



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



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

REPORT 1 - ANNEX 2.10

COUNTRY FICHE - ANNEX

ROMANIA

JANUARY 2014



Contents

1. Selection of the most important regions	3
2. Indicative size of all marine and maritime activities	4
3. Relative growth of all marine and maritime activities	5
4. Assessment of future potential for all marine and maritime activities	6
5. Growth drivers and barriers to growth	7
5.1 Results of the benchmark analysis	7
5.2 SWOT analysis.....	13
6. Maritime strategies.....	19

1. Selection of the most important regions

Due to the geographic conditions of Romanian coastal area there is a single coastal NUTS 2 region so for this reason no selection was needed. However, for those marine and maritime activities which take place also outside the NUTS 2 region different proxies are used (for details see Table 3 of the country fiche).

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	0,360	23,60	13,60	EUROSTAT (2010)
0.2	Water projects	0,168	11,874	6,770	EUROSTAT (2010)
1. Maritime transport					
1.1	Deep-sea shipping	0,015	0,82	0,485	EUROSTAT (2010)
1.2	Short-sea shipping (incl. Ro-Ro)	0,028	1,57	0,925	EUROSTAT (2010)
1.3	Passenger ferry services	0,000	0,000	0,000	EUROSTAT (2010)
1.4	Inland waterway transport	0,144	6,39	3,915	EUROSTAT (2010)
2. Food, nutrition, health and eco-system services					
2.1	Fishing for human consumption	0,088	6,44	3,66	Prodcom (2010); EUROSTAT (2010); The 2012 Annual Economic Report on the EU Fishing Fleet (STECF-12-10), Joint Research Centre
2.2	Fishing for animal feeding	0,000	0,000	0,000	Prodcom (2010); EUROSTAT (2010); The 2012 Annual Economic Report on the EU Fishing Fleet (STECF-12-10), Joint Research Centre
2.3	Marine aquaculture	0,000	0,000	0,000	Joint Research Centre, in approach towards European Aquaculture Performance indicators (2010)
2.4	Blue biotechnology	0,000	0,000	0,000	Experts knowledge (private stakeholder)
2.5	Agriculture on saline soils	0,1936	159,42	80,678	EUROSTAT (2010); The Saline and Sodic Soils Map, Joint Research Centre
3. Energy and raw materials					
3.1	Offshore oil and gas	0,088	37,81	19,345	EWEA 2012: http://www.ewea.org/fileadmin/files/library/publications/statistics/Wind_in_power_annual_statistics_2012.pdf
3.2	Offshore wind	0,000	0,000	0,000	European Wind Energy Association (2013)
3.3	Ocean renewable energy	0,000	0,000	0,000	Experts knowledge (private stakeholder)
3.4	Carbon capture and storage	0,000	0,000	0,000	http://www.getica-ccs.ro/files/CCS_Roadmap-for-Romania.pdf
3.5	Aggregates mining (sand, gravel, etc.)	0,000	0,000	0,000	European Aggregates Association (2008, 2009, 2010)
3.6	Marine minerals mining	0,000	0,000	0,000	www.namr.ro (National Agency for Mineral Resources) 2013
3.7	Securing fresh water supply (desalination)	0,000	0,000	0,000	Experts knowledge (private stakeholder)
4. Leisure, working and living					
4.1	Coastal tourism	0,40	47,51	25,755	EUROSTAT (2010)
4.2	Yachting and marinas	0,0017	0,22	0,1185	EUROSTAT (2010)
4.3	Cruise tourism	0,000	0,000	0,000	EUROSTAT (2010)
5. Coastal protection					
5.1	Protection against flooding and erosion	0,041	0,433	0,4215	www.rowater.ro (2013)
5.2	Preventing salt water intrusion	n/a	n/a	----	Experts knowledge (private stakeholder)
5.3	Protection of habitats	n/a	n/a	----	EUROSTAT (2010)
6. Maritime monitoring and surveillance					
6.1	Traceability and security of goods supply chains	n/a	n/a	----	Experts knowledge (regional official)
6.2	Prevent and protect against illegal movement of people and goods	1,650	16,5	16,500	www.politiadefrontiera.ro/ - Border Police (2013)
6.3	Environmental monitoring	1,231	12,3	16,500	EUROSTAT (2011) http://www.gnm.ro (National Environmental Guard) (2013)

