

STATE OF PLAY AND PRELIMINARY RESULTS of the study on “Blue Growth and sea-basin cooperation”

- Adriatic and Ionian seas
- Black sea
- Mediterranean sea



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EUNETMAR
European Networking Group
for Integrated Maritime Policy



Presentation structure

- ➔ OBJECTIVES , BACKGROUND AND STATE OF PLAY OF THE STUDY

- ➔ PHASE 1
 - Methodological solutions
 - Preliminary results by Country
 - Preliminary results by Sea basin

- ➔ PHASE 2
 - Specific objectives and methodological approach by Sea basin



Objectives of the Study

1. Identification of **Blue Growth needs and potential** in the Black sea and Mediterranean countries for the most promising maritime activities and **policy suggestions for sea-basin cooperation**
2. Supporting the identification of **possible elements for maritime cooperation** in the Mediterranean sea basin, as well as the feasibility and geographical coverage of sub-regional strategies

Further to a study on the marine and maritime activities (MEAs) of Blue Growth (adopting the “value-chain approach”), a number of follow-up studies has been requested by the European Commission with the specific objective of identifying blue growth needs in each of the 5 “EU sea basins” in a homogeneous manner .



Background

The “value-chain approach” makes it possible to put a “core activity” into the context of an array of upstream and downstream activities correlated to it.

For instance, “short-sea shipping” also includes all incidental services linked to it (cargo handling, intermediaries activities, warehousing and storage, etc.).

Despite some limitations, the adoption of the value chain approach enabled us to reach a result as close to reality as possible. **The resulting information is presented homogeneously in a set of Country Fiches within each study**

Ongoing studies focus on :

- **Atlantic and North seas** - *ECORYS consortium*;
- **Baltic sea; Adriatic/Ionian, Mediterranean and Black seas** - *EUNETMAR consortium*



Geographical scope

Adriatic & Ionian Seas

Mediterranean Sea

Black Sea

EU MS	Non-EU MS
Italy	Serbia
Croatia	Bosnia-Herzegovina
Slovenia	Montenegro
Greece	Albania
Italy	
Croatia	
Slovenia	Bosnia-Herzegovina
Greece	Montenegro
Malta	Albania
Cyprus	Turkey
Spain	
France	
Bulgaria	Turkey
Romania	

} State of play and elements of Growth Potential of National maritime economies developed by ECORYS as part of the study on Atlantic Sea.

