

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



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1. Selection of the most important regions

No NUTS 2 are available in Cyprus.

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	0,0062	0,17	0,1165	EUROSTAT(2010)
0.2	Water projects	0,0149	0,35	0,2495	EUROSTAT(2010)
1. Maritime transport					
1.1	Deep-sea shipping	0,1837	3,25	2,5	EUROSTAT, CYSTAT(2010)
1.2	Short-sea shipping (incl. Ro-Ro)	0,113	2,00	1,564	EUROSTAT, CYSTAT(2010)
1.3	Passenger ferry services	0	0	0	EUROSTAT(2010)
1.4	Inland waterway transport	0	0	0	EUROSTAT(2010)
2. Food, nutrition, health and eco-system services					
2.1	Fishing for human consumption	0,03979	2,26	1,33	EUROSTAT(2010), CYSTAT(2010)
2.2	Fishing for animal feeding	0	0	0	EUROSTAT(2010)
2.3	Marine aquaculture	0,0097	0,12	0,107	JRC(2012)
2.4	Blue biotechnology	----	----	----	----
2.5	Agriculture on saline soils	0,0069	0,39	0,22	EUROSTAT(2010) CYSTAT(2010) Based on Cogea methodology
3. Energy and raw materials					
3.1	Offshore oil and gas	----	----	----	----
3.2	Offshore wind	----	----	----	----
3.3	Ocean renewable energy	----	----	----	----
3.4	Carbon capture and storage	----	----	----	----
3.5	Aggregates mining (sand, gravel, etc.)	----	----	----	----
3.6	Marine minerals mining	----	----	----	----
3.7	Securing fresh water supply (desalination)	0,025	0,07	0,162	CYSTAT(2010)
4. Leisure, working and living					
4.1	Coastal tourism	0,463	16,87	10,75	EUROSTAT,2010
4.2	Yachting and marinas	n.a	n.a	n.a	----
4.3	Cruise tourism	0,1146	0,57	0,85	----
5. Coastal protection					
5.1	Protection against flooding and erosion	0,96	n.a.	0,048	EUROSTAT (2010) Based on Cogea methodology
5.2	Preventing salt water intrusion	n.a.	n.a.	n.a.	----
5.3	Protection of habitats	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.	----
6.2	Prevent and protect against illegal movement of people and goods	n.a.	n.a.	n.a.	----
6.3	Environmental monitoring	n.a.	n.a.	n.a.	----

3. Relative growth of all marine and maritime activities

Function/ activity		GVA (CAGR, %)	Employment (CAGR, %)	Score	Source & Reference year
0. Other sectors					
0.1	Shipbuilding and ship repair	-2,33	5,3	1,52	EUROSTAT(2010)
0.2	Water projects	69,3	106,5	87,94	EUROSTAT (2010)
1. Maritime transport					
1.1	Deep-sea shipping	26,4	8,3	17,4	EUROSTAT, CYSTAT(2010)
1.2	Short-sea shipping (incl. Ro-Ro)	36,4	16,9	26,6	EUROSTAT, CYSTAT (2010)
1.3	Passenger ferry services	0	0	0	CYSTAT(2010)
1.4	Inland waterway transport	0	0	0	EUROSTAT (2010)
2. Food, nutrition, health and eco-system services					
2.1	Fishing for human consumption	-13,18	10,9	-1,1	EUROSTAT,CYSTAT(2010)
2.2	Fishing for animal feeding	0	0	0	EUROSTAT(2010)
2.3	Marine aquaculture	-18,4	-7,9	-13,24	JRC(2012)
2.4	Blue biotechnology	----	----	----	----
2.5	Agriculture on saline soils	3,47	-9,6	-3,09	EUROSTAT, CYSTAT(2010) Based on Cogea methodology
3. Energy and raw materials					
3.1	Offshore oil and gas	----	----	----	----
3.2	Offshore wind	----	----	----	----
3.3	Ocean renewable energy	----	----	----	----
3.4	Carbon capture and storage	----	----	----	----
3.5	Aggregates mining (sand, gravel, etc.)	----	----	----	----
3.6	Marine minerals mining	----	----	----	----
3.7	Securing fresh water supply (desalination)	6,9	8,64	7,81	CYSTAT(2010)
4. Leisure, working and living					
4.1	Coastal tourism	-4,9	-0,8	-2,87	EUROSTAT(2010)
4.2	Yachting and marinas	n.a	n.a	----	----
4.3	Cruise tourism	125,7	-8,2	8,7	EUROSTAT(2010)
5. Coastal protection					
5.1	Protection against flooding and erosion	----	----	----	----
5.2	Preventing salt water intrusion	----	----	----	----
5.3	Protection of habitats	----	----	----	----
6. Maritime monitoring and surveillance					
6.1	Traceability and security of goods supply chains	----	----	----	----
6.2	Prevent and protect against illegal movement of people and goods	----	----	----	----
6.3	Environmental monitoring	----	----	----	----