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	2,16	-16,23	-7,03	EUROSTAT (2010)
0.2	Water projects	-13,77	-9,80	-11,78	EUROSTAT (2010)
1. Maritime transport					
1.1	Deep-sea shipping	-39,917	-22,037	-30,977	EUROSTAT (2010)
1.2	Short-sea shipping (incl. Ro-Ro)	-9,742	17,119	3,688	EUROSTAT (2010)
1.3	Passenger ferry services	0	0	0	EUROSTAT (2010)
1.4	Inland waterway transport	1,353	-2,310	-0,487	EUROSTAT (2010)
2. Food, nutrition, health and eco-system services					
2.1	Fishing for human consumption	-10,620	-16,770	-13,690	Prodcum (2010); EUROSTAT (2010); The 2012 Annual Economic Report on the EU Fishing Fleet (STECF-12-10), Joint Research Centre
2.2	Fishing for animal feeding	0.000	0.000	0.000	Prodcum (2010); EUROSTAT (2010); The 2012 Annual Economic Report on the EU Fishing Fleet (STECF-12-10), Joint Research Centre
2.3	Marine aquaculture	0.000	0.000	0.000	Joint Research Centre, in approach towards European Aquaculture Performance indicators (2010)
2.4	Blue biotechnology	0.000	0.000	0.000	Experts knowledge (private stakeholder)
2.5	Agriculture on saline soils	9,57	0,07	4,82	EUROSTAT (2010); The Saline and Sodic Soils Map, Joint Research Centre
3. Energy and raw materials					
3.1	Offshore oil and gas	-49,63	24,97	-12,33	EWEA 2012: http://www.ewea.org/fileadmin/files/library/publications/statistics/Wind_in_power_annual_statistics_2012.pdf
3.2	Offshore wind	0.000	0.000	0.000	European Wind Energy Association (2013)
3.3	Ocean renewable energy	0.000	0.000	0.000	Experts knowledge (private stakeholder)
3.4	Carbon capture and storage	0.000	0.000	0.000	http://www.getica-ccs.ro/files/CCS_Roadmap-for-Romania.pdf
3.5	Aggregates mining (sand, gravel, etc.)	0.000	0.000	0.000	European Aggregates Association (2008, 2009, 2010)
3.6	Marine minerals mining	0.000	0.000	0.000	www.namr.ro (National Agency for Mineral Resources) 2013
3.7	Securing fresh water supply (desalination)	0.000	0.000	0.000	Experts knowledge (private stakeholder)
4. Leisure, working and living					
4.1	Coastal tourism	-28,77	-7,21	-17,99	EUROSTAT (2010)
4.2	Yachting and marinas	-14,03	-17,60	-15,81	EUROSTAT (2010)
4.3	Cruise tourism	0.000	0.000	0.000	EUROSTAT (2010)
5. Coastal protection					
5.1	Protection against flooding and erosion	0,026	0,433	n.a.	www.rowater.ro (2013)
5.2	Preventing salt water intrusion	n.a.	n.a.	n.a.	Experts knowledge (private stakeholder)
5.3	Protection of habitats	n.a.	n.a.	n.a.	EUROSTAT (2010)
6. Maritime monitoring and surveillance					
6.1	Traceability and security of goods supply chains	n.a.	n.a.	n.a.	Experts knowledge (regional official)
6.2	Prevent and protect against illegal movement of people and goods	0,082	0,825	n.a.	www.politiadefrontiera.ro/ - Border Police (2013)
6.3	Environmental monitoring	0,061	0,615	n.a.	EUROSTAT (2011), http://www.gnm.ro (National Environmental Guard) (2013)

