

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



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*REPORT 1 - ANNEX 2.1*

COUNTRY FICHE - ANNEX

**ALBANIA**

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## 1. Selection of the most important regions

Albania has not been further split up into regions, so there are no data reported or available at NUTS 2 level.

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

No data available for a comparative analysis of marine and maritime activities.

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

No data available for a comparative analysis of 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	0	0	0	0	0	0	0
	0.2 Water projects	0	0	0	+	+	0	++
1. Maritime transport and shipbuilding	1.1 Deep-sea shipping	0	-	0	0	+	+	+
	1.2 Short-sea shipping (incl. RoRo)	0	-	0	+	+	+	++
	1.3 Passenger ferry services	0	+	+	+	+	+	++++
	1.4 Inland waterway transport	0	-	0	+	+	+	++
2. Food, nutrition, health and eco-system services	2.1 Fishing for human consumption	0	+	+	+	+	0	++++
	2.2 Fishing for animal feeding	0	0	0	0	0	0	0
	2.3 Marine aquaculture	+	+	+	+	+	+	+++++
	2.4 Blue Biotechnology	+	?	0	0	?	+	++
	2.5 Agriculture on saline soils	?	?	?	?	?	?	?
3. Energy and raw materials	3.1 Offshore oil and gas	0	0	+	+	+	-	++
	3.2 Offshore wind	+	0	0	+	-	+	++
	3.3 Ocean renewable energy (wave, tidal, OTEC, thermal, biofuels, etc.)	0	0	0	0	0	0	0
	3.4 Carbon capture and storage	+	-	-	-	-	+	---
	3.5 Aggregates mining (sand, gravel, etc.)	-	-	-	+	+	+	0
	3.6 Marine minerals mining	-	-	-	-	-	-	-----
	3.7 Securing fresh water supply (desalination)	0	0	0	0	0	0	0
4. Leisure, working and living	4.1 Coastal tourism	?	+	+	+	+	+	++++
	4.2 Yachting and marinas	?	?	?	?	?	?	?
	4.3 Cruise tourism	?	?	?	?	?	?	?
	4.4 Working	?	?	?	?	?	?	?
	4.5 Living	?	?	?	?	?	?	?
5. Coastal protection	5.1 Protection against flooding and erosion	?	?	?	?	?	?	?
	5.2 Preventing salt water intrusion	?	?	?	?	?	?	?
	5.3 Protection of habitats	0	0	0	+	+	+	+++
6. Maritime monitoring and surveillance	6.1 Traceability and security of goods supply chains	0	0	0	+	+	+	+++
	6.2 Prevent and protect against illegal movement of people and goods	0	0	0	+	+	+	+++
	6.3 Environmental monitoring	0	0	0	+	+	+	+++

## 5. Growth drivers and barriers to growth

### 5.1 Results of the benchmark analysis

FISHING FOR HUMAN CONSUMPTION <sup>1</sup>	Growth drivers	Barriers to growth
Maritime research	----	----
Development and innovation	----	----
Access to finance	----	----
Smart infrastructure	----	Weak infrastructure.
Maritime clusters	----	----
Education, needs in training and skills	----	----
Maritime spatial planning	----	----
Integrated local development	----	----
Public engagement	----	Weak law enforcement and quasi inexistent support
Other	----	<ul style="list-style-type: none"> <li>- Old fishing fleet.</li> <li>- Processing industry limited</li> <li>- Public support services weak (monitoring, certifying institutions)</li> </ul>

<sup>1</sup> The benchmark instance is “Fishing for human consumption in the Shetland Islands”.

MARINE AQUACULTURE <sup>2</sup>	Growth drivers	Barriers to growth
Maritime research	----	----
Development and innovation	----	Limited/weak research and innovation.
Access to finance	----	No public funding.
Smart infrastructure	----	Weak infrastructure.
Maritime clusters	----	----
Education, needs in training and skills	----	----
Maritime spatial planning	----	----
Integrated local development	----	----
Public engagement	----	Lack of food safety and quality assurance. Weak veterinary and food safety public institutions and services. Legislation gaps. There is a lack or insufficiency of regularly fish stock assessment programmes as a basis for having under control and monitoring the fishing activity through licensing of fishing fleet and fishing technology used to avoid the over exploitation which is besides the enforcement of the existing laws on licensing of fishing activity, fish net eye sizes etc.
Other	----	----

