

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



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0. General overview

The whole Bosnia and Herzegovina is composed by two entities: Republika Srpska and Federation of Bosnia and Herzegovina. Coastal area is located in the Herzegovina-Neretva Canton of Federation of Bosnia and Herzegovina.

Bosnia and Herzegovina has a very limited access to the sea (21,2 km). The coastline of the country is part of only one Municipality: Neum.

No census has been conducted in the country since its independence in 1992 and there are not adequate statistical data available. The first census was carried out in October 2013.

Morphological structure of the coastline

- Bosnia and Herzegovina coastline is 21,2 km long and the coastal area is approximately 210 km² (within a range of 10 km from the coast). It accounts for 0,4% of the total surface area of Bosnia and Herzegovina (51.209,2 km²).
- The surface of Herzegovina-Neretva Canton (the only one with a maritime boarder) is 4.401 km² (8,6% of the total surface of Bosnia and Herzegovina).

Figure 1 - Localisation of Herzegovina-Neretva Canton



Population and related social condition for maritime areas

The population¹ of Bosnia and Herzegovina following results of the 2013 census is 3.791.662 inhabitants. As regards population in the maritime area:

- Herzegovina-Neretva Canton (2013): 236.278 (6,2% of total population);
 - Neum municipality (2013): 4.960 (0,1% of total population).
- Employment statistics²:
 - ✓ Bosnia and Herzegovina:
 - Working age population: 2.566.000 people;
 - Persons at age between 14 to 64: 2.049.000;
 - Employed: 814.000 people (employment rate: 72%);
 - Unemployed: 317.000 people (unemployment rate: 28%);
 - ✓ Herzegovina-Neretva Canton³:
 - Employed: 42.531 (5,2% of total employed people at national level);
 - Unemployed: 29.403 (3,6% of total unemployed people at national level).

¹ Source: Agencija za statistiku Bosne i Hercegovine: Preliminarni rezultati popisa stanovništva, domaćinstava i stanova u Bosni i Hercegovini 2013. Sarajevo 5th of November 2013

² Source: Labour force survey 2012 - Agency for statistics of Bosnia and Herzegovina

³ Source: Institute for statistics of Bosnia and Herzegovina, 2008.

Economic role of maritime areas over the national total

- The Bosnia and Herzegovina GDP in year 2012 was 13,2 billion EUR⁴.
- The role of maritime area over the total national economy is very small. There are not exact figures on role of the maritime economy. According to estimates (Strategy for development of tourism of Bosnia and Herzegovina), the GDP of Bosnia and Herzegovina maritime area is less than 1% of the total Bosnia and Herzegovina GDP.

⁴ Source: Central Bank of Bosnia and Herzegovina

1. Marine and maritime activities

Table 1 - Indicators of relevant marine and maritime activities in Bosnia and Herzegovina