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

5. Growth drivers and barriers to growth

5.1 Results of the benchmark analysis

INLAND WATERWAY TRANSPORT ¹	Growth drivers	Barriers to Growth
Maritime research	Galati and Constanta Technical Universities, Galati, Tulcea and Constanta Research Institutes provide a high level of research.	Public support is not consistent.
Development and innovation	D&I below the EU standards.	Heavy dependence on public funding.
Access to finance	Financing available through European or foreign funds.	Interest rates of loans, when used, higher than average in the EU. Low public support in infrastructure development.
Smart infrastructure	Below the appropriate sector standards.	Bottlenecks on sectors of fluvial Danube..
Maritime clusters	Maritime cluster organised.	Delays in public support for clusters. Low administrative capacity.
Education, training and skills	Quality of upper education and training is close to EU standards Vocational education is used	Low salaries in the sphere of education. Low application of long life learning.
Maritime spatial planning	Multimodal capacities of Black Sea ports are expanding.	Competition among maritime space users.
Integrated local development	Links with European channel river shipping system by the Danube River.	No barriers identified.
Public engagement	Connections with Pan-European Transport Corridor VII. Cooperation among local authorities.	The navigation on the inland waterways is weakly spread in the public. Lack of intermodal master plan.

¹ The benchmark instance is "Inland waterway transport in Belgium (focus port of Brussels)".

SHORT –SEA SHIPPING ²	Growth drivers	Barriers to Growth
Maritime research	Extensive involvement and experience in maritime research; many universities and R&D institutions involved in maritime research. Maritime research concentrated at NUTS 2 level.	Funding is below EU standards.
Development and innovation	Innovation projects for ports are in process of implementation.	Insufficient investments for maintenance and development of port infrastructure.
Access to finance	Available financing through the European Structural Funds, SOP-T, TEN-T and Danube Strategy.	
Smart infrastructure	Constanța port is on TEN-T corridors (railway, inland waterway and road). Complementarities with inland waterway transport by the River Danube to Central Europe.	Interconnectivity is still a problem.
Maritime clusters	Maritime cluster organised.	Delays in public support for clusters. Low administrative capacity.
Education, training and skills	High level of specialised education and training available in NUTS 2 region. Good professional training at all levels.	Problems in attracting sufficient numbers of entrants. High cost of salaries and social security contributions.
Maritime spatial planning	-	-
Integrated local development	The European integrated maritime policy concept has been incorporated in policy.	Conflicting policy goals. Lack of sufficient road connections with multimodal platforms.
Public engagement	-	The stakeholders' communication needs improvement.

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

OFFSHORE OIL AND GAS ³	Growth drivers	Barriers to Growth
Maritime research	Availability of high quality of scientific and research institutions dealing with oil and gas issues.	Investment into R&D by private companies is relatively low. Low level of government funding for R&D.
Development and innovation	Innovation is seen as key to remain competitive. Cooperation of research institutions and industry. Environmental constraints are forcing development and innovation.	Competition of public funding and skills with new renewable energy D&I projects.
Access to finance	The market is shared among international companies with good financing opportunities.	Competition of investment with other regions and markets. High interest rates for local loans.
Smart infrastructure	Effective port and heliport system. Well-developed supply chain. Well -developed storage, refinery, and transportation system. Good supply chain infrastructure.	Low degree of business localisation.
Maritime clusters	-	No specialised cluster for offshore gas and oil.
Education, training and skills	Excellence in higher education. Existence of business supported vocational schools.	Workforce migration.
Maritime spatial planning	Specialized port for oil and gas is part of spatial planning.	Environmental restrictions and obligations.
Integrated local development	Industry is well-integrated with local communities.	Creates competition with local industries in working force attraction.
Public engagement	Energy independence is a strategic objective for Romania. AGRI project alternative to Nabucco could be a solution.	Updated Energy Strategy does not have funding yet.

³ The benchmark instance is "Offshore oil and gas in the Scottish waters of the North Sea".