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	-
	0.2 Water projects	0	+	+	+	-	+	+++
1. Maritime transport	1.1 Deep-sea shipping	+	+	+	+	+	+	+++++
	1.2 Short-sea shipping (incl. RoRo)	-	-	+	-	-	+	--
	1.3 Passenger ferry services	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
	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	+	++
3. Energy and raw materials	3.1 Offshore oil and gas	0	+	+	+	+	0	++++
	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)	+	+	+	+	+	+	+++++
4. Leisure, working and living	4.1 Coastal tourism	0	+	+	+	+	+	++++
	4.2 Yachting and marinas	+	+	+	+	+	+	+++++
	4.3 Cruise tourism	0	+	+	+	+	+	++++
5. Coastal protection	5.1 Protection against flooding and erosion	0	0	0	0	0	0	0
	5.2 Preventing salt water intrusion	0	0	0	0	0	0	0
	5.3 Protection of habitats	0	0	0	0	0	0	0
6. Maritime monitoring and surveillance	6.1 Traceability and security of goods supply chains	0	0	0	0	0	0	0
	6.2 Prevent and protect against illegal movement of people and goods	+	?	?	+	+	+	++++
	6.3 Environmental monitoring	+	?	0	+	+	+	++++

5. Growth drivers and barriers to growth

5.1 Results of the benchmark analysis

N.B. Benchmark analysis has not been carried out for “Securing fresh water supply - desalination” since no benchmark instance has been identified.

DEEP SEA SHIPPING ¹	Growth drivers	Barriers to Growth
Maritime research	Relevant research from universities and maritime institutes	Limited funded for research
Development and innovation	Strong links with international classification societies and other maritime actors	No ship repair industry exist
Access to finance	Good relations with financial institutions	Exposure to banking system Economic crisis has influence company’s ability for easy access to finance
Smart infrastructure	Good infrastructures	Unstable relationships with neighbouring countries
Maritime clusters	Large number of companies Favourable tax regime	----
Education, needs in training and skills	Universities and training centers	----
Maritime spatial planning	----	----
Integrated local development	Contribution through Corporate Social Responsibility programs, charities and philanthropic activities	----
Public engagement	Favouring tax regime	Bureaucracy

¹ The benchmark instance is “Deep-Sea Shipping in Greece”, therefore results provided in the benchmark analysis have been provided in this Annex.

MARINE AQUACULTURE ²	Growth drivers	Barriers to Growth
Maritime research	Presence of research institutes and research programs	----
Development and innovation	Applied research	Limited financial and human resources
Access to finance	EFF funding	Difficult access for small operators
Smart infrastructure	----	----
Maritime clusters	----	----
Education, needs in training and skills	Presence of relevant courses	----
Maritime spatial planning	Farms require environmental impact assessment	Lack of official aquaculture zones
Integrated local development	----	----
Public engagement	Recognition of sector's contribution to further development Research and promotion	----

² The benchmark instance is "Marine aquaculture in Greece", therefore results provided in the benchmark analysis have been provided in this Annex.