Function/activity		GVA (EUR, billion)	Employment (*1000)	Number of enterprises	Further indicators	Source & Reference year
0. Other sectors						
0.1	Shipbuilding and ship repair	No activity in Bosnia and Herzegovina				
0.2	Water projects	No activity in Bosnia and Herzegovina				
1. Maritime transport						
1.1	Deep-sea shipping	No activity in Bosnia and Herzegovina				
1.2	Short-sea shipping (incl. Ro-Ro)	No activity in Bosnia and Herzegovina				
1.3	Passenger ferry services	No activity in Bosnia and Herzegovina				
1.4	Inland waterway transport	No activity in Bosnia and Herzegovina				
2. Food, nutrition, health and eco-system services						
2.1	Fishing for human consumption	0,000005	0,004	5	Only 3-5 persons (families) are involved in small scale fishing.	No data available from EUROSTAT Minister of Agriculture, Water Management and Forestry of the Federation of Bosnia and Herzegovina, 2012
2.2	Fishing for animal feeding	No activity in Bosnia and Herzegovina				
2.3	Marine aquaculture	0,00004	0,004	2	There are only two registered small businesses and involved in shellfish farming. Confidentiality rules due to the number of companies	No data available from EUROSTAT Statistical institute off Bosnia and Herzegovina: Cantons in numbers, 2012; Technical Directions for fish farming EC LIFE 2008).
2.4	Blue biotechnology	No activity in Bosnia and Herzegovina				
2.5	Agriculture on saline soils	No activity in Bosnia and Herzegovina				
3. Energy and raw materials						
3.1	Offshore oil and gas	No activity in Bosnia and Herzegovina				
3.2	Offshore wind	No activity in Bosnia and Herzegovina				
3.3	Ocean renewable energy	No activity in Bosnia and Herzegovina				
3.4	Carbon capture and storage	No activity in Bosnia and Herzegovina				
3.5	Aggregates mining (sand, gravel, etc.)	No activity in Bosnia and Herzegovina				
3.6	Marine minerals mining	No activity in Bosnia and Herzegovina				
3.7	Securing fresh water supply (desalination)	No activity in Bosnia and Herzegovina				
4. Leisure, working and living						
4.1	Coastal tourism	0,009	1,300	18 registered hotels, over 20 small accommodation providers (and a number of unregistered accommodation providers)	Tourism turnover for Federation of Bosnia and Herzegovina: 420 million euro.	No data available from EUROSTAT Strategy for development of tourism of Bosnia and Herzegovina, 2008-2018; Central Bank of Bosnia and Herzegovina, 2012; World tourist organisation, 2012
4.2	Yachting and marinas	No activity in Bosnia and Herzegovina				
4.3	Cruise tourism	No activity in Bosnia and Herzegovina				
5. Coastal protection						
5.1	Protection against flooding and erosion	No activity in Bosnia and Herzegovina				
5.2	Preventing salt water intrusion	No activity in Bosnia and Herzegovina				
5.3	Protection of habitats	No activity in Bosnia and Herzegovina				
6. Maritime monitoring and surveillance						
6.1	Traceability and security of goods supply chains	No information available				
6.2	Prevent and protect against illegal movement of people and goods	No information available				
6.3	Environmental monitoring	No information available				

Table 2 - Overview of relevant marine and maritime activities in Bosnia and Herzegovina

Function/activity		Activity overview	Socio economic indicators	Source & Reference year
0. Other sectors				
0.1	Shipbuilding and ship repair	No activity in Bosnia and Herzegovina		
0.2	Water projects	No activity in Bosnia and Herzegovina		
1. Maritime transport				
1.1	Deep-sea shipping	No activity in Bosnia and Herzegovina		
1.2	Short-sea shipping (incl. Ro-Ro)	No activity in Bosnia and Herzegovina		
1.3	Passenger ferry services	No activity in Bosnia and Herzegovina		
1.4	Inland waterway transport	No activity in Bosnia and Herzegovina		
2. Food, nutrition, health and eco-system services				
2.1	Fishing for human consumption	- very small number of persons are in fishing (3-5) - it small scale fishing with no adequate equipment	Fishing for human consumption is very small. Self-consumption and sales to local restaurants.	No data available from EUROSTAT Development strategy of Neum Municipality
2.2	Fishing for animal feeding	No activity in Bosnia and Herzegovina		
2.3	Marine aquaculture	Two fish farming companies. The total production of sea fish in 2008 was 178 tons. That was 2% of the total fish production, the rest of the production is inland.	n.a.	No data available from EUROSTAT Technical Directions for fish farming EC LIFE 2008; Development strategy of Neum Municipality Statistical institute of Bosnia and Herzegovina – Cantons in number
2.4	Blue biotechnology	No activity in Bosnia and Herzegovina		
2.5	Agriculture on saline soils	No activity in Bosnia and Herzegovina		
3. Energy and raw materials				
3.1	Offshore oil and gas	No activity in Bosnia and Herzegovina		
3.2	Offshore wind	No activity in Bosnia and Herzegovina		
3.3	Ocean renewable energy	No activity in Bosnia and Herzegovina		
3.4	Carbon capture and storage	No activity in Bosnia and Herzegovina		
3.5	Aggregates mining (sand, gravel, etc.)	No activity in Bosnia and Herzegovina		
3.6	Marine minerals mining	No activity in Bosnia and Herzegovina		
3.7	Securing fresh water supply (desalination)	No activity in Bosnia and Herzegovina		
4. Leisure, working and living				
4.1	Coastal tourism	Main industry in the coastline of Bosnia and Herzegovina is tourism. Approximately 7.000 beds	The estimation is over 1.300 employees during the touristic season.	No data available from EUROSTAT
4.2	Yachting and marinas	No activity in Bosnia and Herzegovina		
4.3	Cruise tourism	No activity in Bosnia and Herzegovina		
5. Coastal protection				
5.1	Protection against flooding and erosion	No activity in Bosnia and Herzegovina		
5.2	Preventing salt water intrusion	No activity in Bosnia and Herzegovina		
5.3	Protection of habitats	There is protected ornithology habitat Hutovo blato in the area close to the sea.	n.a.	n.a.
6. Maritime monitoring and surveillance				
6.1	Traceability and security of goods supply chains	The traceability of good supply chains is very weak and without adequate control	Traceability and security of goods is based on existing laws and practices that are not full in line with EU requirements (e.g. in the fishery the requirement of the HACCP is not compulsory).	No data available from EUROSTAT Strategy for development of agriculture in rural areas of HN canton 2012 – 2017; Strategy for economic development of Herzegovina, 2004
6.2	Prevent and protect against illegal movement of people and goods	Prevention and protection against illegal movement of people and goods are on a very good level due to fact that	There are not registered illegal movement of goods and people in this area. Regarding the maritime border between	No data available from EUROSTAT Potential of maritime spatial