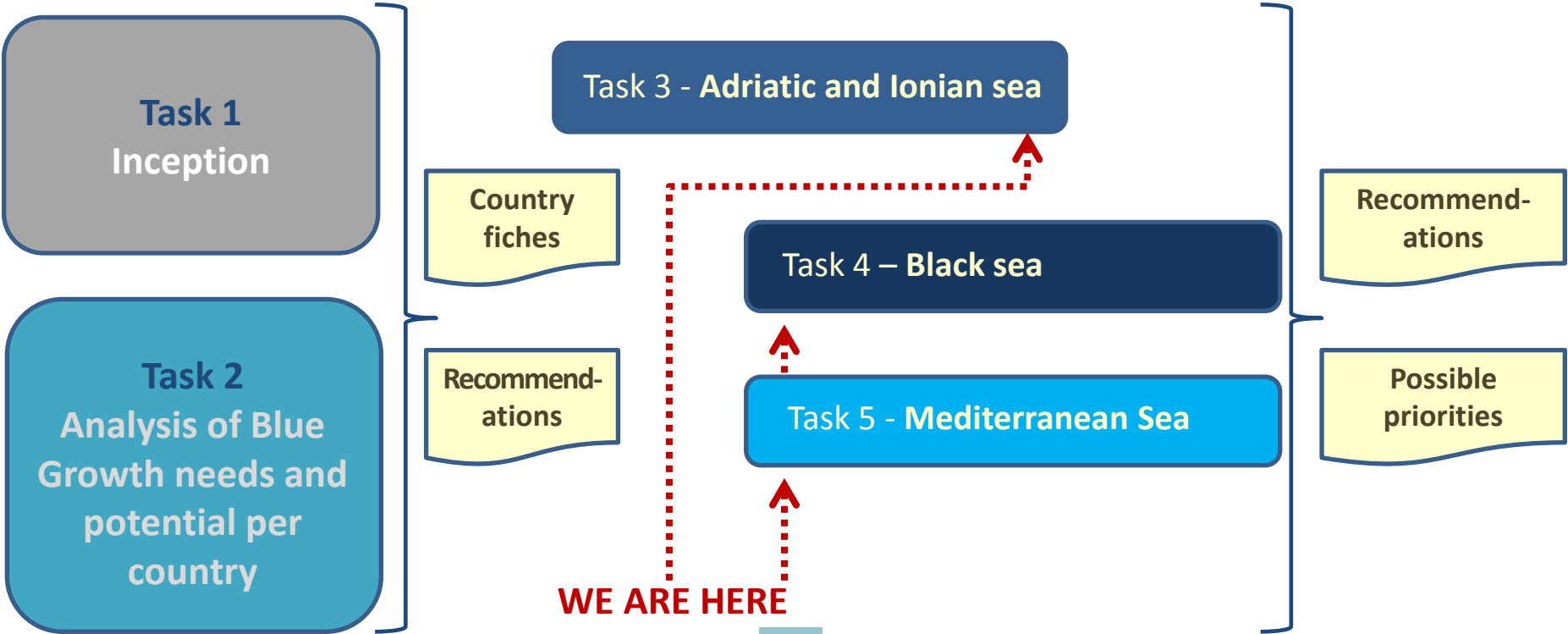


Methodological roadmap

← - - - - - 12 months - - - - - →

Phase 1
Identification and analysis of promising MEAs by Country

Phase 2
Identification of elements for a sea-basin cooperation



Data used

Official sources

- EUROSTAT
- National statistics institutes
- Other EU/national official sources (*DGs/government, special agencies, etc.*)

Other public sources

- Sector associations at EU/transnational level
- Sector associations at national level
- Studies from other public sources

Other sources

- Reports of private actors
- Databases of private actors
- Qualitative information (interviews) to corroborate and complement data

The study seeks as much as possible to use **single sources common to all countries**.

However, there are still great differences between countries when it comes to data availability. It is **very difficult to find homogenous and complete data in non-EU MSs**, also due to different reporting obligations.

METHODOLOGICAL SOLUTIONS STUDY PHASE 1

Objective: Identifying Blue Growth needs and potential in the Mediterranean and Black Sea countries

Activities

1. Finalization of a **thorough breakdown** of these countries' marine and maritime sectors making up their blue economy and drafting related **scenarios for growth**
2. Elaboration of **Policy Recommendations** in the context of the Europe 2020 Strategy and the **related opportunities for funding over the 2014-2020 period**