COASTAL TOURISM ³	Growth drivers	Barriers to Growth
Maritime research	----	----
Development and innovation	Support policies Enhancement of touristic profile of domestic tourism	----
Access to finance	Public support	Difficulty to access financial resources
Smart infrastructure	Effective infrastructures	Improvement of public transport
Maritime clusters	----	----
Education, needs in training and skills	Good standards	----
Maritime spatial planning	Department of Town Planning and Housing execute spatial planning - strategic environmental assessment is required	----
Integrated local development	Urban development	Environmental pressures
Public engagement	Promotional activities	----

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

CRUISE TOURISM⁴	Growth drivers	Barriers to Growth
Maritime research	Research on multiple areas of cruise activity	Limited resources
Development and innovation	Stakeholders participation to planning	----
Access to finance	Legislation for PPP	----
Smart infrastructure	Expansion of cruise infrastructures	High cost
Maritime clusters	Existence of national cluster	----
Education, needs in training and skills	Presence of schools and universities related to tourism activity	No specialized cruise courses
Maritime spatial planning	Planning in regional level	No planning related to cruise activity
Integrated local development	Regional development planning	Environmental pressures
Public engagement	Support toward cruise development	----

⁴ The benchmark instance is “**Cruise Tourism in Italy**”.

OFFSHORE OIL AND GAS ⁵	Growth drivers	Barriers to Growth
Maritime research	Strong willingness by Universities to perform research on the area	Need for specialized research
Development and innovation	EU-funded and national-funded R&I projects– TEN-E projects	----
Access to finance	EU funding Potential and big private funding	Large investments are required
Smart infrastructure	----	----
Maritime clusters	Existence of strong shipping network that can transfer knowledge and expertise	No established connections
Education, needs in training and skills	Well educated personnel in the shipping industry which is willing to be further trained in the offshore industry	Need for specialized personnel
Maritime spatial planning	Prior experience in maritime planning; EEZ– strategic environmental assessment done – environmental impact assessment required for each project	Absence of well defined MSP
Integrated local development	Contribution to local development	----
Public engagement	Potential huge income for the national government	Debate on environmental issues

⁵ The benchmark instance is “Offshore oil and gas in the Scottish waters of the North Sea”.

5.2 SWOT analysis

Deep Sea Shipping		
Maritime Research	Strengths	Weaknesses
	Research from maritime institutes Participation to European projects (safety, marine environment etc) Experience in Marine Technology	Non existence of dedicated marine technology-related programs of studies Non specific Maritime Research programme
	Opportunities	Threats
	Closer cooperation of public authorities with academic institutions	Closer cooperation of public authorities with academic institutions
Development and innovation	Strengths	Weaknesses
	Open registry' Strong ship management sector, with location of many companies Strong relations with international bodies and organizations Increased trends due to less dependency from countries affected from economic crisis	No ship building industry Limited ship repair activity Limited interest from national bank institutions to ship finance
	Opportunities	Threats
	Competitive tonnage-tax system Know-how in ship management Development of offshore sector	Limited scientific resources –mostly due to country's small size and needs. High risk of undertaking "expensive" research
Access to finance	Strengths	Weaknesses
	Self-finance ability of the sector	Economic instability- has made financing more difficult
	Opportunities	Threats
	International funding opportunities	----
Smart infrastructure	Strengths	Weaknesses
	Sufficient multipurpose port infrastructures which can handle all kinds of freights Two deep sea multipurpose ports	Closed ports
	Opportunities	Threats
	Position of Cypriot ports (can be used as a transhipment center for Europe-Far East trade) National investment plan for developing and redeveloping infrastructures and superstructures European funding	Turkish restrictive measures against Cyprus flag vessels Instability of neighbour countries
Maritime clusters	Strengths	Weaknesses
	Strong national cluster with inter-linkages with international market	----
	Opportunities	Threats
	Development of offshore oil and gas shipping industry	----
Education, training and skills	Strengths	Weaknesses
	Strong maritime education in the fields of maritime operation and maritime management Well qualified workforce	Non existence of dedicated marine technology-related programs of studies
	Opportunities	Threats
	Know-how in maritime technology Future potential of offshore industry	Requires funding for developing dedicated departments and due to country's size is not grounded its necessarily
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Under development	Under development
	Opportunities	Threats
	Under development	Under development
Integrated local	Strengths	Weaknesses

Deep Sea Shipping		
development	Significant contribution to national GDP Important number of shore based employment Sufficient number of EU seafarers	Limited funding for new services Limited number of Cypriot seafarers Small domestic market
	Opportunities	Threats
	Development of new port infrastructures	----
Public engagement	Strengths	Weaknesses
	Provision of fiscal and economic incentives such as competitive registration costs Stable framework conditions and favouring legislative regime Competitive corporation tax Committed Maritime administration Good cooperation between shipping companies and public administration Environmental protection	Embargo Red tape
	Opportunities	Threats
	Synergies with energy sector	Embargo