COASTAL TOURISM ⁴	Growth drivers	Barriers to Growth
Maritime research	Strong institute for tourism research and development Two important maritime and Delta research institutes	Difficult access to financing. Shortage of newcomers in research activity.
Development and innovation	Environmental protection policies; business support policies.	Low use of innovations for tourism development.
Access to finance	Public support for development.	Interest rates of loans higher than average in the EU. Access to public funding is too bureaucratic.
Smart infrastructure	Effective port and airport system. Good connections by all means of transport with other regions.	Low connectivity within the NUTS 2 region.
Maritime clusters	-	-
Education, training and skills	Widespread presence of vocational schools and universities for tourism. Higher education is possible in Constanța universities.	Seasonal personnel employed in tourism have low qualification level. Qualified personnel emigrating abroad.
Maritime spatial planning	Plan for Urban Development in the coastal area exists.	High pressure from environmental public/private bodies and low level of consultations.
Integrated local development	Advanced urban development planning. Plan for coastal development. Costal tourism is eligible within the Fisheries Local Action Groups covering the coastal zone of NUTS 2 (Danube and Danube Delta).	Weak focus on regional integration.
Public engagement	Supportive legislation for tourism development.	Local administration engagement is much more efficient than the national one.

⁴ The benchmark instance is "Coastal Tourism in Sardinia (Italy)".

SHIPBUILDING AND SHIP REPAIR ⁵	Growth drivers	Barriers to Growth
Maritime research	Multinational companies involved in shipbuilding with access to own sources of research.	Low levels of national public financing for national R&D. Poor coordination between research and businesses.
Development and innovation	High level of R & D and innovation. Tradition in offshore equipment and tankers.	Low degree of localisation.
Access to finance	Sufficient access to finance (solid banking system). Multinational companies involved with access to funding.	Lack of standard financing scheme for shipbuilding in terms of currency risks, pre financing and guarantees for export.
Smart infrastructure	Below the appropriate sector potential.	Low quality of diversified infrastructure network (roads, railways).
Maritime clusters	Well organized professional associations. Maritime economic cluster established recently.	Not enough critical mass and organisational capacity in cluster in order to maintain self financial support. Delays in public support schemes.
Education, training and skills	Very good standard of education. Long tradition of high level specialized training. Skilled and experienced personnel. Very good connection between the industry and the educational institutions.	Internship is not regulated by legislation.
Maritime spatial planning	New areas for development (e.g., offshore technologies).	No minimum local content/local sourcing requirements for companies exploring and exploiting Black Sea resources.
Integrated local development	Close ties between shipyards and local community.	Environmental issues raised by local communities.
Public engagement	Government is supporting companies to access export markets.	Low levels of domestic orders and domestic industrial integration. Lack of a consistent national strategy for shipbuilding sector.

⁵ The benchmark instance is "Shipbuilding and Ship repair in Germany".

WATER PROJECTS ⁶	Growth drivers	Barriers to Growth
Maritime research	Strong research infrastructure and tradition based at the National Institute for Marine Research and Development “Grigore Antipa” and University of Constanța.	Funding is below the average in the EU.
Development and innovation	Fair technical capacity in universities and also in private companies.	Weak implementation of innovation at companies' level.
Access to finance	Availability of public (national and European) and also private financing for water projects.	National financing is insufficient. Public funding is delayed due to bureaucracy.
Smart infrastructure	Water projects implementation is increasing.	There is some lack of coherence in the infrastructure development because of the financial capacity of the government in the long term.
Maritime clusters	-	-
Education, training and skills	Specialised faculties in almost all public universities, including the ones in coastal area. Vocational schools locally available.	Lack of attractiveness due to economic performance of the sector.
Maritime spatial planning	Concept is well known and applied. National Committee of Coastal Zone is functional.	Uneven distribution of economic power among the stakeholders.
Integrated local development	Water projects are included in local development strategies as critical for economic development and quality of life.	Low coherence of different projects.
Public engagement	Major water projects are public projects as part or different water basin management plans.	Low level of stakeholders' organisation. Public consultation is formal, environmental issues minimised or exaggerated by the stakeholders. Sometimes unfavourable media coverage.

⁶ The benchmark instance is “Water projects in Belgium”.

