huge expansion of port-related activities seems to be favouring some related maritime activities as well, on the other hand it risk hampering the development of some sectors, e.g. aquaculture.
Public engagement	Strengths	Weaknesses
	Maritime transport and short-sea shipping are and the centre of the political agenda in Slovenia.	No weakness identified.
	Opportunities	Threats
	Motorways of the Sea has been and will probably continue to be an important initiative that keeps the level of public engagement on short-sea shipping relatively high.	A potential threat could be seen in the fact that short-sea shipping has now reached a satisfactory level of development in the country, and policy makers may consequently decide to move their attention to less developed sector.

Coastal tourism		
Maritime Research	Strengths	Weaknesses
	There are some universities working and carrying out research on tourism in Coastal Karst.	The level of research carried out is not significant.
	Opportunities	Threats
Geographical proximity with Italy, which has a long tradition in research on coastal tourism, could be seen has an opportunity to increase the know-how, and promote fruitful exchange. EU research programme (Horizon 2020) should also be taken into consideration.	Generally speaking, universities in southern Europe tend to be at a more advanced stage of research on coastal tourism.	
Development and innovation	Strengths	Weaknesses
	Coastal tourism is a mature sector that is very strong in the Mediterranean. Slovenia has introduced innovation as to increased attention to sustainability, as well as the introduction of the "I feel sLOVEenia" brand, to increase the recognisability of the country.	Slovenia has a limited coastline and as a consequence there is an intrinsic limit to the possible development of coastal tourism.
	Opportunities	Threats
The increasing importance of Koper as a port of call for several cruises is expected to have a positive impact on coastal tourism.	There is a strong competition from more established tourist destinations in Italy and Croatia.	
Access to finance	Strengths	Weaknesses
	Several investment opportunities are sponsored by the Government, and a dedicated government agency has been established to support businesses and facilitate access to finance.	Despite the institutional effort, the total amount of resources for national investors remain limited.
	Opportunities	Threats
No opportunities identified.	Both national and foreign investors may be tempted to invest in more profitable markets with a faster and higher return.	
Smart infrastructure	Strengths	Weaknesses
	There is a good infrastructure endowment, especially when it comes to non-hotel accommodations on the coast. Attention has been placed on environmentally-friendly accommodations.	The airport infrastructure is insufficient.
	Opportunities	Threats
The new financial framework can be an opportunity to modernise the existing infrastructure.	Italy, i.e. main Slovenia's competitor as a coastal tourism destination can certainly offer more adequate touristic and touristic infrastructure.	
Maritime clusters	Strengths	Weaknesses
	The Koper port is believed to be a cluster per se. Although this mainly affect cruise tourism, it has a positive impact on coastal tourism as well.	There is no proper maritime cluster.
	Opportunities	Threats
There could be the possibility to work in close cooperation with Fisheries Local Action Group to set up what may later become a maritime or at least tourism cluster.	Other countries have well developed maritime cluster, even though it should be noted that in some cases coastal tourism is not part of them.	
Education, training and skills	Strengths	Weaknesses
	There are universities with specialised courses (even post-graduate) in tourism and coastal tourism	The minimum wage system in force in Slovenia envisages very low wages for employees in the tourism sector. This is a disincentive for qualified people to work in it.
	Opportunities	Threats
Synergies could be established with Italy. Several people living in coastal areas are bilingual and could benefit from a period of study abroad (Italy has a well-developed coastal tourism sector).	No threats identified.	
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	No strengths identified.	Slovenia has a small coastline, and it is not easy to find a proper balance between competing uses of a very limited shared sea. This is a problem particularly when it comes to coastal tourism and maritime transport (both deep-sea and short-sea) which are both considered very important. MPS/ICZM is not specifically regulated.
	Opportunities	Threats
EU pressure on the need for MSP and ICZM will probably lead to the adoption and implementation of	No threats identified.	

Coastal tourism		
	specific and better focused MSP and ICZM plans.	
Integrated local development	Strengths	Weaknesses
	Coastal tourism is fostering integrated local development in that it is creating a whole related industry in Coastal Karst (restaurants, sports, leisure, etc.), also causing important migration phenomena from the inland to the coast.	No weaknesses identified.
	Opportunities	Threats
	Important synergies could be established with Fisheries Local Action Groups	No threats identified.
Public engagement	Strengths	Weaknesses
	There is strong public engagement, since tourism is an important source of income. A Slovenia Tourist Board has also been established.	At the same time it should be noted that much emphasis is placed on inland areas, also because Slovenia's coast is very small compared to the inner areas.
	Opportunities	Threats
	The operational programmes for the new financial framework could seek for increased integration between tourism, fisheries and maritime policy, rural areas, etc.	No threats identified.

