



*Study to support the development of sea-basin cooperation in the
Mediterranean, Adriatic and Ionian, and Black Sea*
Analysis of Blue Growth needs and potential per country

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EUNETMAR

Study to support the development of sea-basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea
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Background and objectives

The Blue Growth Strategy was developed within the framework of the European Union's (EU's) Integrated Maritime Policy (IMP). Created in 2007, the IMP seeks to provide a more coherent approach to maritime issues by increasing coordination among different policy areas in order to enhance cooperation between coastal EU Member States and EU candidate and potential candidate countries.

With its communication *Blue Growth opportunities for marine and maritime sustainable growth* (COM(2012) 494), the European Commission set the way forward for unleashing the potential of coasts, seas and oceans to help put the EU economy back on track, while at the same time safeguarding biodiversity and protecting the marine environment. Sea basin strategies are recognized as an important component of the IMP.

The EU Strategy for the Baltic Sea Region (EUSBSR), launched in 2009, was the first example of this intensive regional cooperation approach. It was replicated in the EU Strategy for the Danube Region (EUSDR) in 2010 and developed further in the Action Plan for the Atlantic Ocean Area and the EU Strategy for the Adriatic and Ionian Region (EUSAIR) in 2013. Together with the partner countries from the South Mediterranean and the Black Sea, the European Commission has worked to develop a common maritime agenda for the respective seas.

The present study is part of the overall *Study to support the development of sea-basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea*. Its main objective is to identify the blue growth needs and potential in the Mediterranean and Black Sea countries by providing a breakdown of the marine and maritime activities that make up the blue economy of each country and elaborating policy recommendations for those activities identified as "most relevant and promising".

It is worth noting that, while the results and proposed recommendations derive from robust quantitative data, the analysis initially faced a lack of harmonized and comparable quantitative data in candidate and potential candidate countries. In these cases, alternative non-numerical factors (i.e. qualitative indicators) were used to fill the gaps, based on the assessment and knowledge of experts involved in the analysis of the country and sectors concerned. By combining the quantitative data with qualitative indicators, the assessment was able to produce harmonized information for all countries examined.

As a result, the present study depicts the maritime dimension at country level in a homogeneous and reproducible way. The information provided not only contributes to an appropriate formulation of policy recommendations, it also facilitates identification of alternative approaches to the development of the blue economy in the EU Member States, and candidate and potential candidate countries. Indeed, mapping socio-economic key indicators in a homogeneous way, replicable for each country, makes it possible to adopt a macro-regional perspective that can support more efficient policy-making and streamline cooperation.

Methodology

Approach. The analyses carried out in this study followed a value-chain approach, also used by the *Blue Growth Study*.¹ This approach enabled an analysis of the size and relevance of marine or maritime activities within an array of correlated upstream and downstream activities, and therefore allowed the drafting of a more complete picture of the maritime dimension in the economy of a given country.²

NACE³ classification. With respect to the Blue Growth Study, the main adaptation regarded the NACE classification. The Blue Growth Study was based on NACE rev. 1.1 which was subsequently replaced with NACE rev. 2, which provides additional or different economic activities. Therefore, the present study has adapted the methodology to allow for the newly available NACE rev. 2 codes.

Data sources. Generally speaking, quantitative data were used throughout the study, complemented with qualitative data when necessary, in order to better address the objectives and geographical scope of the study. Data cover the period between 2008 and 2010.⁴ Adjustments with other reliable data sources (at national and EU level) and experts' analyses were applied to reflect – as exhaustively as possible – the maritime dimension of the countries analysed. Data sources were chosen based on their reliability, with preference given, when possible, to single sources common to all countries, in order to ensure homogeneity of information.



Marine and maritime activities. The reference list included in the scope of the present study comprises 29 marine and maritime activities. It was drawn up during a two-month process with experts from the European Commission reviewing the methodology used for the Blue Growth Study and, in turn, adapting specific aspects of it for this study.

It should be noted that the set of marine and maritime activities identified is highly heterogeneous and complex, mainly because of the manifold structures of the respective value chains and the mutual interdependence among them. Specific methodology sheets were elaborated for each of the 29 activities to determine their correlation to the related classification systems.

Indicator mapping. The mapping of key socio-economic indicators for each marine and maritime activity by country made it possible to compile specific country fiches, each of which contained a selection of the "most relevant and promising activities" at national level, on which further analyses have been developed.

Quantitative and qualitative analyses. A part of the analyses carried out for the study combined results of quantitative analysis with the knowledge of country and sector experts (qualitative analysis).

¹ *Blue Growth. Scenarios and Drivers for Sustainable Growth from the Oceans, Seas and Coasts*, Rotterdam/Brussels, 13 August 2012.

² For detailed methodology on the value chain approach and on the country fiche compilation, please consult the Country Fiche Guide available at <http://www.cogeaspa.it/blue-growth-study/country-fiches/?lang=en>.

³ NACE from French "*nomenclature statistique des activités économiques dans la Communauté Européenne*", namely: "statistic nomenclature of economic activities in the European Community".

⁴ The three-year coverage is due to the fact that NACE rev.2 was adopted in 2008 and the data are available only since that date. More recent and homogeneous data were not available at the time of the analysis.