Securing fresh water supply (desalination)		
Maritime Research	Strengths	Weaknesses
	Impact assessment studies on the effects of the activity to marine ecosystem ⁶⁷	Non extensive research on the impacts of the activity to the marine environment can undermine the quality of seawaters and affect both securing fresh water supplies and other sectors such as tourism and aquaculture
	Opportunities	Threats
	Research on co-generation of electricity via concentrated Solar Power and Desalinated Sea Water ⁸ Potential research in offshore desalination plants	Limited funding resources Limited research personnel
Development and innovation	Strengths	Weaknesses
	Sufficient infrastructures of high productivity Existence of mobile plants for the satisfy water need in different areas Small scale private desalination units	Control of the quality of water produced in private units Limited research activity from private companies
	Opportunities	Threats
	Participation to European projects for the application of renewable forms of energy ⁹ in the production of electricity and water Research from universities and pilot application of the use alternative forms of energy such as solar thermal energy for the operation of desalination units ¹⁰ Potential of use natural gas in the operation of plants, especially the ones with proximity to Energy Centre	Environmental impacts from the operation of desalination units High mitigating cost
Access to finance	Strengths	Weaknesses
	BOT method	----
	Opportunities	Threats
	----	----
Smart infrastructure	Strengths	Weaknesses
	Existence of infrastructures which can be supportive	High costs of infrastructures
	Opportunities	Threats
	----	High energy consumption
Maritime clusters	Strengths	Weaknesses
	----	No specialized cluster
	Opportunities	Threats
	----	----
Education, training and skills	Strengths	Weaknesses
	Polytechnic departments Universities have departments that can provide the specialized personnel needed	No specialized courses
	Opportunities	Threats
	Creation of state training programs	Lack of specialized personnel can affect the future development of the activity and its green orientation
Maritime spatial planning/Integrated Coastal Zone	Strengths	Weaknesses
	There are specific criteria for the location of plants – environmental impact assessment required. MSP rests however under development	---

⁶ <http://proceedings.spiedigitallibrary.org/proceeding.aspx?articleid=1269898>

⁷ http://www.moa.gov.cy/moa/dfmr/dfmr.nsf/DMLSea_en/DMLSea_en?OpenDocument

⁸ <http://www.cyi.ac.cy/ewrc/ewrc-research-projects/solar-energy-and-desalination.html>

⁹ Solar Thermal Production of Electricity and Water (STEP-EW)

¹⁰ CSP-DSW <http://www.cyi.ac.cy/ewrc/ewrc-research-projects/solar-energy-and-desalination.html>

Securing fresh water supply (desalination)		
Management	Opportunities	Threats
	-----	----
Integrated local development	Strenghts	Weaknesses
	Significant contribution to agriculture and tourism	----
	Opportunities	Threats
	Contribution to the support of new forms of touristic products such as golf tourism	Public awareness due to environmental effects (it is an opportunity to protect the environment)
Public engagement	Strenghts	Weaknesses
	Water development departments Policies and controls of water supplies Quality of water International relations with other countries for collaboration and transfer of know-how International agreements	----
	Opportunities	Threats
	Participation to cross-boarder projects Cooperation with research institutions Use of renewable energy sources in desalination plants	Potential threat due to limited resources for establishing measures for mitigating climate change through the use of new technologies in the field Limited funded for relevant research