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

COASTAL TOURISM <sup>3</sup>	Growth drivers	Barriers to growth
Maritime research	----	----
Development and innovation	----	----
Access to finance	----	----
Smart infrastructure	----	Weak infrastructures
Maritime clusters	----	----
Education, needs in training and skills	----	In general, poor educated people
Maritime spatial planning	----	----
Integrated local development	----	----
Public engagement	----	Weak infrastructures
Other	<ul style="list-style-type: none"> <li>- Recent promotion of Albanian (coastal) tourism is attracting international tourists.</li> <li>- High diversity of coasts – mountains next to the sea.</li> <li>- Still limited explored seaside – many sea sites are still “virgin”</li> </ul>	----

<sup>3</sup> The benchmark instance is “Coastal Tourism in Sardinia (Italy)”.

PASSENGER FERRY SERVICES <sup>4</sup>	Growth drivers	Barriers to growth
Maritime research	----	----
Development and innovation	----	----
Access to finance	----	----
Smart infrastructure	----	Weakly developed ports capacities and facilities.
Maritime clusters	----	----
Education, needs in training and skills	----	----
Maritime spatial planning	----	----
Integrated local development	----	----
Public engagement	----	No support from the national government.
Other	----	<ul style="list-style-type: none"> <li>- Weak competition.</li> <li>- Limited investments by passenger ferry enterprises.</li> <li>- Lack of services for maintenance.</li> </ul>

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<sup>4</sup> The benchmark instance is "Passenger ferry services in Greece".

## 5.2 SWOT analysis

Fishing for human consumption		
Maritime Research	<b>Strengths</b>	<b>Weaknesses</b>
	----	Limited research by public institutions and no research from private sector
	<b>Opportunities</b>	<b>Threats</b>
	EU funding and cooperation opportunities in the future.	Economic contraction and public fiscal constraints will inhibit support for research
Development and innovation	<b>Strengths</b>	<b>Weaknesses</b>
	----	There are limited research and innovation capacities by both public and private sector.
	<b>Opportunities</b>	<b>Threats</b>
	EU funding and cooperation opportunities in the future.	Economic contraction and public fiscal constraints will inhibit support for research
Access to finance	<b>Strengths</b>	<b>Weaknesses</b>
	Some fishing companies are strengthening their own financial resources.	Lack of credit lines. (Currently, very few banks have provided loans to fishing entities). Lack of financial support public policies from the government.
	<b>Opportunities</b>	<b>Threats</b>
	----	Financial sector contraction could further inhibit access to finance.
Smart infrastructure	<b>Strengths</b>	<b>Weaknesses</b>
	Recent investments in improving harbours.	Lack of infrastructure to support fishing activity: non efficient ports and lack of landing points, lack of wholesale markets, lack of slipways and areas for maintenance, lack of sale points of ancillary materials (nets, lines, and other equipment). Not very developed structure for trading in international markets
	<b>Opportunities</b>	<b>Threats</b>
	----	Economic contraction and public fiscal constraints will inhibit support for research
Maritime clusters	<b>Strengths</b>	<b>Weaknesses</b>
	----	----
	<b>Opportunities</b>	<b>Threats</b>
	----	----
Education, training and skills	<b>Strengths</b>	<b>Weaknesses</b>
	There is a department at the Agriculture University of Tirana that provides education on fishing with good tradition.	Weak vocational education. Few young specialists/experts
	<b>Opportunities</b>	<b>Threats</b>
	----	Generation gaps among experts (lack/few young experts as shown above) may result in vacuum/lack of specialists/experts in 1-2 decades from now.
Maritime spatial planning/Integrated Coastal Zone Management	<b>Strengths</b>	<b>Weaknesses</b>
	----	There is no Integrated Coastal Management System as required to enable development of the whole sector and each of the subsectors.
	<b>Opportunities</b>	<b>Threats</b>
	Strong commitment by the new government to address the issue.	----
Integrated local development	<b>Strengths</b>	<b>Weaknesses</b>
	----	No explicit introduction of fisheries in plans of integrated local development
	<b>Opportunities</b>	<b>Threats</b>
	----	----
Public engagement	<b>Strengths</b>	<b>Weaknesses</b>
	----	Lack of public support policies Quasi inexistent support from the state in terms of finance or services. Lack of research infrastructure / institute Weak legal frame and not yet EU compliant Weak law enforcement. An example: Abusive fishing – in the past and to some extend still now, dynamites are used for fishing.
	<b>Opportunities</b>	<b>Threats</b>