The geographical scope of this study, reported in the table below, identifies the 12 countries⁵ analysed.

| GEOGRAPHICAL SCOPE | |
|--------------------|-----------------------------------------|
| EU Member States | Candidate/potential candidate countries |
| Bulgaria | Albania |
| Croatia | Bosnia and Herzegovina |
| Cyprus | Montenegro |
| Greece | Turkey |
| Italy | |
| Malta | |
| Romania | |
| Slovenia | |

Country fiches

Based on the above mentioned objectives and methodology, the first core of this study identifies the needs and potential of each country's blue economy. "Country fiches" have been compiled in order to ensure consistency. Each includes an agreed six steps for reporting on the analyses carried out for each country.

| Steps | Analyses carried out |
|-------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1) | General overview on the role of coastal areas in the national economy |
| 2) | Breakdown of marine and maritime activities at NUTS 2 ⁶ level and selection of most relevant regions |
| 3) | List of the 7 largest, 7 fastest growing and 7 activities with most future potential and identification of the 6 most promising marine and maritime activities |
| 4) | Growth scenarios for the 6 most promising marine and maritime activities |
| 5) | Growth drivers and barriers for the 6 most promising marine and maritime activities |
| 6) | Analysis of maritime strategies at regional and national level, as well as those under preparation and their links with Smart Specialisation Strategies |

Steps 1 and 2. Two indicators were used to measure the size and importance of each activity in each country. Gross value added at factor costs (GVA) was used to provide an indication of the economic impact, and number of persons employed (EMP) was used as an indicator of social impact.

Step 3. This "7-7-7 Step" adopted the methodology developed for the *Blue Growth Study* in order to identify the 7 largest and the 7 fastest growing marine and maritime activities in each country. Country experts, who contributed by collating data, proved especially crucial in processing the data according to their knowledge of their respective countries' economies. This exercise also identified the 7 activities with the most future potential in each country through using the scores country experts assigned to each marine and maritime activity, according to qualitative indicators such as innovativeness, competitiveness, employment, policy relevance, spill-over effects and environmental sustainability.

Step 4. Building from the 7-7-7 identified in Step 3, Step 4 identified the most relevant and promising activities in each country, by giving priority to the "growth potential" of each activity. As a general rule, 6 activities were identified in each country. However, in some cases, due to the limited dimension of the

⁵ Spain and France have been analysed in a parallel study on Blue Growth potential in the Atlantic.

⁶ NUTS: Nomenclature of territorial units for statistics

respective maritime economies (e.g. Bosnia) or further to the assessment of country experts (e.g. Albania), fewer than 6 activities were recognized. Subsequently, country experts provided a short description of each of the promising activities according to: i) the nature of the activity and its value chain, ii) its economic and infrastructural scenario, and iii) the regulatory environment of the activity.

Step 5. This step identified both drivers for growth and barriers to growth of the most relevant and promising activities in each country, using two consolidated and widely-used tools for decision-making: the benchmark and the SWOT analysis.

- **Benchmark analysis**, an external comparison, used 19 “benchmark instances” previously identified for each activity, based on the EU country where the given activity is believed to perform best according to functional elements such as maritime research, development and innovation, access to finance, smart infrastructure, maritime clusters, education, training and skills, maritime spatial planning, integrated local development and public engagement. Each most relevant and promising activity was then assessed against the benchmark instance of reference, highlighting drivers for growth and barriers to growth so that the results reflected differences between the country analysed and the benchmark.
- **SWOT analysis**, an internal comparison, considered strengths and weaknesses of the most relevant and promising activities within the country of reference in order to identify possible drivers and bottlenecks to economic growth.

Step 6. The last step revealed the links between the most promising activities in a given country and all strategies at national and regional levels. Furthermore, using two logical diagrams, it highlighted the links of the activities identified as most promising in the related country with i) blue growth objectives and ii) Smart Specialisation Strategies. These were followed by “logical conclusions” drafted with the support of country experts.

Assessment of policies at national and regional levels

An assessment of policies at national and regional levels, the second core of the study, was undertaken to identify all possible elements perceived to favour or hinder the sustainable growth of the most promising activities identified in each country.

The analysis was structured into three main steps.

- **Identify links.** The first step identified what already existed, e.g. policies and financial instruments, operational programmes and cooperation programmes that had actual or potential links to the most promising activities identified in the country.
- **Analyse documents.** The second step analysed all relevant documents useful to detect elements assessed as limiting or supporting the development of the activity. This included, e.g. ex-ante and interim evaluations and annual implementation reports.
- **Assess at country level.** The third step was a country-level assessment carried out with the support of country experts that highlighted key features of policies related to the most promising activities identified per country.

Due to lack of relevant documents or information useful for carrying out the assessment, it was not always possible to identify those elements that favoured or hindered the growth of the sector. Thus, those cases included, when possible, the assessment of an expert and results of informal interviews with relevant stakeholders, in order to corroborate the findings of the desk analysis that identified the activity as one of the most promising.

Main findings and study results

Most promising marine and maritime activities

The methodology adopted for this study led to the compilation of country fiches and to the identification of the 6 most relevant and promising activities in each of the 12 countries analysed.⁷

As per the figures to the right, the analysis identified 4 marine and maritime activities as being the most promising in more than 5 countries (Figure 1), 8 in fewer than 5 countries (Figure 2), and 13 in fewer than 2 countries (Figure 3).