5.2 SWOT analysis

Inland waterway transport

Maritime Research	Strengths	Weaknesses
	Maritime research is well developed in the coastal region.	Low levels of public funding.
	Opportunities	Threats
	Environmentally friendly policies; good regional cooperation.	---
Development and innovation	Strengths	Weaknesses
	Enhanced by Danube Strategy. Green knowledge intelligent systems.	Low level of national support.
	Opportunities	Threats
	Regional strategies favour D&I.	Environmental problems raised by some Danube segments.
Access to finance	Strengths	Weaknesses
	Financing available through European or foreign funds.	High interest rates for domestic SMEs. Low public investment level.
	Opportunities	Threats
	European policies and financing.	National implementation defaults.
Smart infrastructure	Strengths	Weaknesses
	Good infrastructure from Constanta to Danube represented by the Danube Canal. Constanta port placed on TEN-T network giving wide range of possibilities for operating ships and goods. Danube ports network functional.	Low quality of other types of transport infrastructure. Unsolved bottlenecks on Danube hinder navigation conditions.
	Opportunities	Threats
	Environmental policies on green-house emissions reduction	Lack of investments in interconnectivity.
Maritime clusters	Strengths	Weaknesses
	Maritime economic cluster established.	Low visibility of inland waterway opportunities. Lack of economic growth.
	Opportunities	Threats
	----	Lack of critical mass and poor strategic organisation impede competitiveness.
Education, training and skills	Strengths	Weaknesses
	Good opportunities for vocational education in the coastal area. Higher education available in Constanța and Galați.	Lack of strong relationship between educational offers and private companies.
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Plans for expansion of multimodal capacities of the port of Constanta to Black Sea hub status.	Conflict with other inland waterways users.
	Opportunities	Threats
	Infrastructure water projects are planned (ports, docks, etc).	Environmental issues very common on Danube mainly because of fish species protection.
Integrated local development	Strengths	Weaknesses
	Inland waterway transport is integrated in local development strategies. Intermodal Strategy approved.	Lack of critical mass.
	Opportunities	Threats
	Local development strategies of Danube communities rely on inland waterway transport development.	Low levels of foreign investments.
Public engagement	Strengths	Weaknesses
	Strong cooperation among riverside municipalities.	Weak territorial coherence and critical mass.
	Opportunities	Threats
	Strong regional and cross-border cooperation in the framework of the Danube Strategy.	Lack of legislative predictability and stability Low levels of transparency and effective consultation processes

Short-sea shipping

Maritime Research	Strengths	Weaknesses
	Extensive involvement and experience in maritime research; many universities and R&D institutions involved in maritime research.	Reduced funding due to the economic crisis.
	Opportunities	Threats
	Sustainable development policies in terms of CO2 emission decrease	----
Development and innovation	Strengths	Weaknesses
	Innovation is promoted through private investors' intention to increase competitiveness.	Strong competition from low cost products from the Far East.
	Opportunities	Threats
	European policies for TEN-T networks development.	----
Access to finance	Strengths	Weaknesses
	Financing through European Structural Funds, SOP-T, TEN-T and Danube Strategy.	Difficult access to bank loans and high interest rates for local actors.
	Opportunities	Threats
	European policies and funds available.	Economic context is unfavourable due to the decline in consumption.
Smart infrastructure	Strengths	Weaknesses
	High quality general infrastructure (energy, telecommunications, etc.). Complementarities with inland waterway transport by Danube to Central Europe.	Low levels of investment in port equipment infrastructure.
	Opportunities	Threats
	Constanta is placed on three TEN-T network corridors (railway, inland waterway and road).	Lack of investment in intermodality.
Maritime clusters	Strengths	Weaknesses
	A maritime economic cluster was founded in 2011.	Organisational structure is not strategic oriented
	Opportunities	Threats
	Constanta as regional transport hub.	----
Education, training and skills	Strengths	Weaknesses
	High level of specialised education and training available in NUTS 2 region.	Problems in attracting sufficient numbers of entrants.
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	The National Coastal Zone Committee ensures the effective management of coastal areas for their sustainable development.	Conflicts with other users of maritime space. Environmental constraints.
	Opportunities	Threats
	Excellent economic potential of Constanta ports.	Price competition with foreign markets.
Integrated local development	Strengths	Weaknesses
	National Strategy for Intermodal transport available.	Lack of a Intermodal Transport Master Plan.
	Opportunities	Threats
	----	Competition for space
Public engagement	Strengths	Weaknesses
	Long tradition in integrated policies. Partnership Agreement for the 2014-2020 programming period.	Poor organising capacity.
	Opportunities	Threats
	----	Low levels of transparency and ineffective consultation process.