Output 1

Country fiches

Output 2

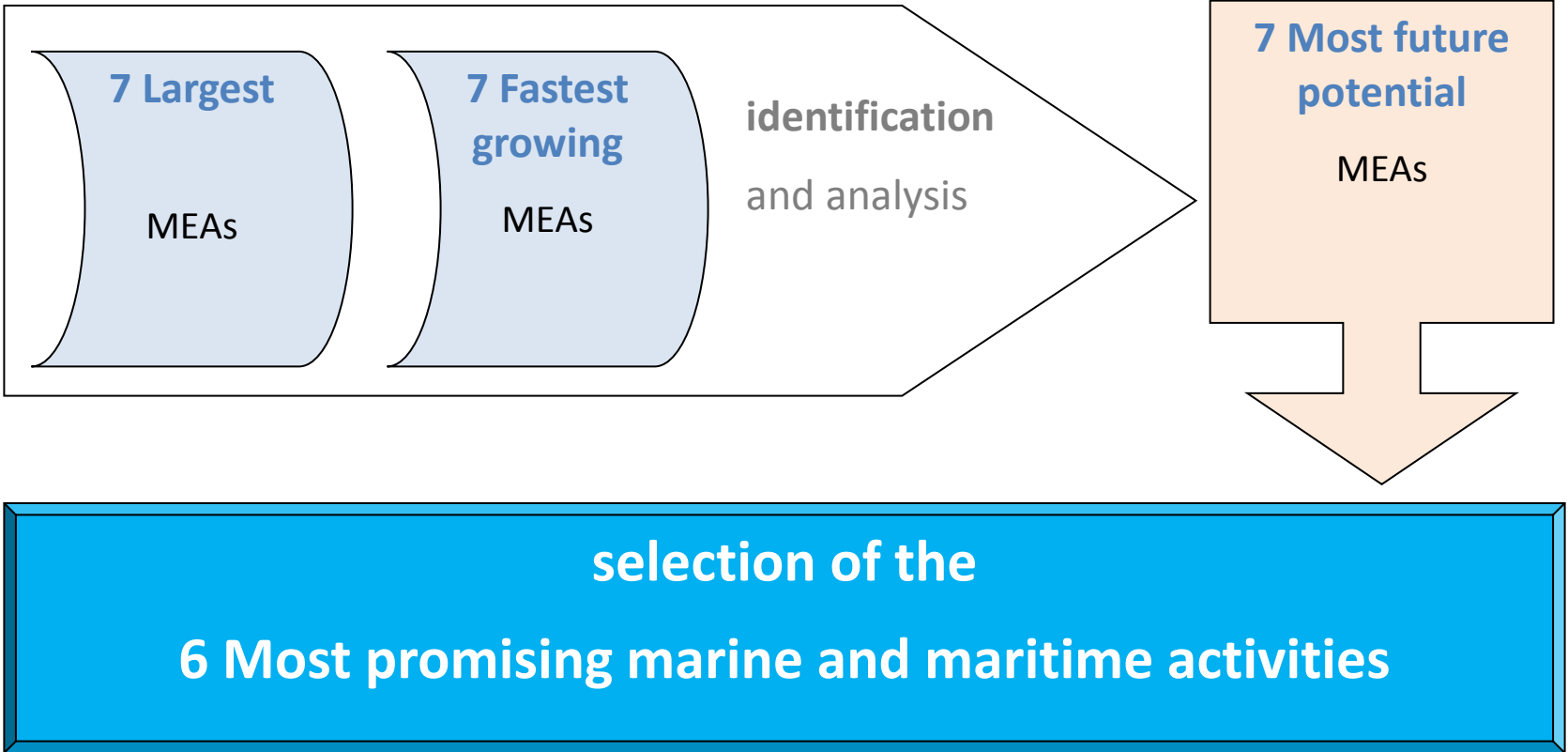
Recommendations

Identification and description of the MEAs by Country as a preliminary step of analysis

This task is based on the “value-chain analysis” as per the methodology developed in 2011 by ECORYS. **This methodology has been reviewed and adapted, jointly with ECORYS and DG MARE, for the purpose of this Study,** especially as regards the geographical scope and objectives, since it was conceived for different purposes. It has been decided to adopt:

- a) Data : Nace 4-digit Rev. 2, 2008
- b) Coastal Regions : NUTS 3 Level

Selection of the 6 Most promising marine and maritime activities by Country as the second step of analysis



Selection of the 6 Most promising marine and maritime activities by Country

Based on EUROSTAT and national data, quantitative data such as gross value added (GVA) and employment have been analysed for 29 activities in each MS.

Subsequently, in each country we have identified and analysed:

- the "**7 largest MEAs**" based on GVA and employment in 2010, since no more recent data were available on EUROSTAT
- the "**7 fastest growing MEAs**" based on compound annual growth rates (CAGR) for GVA and employment over the 3 years 2008-2010.