Coastal tourism turned out to be one of the most promising activities in all countries surveyed – one that would have even greater potential if it were given a wider perspective that includes other leisure activities such as cruise tourism, and yachting and marinas.

Marine aquaculture emerged as one of the most promising activities in Mediterranean countries, although not in the Black Sea countries of Romania, Bulgaria and only marginally on the Turkish side.

Short-sea shipping (including Ro-Ro) was identified as a most promising activity in 8 countries out of 12. Indeed, short-sea shipping represents a sustainable, cost-effective and safe alternative to land transport, especially in the Mediterranean and Black Sea, where short-sea shipping covers around three-fourths of total goods transported to and from main ports (EUROSTAT, 2011).

Figure 3 indicates that the majority of activities – 8 – proved not to be most promising in any of the countries analysed.

More in detail, the first 4 of the 8 are part of the group of activities the EU designates as “*Energy and raw materials*”, the next 2 are linked to “*Food, nutrition, health and ecosystem services*” and the last 2 are linked to “*Coastal protection*”.

In order to better explain the socio-economic dimension of each country, the following figure gives a snapshot of key socio-economic features of coastal areas and most promising activities identified for each country analysed.

Figure 1 – Marine and maritime activities shared by more than 5 countries

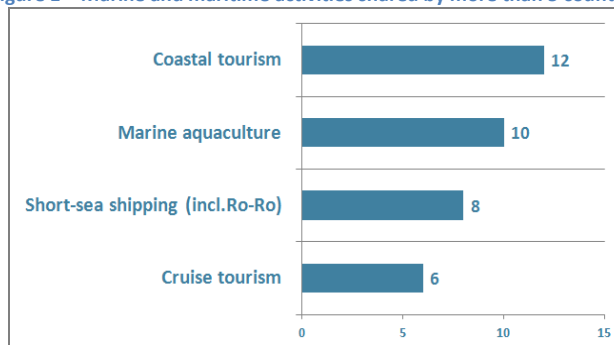


Figure 2 – Marine and maritime activities shared between 2 and 5 countries

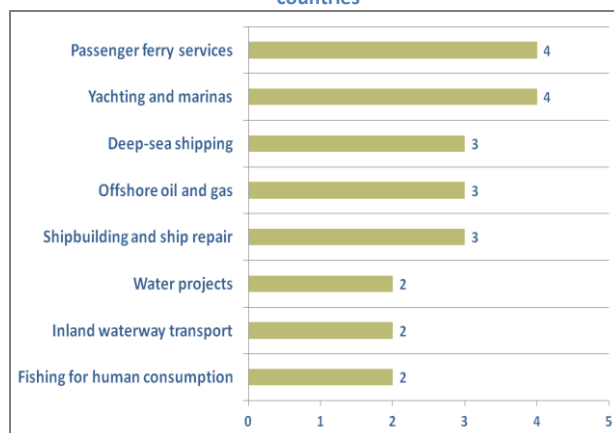
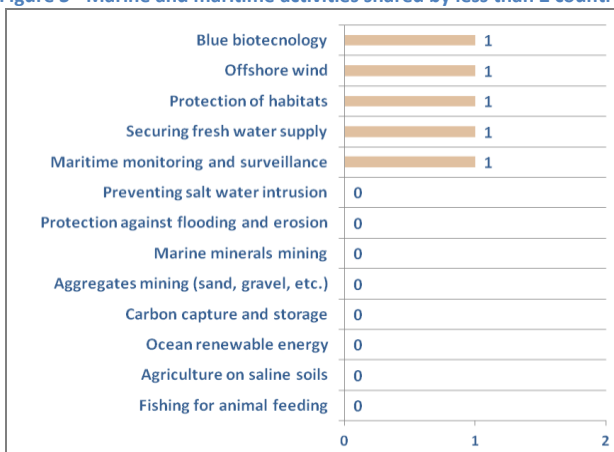


Figure 3 - Marine and maritime activities shared by less than 2 countries



⁷ Although this analysis was carried out at national level, a focus was also provided at sea-basin level for some countries, given that maritime activities presented specificities at sea-basin level. This focus will be further developed, as other tasks of the present study will aim at assessing the potential cooperation at sea-basin level: Adriatic and Ionian (Task 3), Black Sea (Task 4) and Mediterranean (Task 5).

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

Analysis of Blue Growth needs and potential per country

SLOVENIA

Socio-economic features

GVA of coastal area: 1,84 billion Euro
 % on country total: 5,9%
 Persons employed in coastal area: 52.000
 % on country total: 6%

Most promising activities

Blue biotechnology
 Short Sea Shipping
 Coastal tourism
 Deep-sea shipping
 Cruise tourism
 Marine aquaculture

BOSNIA AND HERZEGOVINA

Socio-economic features

The coastline of the country accounts for only 22,1 km and is part of the only Municipality of Neum. Therefore it is estimate that maritime activities have low socio-economic impact and only 2 most promising activities has been reported based on qualitative analyses.

