

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



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**BOSNIA AND HERZEGOVINA**

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## 1. Selection of the most important regions

The only one relevant region for the Study is Herzegovina-Neretva Canton (NUTS 3). The data for the maritime sub-functions is the same for state level (NUTS 0) and regional level (NUTS 2 or 3) since there is only one defined coastal area.

## 2. Indicative size of all marine and maritime activities

Function/activity		GVA (EUR, billion)	Employment (*1000)	Score	Source & Reference year
<b>0. Other sectors</b>					
0.1	Shipbuilding and ship repair	0	0	0	-
0.2	Water projects	0	0	0	-
<b>1. Maritime transport</b>					
1.1	Deep-sea shipping	0	0	0	-
1.2	Short-sea shipping (incl. Ro-Ro)	0	0	0	-
1.3	Passenger ferry services	0	0	0	-
1.4	Inland waterway transport	0	0	0	-
<b>2. Food, nutrition, health and eco-system services</b>					
2.1	Fishing for human consumption	0,000	0,004	0,002	-
2.2	Fishing for animal feeding	0	0	0	-
2.3	Marine aquaculture	0,000	0,004	0,002	-
2.4	Blue biotechnology	0	0	0	-
2.5	Agriculture on saline soils	0	0	0	-
<b>3. Energy and raw materials</b>					
3.1	Offshore oil and gas	0	0	0	-
3.2	Offshore wind	0	0	0	-
3.3	Ocean renewable energy	0	0	0	-
3.4	Carbon capture and storage	0	0	0	-
3.5	Aggregates mining (sand, gravel, etc.)	0	0	0	-
3.6	Marine minerals mining	0	0	0	-
3.7	Securing fresh water supply (desalination)	0	0	0	-
<b>4. Leisure, working and living</b>					
4.1	Coastal tourism	0,009	1,300	0,695	-
4.2	Yachting and marinas	0	0	0	-
4.3	Cruise tourism	0	0	0	-
<b>5. Coastal protection</b>					
5.1	Protection against flooding and erosion	n.a.	n.a.	n.a.	-
5.2	Preventing salt water intrusion	n.a.	n.a.	n.a.	-
5.3	Protection of habitats	n.a.	n.a.	n.a.	-
<b>6. Maritime monitoring and surveillance</b>					
6.1	Traceability and security of goods supply chains	n.a.	n.a.	n.a.	-
6.2	Prevent and protect against illegal movement of people and goods	n.a.	n.a.	n.a.	-
6.3	Environmental monitoring	n.a.	n.a.	n.a.	-

### 3. Relative growth of all marine and maritime activities

No data available on the evolution of the different marine and maritime activities.

### 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	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	0.2 Water projects	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
1. Maritime transport	1.1 Deep-sea shipping	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	1.2 Short-sea shipping (incl. RoRo)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	1.3 Passenger ferry services	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	1.4 Inland waterway transport	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
2. Food, nutrition, health and eco-system services	2.1 Fishing for human consumption	0	0	0	+	0	-	----
	2.2 Fishing for animal feeding	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	2.3 Marine aquaculture	0	0	0	+	0	+	++
	2.4 Blue Biotechnology	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	2.5 Agriculture on saline soils	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
3. Energy and raw materials	3.1 Offshore oil and gas	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	3.2 Offshore wind	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	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	0	+	+	0	+	+++
	4.2 Yachting and marinas	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	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	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	5.2 Preventing salt water intrusion	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	5.3 Protection of habitats	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
6. Maritime monitoring and surveillance	6.1 Traceability and security of goods supply chains	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	6.2 Prevent and protect against illegal movement of people and goods	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	6.3 Environmental monitoring	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