Marine aquaculture		
Maritime Research	Strengths	Weaknesses
	Laboratories conduct research on new species cultivation , fish biology, marine ecology, seawater analysis, mooring standards etc Established international research links	Limited funding for research
	Opportunities	Threats
	Pilot applications of research results	Risks of undertaking large scale research
Development and innovation	Strengths	Weaknesses
	Use of open cage cultivation methods Favouring climate conditions Promotion of organic production Export sector	Small size of farms –low production volume and low technological development ¹¹ Distance from main European markets- Higher transport cost of primary inputs
	Opportunities	Threats
	Diversification of production Export orientation to European and marketing potentials in Near East markets Development of fish processing activity Increase of per capita consumption of seafood	Increased competition from other European and non producers
Access to finance	Strengths	Weaknesses
	Government budget for research and training	Limited funding for research
	Opportunities	Threats
	European funding opportunities	----
Smart infrastructure	Strengths	Weaknesses
	Existence of relevant infrastructures to support production and distribution of aquaculture products	Mooring systems ¹²
	Opportunities	Threats
	Planning for the construction of dedicated infrastructures	Limited port and land facilities
Maritime clusters	Strengths	Weaknesses
	----	No connection with maritime cluster
	Opportunities	Threats
	----	Non existence of relevant cluster to promote and enhance local production in wider scale
Education, training and skills	Strengths	Weaknesses
	Existence of high educated and qualified personnel Existence of know-how	---
	Opportunities	Threats
	Existence of centers promoting research and can attract scientific personnel	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Concentration of production units in the South of the island (unofficial mariculture zone) ¹³	MPS Under development Limited sites for new farms establishment
	Opportunities	Threats
	MSP under development will avoid space competition and can improve investment climate Establishment of new farms in deeper waters	Competition with other coastal activities
Integrated local development	Strengths	Weaknesses
	Important number of locals are employed in the sector	Dominance of other economic activities ¹⁴ Lack of local strategies for sustainable development

¹¹ <http://www.aquamedproject.net/files/4613/6506/9021/Cyprus.pdf> (perceived constrains)

¹² <http://www.cut.ac.cy/mem/news/article/?contentId=117533&languageId=2>

¹³ http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/cyprus_01_en.pdf p.3

¹⁴ <http://www.aquamedproject.net/files/4613/6506/9021/Cyprus.pdf>

Marine aquaculture		
		Lack of cooperation among organizations and producers for promotion actions
	Opportunities	Threats
	Increase of the volume of existence farms Development of cluster activities such as fish processing	Public awareness on environmental impacts and alternative uses of coastal areas Increase of marine traffic in Vasiliko will affect the development of the mariculture sites currently licensed ¹⁵ Conflicting use with touristic areas and bathing waters.
Public engagement	Strengths	Weaknesses
	Dedicated department designing relevant policy, sustainable development, protection of marine and aquatic environment ¹⁶ Dialogue between government and professionals and organizations ¹⁷ Environmental controls Ensure quality of production	Licensing procedures and bureaucracy
	Opportunities	Threats
	Operational program of next period (support of SME's, training, promotional activities)	Conflict of coastal uses and potential opposition of local communities

¹⁵ http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/cyprus_01_en.pdf p.3

¹⁶ <ftp://ftp.fao.org/fi/document/aquaculture/ReviewAquacultureDevCyprus.pdf>

¹⁷ <http://www.aquamedproject.net/files/4613/6506/9021/Cyprus.pdf>

Coastal tourism		
Maritime Research	Strenghts	Weaknesses
	Research on coastal and marine tourism (ex. economic, environmental impact etc)	Limited financial resources
	Opportunities	Threats
	----	----
Development and innovation	Strenghts	Weaknesses
	Climate conditions Short distances among major attractions Qualitative services Alteration of tourist profile. Promotion of new touristic products related to the sea and more environmental friendly	Lack of sufficient funding for further improvement of services and development of new forms of products Expensive destination Decrease of the relation of quality/price Low profitability Seasonality
	Opportunities	Threats
	Development of e-marketing for the facilitating penetration to new markets Increase interest from airlines Strategy for the alteration of touristic profile Funds that would encourage innovative products and services	Competition from emergence non EU destinations Dependency from tour operators Lack of funding resources Weakened hospitality image
Access to finance	Strenghts	Weaknesses
	Presence of incentives Funds for the improvement of infrastructures and other kind of interventions	Limited number of beneficiaries from operational programs Limited ability of bank system to finance touristic activities No PPP mechanism
	Opportunities	Threats
	EU funding	Difficulty to attract new investments Difficulties of SME's to access private finance
Smart infrastructure	Strenghts	Weaknesses
	Wide scale infrastructures (accommodation and transport) Provision of e-services , electronic info-kiosks electronic guides	Degradation of built environment in street level Lack of efficient transport connections with the airport
	Opportunities	Threats
	EU funding for the construction of new infrastructures and the improvement of the existed ones Construction of water projects (port, marinas)	Ageing infrastructures
Maritime clusters	Strenghts	Weaknesses
	Strong linkages with major stakeholders of the sector	Need for closer cooperation related to spatial planning and cluster development
	Opportunities	Threats
	Cooperation with maritime cluster	----
Education, training and skills	Strenghts	Weaknesses
	Good standards University departments and vocational d schools provide specialized personnel	Perception of low image of touristic education
	Opportunities	Threats
	Incentives for participation to training activities	----
Maritime spatial planning/Integrated Coastal Zone Management	Strenghts	Weaknesses
	Use Carrying Capacity Assessment to sustain natural resources	Under development
	Opportunities	Threats
	Under development	Coastalization
Integrated local development	Strenghts	Weaknesses
	Existence of relevant legislation applied in local level	Difficulties in the application of relevant regulations