Offshore oil and gas

Maritime Research	Strengths	Weaknesses
	High quality of scientific and research institutions.	Investment into local R&D by private companies is relatively low.
	Opportunities	Threats
	Environmental policies need on-site research activities.	----
Development and innovation	Strengths	Weaknesses
	Need for innovation is seen as key to remaining competitive. Cooperation of research institutions and industry.	Competition of public funding and skills with new renewable energy D&I projects. Insufficient innovation on environmental issues.
	Opportunities	Threats
	Good reserves in the Black Sea.	International competition.
Access to finance	Strengths	Weaknesses
	The market is shared among international companies with easy access to finance.	High tax rates. Competition for investment with other regions and markets.
	Opportunities	Threats
	Development of AGRI project as an alternative to the Nabucco.	----
Smart infrastructure	Strengths	Weaknesses
	Effective port and heliport system. Well-developed supply chain infrastructure.	High tax rates (but comparable to peer EU countries).
	Opportunities	Threats
	----	----
Maritime clusters	Strengths	Weaknesses
	A maritime economic cluster was started in Constanta in 2011.	Not enough critical mass to keep it functional. No specialized cluster for offshore oil and gas sector.
	Opportunities	Threats
	----	----
Education, training and skills	Strengths	Weaknesses
	Good standard of education. Wide range of educational opportunities.	Low level of public funding.
	Opportunities	Threats
	----	Migration to other economic areas, countries and activities is affecting recruitment for educational purposes.
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Existence of local spatial planning.	Environmental issues identified in gas and oil extraction, transport and refining.
	Opportunities	Threats
	Oil and gas harbour and refinery.	Environmental restrictions and obligations are increasing costs.
Integrated local development	Strengths	Weaknesses
	Industry is well integrated with local communities.	Creates competition with local industries.
	Opportunities	Threats
	----	Environmental issues are generating costs.
Public engagement	Strengths	Weaknesses
	National policy for energetic independence is a priority.	Strict regulatory systems and controls.
	Opportunities	Threats
	AGRI alternative to Nabucco could be a solution.	Low levels of transparency and ineffective consultation process.

Coastal tourism

Maritime Research	Strengths	Weaknesses
	There is a national institute for tourism research and development.	Public funding is low. Weak involvement of SMEs in research
	Opportunities	Threats
	----	----
Development and innovation	Strengths	Weaknesses
	Environmental protection policies; business support policies.	Low use of innovations for tourism development.
	Opportunities	Threats
	Good status of habitat and biodiversity.	Cooperation among stakeholders and regulatory bodies is not effective.
Access to finance	Strengths	Weaknesses
	Availability of national and European public support through operational programmes.	Inadequate access to finance; high level of bureaucracy for SMEs.
	Opportunities	Threats
	European funding available.	Economic growth is inconsistent.
Smart infrastructure	Strengths	Weaknesses
	Effective port and airport system. Good general infrastructures (energy, telecommunications, etc.). Good connections by all means of transport with other regions.	Low connectivity within the NUTS 2 region.
	Opportunities	Threats
	Development of specialised tourism. Danube Delta potential for eco-friendly tourism.	Aging workforce; migration to urban areas and to foreign markets.
Maritime clusters	Strengths	Weaknesses
	A maritime economic cluster was started in Constanta in 2011.	Low level of motivation for different actors involved
	Opportunities	Threats
	----	----
Education, training and skills	Strengths	Weaknesses
	Good standard of education. Widespread presence of vocational schools and universities for tourism.	Lifelong learning is not consistent.
	Opportunities	Threats
	Regional and local development strategies.	Migration to other economic areas, countries and activities.
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	The agency for conservation of coasts effectively manages the sustainable development of coastal areas.	High pressure from environmental public/private bodies and low level of consultation..
	Opportunities	Threats
	Coastal area rehabilitation Master Plan exists.	----
Integrated local development	Strengths	Weaknesses
	Advanced urban development planning.	Weak focus on regional integration.
	Opportunities	Threats
	Local development plans and fisheries local action groups include tourism as a development opportunity.	Competition with other coastal locations.
Public engagement	Strengths	Weaknesses
	High degree of involvement of local authorities and local stakeholders in development strategies.	Legislation is unclear due to constant changes
	Opportunities	Threats
	----	Low levels of transparency and ineffective consultation process.