Most promising activities

Marine aquaculture
 Coastal tourism

MONTENEGRO

Socio-economic features

GVA of coastal area: EUR 2,7 billion
 % on country total: N/A
 Persons employed in coastal area: 201.600
 % on country total: 27%

Most promising activities

Coastal tourism
 Yachting and marinas (including water projects)
 Passenger ferry services
 Marine aquaculture
 Shipbuilding and ship repair
 Short-sea shipping (including Ro-Ro)

ROMANIA

Socio-economic features

GVA of coastal area: EUR 5,4 billion
 % on country total: 4,9%
 Persons employed in coastal area: 468.200
 % on country total: 5,1%

Most promising activities

Inland waterway transport
 Short-sea shipping (incl. Ro-Ro)
 Offshore oil and gas
 Coastal tourism
 Shipbuilding and ship repair
 Water projects

CROATIA

Socio-economic features

GVA of coastal area: EUR 12,4 billion
 % on country total: 33%
 Persons employed in coastal area: 455.800
 % on country total: 32%

Most promising activities

Coastal tourism
 Cruise tourism
 Passenger ferry services
 Short-sea shipping (incl. Ro-Ro)
 Yachting and marinas
 Marine aquaculture

ITALY

Socio-economic features

GVA of coastal area: EUR 727,4 billion
 % on country total: 53,1%
 Persons employed in coastal area: 12.472.200
 % on country total: 50,6%

Most promising activities

Passenger ferry services
 Marine aquaculture
 Coastal tourism
 Cruise tourism
 Short-sea shipping (Incl. Ro-Ro)
 Protection of habitats

BULGARIA

Socio-economic features

GVA of coastal area: EUR 4,0 billion
 % on country total: 13%
 Persons employed in coastal area: 493.500
 % on country total: 13,9%

Most promising activities

Coastal tourism
 Offshore oil and gas
 Fishing for human consumption
 Short-sea shipping (incl. Ro-Ro)
 Inland waterway transport
 Water projects

TURKEY

Socio-economic features*

GVA of coastal area: EUR 74,6 billion
 % on country total: 51%
 Persons employed in coastal area: 12,6 million
 % on country total: 51%

Most promising activities

Coastal tourism
 Marine aquaculture
 Shipbuilding and ship repair
 Cruise tourism
 Short-sea shipping
 Yachting and marinas

*Due to lack of data at NUTS2 level, data provided are estimates based on number of habitants of coastal areas (7% live in Black sea coastal area and 44% in the Med one)

GREECE

Socio-economic features

GVA of coastal area: EUR 181,8 billion
 % on country total: 93,1%
 Persons employed in coastal area: 4.300
 % on country total: 91,3%

Most promising activities

Deep sea shipping
 Marine aquaculture
 Coastal tourism
 Cruise tourism
 Short-sea shipping (Incl. Ro-Ro)
 Yachting and marinas

CYPRUS

Socio-economic features

GVA of coastal area: EUR 15,72 billion
 % on country total: 100%
 Persons employed in coastal area: 390.900
 % on country total: 100%

Most promising activities

Deep sea shipping
 Securing fresh water supply
 Marine aquaculture
 Coastal tourism
 Cruise tourism
 Offshore oil and gas

MALTA

Socio-economic features

GVA of coastal area: EUR 5,5 billion
 % on country total: 100%
 Persons employed in coastal area: 176.000
 % on country total: 100%

Most promising activities

Marine aquaculture
 Coastal tourism
 Offshore wind
 Maritime monitoring and surveillance

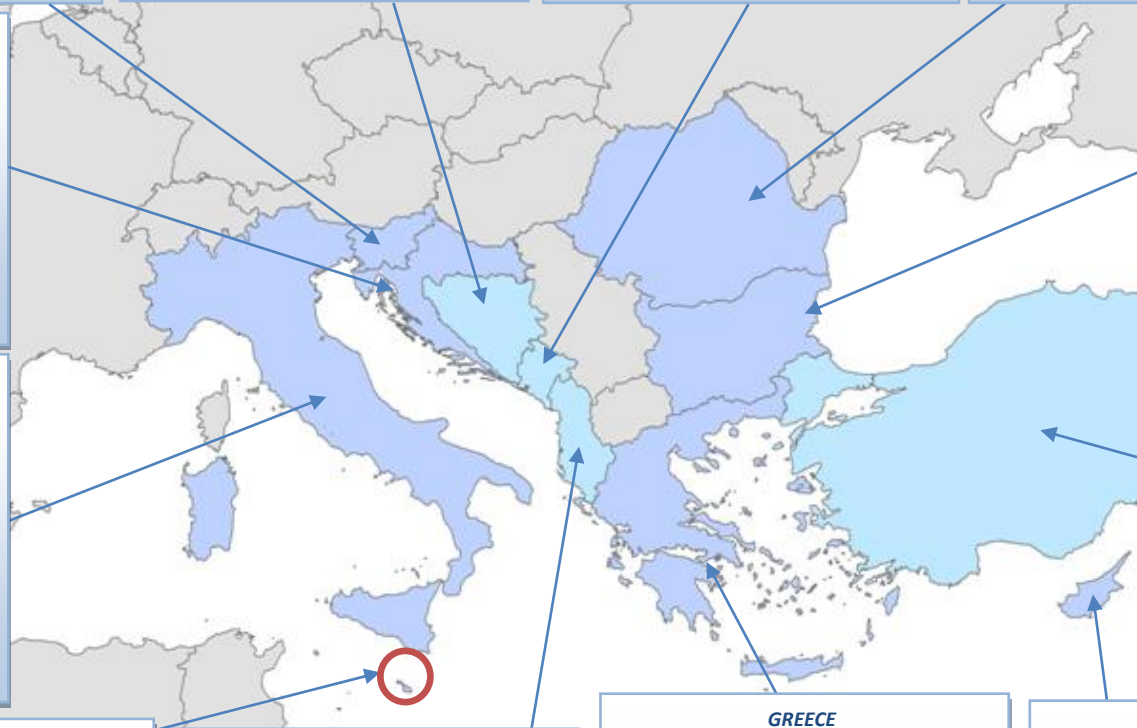
ALBANIA

Socio-economic features

GVA of coastal area: EUR 5,7 billion
 % on country total: 72%
 Persons employed in coastal area: 728.239
 % on country total: 63%