The "**future potential**" of each MEAs has also been analysed, based on scores given by country experts to a series of qualitative indicators such as innovativeness, competitiveness, employment, policy relevance, spill-over effects and sustainability.

Finally, as regards the **selection of the 6 "most promising" MEAs in each Country**, the first 6 MEAs with "most future potential" have been selected, and, where needed, external factors have also been taken into account to contextualize growth potentials.

Analysis of the 6 most promising MEAs is at present at the final stage of discussion

Description of the **value chain and economic/infrastructural scenario** of each activity

Growth drivers and barriers to growth, through a benchmark and a SWOT analysis

Analysis of maritime strategies at regional and national level and their links with Blue Growth Objectives and Smart Specialisation strategies



Country Fiches



Recommendations background

Structure and contents of Country Fiches

In order to map the role of each activity in each Country, **two indicators have been used**:

- **Gross value added at factor costs (GVA)** provides an indication of the economic impact of each activity in a given Country
- **Number of persons employed (EMP)** is a key indicator representing the social impact of maritime activities in each country.

This coherent methodology and exact definitions make it possible to directly compare MS and/or sea basins.

Heterogeneous and complex structures of MEAs within the respective value chains and the mutual interdependence between them determined the need for a specific study and joint discussion with DG MARE and ECORYS.

e.g. two different MEAs such as 1.1 Deep-sea shipping and 1.2 Short-sea shipping are both included in NACE code "H 50.20 Sea and coastal freight water transport".

Methodological sheets have been elaborated for determining the **correlation to the related classification systems** for each of the 29 activities selected.

Structure and contents of Country Fiches

- **General overview** of the country socio-economic aspects;
- Overview of the **main socio-economic aspects** related to each of the 29 maritime sub-functions at NUTS 0 level;
- **Breakdown of maritime sub-functions at regional level** (NUTS 2) for a selection of 6 “most important regions” for EU countries;
- List of the **7 largest, 7 fastest growing and 7 most future potential** maritime sub-functions, **in order to identify the 6 most promising MEAs** (*Maritime Economic Activities*);
- Description of **growth scenarios for the 6 most promising MEAs** at NUTS 0 level, including the nature and related value chains, a description and quantitative analysis of the economic performance and infrastructures available, and a description of the Regulatory environment;
- Identification of **growth drivers and barriers** to the 6 most promising MEAs;
- **Analysis of maritime strategies at regional and national level**, and their links with Smart Specialisation Strategies.

Second objective of Phase 1 of the Study

Elaboration of **Policy Recommendations** in the context of the Europe 2020 Strategy and the related opportunities for funding over the 2014-2020 period, for each country involved in the Study