Function/activity		Activity overview	Socio economic indicators	Source & Reference year
		territory and Bosnia and Herzegovina's sea are small and very well controlled by the Bosnia and Herzegovina's and Croatian police, border police and custom.	Croatia and Bosnia and Herzegovina, a treaty on the maritime borders of Bosnia and Herzegovina's territorial sea was signed in 1999. In this specific case, the ratification of the treaty has not yet been completed.	planning in Med. sea 2011 (Country Report, European Union Maritime Affairs)
6.3	Environmental monitoring	There is not adequate and defined environmental monitoring of the sea and costal area. Small, ad hoc, monitoring activities are related to work of NGO sector.	Currently, there is no integral monitoring system or integrated coastal management in Bosnia and Herzegovina. There are no all needed legislative instruments, mechanisms or procedures for coastal management, and bodies or agencies for integrated management of the coastal area are not present	No data available from EUROSTAT Potential of maritime spatial planning in Med. sea 2011 (Country Report, European Union Maritime Affairs)

2. Breakdown of marine and maritime activities at regional level (NUTS 2) and selection of most relevant regions

Data for the maritime activities are the same for national and regional levels since there is only one defined coastal area.

3. List of the 3 largest, fastest growing and with most future potential marine and maritime activities

3.1 Ranking order of the 3 largest marine and maritime activities

Table 3 - Ranking order of the 3 largest marine and maritime activities in Bosnia and Herzegovina

Rank	Maritime activities	GVA (million EUR)	Employment (*1000)	Score
1.	Coastal tourism	9	1,300	0,714
2.	Marine aquaculture	0,04	0,004	0,002
3.	Fishing for human consumption	0,005	0,004	0,002

The largest marine and maritime activity is *Coastal tourism*, the other two activities have very limited economic importance.

3.2 Ranking order of the 3 fastest growing marine and maritime activities

Table 4 - Ranking order of the 3 fastest growing marine and maritime activities in Bosnia and Herzegovina

Rank	Maritime activities	GVA (CAGR)	Employment (CAGR)	Score
1.	Coastal tourism	0,72%	0,72%	0,72
2.	Marine aquaculture	0,2%	0,2%	0,2
3	Fishing for human consumption	0%	0%	0

No data are available on growth of the different marine and maritime activities and estimates have been performed.