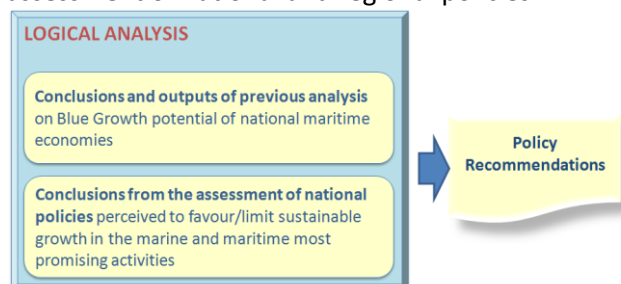
Most promising activities

Marine aquaculture
 Coastal tourism
 Passenger ferry services
 Fishing for human consumption



Recommendations to fulfil the Blue Growth potential

“Recommendations to fulfil the Blue Growth potential” have been formulated based on the results of the analysis described so far. The recommendations are meant to give guidance as to how to unleash the growth potential of the most relevant and promising activities in each country. As shown in the figure below, this is the result of a logical analysis based on the findings from the country fiches and the assessment of national and regional policies.



In order to corroborate these findings, the analysis also included stakeholders’ perceptions of the elements favouring/hindering the sustainable growth of most promising activities.

Thus, this study has been able to suggest practical recommendations that could help fulfil the sustainable growth potential of the blue economy of Mediterranean and Black Sea countries, also identifying possible financial sources for each most promising maritime activity. The following table summarizes the recommendations for each country analysed.⁸

| Country | Marine and maritime activity | Recommendations to fulfil the Blue Growth potential |
|----------|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Albania | Marine aquaculture | Implement a production quality system and explore the feasibility of a macro-regional label in line with EU standards in order to: i) develop internal demand and ii) facilitate access to the EU market. Invest in research projects and exploit the results of previous studies in order to introduce new species in Albanian farming and increase the value added of production. Implement MSP and ICZM for optimizing the use of marine and coastal space. |
| | Coastal tourism | Adopt specific legislative measures in order to regulate building in coastal areas and develop a wastewater management plan. Ensure tourism mobility through adequate infrastructure facilities. Strengthen cooperation in the sea-basin for increasing the quality and attractiveness of the tourism offer. |
| | Passenger ferry services | Develop facilities and modernise infrastructures in the south (Vlore), as has been done for the port of Durres. Develop a maritime cluster, involving ports and companies operating in the sector. Adopt a strategic plan for defining complementarities among Albania’s four major ports. |
| | Fishing for human consumption | Create conditions aimed at improving the demand-effort by: i) stimulating caught species’ diversification, ii) introducing quality certification systems at all production stages in order to favour EU market access, iii) motivating cooperation among littoral states for the sustainable management of fishery resources and iv) improving systematic environmental monitoring at national level by involving the country in wider cooperation projects. |
| Bosnia | Coastal tourism | Plan actions at sea-basin level, particularly including Neum in a wider tourism area and improving the quality of accommodations. Develop road and railway connections, linking the Neum area to both internal and coastal destinations. Develop MSP and ICZM to mitigate divergences with aquaculture activities. |
| | Marine aquaculture | At sea-basin level, absorb innovations and benefit from already developed research in the sector through the exchange of best practices. Improve production quality by introducing certification systems. Aligning quality production standards to a possible “Adriatic label” represents a possible action to undertake at macro-regional level. |
| Bulgaria | Coastal tourism | Diversify the tourism sector by developing other forms of tourism. Create integrated promotional actions at international level that include all (or at least more than one) littoral countries. Align accommodation standards to the European quality level, in order to create a “qualitatively standardised offer” in the Black Sea, and widen the range and types of potential tourist flows. Introduce regulations on building activities in the coastal areas. |
| | Offshore oil and gas | Rationalise procedures of concessions in order to widen the number of companies taking part in exploration/exploitation activities. Adopt specific environment-monitoring rules and tools for continuously assessing the environmental impact of the activity, and explore the feasibility of adopting these rules at sea-basin level. At national level, increase financial investments in research activities for: i) identifying new oil & gas fields, ii) improving the level of expertise of personnel and (iii) developing environmental-friendly technologies. |
| | Fishing for human consumption | Make better use of EU funds for supporting the switch to environmentally sustainable fisheries, simplify procedures for accessing to EU grants and increase “euro-planning” expertise by, e.g. introducing specific training courses. In general, |

⁸ For an in-depth overview of policy recommendations, please read the full Report 1: “Analysis of Blue Growth needs and potential per country”.