Shipbuilding and ship repair

Maritime Research	Strengths	Weaknesses
	Extensive involvement and experience in maritime research of the private actors.	Low level of national public financing for R&D. The average age of the researchers is increasing. Poor coordination between research and businesses.
	Opportunities	Threats
	"Greening" transport policy.	Global competition.
Development and innovation	Strengths	Weaknesses
	High level of R & D and innovation.	Shipbuilding capacity is under exploited. Low capacity of technological transfer from local sources.
	Opportunities	Threats
	----	Price competition.
Access to finance	Strengths	Weaknesses
	Sufficient access to finance (solid banking system).	Lack of standard financing schemes for shipbuilding in terms of currency risks, pre financing and guarantees for export. Higher interest rates than the Asian market.
	Opportunities	Threats
	Development of guarantee schemes for export.	Competition from Asian and global clusters.
Smart infrastructure	Strengths	Weaknesses
	Shipyards infrastructure is improving rapidly. Good geographical position and connectivity between Danube and Black Sea.	Connectivity is still low and costly.
	Opportunities	Threats
	TEN-T networks, intermodal transport strategies, Inland waterway transport strategies	Economic growth too low to generate constant development
Maritime clusters	Strengths	Weaknesses
	Maritime economic cluster established.	Low level of organisation for different actors involved; not enough critical mass or strategic development. Delays in public support schemes.
	Opportunities	Threats
	Multi-sectorial integrative development.	Global competition.
Education, training and skills	Strengths	Weaknesses
	Very good standard of education. Long tradition of high level specialised training. Skilled and experienced personnel. Close relationship of stakeholders with educational structures.	Mean age of shipbuilding workforce is rising. Internship is not regulated by legislation.
	Opportunities	Threats
	Innovative development of the sector.	Workforce migration.
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	New areas for development (e.g offshore technologies).	Foreign investments involved in offshore or coastal activities use little local content as very few components are produced locally.
	Opportunities	Threats
	Offshore gas and oil extraction and transport.	----
Integrated local development	Strengths	Weaknesses
	Close ties between shipyards and local community.	Environmental issues raised by the local communities, NGOs against industrial activities.
	Opportunities	Threats
	----	----
Public engagement	Strengths	Weaknesses
	Policies development for the Black Sea and Danube region.	Low levels of domestic orders.
	Opportunities	Threats
	----	Low levels of transparency and ineffective consultation process.