Coastal tourism

Growth estimates (GVA and Employment) are based on the evolution of the number of nights spent by tourists at national level between 2008 and 2010⁵.

Marine aquaculture

The estimates (GVA and Employment) are based on the evolution of production of sea product in Bosnia and Herzegovina between 2008 and 2010 (source: FAO)⁶.

Fishing for human consumption

No data are available on fishing activity, which is very limited in Bosnia and Herzegovina. We estimate that the activity remained stable between 2008 and 2010.

⁵ Evolution of the number of nights spent by tourists at national level based on data from Agency of Statistics of Bosnia and Herzegovina. There is no data available at regional level or on coastal area

⁶ Based on the evolution of aquaculture production at national level (FAO data), it includes inland aquaculture. There is no data focusing on marine aquaculture due to limited number of companies (confidentiality of data).

3.3 Ranking order of the 2 marine and maritime activities with most future potential

Table 5 - Ranking order of the 2 marine and maritime activities with most future potential in Bosnia and Herzegovina

Rank	Maritime activities	Score
1.	Coastal tourism	+++
2.	Marine aquaculture	++

Coastal tourism

- **Innovativeness:** this sector is not innovative. **Score assigned: 0**
- **Competitiveness:** this activity is not competitive (low organisation and investments). **Score assigned: 0**
- **Employment:** this activity represents a large part of employment in coastal area. **Score assigned: +**
- **Policy relevance:** this activity can be supported by policies through space management, organisation of the sector and investments. **Score assigned: +**
- **Spill-over effects:** there are no spill-over effects identified. **Score assigned: 0**
- **Sustainability:** the growth of this activity can be performed in good environmental and social conditions. **Score assigned: +**

Marine aquaculture

- **Innovativeness:** this sector is not innovative. **Score assigned: 0**
- **Competitiveness:** this activity is not competitive compared to other countries of Mediterranean area. **Score assigned: 0**
- **Employment:** this activity has a very limited economic importance. **Score assigned: 0**
- **Policy relevance:** this activity can be supported by policies through space management, investments and innovation. **Score assigned: +**
- **Spill-over effects:** there are no spill-over effects identified. **Score assigned: 0**
- **Sustainability:** the impact of marine aquaculture on environment is limited and lower than the one of fishery which impacts fish stocks. The activity is considered therefore "sustainable". **Score assigned: +**

4. Growth scenarios for the 2 most relevant and promising marine and maritime activities

Below a synoptic overview of the 7 largest, fastest growing and with most future potential activities is provided:

Table 6 - Sets of top-3 activities ranking in order of size/growth/future potential

Top-3 current size	Top-3 recent growth	Top-3 future potential
Coastal tourism	Coastal tourism	Coastal tourism
Marine aquaculture	Marine aquaculture	Marine aquaculture
Fishing for human consumption	Fishing for human consumption	---

Due to the very limited economic importance of fishing for human consumption, it has not been selected among the most relevant and promising marine and maritime activities. Therefore, the activities identified as most relevant and promising in Bosnia and Herzegovina are the following:

Table 7 - 2 most relevant and promising marine and maritime activities

2 most relevant and promising marine and maritime activities
Coastal tourism
Marine aquaculture

4.1 Overview of the 2 most relevant and promising marine and maritime activities

Coastal tourism

The main maritime activity in Bosnia and Herzegovina is Coastal tourism. The activity presents a valuable growth potential which can be exploited through a better organisation of the sector and cooperation with other tourism areas (also inland) in Bosnia and Herzegovina or Croatia.

Marine aquaculture

Marine aquaculture has a limited economic importance (only two companies) but have potential of development with the purpose of increasing not only production volumes but also quality product and innovation of plants.

4.2 Description of the nature of each of the 2 marine and maritime activities and their value chains

Coastal tourism

Limited data are available on coastal tourism in Bosnia and Herzegovina: no data are available from EUROSTAT (non-EU country) and national statistics do not focus on this sector as maritime/coastal activities are very limited in Bosnia and Herzegovina.