Analysis of Blue Growth needs and potential per country

| Country | Marine and maritime activity | Recommendations to fulfil the Blue Growth potential |
|---------|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | stakeholders should be more informed about funding possibilities. At processing stage, develop innovative products and marketing strategies for increasing profitability of the sector. Improve overall quality system and inspections for a better product. |
| | Short-sea shipping (incl. Ro-Ro) | At national level, develop infrastructural facilities and intermodal connections, especially with inland waterway transport. Explore synergies with other countries in the sea basin by, e.g. strengthening the Motorways of the Seas in the Black Sea. Strengthen the role of the sector in the Transport Operational programme, including in it specific measures for funding modernisation of the fleet and financing the sector in general. |
| | Inland waterway transport | Modernise infrastructure facilities at the Danube ports and support the enhancement of intermodality in fluvial ports. A navigation information system should be set up with the purpose of increasing security of navigation in waterways. Workforce training should be strengthened. It is also recommended to: i) support the modernisation of the fleet, ii) develop integrated strategies that include this activity in local planning and iii) improve prognostic services. |
| | Water projects | Ensure the stable funding and successful implementation of activities for i) modernisation and enlargement of the Black Sea ports in Varna and Bourgas, and ii) improve infrastructures connected to inland waterways transport. Adopt adequate MSP and ICZM. |
| Croatia | Coastal tourism | Extend potential users by finding new markets, developing new consumer segments and improving standards of what is offered (especially accommodations). Develop a strategic plan encompassing links with “satellite” activities. Support the adoption of a macro-regional approach, identifying “hotspots” on the coastline, and optimise connections with main internal tourism nodes and other potential inland attractors. Adopt MSP and ICZM. Develop a maritime cluster especially focused on coastal tourism. |
| | Cruise tourism | Improve planning of cruise traffic to reduce seasonality and further develop cruise tourism in traditional ports while adding new ports. Cruise tourism could be addressed at sea-basin level, which could mitigate competition between different ports of call and potentially create a structured offer and specific cruise itineraries. |
| | Passenger ferry services | Develop linear connections with foreign countries at international level and with islands at national level, given that Croatia has poor ferry connections between the mainland and its islands. Create specialised terminals in key nodes exclusively dedicated to passenger traffic. |
| | Short-sea shipping (Incl. Ro-Ro) | Strengthen the development of intermodality in main ports. Define a possible “port specialisation map” of the Adriatic, identifying roles and competences of strategic nodes with the purpose of mitigating competition. |
| | Yachting and marinas | Develop more targeted promotional campaigns. Strengthen the marina network and enhance cooperation at sea-basin level. Strengthen integration with other forms of tourism within an overall tourism strategic plan (see coastal tourism). |
| | Marine aquaculture | Incentivise investments in new farming plants, strengthening links between research activities and businesses, and support cooperation among producers. Develop specific labelling for Adriatic and Ionian production at macro regional level for diversifying fishing activities. |
| Cyprus | Deep sea shipping | Implement a coordinate scale of infrastructural interventions to support sustainable development of the sector. Extend the value chain of deep-sea shipping, supporting the development of ancillary activities at national level and providing extensive services to registered vessels. |
| | Securing fresh water supply | Adopt alternative sources of energy for feeding desalination plants and develop alternative desalination methods (solar). This activity should be included in MSP and ICZM. |
| | Marine aquaculture | Increase the expertise of farmers through life-long learning programmes and exchanges with neighbouring countries. Strengthen the R&D in the sector for the purpose of developing open sea farms, increase qualitative production standards and introduce new species. Increase the profitability of the sector by: i) supporting the formation of sector producer organisations, ii) increasing technological development of farms and iii) supporting the development of port and land facilities for streamlining landing operations. Enhance the competitiveness of enterprises through fiscal support and targeted incentives to SMEs for exporting their productions. |
| | Coastal tourism | Develop links with other activities especially linked to tourism (e.g. cruise). Increase the visibility of the island in the international market through more targeted promotional campaigns. Activate fund-raising activities by a national-based structure (e.g. a tourism cluster) that could facilitate the convergence of supply of and demand for credit. Implement MSP and ICZM. |
| | Cruise tourism | Develop a strategy at national level for enhancing links with other maritime as well as non-maritime activities. Plan the construction of an equipped dock exclusively dedicated to cruise tourism. Strengthen international connections and internal intermodal connections to transform Cyprus as a possible cruise home-port of the Eastern Mediterranean. Adopt specific measures in order to prevent possible environmental impact of big cruise ships. |
| | Offshore oil and gas | Strengthen the development of complementary activities, e.g. shipping, shipbuilding, ship and platform repair. Increase skills and competences of local people not only in the extractive sector, but also in ancillary activities. |
| Greece | Marine aquaculture | Strengthen promotional activities, and work with the producers for consolidating the export vocation of the sector. Strengthen the liaison between research and industry, favouring the technology transfers and launching life-long learning programmes for increasing the expertise of the well-trained Greek farmers. Integrate aquaculture in maritime spatial planning and simplify procedures for licensing. |
| | Deep-sea shipping | Develop a maritime cluster so weaker maritime activities can receive benefits from the sector’s strong position. Introduce specific guarantee schemes for facilitating credit access for new companies. |
| | Cruise tourism | Launch a long-term strategic effort at national level mainly aimed at: i) strengthening international connections, ii) developing intermodal links between different nodes, iii) increasing infrastructural facilities and creating specialised terminals and iv) strengthening links with coastal tourism and other forms of tourism. Strengthen the role of the cruise ports’ cluster and increase workforce expertise by supporting the development of education and vocational schools. |
| | Coastal tourism | Develop an integrated strategy, linking coastal tourism to yachting and cruise activities. Invest in infrastructure at national level |