Water projects

Maritime Research	Strengths	Weaknesses
	Strong research infrastructure.	Inconsistent public funding.
	Opportunities	Threats
	Expertise based development.	----
Development and innovation	Strengths	Weaknesses
	Fair technical capacity.	Dependence on public funding.
	Opportunities	Threats
	Development strategies include water projects	Overreaction to environmental impact elements.
Access to finance	Strengths	Weaknesses
	Regional cooperation projects	National financing insufficient.
	Opportunities	Threats
	European funding is available.	Economic crisis reduced public financing for infrastructure programmes.
Smart infrastructure	Strengths	Weaknesses
	Water framework Directive implemented and functional.	Financial capacity of the government in the long-term.
	Opportunities	Threats
	Water projects integrated into regional infrastructure development.	Environmental legislation misinterpreted.
Maritime clusters	Strengths	Weaknesses
	Maritime economic cluster exists	Not enough critical mass and organisational strategy
	Opportunities	Threats
	Development strategies include water projects.	----
Education, training and skills	Strengths	Weaknesses
	Good educational infrastructure.	Lack of attractiveness due to economic performance of the sector.
	Opportunities	Threats
	Long term planning of water projects.	Demographic decline and workforce migration is decreasing the skills base.
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	National Committee of Coastal Zone is functional.	Uneven distribution of economic power among the stakeholders. Conflicts with environmental organisations.
	Opportunities	Threats
	The investment potential of coastal area for water projects.	----
Integrated local development	Strengths	Weaknesses
	Water projects are included in local development strategies.	Low coherence of different projects.
	Opportunities	Threats
	Development strategies for the Black Sea and Danube region.	Centralised management.
Public engagement	Strengths	Weaknesses
	Danube strategy and Black Sea international stakeholders cooperation.	Low level of stakeholders' involvement.
	Opportunities	Threats
	----	Low levels of transparency and ineffective consultation process.

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
National Strategic Reference Framework ⁷	National	Romanian Government	Economic and social development	2007
National Strategy for a Sustainable Transport 2007-2013, 2020, 2030 ⁸	National	Ministry of Transport	Multimodal transport, inland waterway transport, sea shipping, railway and road interconnectivity	2008
National Sustainable Development Strategy 2013, 2020, 2030 ⁹	National	Ministry of Environment and Climate Changes	Environmental issues of the development	2008
The Strategic Concept of Spatial Development – Romania 2030 ¹⁰	National	Ministry of Regional Development and Public Administration	Coastal area development	2008
Strategy for the Danube Region ¹¹	EU	Ministry of Foreign Affairs	Inland waterway transport and sea shipping, interconnectivity	2010 Commission Communication endorsed by General Affairs Council in 2011
Fisheries Operational Programme ¹²	National	Ministry of Agriculture and Rural Development	Fishing and aquaculture	2007 revised in 2010
Tourism Development Master Plan 2007 -2026 ¹³	National	Ministry of Economy	Coastal tourism	2007
Black Sea Basin Joint Operational Programme ¹⁴	EU	Romanian Ministry of Regional Development and Public Administration	Economic and social development	2007
Report on an EU Strategy for the Black Sea (2010/2087(INI)) ¹⁵	EU	Romanian Government	Strategic development	2010
Communication from the Commission to the Council and the European Parliament Black Sea Synergy - A new Regional Cooperation Initiative COM(2007) 160 final ¹⁶	EU	Ministry of Foreign Affairs	Strategic development	2007

⁷ http://amposce.minind.ro/fonduri_structurale/CSNR_engleza_261109.pdf

⁸ http://www.mt.ro/strategie/strategii%20sectoriale_acte%20normative/strategie%20dezvoltare%20durabila%20noua%20ultima%20forma.pdf

⁹ <http://www.insse.ro/cms/files/IDDT%202012/sndd-final-en.pdf>

¹⁰ http://www.mdrl.ro/documente/publicatii/2008/Brosura_Conc_strat_EN.pdf

¹¹ <http://www.danube-region.eu/pages/what-is-the-eusdr>

¹² <http://old.madr.ro/pages/fep/programul-operational-pentru-pescuit-2007-2013-revizuit-09.08.2010.pdf>

¹³ <http://www.bed-and-breakfast.ro/ro/masterplan.php>

¹⁴ <http://www.blacksea-cbc.net/index.php/eng/Documents/Programme-documents>

¹⁵ <http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//TEXT+REPORT+A7-2010-0378+0+DOC+XML+V0//EN>

¹⁶ <http://eur-lex.europa.eu/Notice.do?mode=dbl&lang=en&ihmlang=en&lng1=en,ro&lng2=bg,cs,da,de,el,en,es,et,fi,fr,hu,it,lt,lv,mt,nl,pl,pt,ro,sk,sl,sv,&val=447098:cs>