The total number of nights spent by tourists in Bosnia and Herzegovina in 2012 is 1.645.521; foreigners account for 57% and domestic people for 43%⁷.

The breakdown by area is not available; however data exist on the number of nights by month. Bosnia and Herzegovina is tourist destination for summer holidays and also for winter holidays, notably for skiing.

⁷ Agency for statistics of Bosnia and Herzegovina

Nights spent between October and March account for 38% of the total in 2012. Thus, summer tourism (including to a small extent coastal tourism) account for the largest share of tourism in Bosnia and Herzegovina.

The number of accommodation facilities registered in Bosnia and Herzegovina is quite limited; there are 432 of them in 2012 (23.559 beds registered). Hotels and motels account for 72% of the total number of facilities. The amount of unregistered accommodation may be important but no data exist.

The main industry in the coastline of Bosnia and Herzegovina is tourism. There is no accurate information on turnover in this field; according to estimate, the GVA is less than 10 M€. Approximately 7.000 beds are registered in the area of Neum Municipality (estimate including unregistered beds). There are 18 registered hotels, over 20 small accommodation providers and a number of unregistered accommodation providers. There is no information about the number of employees in the tourism sector in the coastline area, the estimate is 1.300 during the touristic season.

The main touristic places of Herzegovina-Neretva Canton are not located on the seaside but are inland, such as Mostar for its architectural and historical values. Tourists from abroad do not specifically target Bosnia and Herzegovina as the destination of their holidays but they spend a few days in this country during their holidays in the South of Croatia (Split, Dubrovnik...).

Neum, located 200 km south from Sarajevo, remains a touristic destination for people from Bosnia and Herzegovina. However, Croatian seaside may be closer than Neum from many places in Bosnia and Herzegovina, which makes Croatia more attractive than Bosnia for some of the domestic tourists.

Marine aquaculture

There are two fish farming companies: 'ANCORA commerce' (1.500 m²) and 'KARAKA maricultura' (2.100 m²). The total production of sea fish in 2008 was 178 tons. The fishes are European seabass (*Dicentrarchus labrax*), Gilthead seabream (*Sparus aurata*) and Common dentex (*Dentex dentex*)⁸.

Limited data are available on maritime aquaculture in Bosnia and Herzegovina: no data is available from EUROSTAT, while national statistics do not focus on this sector as maritime/coastal activities are very limited in Bosnia and Herzegovina. Furthermore, confidentiality rules apply for marine aquaculture as there are only two companies: this highly limits the availability of information on this sector.

As pointed out in the report "State of the environment report of Bosnia and Herzegovina, 2012" from Ministry of Foreign Trade and Economic Relations, missing data in the aquaculture and fishery sectors hamper the implementation of specific projects and actions.

According to the reports from Agency for statistics of Bosnia and Herzegovina the production of fish for human consumption in BiH (freshwater + seawater) is 4.200 t in 2011, except shellfish. Data from FAO are highly different, according to the National aquaculture overview, the total aquaculture production was 8.009 t in 2011. In both cases, sea production accounts for less than 5% of total national production.

Table 8 - Production of consumer fish and shellfish in Bosnia and Herzegovina between 2010 and 2012 (tons)

Type of culture \ Year	2010	2011	2012
Trout	2900,9	3021,1	2818,0
Carpe	1355,8	909,0	573,0
Other fish	355,0	250,0	193,0
Shellfish	s ⁹	s	s

Source: Aquaculture report – Agency for statistics of Bosnia and Herzegovina

⁸ Technical Directions for fish farming EC LIFE 2008

⁹ Statistical secret

The main market of aquaculture products (freshwater and marine) is the domestic one, even if 35% of the production is exported (mainly to Serbia, Montenegro and a small amount in Croatia). A very limited amount of the production is exported smoked (15 tons)¹⁰.

4.3 Description of economic and infrastructural scenario

Coastal tourism

There are no data available to assess the evolution of the sector in coastal area, only national data are available.