Coastal tourism		
	Tourism board design local development activities and plans	
	Opportunities	Threats
	----	Overconcentration of economic activities in coastal areas ¹⁸ Loss of productive resources Environmental pressures
Public engagement	Strengths	Weaknesses
	Municipality, chamber of commerce and associations participate to the development of policies and strategies Regional Tourism Boards (PPP forms responsible to promote public-private collaboration, regional strategies, development of new products and promotion)	Low priority from co-responsible public services Red tape No national funding opportunities Difficulties of Regional Boards to implement strategies, mostly due to limited funding
	Opportunities	Threats
	Strategy for the promotion of new products and image	Debated in regional level

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[http://www.moa.gov.cy/moa/environment/environment.nsf/460AA5BE3E7C2D7DC225791300371F00/\\$file/13.%20CAMP%20Cyprus%20Final%20Report.pdf](http://www.moa.gov.cy/moa/environment/environment.nsf/460AA5BE3E7C2D7DC225791300371F00/$file/13.%20CAMP%20Cyprus%20Final%20Report.pdf)

Cruise tourism		
Maritime Research	Strengths	Weaknesses
	Presence of research concerning sector's related areas such as ships' technology, environment and economy	Limited resources
	Opportunities	Threats
	EU funding and participation to European research projects Existence of institutes with innovative proposals	----
Development and innovation	Strengths	Weaknesses
	Existence of national companies starting cruise itineraries Proximity to main cruise destinations Many shore attractions	Promotional gap
	Opportunities	Threats
	New port infrastructures Interest from airlines	Unstable political conditions of neighbouring countries
Access to finance	Strengths	Weaknesses
	PPP legislation	Limited financial resources for interventions in city level and support of the regional tourism boards
	Opportunities	Threats
	EU funding	----
Smart infrastructure	Strengths	Weaknesses
	New port infrastructures Extended tourist infrastructures	Ageing accommodation infrastructure
	Opportunities	Threats
	----	Limited funding for renewal of current infrastructures (high cost)
Maritime clusters	Strengths	Weaknesses
	No specialized cluster	No specialized cluster
	Opportunities	Threats
	Relations with maritime cluster for the development of promotional actions	----
Education, training and skills	Strengths	Weaknesses
	Vocational schools and university departments related to tourism studies	No specialized courses
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Planning at central level in consultation with local stakeholders	Under development
	Opportunities	Threats
	Under development	----
Integrated local development	Strengths	Weaknesses
	Promotion of local production to cruise passengers No conflict with other maritime activities Improves the use of port space-	----
	Opportunities	Threats
	Promotion of local production to cruise companies	Potential competition among cruise tourism and conventional tourism Potential environmental pressures to bathing waters
Public engagement	Strengths	Weaknesses
	Development planning	Limited funding resources for proceeding in interventions related to build environment and promotional activities
	Opportunities	Threats
	Support promotional centres EU funding	----