Deep-Sea Shipping		
Maritime Research	Strengths The port of Koper has its own study centre, where research activities on the sector are carried out. Local universities are also involved in maritime research on deep-sea shipping.	Weaknesses No weaknesses identified.
	Opportunities No opportunities identified.	Threats The sector is still relatively new in Slovenia. Universities in central and northern EU countries have been carrying out research in the field from a longer time.
Development and innovation	Strengths Deep-sea shipping is a mature and well-established sector. Fundamental innovations (logistics, containers, supply chain management) have been introduced years ago now, and the port of Koper is in this sense an innovative port.	Weaknesses Being this a mature sector, it is expected that innovation is not going to play a major role in the next few years, as development will probably be based mainly on the increase of transported goods.
	Opportunities The main opportunity for further expansion of the sector may come from the completion of the infrastructural works that are being carried out at Koper. Bigger ships will be able to land.	Threats The economic crisis and its consequent reduction of international trade represent the major threat to deep-sea shipping.
Access to finance	Strengths The main strength can be found in the fact that the Luka Koper group (the company in charge of managing the port of Koper) is a public company with excellent operating results, therefore does not seem to have particular difficulties in accessing both public and private credit, despite the financial crisis.	Weaknesses No weaknesses identified.
	Opportunities The EU financial framework (current and future) represent a further opportunity for accessing financial resources. Several infrastructural projects have been financed through EU projects, and there is more than one reason to believe that the trend is not going to stop during the forthcoming financial period.	Threats As a matter of fact, ports in central and northern Europe can count on a much larger critical mass, which enables them to mobilise more financial resources. This could put Koper at a disadvantage.
Smart infrastructure	Strengths The port of Koper can count on relatively modern infrastructure that is currently being enlarged and improved to better support the increased demand for short-sea shipping. Furthermore, great attention is placed to environmental sustainability.	Weaknesses Despite general infrastructure improvements (some of which are still being implemented), there remain missing linkages between the port of Koper and the hinterland. The train and railroad infrastructure of the country is not on par with the increasing role of the port.
	Opportunities No opportunities identified.	Threats Other ports in the same area can benefit from more efficient road and railroad infrastructure.
Maritime clusters	Strengths The port has reached such an importance that is believed to constitute a cluster per se.	Weaknesses Slovenia is a very small country with a very limited coastline: a fully developed maritime cluster as such does not exist in the country, and it cannot be taken for granted that the port alone will be able to absorb all the function that fully-fledged maritime clusters do.
	Opportunities The port of Koper has an extensive international network, and the presence of several maritime clusters associations in Europe can be of help to promote the transformation of the port in a fully developed maritime cluster that can encompass several other maritime activities, besides those strictly related with maritime transport.	Threats Once again, the main threat is coming from other EU port which have been cooperating with maritime clusters in their countries of origin for quite a while.
Education, training and skills	Strengths Workforce skills are considered adequate, probably also due to the fact that the University of Ljubljana offers specialised courses.	Weaknesses No weaknesses identified.
	Opportunities Exchange programmes such as the Erasmus Mundus for seafarers and people who is interested in working at sea can be an opportunity to increase educational and training levels.	Threats No threats identified.

Deep-Sea Shipping		
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Much attention is placed on traffic separation schemes, but apart from that, from the point of view of maritime transport, it is believed that sector is not going to face much competition from other maritime activities, since there is strong public involvement in maritime transport.	MSP and ICZM are not specifically regulated.
	Opportunities	Threats
	EU pressure on the need for MSP and ICZM will probably lead to the adoption and implementation of specific and better focused MSP and ICZM plans.	No threats identified.
Integrated local development	Strengths	Weaknesses
	The whole Coastal Karst is benefitting from the expansion of maritime transport and Koper as well. The port can be considered as a paramount driver for development in the area, in that it favours the growth of other related maritime activities, and is the engine of important transformation in the social, economic, and urban context.	No weaknesses identified
	Opportunities	Threats
	No opportunities identified.	If on the one hand the huge expansion of port-related activities seems to be favouring some related maritime activities as well, on the other hand it risk hampering the development of some sectors, e.g. aquaculture.
Public engagement	Strengths	Weaknesses
	Maritime transport and deep-sea shipping are and the centre of the political agenda in Slovenia.	No weakness identified.
	Opportunities	Threats
	Maritime commerce with the Far East is expected to increase in the next few years. The Port of Koper is very active in trying to win the competition from other ports to attract cargoes from the Far East.	A potential threat could be seen in the fact that deep-sea shipping has now reached a satisfactory level of development in the country, and policy makers may consequently decide to move their attention to less developed sector.