Analysis of Blue Growth needs and potential per country

| Country | Marine and maritime activity | Recommendations to fulfil the Blue Growth potential |
|------------|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | for improving tourists' mobility. At international level, develop common strategies for attracting "new tourist flows" by offering an integrated tourism product at sea-basin level. |
| | Short sea shipping (Incl. Ro-Ro) | Improve intermodal connections between ports and road/railway systems, prioritizing the main hubs of Piraeus, Heraklion and Thessaloniki. Create a maritime cluster in order to benefit from the strong position held by deep-sea shipping and encourage research activities. Align the national register to more competitive registers, in order to reduce bureaucratic burdens. |
| | Yachting and marinas | Adopt strategic planning: i) for increasing infrastructural facilities, modernizing marinas and building new ones and ii) for strengthening synergies with other tourism activities. Set up an integrated network of marinas that provides the same standardised services in all networked ports. As for construction of leisure boats, support the sector through guarantee schemes and facilitating shipyards' access to financing opportunities. . |
| Italy | Short sea shipping (Incl. Ro-Ro) | Plan a port specialisation roadmap to optimise port system development and improve intermodal connections at national level between ports and roads/railways. Incentivise the transfer of cargo flows from road to ships, taking advantage of the Motorways of the Seas. Develop maritime technologies in terms of security, sustainability and efficiency, by strengthening research. Lighten bureaucratic procedures in handling goods at seaports. |
| | Passenger ferry services | Link the sector with other maritime activities, strengthening intermodality and passengers' movement from different modes of transport. Guarantee connections with islands by establishing specific agreements between private operators and the state. Identify "intervention priorities" in order to identify which port/facility/intermodal link/etc. should be prioritised within the overall framework of the European corridors. |
| | Marine aquaculture | Adopt a long-term strategy that encompasses promotional activities for increasing internal demand, strengthens links between research and industry, promotes production diversification and increases production shares addressed to exports. Centralize the MSP and ICZM plans. Support research on bluefin tuna reproduction in captivity. |
| | Protection of habitats | Continue funding protected areas. Maximize site usability by strengthening links with other activities and incentivizing the self-financing capability of the different sites. Identify new areas that should be protected at national and international levels, through research cooperation projects. |
| | Coastal tourism | Maximise the attractiveness of southern destinations by improving infrastructure and developing links with international countries of origin of tourist flows. Adopt macro-regional perspective for promoting the activity. Identify potential liaisons for cruise tourism in order to encourage cruise passengers to stay longer in cities of call. |
| | Cruise tourism | Develop integrated strategic planning encompassing all possible forms of maritime tourism. Assess the possibility of moving cruise traffic out of Venice, which is considered too fragile to absorb the impact of large vessels. Incentivise a specific education programme for training personnel and staff. |
| Malta | Marine aquaculture | Incentivise the movement of plants to deeper water sites offshore (MSP could help maximise the use of spaces) and adopt a strategy for the production of high value products addressed to exports. Implement research activities and exchange with neighbouring countries through international cooperation projects for developing high value farming. Enhance workforce skills through specific training and life-long learning programmes. |
| | Offshore wind | Strengthen specialisation of both the internal workforce and researchers, encourage exchanges with foreign universities and/or research institutes. Increase the visibility of the offshore wind potential for attracting FDI. Also in this case, due to the limited maritime space available, MSP could support the optimal use of marine area. |
| | Coastal tourism | Develop strategies focused on selective and exclusive tourism, and raise the quality of services offered. Strategic planning should also identify synergies with other leisure activities. Improve primary roads connecting main islands nodes – airports to ports to main tourist destinations. |
| | Maritime monitoring and surveillance | Reinforce the capabilities of applying scientific results to operations: specific formation and training sessions could be organised in other countries (Spain and Italy) in order to exchange expertise. Improve both environmental monitoring and maritime risk management, launching international research projects. |
| Montenegro | Coastal tourism | Reduce seasonality effects by: i) diversifying the tourism offers, ii) updating infrastructure and iii) limiting the environmental impact of overbuilding. Support a macro-regional approach (EUSAIR) by exploring the feasibility of organising a common offer with shared standards in the sea basin. Create specialized schools and launch cooperation projects with more experienced neighboring countries. |
| | Yachting and marinas (Incl. Water projects) | Reinforce links with coastal tourism need by increasing the attractiveness of coastal areas. Consider the high level of expertise of Montenegrin ship repair activity and develop specialised facilities in order to streamline the transport of ships from the sea to the shipyard. |
| | Passenger ferry services | Improve infrastructural facilities and strengthen links with coastal tourism for ensuring year-round liner connections. |
| | Marine aquaculture | Balance divergent interests among stakeholders at national level (especially for the use of maritime space) by developing a maritime cluster and supporting the organization of stakeholders in sector associations/POs/etc. At international level, support exchanges of experiences among European fish farmers or within the Adriatic-Ionian sea basin. |
| | Shipbuilding and ship repair | Implement cooperation synergies with other shipyards in the Adriatic sea basin, in order to boost innovation and increase competitiveness. Reinforce liaisons with yachting and marina activities in order to take advantage of the increasing flows of yachts and sailboats. |
| | Short sea shipping (Incl. Ro-Ro) | Implement investments in infrastructure, especially for increasing intermodal (road and rail) connections. Develop a sea-basin approach for optimizing the use of funds. |
| Romania | Inland waterway transport | Pursue the path of rehabilitating and modernising port infrastructure for the next programming period, identifying strategic ports and terminals. Achieve synergies among Danubian countries in order to develop common strategies for the sustainable exploitation of the Danube as a water highway in Eastern Europe. Facilitate the convergence between supply and demand of credit by involving private companies and private investors. Incentivise transfer of expertise from universities and specialised schools to businesses. |