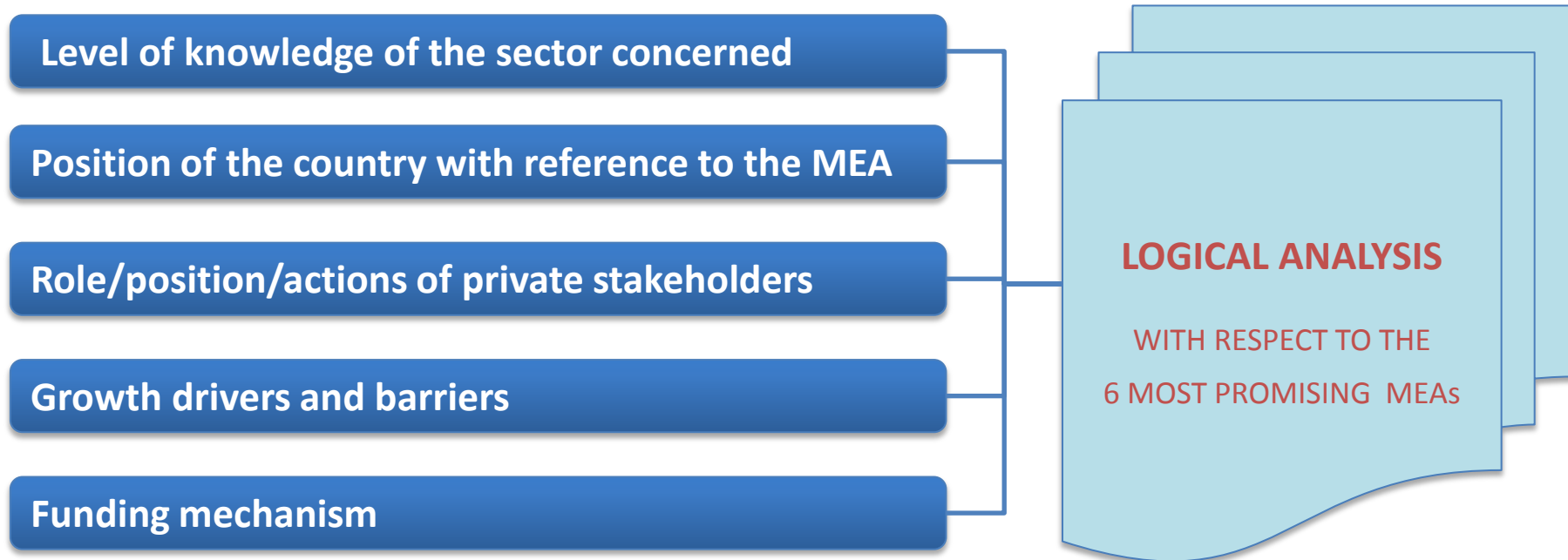
This part of the Study is the core of **Report 1**

Information and results achieved with the Country Fiches have made it possible to develop this section of the Study

This section of the Study is still ongoing

Policies assessment as a preliminary step towards the elaboration of Policy Recommendations

all policies with a maritime dimension at
EU – cross-border – national – regional levels



Identification of recommendations to fulfil the sustainable growth potentials of each country's blue economy

LOGICAL ANALYSIS

with respect to the Europe 2020 Strategy

Conclusions and outputs of previous analysis
on Blue Growth potential of national maritime
economies

Conclusions from the assessment of policies
perceived to favour/limit sustainable growth in
the marine and maritime sectors



**Policy
Recommendations**

Policy Recommendations

Concrete and useful suggestions to :

1. capitalize the new elements of knowledge available concerning Blue Growth opportunities
2. select MEAs considered strategic in order to be reinforced
3. tackle barriers to growth at national level
4. enhance maritime strategies existing at national and regional level
5. better address future funding frameworks in order to strengthen blue growth
6. identify a monitoring system on the effectiveness of public actions regarding Europe 2020 objectives



PRELIMINARY RESULTS by Country

Country fiches' overall results

The following slides report MEAs by Function, focusing on :

- ✓ **7 largest activities**
- ✓ **7 fastest growing activities**
- ✓ **7 most potential activities**

most promising MEAs at sea-basin level

Please note

the following figures are presently under discussion and review with DG MARE

Figures at national level

7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	6,92	216,57	21,0
	2 Fishing for human consumption	3,72	129,23	5,6
	3 Shipbuilding and ship repair	1,39	24,12	4,3
	4 Water projects	0,94	19,81	0,7
	5 Marine aquatic products	0,13	22,88	-4,1
	6 Short-sea shipping (incl. Ro-Ro)	0,65	9,26	-5,8
	7 Deep-sea shipping	0,62	8,86	-6,4