Cruise tourism		
Maritime Research	Strengths	Weaknesses
	No strengths identified.	Research in the sector is virtually inexistent.
	Opportunities	Threats
	Opportunities could be found in liaising with Italian universities, which have an established tradition in the field.	No threats identified.
Development and innovation	Strengths	Weaknesses
	The sector is not innovative per se in Slovenia. It can be regarded as an innovation, in that Slovenia was not a cruise destination until a few years ago, while it has experienced a boost in the recent years.	The country lags behind in terms of attractiveness for cruise tourists. It has to be understood, whether the recent trend can be maintained in the future, or traditional cruise destinations will prevail.
	Opportunities	Threats
	The main opportunities for further development and innovation of the sector are to be found in the proximity with famous cruise destinations (which can also be a threat, if not managed well), and in the development of the port of Koper.	The main threat comes from the competition of other longer-established cruise destinations in the area (e.g. Venice).
Access to finance	Strengths	Weaknesses
	As for maritime transport, it should be noted that the Port of Koper has excellent operating results and should not have particular difficulties in accessing credit, despite the financial credit.	There are no Slovenian cruise companies. The major players are all from other countries, and therefore there is no adequate public financial support.
	Opportunities	Threats
	No opportunities identified.	No threats identified.
Smart infrastructure	Strengths	Weaknesses
	The port of Koper is building a passenger terminal.	The infrastructure level is still insufficient compared with other cruise destinations.
	Opportunities	Threats
	The new financial framework will put further resources at the disposal of the port to improve their passenger infrastructure.	The improvement works of the passenger terminal are proceeding slowly, and this may hamper the potential of the business.
Maritime clusters	Strengths	Weaknesses
	Cruise tourism can build on the synergies established in the Koper area.	There is no proper cluster.
	Opportunities	Threats
	It should be taken into consideration to create a maritime cluster (at least for the cruise sector) in the North Adriatic where cooperation is already existing. It wouldn't make any sense to create a maritime cluster starting from cruise tourism in Slovenia, as the sector does not have sufficient critical mass.	Popular cruise destinations are already benefitting from clusters or cluster-like aggregations. This certainly reduces the competitiveness of Koper further.
Education, training and skills	Strengths	Weaknesses
	Not particularly high education standards are required for the nature of the business in Slovenia.	No weaknesses identified.
	Opportunities	Threats
	No opportunity identified.	No threats identified.
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Much attention is placed on traffic separation schemes	MSP and ICZM are not specifically regulated.
	Opportunities	Threats
	EU pressure on the need for MSP and ICZM will probably lead to the adoption and implementation of specific and better focused MSP and ICZM plans.	No threats identified.
Integrated local development	Strengths	Weaknesses
	Thanks to the cruise sector, Slovenia is becoming popular to a target of tourists that were previously not interested in it. Cruise tourism establishes synergies with the Hotel & Restaurant sector, as well as with the culture industry.	The concept of "port city", which could foster integrated local development, is far from being implemented.
	Opportunities	Threats
	So far – comprehensibly – Slovenia has not implemented any strategies and/or policies dedicated to coastal tourism. In the new programming period, it will be possible to duly take into account all the possible synergies between cruise tourism, coastal tourism, port cities, etc.	Perhaps not a proper threat, the nature of cruise tourism may well not benefit integrated local development at all, in that – especially in ports of call – many tourists simply "hit and run".
Public engagement	Strengths	Weaknesses
	No strengths identified.	Lack of a dedicated strategy. The sector does not

Cruise tourism		
		receive particular attention by the public sector, probably because it is very recent, and because its impact on the territory is controversial.
	Opportunities	Threats
	So far – comprehensibly – Slovenia has not implemented any strategies and/or policies dedicated to coastal tourism. In the new programming period, it will be possible to duly take into account all the possible synergies between cruise tourism, coastal tourism, port cities, etc.	It is possible that in the long-term policy makers decide not to focus on this sector, as its impact on the territory is controversial, while other more locally-based sector could benefit from such a support.

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
Research and Innovation Strategy of Slovenia (RISS)	National	Ministry of Higher Education, Science and Technology, Ministry of Economic Development	Blue biotech	Overarching strategy that addresses several sectors, published on 11/01/2011
International Challenges 2013 - Partnership to promote international cooperation	National	Government	Blue biotech	Document in course of definition
Transport Policy of the Republic of Slovenia	National	Ministry of Transport	Short-sea and deep-sea shipping	Overarching strategy for the whole transport sector, published on 06/06/2006
Five-year Strategic Plan of Luka Koper and the Luka Koper Group	Local	Luka Koper (public company managing the Port of Koper)	Short-sea and deep-sea shipping	Strategic document outlining the vision, mission, and objectives of Luka Koper
2012-2016 Partnership for the Sustainable Development of Slovenian Tourism	National	Ministry of Economic Development	Coastal and cruise tourism	Overarching strategy for the whole tourism sector, published on 12/07/2012