Analysis of Blue Growth needs and potential per country

| Country | Marine and maritime activity | Recommendations to fulfil the Blue Growth potential |
|---------------------|-----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | Short-sea shipping (incl. Ro-Ro) | Strengthen complementarities with other modes of transport and enhance intermodal connections, especially with inland waterway, but also for deep-sea shipping and liquid bulk transport. Make better use of ERDF funds for maintaining and innovating port infrastructures. |
| | Offshore oil and gas | Adopt specific environment-monitoring rules and tools at sea-basin level. Strengthen education and research by introducing education programmes and, at international level, by developing research and cooperation initiatives. |
| | Coastal tourism | Adopt a more holistic approach for developing the sector by strengthening integration with other forms of tourism. Introduce specific guarantee schemes for overcoming SMEs' limited access to credit. Improve tourism education in vocational schools. |
| | Shipbuilding and ship repair | Develop product innovation through increasing cooperation with universities and research centres, and supporting R&D and technological transfer. Explore possible synergies with the offshore oil and gas sector. |
| | Water projects | Explore public-private partnership possibilities. Launch life-long learning programmes for enhancing the specialisation of engineers, and improve university education and research devoted to civil engineering. |
| Slovenia | Blue biotechnology | Increase the level of know-how by: i) improving cooperation between public and private sector and ii) exchanging practices with other EU countries. Improve fund-raising activities by supporting intervention of private investors. |
| | Short-sea shipping | Reinforce the port of Koper's infrastructure for the Trans-European Network (TEN-T), especially within Motorways of the Seas. Improve intermodal connections from the port to rail and road systems, and reduce administrative constraints on port activities. |
| | Coastal tourism | Enhance cooperation between the public and private sectors. At international level, increase cooperation at sea-basin level for developing common strategies and creating a macro regional brand. Develop integrated and synergic planning among different tourism activities at national level. |
| | Deep-sea shipping | Improve smart transport infrastructure to increase intermodality in the framework of the TEN-T network. Promote sustainable transport and remove bottlenecks in key network infrastructures. |
| | Cruise tourism | Improve passenger terminal facilities to better meet future demand. Favour structural interventions by means of private-public partnerships, and strengthen synergies with coastal and internal tourism by including this activity within the scope of Slovenia's Tourism Strategy. |
| | Marine aquaculture | Promote co-location of plants with other activities in order to overcome conflicts for the use of maritime areas. Encourage international research projects in order to improve upon the limited expertise available for co-location practices. |
| Turkey ⁹ | Coastal tourism | Identify critical areas and strengthen international connections for tackling the issue of accessibility to tourism sites. Exploit the potential of the Black Sea coast, increasing its visibility by strengthening connections with main nodes (airports) and integrating these destinations in national tourism packages. Develop a sea basin approach (e.g. tourist packages at sea-basin level) for promoting Black Sea destinations. Adopt a holistic legal framework for ICZM and MSP. |
| | Marine aquaculture | Add value to production of seafood processing industry by strengthening links with research activities aimed at introducing product and process innovation. Adopt specific measures for accomplishing internal rules with EU standards. Support the development of MSP and ICZM in order to mitigate conflicts between farmers and other players. |
| | Shipbuilding and ship repair | Support the development of clusters and invest in innovation and in the production of sustainable ships. Links with short-sea shipping should be reinforced at national level. |
| | Cruise tourism | Increase know-how and strengthen links with coastal tourism, thus creating common tourism. Improve international flight connections to those cities envisioned to take the role of "home ports" and intermodal connections. Reinforce international cooperation, both on the Mediterranean and on the Black Sea, for jointly developing possible cruising itineraries and creating common tourism offers. |
| | Short-sea shipping | Develop intermodal connections for connecting ports to the huge demand-driven market. Enhance specific expertise in the sector (especially academicians with seafaring backgrounds), and support exchanges with neighbouring countries. Explore the feasibility of an integrated short-sea offer in the Black Sea within a macro-regional strategy, and develop, e.g. a specialisation map of Black Sea ports, in order to create synergies among them and to mitigate competition. |
| | Yachting and marinas | Strengthen marinas in the Black Sea by adopting a strategic perspective at national level, encouraging synergic development of the activity with other leisure activities. |

⁹ Recommendations for Turkey have been developed at national level, given that the most promising activities and related analyses have been developed at national level. However, where needed, specific focuses at sea-basin level have been provided.