7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Inland waterway transport	31,79	10,28	21
	2 Short-sea shipping (incl. Ro-Ro)	6,80	4,42	5,6
	3 Fishing for animal feeding	20,24	-11,56	4,3
	4 Deep-sea shipping	1,80	0,48	0,7
	5 Fishing for human consumption	2,03	-10,16	-4,1
	6 Coastal tourism	-7,12	-4,54	-5,8
	7 Shipbuilding and ship repair	-4,33	-8,48	-6,4

7 Most future potential	Maritime activity	Score
	1 Ocean renewable energy	++++
	2 Blue biotechnology	++++
	3 Securing freshwater supply	++++
	4 Cruise tourism	++++
	5 Deep-sea and Short-sea shipping	++++
	6 Marine aquaculture	++++
	7 Offshore oil and gas	++++



6 most relevant and promising Maritime Activities	Estimated breakdown between sea-basins	
	Med	Atl
Ocean renewable Energy	16%	84%
Blue biotechnology	breakdown N/A	
Securing freshwater supply	74%	26%
Cruise tourism	57%	43%
Deep-sea shipping	72%	28%
Short-sea shipping	72%	28%

Figures at national level

7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	3,40	65,57	49,8
	2 Fishing for human consumption	2,76	56,16	41,9
	3 Short-sea shipping (incl. Ro-Ro)	3,05	30,57	30,5
	4 Yachting and marinas	0,82	33,18	20,7
	5 Shipbuilding and ship repair	1,47	26,63	20,7
	6 Deep-sea shipping	1,46	14,64	14,6
	7 Passenger ferry services	0,98	13,93	11,9

7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Cruise tourism	25,10	10,90	25,1
	2 Shipbuilding and ship repair	10,70	-2,00	10,7
	3 Aggregates mining (sand, gravel, etc.)	7,40	n/a	7,4
	4 Fishing for human consumption	2,30	1,70	2,3
	5 Fishing for human consumption	2,30	1,70	2,3
	6 Marine aquaculture	0,80	n/a	0,8
	7 Passenger ferry services	0,40	-1,00	0,4

7 Most future potential	Maritime economic activity	Score
	1 Ocean renewable energy	+++++
	2 Offshore wind	++++
	3 Yachting and marinas	++++
	4 Blue Biotechnology	++++
	5 Maritime surveillance of goods and	++++
	6 Shipbuilding and ship repair	++++
	7 Marine minerals mining	++++



6 most relevant and promising Maritime Activities	Estimated breakdown between sea-basins	
	Med	Atl & North
Ocean renewable energy		100%
Offshore wind		100%
Yachting and marinas	42%	58%
Blue biotechnology	breakdown N/A	
Maritime surveillance	breakdown N/A	
Shipbuilding and ship repair	16%	84%

Country Fiches:

ITALY



7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	5,34	166,00	109,7
	2 Fishing for human consumption	3,51	111,90	73,5
	3 Short-sea shipping (incl. Ro-Ro)	3,05	40,90	35,7
	4 Cruise tourism	1,80	36,15	27,1
	5 Shipbuilding and ship repair	1,45	38,40	26,5
	6 Passenger ferry services	1,49	29,90	22,4
	7 Deep-sea shipping	0,91	12,20	10,7

7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Securing fresh water supply (desalination)	252,07	205,69	228,9
	2 Short-sea shipping (incl. Ro-Ro)	18,58	-0,95	8,8
	3 Cruise tourism	17,08	-1,40	7,8
	4 Deep-sea shipping	12,89	-5,99	3,5
	5 Fishing for human consumption	7,04	3,74	5,4
	6 Maritime monitoring and surveillance	4,97	-1,83	1,6
	7 Inland waterway transport	7,37	-4,56	1,4

7 Most future potential	Maritime activity	Score
	1 Short-sea shipping (incl. Ro-Ro)	++++
	2 Passenger ferry services	++++
	3 Marine aquaculture	++++
	4 Protection of habitats	++++
	5 Coastal tourism	++++
	6 Cruise tourism	++++
	7 Protection against flooding and erosion	+++