Fishing for human consumption		
	Opportunities	Threats
	----	----
	Strengths	Weaknesses
Other	----	<p>The relatively old fishing fleet in terms of structures and technology with still low levels of investment for its modernization. A considerable part of the fleet does not have the necessary capacities for the use of over 12 miles water and therefore fishing effort is concentrated in the coastal areas. Such fishing causes catching a large number of juveniles, with negative ecological consequences.</p> <p>Limited capacities of support industries as fish processing industry with and not allowing the diversification of fishing methods and processing of the pelagic fishes etc.</p>
	Opportunities	Threats
	<p>Growing demand for fish products in the domestic market.</p> <p>Growing tourism in coastal areas (triggers growing demand).</p>	----

Marine aquaculture		
Maritime Research	<b>Strengths</b>	<b>Weaknesses</b>
	----	Limited research by public institutions and no research from private sector.
	<b>Opportunities</b>	<b>Threats</b>
----	Economic contraction and public fiscal constraints will inhibit support for research.	
Development and innovation	<b>Strengths</b>	<b>Weaknesses</b>
	----	Lack of introduction of new species (species diversification) and new technologies. Limited research and innovation capacities, quasi nonexistent extension service
	<b>Opportunities</b>	<b>Threats</b>
----	Economic contraction and public fiscal constraints will inhibit support for research.	
Access to finance	<b>Strengths</b>	<b>Weaknesses</b>
	----	Lack of credit lines. (Currently, very few banks have provided loans to fishing entities). Lack of financial support from the government.
	<b>Opportunities</b>	<b>Threats</b>
----	Financial sector contraction could further inhibit access to finance.	
Smart infrastructure	<b>Strengths</b>	<b>Weaknesses</b>
	----	Not very developed structure for trading in international markets.
	<b>Opportunities</b>	<b>Threats</b>
----	Economic contraction and public fiscal constraints will inhibit support for research	
Maritime clusters	<b>Strengths</b>	<b>Weaknesses</b>
	Emerging clusters of aquaculture activities in various parts, especially South-West Coast	----
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Education, training and skills	<b>Strengths</b>	<b>Weaknesses</b>
	There is a department at the Agriculture University of Tirana that provides education on aquaculture .	Weak vocational education. Few young specialists/experts.
	<b>Opportunities</b>	<b>Threats</b>
----	Generation gaps among experts (lack/few young experts as shown above) may result in vacuum/lack of specialists/experts in 1-2 decades from now.	
Maritime spatial planning/Integrated Coastal Zone Management	<b>Strengths</b>	<b>Weaknesses</b>
	----	----
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Integrated local development	<b>Strengths</b>	<b>Weaknesses</b>
	----	Not part of integrated local planning
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Public engagement	<b>Strengths</b>	<b>Weaknesses</b>
	----	Lack of specific legal bases for Aquaculture. Lack of food safety and quality assurance. Safety problems (eg. mussels banned from exports to EU due to safety problems). Lack of quality assurance systems as HACCP in processing industry. Weak authorities' ability to control the production and its environmental impact.
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Other	<b>Strengths</b>	<b>Weaknesses</b>
	Albania is rich in water resources; extensive coastline; favourable climacteric conditions; proximity to EU markets.	Lack of big market centres for developing marketing tools such as branding or labelling of aquaculture products .
	<b>Opportunities</b>	<b>Threats</b>
Growing demand for fish products in the domestic market; growing tourism in coastal areas (triggers growing demand).	----	