Offshore oil and gas		
Maritime Research	Strenghts	Weaknesses
	Extensive maritime research for the discovery of oil resources and its exploration process	----
	Opportunities	Threats
	Ongoing research for the new resources	----
Development and innovation	Strenghts	Weaknesses
	New investments	----
	Opportunities	Threats
	High interest in licensing rounds Additional growth of local market demand Substitution of imported oil products with produced gas ¹⁹ Export orientation Financing of training programs	Unstable relations with neighbour countries ²⁰
Access to finance	Strenghts	Weaknesses
	PPP	Currently limited national resources
	Opportunities	Threats
	EU participation Collaboration with third countries	High cost of infrastructures
Smart infrastructure	Strenghts	Weaknesses
	Existence of infrastructures which can be supportive to the sector, such as Vasilikos Power Station, Dhekelia and Moni	----
	Opportunities	Threats
	Decision for the establishment of Energy Centre (incl facilities for the import, storage, distribution and export of oil products and liquefied natural gas) Development of gas pipeline links New commercial port at the Vasilikos area	----
Maritime clusters	Strenghts	Weaknesses
	----	No specialized cluster
	Opportunities	Threats
	Collaboration with maritime cluster	----
Education, training and skills	Strenghts	Weaknesses
	Existence of university degree programs Training programs	Limited possibilities for local to be employed to the preliminary phase of exploitation, due to the experience required in the field Need for experience foreign personnel Training programs of limited duration
	Opportunities	Threats
	Enrichment and readjustment of educational programs in post secondary level education, training programs	Delays in adjustment will lead to limited number of benefited local employees
Maritime spatial planning/Integrated Coastal Zone Management	Strenghts	Weaknesses
	Exclusive Economic Zone	Under development
	Opportunities	Threats
	Under development	Conflicts with other established activities and opposition from current producers (ex. Aquaculture)
Integrated local development	Strenghts	Weaknesses
	Developed shipping industry	Competition with currently developed activities such as aquaculture plans already located in the

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<http://oilgas.flemingeurope.com/webdata/2679/The%20Offshore%20Discovery%20in%20the%20Republic%20of%20Cyprus%20%20Monetisation%20Prospects%20and%20Challenges.pdf> p. 12

²⁰ <http://maplecroft.com/about/news/country-reports-july25.html>

Cruise tourism		
		area and tourism
	Opportunities	Threats
	Lower prices of fuel can contribute to the emergence of other economic activities such as chemical industry Development of complementary sectors and supportive sectors (transport, logistics etc)	Environmental pressures which can affect the profitability of other sectors
Public engagement	Strenghts	Weaknesses
	Favouring legislative framework regarding the attraction and establishment of companies Favouring tax system International tax treaties for encouraging investments Controls and monitors stocks and its quality	Relative limited resources regarding institutional capacity, may lead to discouragement of investments (institutional capacity) Ability of various bodies to collaborate and to produce expertise for facilitating the development of the sector
	Opportunities	Threats
	Energy centre EU funding	----

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
Strategic Development Plan 2007-2013 www.planning.gov.cy	National	Planning Bureau	All sectors	Strategic Plan (2007)
National Strategic Plan for Fisheries, 2007-2013 www.planning.gov.cy	National	Department of Fisheries and Marine Research (Ministry of Agriculture, Natural Resources and Environment)	Fisheries Marine Aquatic products Environmental monitoring	Strategy document April (2007)
Tourism Strategy 2011-2015 http://www.visitcyprus.com/media/Downloads/Strategy/Executive_Summary_Tourism_Strategy_2011_2015.pdf	National	Cypriot Tourism Organization	Coastal Tourism Cruise Tourism Environmental protection	Strategy document (2011)
Cyprus River Basin Management Plan http://www.moa.gov.cy/moa/wdd/wdd.nsf/all/1AE1F4E1B33E432CC22578AF002C0E71/\$file/RBMP_EN.pdf?openelement	National	Ministry of Agriculture Natural Resources and Environment Water Development Department	Securing fresh water (desalination) Aquaculture products Environmental monitoring	Management Plan April (2011)
"Strategic Environmental Assessment Concerning Hydrocarbon Activities within the Exclusive Economic Zone" http://www.pwc.com/cy/en/publications/eum/appendixv/strategic_environmental_assessment.pdf	National	Ministry of Commerce, Industry and Tourism of the Republic of Cyprus	Offshore oil and gas	Environmental Report November (2008)
Strategic Environmental Assessment concerning Desalination Plants http://www.moa.gov.cy/moa/environment/environment.nsf/All/5FE9D6F34E2EBF58C2257A320027B903?OpenDocument	National	Ministry of Agriculture, Natural Resources and Environment	Securing fresh water supply	Environmental Report (2010)