The total number of nights spent by tourists highly grew between 2007 and 2012 in Bosnia and Herzegovina as a whole (+23%). This increase is notably due to foreigners (+34%) that account for 57% of the number of nights in 2012. Nights spent by domestic people increased by 11% over the same period.

Table 9 - Number of nights by tourists in Bosnia and Herzegovina between 2007 and 2012

	2007	2008	2009	2010	2011	2012	Evolution 2012/2007
Domestic	641.652	677.735	597.045	643.937	668.200	714.440	11%
Foreigners	694.507	718.750	671.128	772.754	836.005	931.081	34%
Total	1.336.159	1.396.485	1.268.173	1.416.691	1.504.205	1.645.521	23%

Source: Agency for statistics of Bosnia and Herzegovina

Considering that coastal tourism is seasonal and mainly occurs from April to September while winter tourism (Bosnia and Herzegovina is a destination for skiing) occurs from October to March, we can analyse the number of nights spent by month.

Nights spent between April and September account for 62% of the total in 2012 and increased by 26% between 2007 and 2012. Nights spent between October and March account for 38% of the total in 2012 and grew by 19% during the same period. Thus, summer tourism (including coastal tourism) accounts for the largest share of tourism in Bosnia and Herzegovina and grow faster than winter tourism.

Table 10 - Number of nights by tourists in Bosnia and Herzegovina between 2007 and 2012

Months	2007	2012	Evol. 2012/2007
January	80.960	90.266	11%
February	69.660	80.295	15%
March	78.182	112.662	44%
April	91.427	120.643	32%
May	133.401	167.118	25%
June	136.880	172.352	26%
July	158.682	191.227	21%
August	155.901	191.916	23%
September	136.098	181.282	33%
October	119.074	142.786	20%
November	87.011	99.750	15%
December	88.883	95.224	7%
Total	1.336.159	1.645.521	23%

Source: Agency for statistics of Bosnia and Herzegovina

The number of accommodation facilities registered in Bosnia and Herzegovina increased by 26% between 2007 and 2012. This growth concerns all types of facilities (hotels, motels, pensions...).

¹⁰ Source:FAO

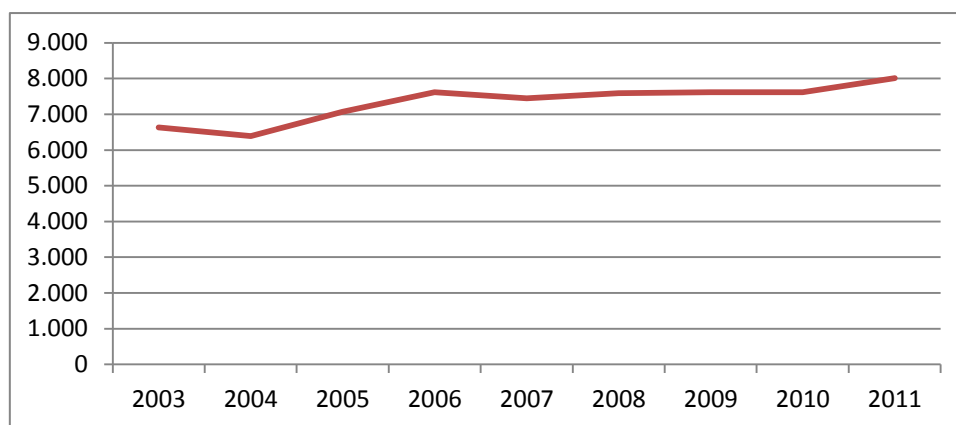
According to these national data, we can identify the following axis of development for the coastal tourism in Bosnia and Herzegovina:

- Increase notoriety of Neum area for domestic tourists and foreigners.
- Increase notoriety of Bosnia and Herzegovina as a touristic destination.
- Strengthen cooperation with Croatian stakeholders to include BiH in tours.
- Improve road and rail connexions to coastal area.
- Develop the accommodation offer (large importance of unregistered accommodations) and tourist activities.

Marine aquaculture

Aquaculture production (freshwater and marine aquaculture) increased by 21% between 2003 and 2011 (source: FAO).