Coastal tourism		
Maritime Research	<b>Strengths</b>	<b>Weaknesses</b>
	----	Limited research
	<b>Opportunities</b>	<b>Threats</b>
----	----	----
Development and innovation	<b>Strengths</b>	<b>Weaknesses</b>
	----	Poor innovation development.
	<b>Opportunities</b>	<b>Threats</b>
----	----	----
Access to finance	<b>Strengths</b>	<b>Weaknesses</b>
	----	Lack of financial support from the government. High interest rate of bank loans.
	<b>Opportunities</b>	<b>Threats</b>
----	Financial sector contraction could further inhibit access to finance.	----
Smart infrastructure	<b>Strengths</b>	<b>Weaknesses</b>
	Improving travel infrastructure, especially roads.	Weakly developed ferry travel within Albania (so far ferry travel mainly connects Albania to other countries). Sea Ports infrastructure not developed enough. Problems with water supply and sewerage infrastructure.
	<b>Opportunities</b>	<b>Threats</b>
Economic contraction and public fiscal constraints will inhibit further infrastructure development.	----	----
Maritime clusters	<b>Strengths</b>	<b>Weaknesses</b>
	Establishment of coastal tourism clusters with full range of services available.	----
	<b>Opportunities</b>	<b>Threats</b>
----	----	----
Education, training and skills	<b>Strengths</b>	<b>Weaknesses</b>
	There are several Universities and there is one vocational school that provide education on tourism.	Quality of education is not up to the standards.
	<b>Opportunities</b>	<b>Threats</b>
----	----	----
Maritime spatial planning/Integrated Coastal Zone Management	<b>Strengths</b>	<b>Weaknesses</b>
	----	There is no Integrated Coastal Management System
	<b>Opportunities</b>	<b>Threats</b>
Strong commitment by the new government to improve maritime spatial planning.	----	----
Integrated local development	<b>Strengths</b>	<b>Weaknesses</b>
	----	Not part of integrated local planning. Weak urban planning. Illegal constructions without standards – some seaside areas are practically destroyed.
	<b>Opportunities</b>	<b>Threats</b>
Strong commitment by the new government to ensure integrated local development.	----	----
Public engagement	<b>Strengths</b>	<b>Weaknesses</b>
	Promotion of tourism recently sponsored by the Albanian government.	Port safety and sailing safety not up to the international standards. Weak law enforcements towards environmental aspects (in some parts, untreated sewerage water is directly poured into the sea) and illegal construction.
	<b>Opportunities</b>	<b>Threats</b>
----	----	----
Other	<b>Strengths</b>	<b>Weaknesses</b>
	Favorable geographic position and climatic conditions. Growing domestic demand for tourism services. Wider international recognition for Albanian coastal tourism	----
	<b>Opportunities</b>	<b>Threats</b>
Recent promotion of Albanian (coastal) tourism is attracting international tourists. High diversity of coasts – mountains next to the sea. Still limited explored seaside – many sea sites are still “virgin”	----	----

Passenger ferry services		
Maritime Research	<b>Strengths</b>	<b>Weaknesses</b>
	----	Weakly developed.
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Development and innovation	<b>Strengths</b>	<b>Weaknesses</b>
	----	Practically inexistent.
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Access to finance	<b>Strengths</b>	<b>Weaknesses</b>
	----	Difficult access to finance.
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Smart infrastructure	<b>Strengths</b>	<b>Weaknesses</b>
	Port of Durres (main port) has been modernized.	Weakly developed ports capacities and facilities
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Maritime clusters	<b>Strengths</b>	<b>Weaknesses</b>
	Increasing number of operators.	No real maritime clusters exist. Coordination and complementarity between the four Albanian ports should be realised.
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Education, training and skills	<b>Strengths</b>	<b>Weaknesses</b>
	----	No specialized education on field.
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Maritime spatial planning/Integrated Coastal Zone Management	<b>Strengths</b>	<b>Weaknesses</b>
	----	Coordination and complementarity between the four Albanian ports is weak.
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Integrated local development	<b>Strengths</b>	<b>Weaknesses</b>
	----	----
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Public engagement	<b>Strengths</b>	<b>Weaknesses</b>
	----	No support from the national government.
	<b>Opportunities</b>	<b>Threats</b>
----	----	
Other	<b>Strengths</b>	<b>Weaknesses</b>
	Increasing number of operators.	Weak competition. Limited investments by passenger ferry enterprises. Lack of services for maintenance.
	<b>Opportunities</b>	<b>Threats</b>
Increasing demand for passenger ferry services, also triggered by growing tourism.	----	

## 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
Sectorial Strategic Document of Transportation for 2013 – 2020	National	Ministry of Public Works and Transport of Albania	Integration of different kinds of transportation; modernization of ports; increasing security of life in sea and protection of maritime environment	National Strategy, draft (still to be approved)
Sectorial Strategic Document of Tourism for 2013 – 2020	National	Ministry of Tourism, Culture, Youth and Sports	Increasing promotion and marketing of tourism image; diversifying the touristic products	National Strategy, draft (still to be approved)
Intersectorial Strategy on Agriculture and Rural Development 2013 - 2020	National	Ministry of Agriculture, Food and Consumer Protection	2 support measures related to fishery and aquaculture: processing and marketing of fishery products and farm diversification (aquaculture)	National Strategy, draft (still to be approved)
Strategy of Fisheries and Aquaculture Development 2007 - 2015	National	Ministry of Environment, Forestry and Water Management	Development of aquaculture, fisheries, fish processing industry and marketing infrastructures.	National Strategy, developed in 2007