## 5. Growth drivers and barriers to growth

### 5.1 Results of the benchmark analysis

COASTAL TOURISM <sup>1</sup>	Growth drivers	Barriers to Growth
Maritime research	No drivers identified	No maritime research linked to Coastal tourism
Development and innovation	No drivers identified	No barriers identified
Access to finance	No drivers identified	Difficult access to credit
Smart infrastructure	No drivers identified	Insufficient rail and road public transport
Maritime clusters	No drivers identified	No maritime clusters linked to coastal tourism
Education, needs in training and skills	No drivers identified	No barriers identified
Maritime spatial planning	No drivers identified	No barriers identified
Integrated local development	No drivers identified	Environmental pressure
Public engagement	No drivers identified	No barriers identified

MARINE AQUACULTURE <sup>2</sup>	Growth drivers	Barriers to Growth
Maritime research	No drivers identified	No barriers identified
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, needs in training and skills	No drivers identified	No barriers identified
Maritime spatial planning	No drivers identified	No barriers identified
Integrated local development	No drivers identified	No barriers identified
Public engagement	No drivers identified	No barriers identified

<sup>1</sup> The benchmark instance is "Coastal Tourism in Sardinia (Italy)".

<sup>2</sup> The benchmark instance is "Marine aquaculture in Greece".

## 5.2 SWOT analysis

<b>Coastal Tourism</b>		
<b>Maritime Research</b>	<b>Strengths</b>	<b>Weaknesses</b>
	----	No maritime research linked to Coastal tourism
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Development and innovation</b>	<b>Strengths</b>	<b>Weaknesses</b>
	Tourism is the main coastal activity in BiH	Many unregistered accommodation
	<b>Opportunities</b>	<b>Threats</b>
Opportunities to develop multi-destination touristic products	----	
<b>Access to finance</b>	<b>Strengths</b>	<b>Weaknesses</b>
	----	Difficult access to credit
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Smart infrastructure</b>	<b>Strengths</b>	<b>Weaknesses</b>
	----	Limited access by road, no railway
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Maritime clusters</b>	<b>Strengths</b>	<b>Weaknesses</b>
	----	No maritime clusters linked to coastal tourism
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Education, training and skills</b>	<b>Strengths</b>	<b>Weaknesses</b>
	----	Seasonal activity, difficulties to hire people in summer
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Maritime spatial planning/Integrated Coastal Zone Management</b>	<b>Strengths</b>	<b>Weaknesses</b>
	----	Competition with aquaculture
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Integrated local development</b>	<b>Strengths</b>	<b>Weaknesses</b>
	----	Environmental pressure
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Public engagement</b>	<b>Strengths</b>	<b>Weaknesses</b>
	----	----
	<b>Opportunities</b>	<b>Threats</b>
Identification of tourism as a strategic sector in BiH	----	

<b>Marine aquaculture</b>		
<b>Maritime Research</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	----	No research related to this MEA in BiH
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Development and innovation</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	----	----
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Access to finance</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	----	Limited access to credit
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Smart infrastructure</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	----	----
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Maritime clusters</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	----	No related maritime cluster
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Education, training and skills</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	----	No specific education in BiH on marine aquaculture
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Maritime spatial planning/Integrated Coastal Zone Management</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	Marine aquaculture taken into account at local level	Competition with tourism
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Integrated local development</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	----	----
	<b>Opportunities</b>	<b>Threats</b>
----	----	
<b>Public engagement</b>	<b>Strenghts</b>	<b>Weaknesses</b>
	----	----
	<b>Opportunities</b>	<b>Threats</b>
----	----	

## 6. Maritime strategies

<b>Title of the official document</b>	<b>Level (regional, national, cross-national, EU level)</b>	<b>Responsible body</b>	<b>Maritime Strategy concerned</b>	<b>Kind of Strategy document and publishing date</b>
National strategy for Tourism	<b>National</b>	Ministry of Tourism	<b>Coastal tourism</b>	<b>Strategy in national language</b>
Strategy for Neum area	<b>Local</b>	Neum county	<b>Marine aquatic products</b>	<b>Strategy in national language</b>