Figure 2 - Aquaculture production in Bosnia and Herzegovina between 2003 and 2011



Source: National Aquaculture Sector Overview - Bosnia and Herzegovina - FAO

Marine aquaculture activity is performed by only two companies located in Neum, they produce fish and shellfish. Different constraints have been identified for the development of the production:

- Space available in coastal area, due to competition with tourism;
- Organisation of the sector;
- Regulatory environment.

The establishment of a development plan and co-operation of the scientific and applied research sector would support the development of the sector. Transnational projects could focus on marketing, investments, production methods, environment, and implementation of marketing standards in order to increase exports to EU countries.

4.4 Regulatory environment

- Law on Tourism and Catering Businesses (“Official Gazette of Federation Bosnia and Herzegovina”, No. 19/96 and 28/03);
- Law on Tourism Associations and Tourism Promotion in Federation Bosnia and Herzegovina (“Official Gazette of Federation Bosnia and Herzegovina”, No. 19/96 and 28/03);
- By-laws in area of tourism and catering (“Official Gazette of Federation Bosnia and Herzegovina”, No. 23/96) ;
- Law on Waters (“Official Gazette of Bosnia and Herzegovina”, No. 18/98);
- Law on Waste Management (“Official Gazette of Federation Bosnia and Herzegovina”, No. 33/03);
- Law on Water Protection (“Official Gazette of Federation Bosnia and Herzegovina”, No. 33/03);
- Law on Environment Protection (“Official Gazette of Federation Bosnia and Herzegovina”, No. 33/03);
- Law on Protection of Nature (“Official Gazette of Federation Bosnia and Herzegovina”, No. 33/03).

5. Growth drivers and barriers to growth for the 2 most promising marine and maritime activities

The table below provides an overview of growth drivers and barriers to growth summarising both benchmark and SWOT analysis.

Table 11 – Growth drivers and barriers to growth for Coastal tourism

COASTAL TOURISM	Growth drivers	Barriers to growth
Maritime research	No drivers identified	No maritime research linked to Coastal tourism
Development and innovation	Tourism is the main coastal activity in Bosnia and Herzegovina Opportunities to develop multi-destination touristic products	Many unregistered accommodation
Access to finance	No drivers identified	Difficult access to credit
Smart infrastructure	No drivers identified	Limited access by road, no railway Insufficient rail and road public transport
Maritime clusters	No drivers identified	No maritime clusters linked to coastal tourism
Education, training and skills, training and skills	No drivers identified	Seasonal activity, difficulties to hire people in summer
Maritime spatial planning	Tourism is the main coastal activity in Bosnia and Herzegovina	Competition with aquaculture
Integrated local development	Only access to the sea for Bosnia and Herzegovina	Environmental pressure
Public engagement	Identification of tourism as a strategic sector in Bosnia and Herzegovina	No barriers identified

Table 12 - Strengths and weaknesses analysis of Marine aquaculture

MARINE AQUACULTURE	Growth drivers	Barriers to growth
Maritime research	No drivers identified	No research related to this MEA in Bosnia and Herzegovina
Development and innovation	No drivers identified	No barriers identified
Access to finance	No drivers identified	Limited access to credit
Smart infrastructure	No drivers identified	No barriers identified
Maritime clusters	No drivers identified	No related maritime cluster
Education, training and skills	No drivers identified	No specific education in Bosnia and Herzegovina on marine aquaculture
Maritime spatial planning	Marine aquaculture taken into account at local level	Competition with tourism
Integrated local development	No drivers identified	No barriers identified
Public engagement	No drivers identified	No barriers identified

6. Analysis of maritime strategies at regional and national level, as well as those under preparation and their links with Smart Specialisation Strategies

Two strategies have been identified:

- A strategy for tourism has been defined at national level. The Strategy is divided in 10 parts for each of 10 cantons of Bosnia and Herzegovina, the coastline is part of the Herzegovina-Neretva Canton. Coastal tourism has a very limited importance in national tourism.
- A strategy for local development has been defined at the level of Neum municipality. It covers tourism and marine aquaculture through space planning.

This second strategy is the relevant level to face maritime issues.

Those two strategies have not been implemented in the framework of Smart Specialisation Strategies. At present, no strategy is in progress of definition regarding maritime areas, in relation with Smart Specialisation Strategies. However, the following links can be figured out:

Table 13 - Policies/interventions towards most promising marine and maritime activities and the Blue Growth objectives

Level	Strategies	Objectives	Most relevant and promising maritime activities	Links to BG Objectives	
Local	Neum Development strategy	<ul style="list-style-type: none"> - Economy growth, with focus on tourism and its compatible branches of the economy; - Development of social services with focus on education, health-care, social-care, veterans, sport, culture, etc; - Infrastructure development, space planning and environmental protection; - Strengthening of local authorities, with focus on projects and activities that need to provide their efficiency. 	Coastal tourism	<ul style="list-style-type: none"> - Healthy environment; - Increase the growth potential of activities; - Increase the attractiveness of coastal areas. 	Maritime, coastal and cruise tourism
			Aquaculture	<ul style="list-style-type: none"> - Contribution to an overall improvement in human diet and more quality merchandise; - Diversification of coastal communities activities; - Preservation of fish stock-sustainable aquaculture; - Promote aquaculture based on-binding strategic guidelines, multiannual national strategic plans and the exchange of best practice. 	Aquaculture
National / regional	National tourism strategy Chapter on Herzegovina-Neretva Canton	<ul style="list-style-type: none"> - Valorisation of heritage and use for conservation and protection from the tourism devastation; - Improvement of life quality at the local level; - Open possibilities for stronger development of entrepreneurship (direct or indirect in tourism function); - Tourism as dominated economic activity. 	Coastal tourism	<ul style="list-style-type: none"> - Healthy environment; - Increase the growth potential of activities; - Increase the attractiveness of coastal areas. 	Maritime, coastal and cruise tourism

Table 14 - Policies/interventions towards most promising and relevant marine and maritime activities and the Smart Specialisation Strategies¹¹

Level	Strategies	Objectives	Most relevant and promising maritime economic activities	Links to Smart Specialisation Strategies
Local	Neum Development strategy	<ul style="list-style-type: none"> - Economy growth, with focus on tourism and its compatible branches of the economy; - Development of social services with focus on education, health-care, social-care, veterans, sport, culture, etc; - Infrastructure development, space planning and environmental protection; - Strengthening of local authorities, with focus on projects and activities that need to provide their efficiency. 	Coastal tourism	<ul style="list-style-type: none"> - Innovation friendly business environments for SMEs - Cultural and creative industries
			Aquaculture	
National / regional	National tourism strategy Chapter on Herzegovina-Neretva Canton	<ul style="list-style-type: none"> - Valorisation of heritage and use for conservation and protection from the tourism devastation; - Improvement of life quality at the local level; - Open possibilities for stronger development of entrepreneurship (direct or indirect in tourism function); - Tourism as dominated economic activity. 	Coastal tourism	<ul style="list-style-type: none"> - Innovation friendly business environments for SMEs - Cultural and creative industries

¹¹ Smart Specialisation Strategies (S3) used for this logical analysis have been defined on the basis of the S3 horizontal approaches (or RIS horizontal priorities), as defined in the Guide to Research and Innovation Strategies for Smart Specialisation, available at http://s3platform.jrc.ec.europa.eu/en/c/document_library/get_file?uuid=e50397e3-f2b1-4086-8608-7b86e69e8553. See the Country fiche guide for more details at <http://www.cogeaspa.it/blue-growth-study/country-fiches/?lang=en>.

Sources and references

This Country fiche has been compiled according to a common methodology adopted in the framework of this Study and more specifically in Task 2.

A “Country fiche Guide” and a detailed methodology (“*Methodology for identifying and estimating Maritime Economic Activities using NACE and other data*”) are available at <http://www.cogeaspa.it/blue-growth-study/country-fiches/?lang=en>

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