6 most relevant and promising maritime economic activities

Short-sea shipping (incl. Ro-Ro)

Passenger ferry services

Marine aquaculture

Protection of habitats

Coastal tourism

Cruise tourism

Country Fiches: SLOVENIA



7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	0,05	1,97	1,2
	2 Water projects	0,03	0,98	0,6
	3 Fishing for human consumption	0,02	0,70	0,5
	4 Short-sea shipping (incl. Ro-Ro)	0,02	0,40	0,3
	5 Deep-sea shipping	0,02	0,35	0,3
	6 Cruise tourism	0,00	0,18	0,1
	7 Shipbuilding and ship repair	0,00	0,17	0,1

7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Short-sea shipping (incl. Ro-Ro)	26,31	-1,39	12,5
	2 Cruise tourism	17,08	-1,40	7,8
	3 Deep-sea shipping	16,39	-2,26	7,1
	4 Protection of habitats	9,70	9,70	9,7
	5 Coastal tourism	-8,26	3,41	-2,4
	6 Fishing for human consumption	-11,81	4,07	-3,9
	7 Water projects	-16,43	-7,14	-11,8

7 Most future potential	Maritime activity	Score
	1 Blue biotechnology	++++
	2 Short-sea shipping (incl. Ro-Ro)	++++
	3 Coastal tourism	++++
	4 Deep-sea shipping	+++
	5 Cruise tourism	++
	6 Protection against flood and erosion	++
	7 Protection of habitats	++



5 most relevant and promising maritime activities

- Blue biotechnology**
- Short-sea shipping (incl. Ro-Ro)**
- Coastal tourism**
- Deep-sea shipping**
- Cruise tourism**

7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	0,64	30,59	18,5
	2 Shipbuilding and ship repair	0,27	15,57	9,1
	3 Fishing for human consumption	0,06	6,37	3,5
	4 Short-sea shipping (incl. Ro-Ro)	0,16	3,27	2,4
	5 Water projects	0,06	3,36	2,0
	6 Passenger ferry services	0,06	2,65	1,6
	7 Cruise tourism	0,06	2,65	1,6

7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Marine aquaculture	21,80	21,80	119,7
	2 Passenger ferry services	16,60	27,60	96,6
	3 Cruise tourism	12,60	23,30	74,8
	4 Coastal tourism	0,10	-5,90	-2,5
	5 Fishing for human consumption	-1,30	-1,70	-7,2
	6 Shipbuilding and ship repair	-2,70	-6,20	-16,5
	7 Fishing for animal feeding	-5,00	-8,60	-29,1

7 Most future potential	Maritime activity	Score
	1 Coastal tourism	++++
	2 Cruise tourism	++++
	3 Passenger ferry services	++
	4 Short-sea shipping (incl. Ro-Ro)	++
	5 Yachting and marinas	++
	6 Marine aquaculture	0
	7 Shipbuilding and ship repair	0



6 most relevant and promising Maritime Activities

Coastal tourism

Cruise tourism

Passenger ferry services

Short-sea shipping (incl. Ro-Ro)

Yachting and marinas

Marine aquaculture

Country Fiches: BOSNIA and HERZEGOVINA



N.B.: Bosnia's GVA is expressed in million EUR.

3 Largest activities	Maritime activity		GVA (eur million)	Empl. (*1000)	Score
	1	Coastal tourism	9,00	1,30	0,7
	2	Marine aquaculture	0,04	0,004	0,0
	3	Fishing for human consumption	0,005	0,004	0,0

3 Fastest growing	Maritime activity		GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1	Coastal tourism	0,72	0,72	0,72
	2	Marine aquaculture	0,20	0,20	0,20
	3	Fishing for human consumption	0,00	0,00	0,00

2 Most future potential	Maritime activity		Score
	1	Coastal tourism	0
	2	Marine aquaculture	--



**2 most Relevant and Promising
Maritime Activities**

Coastal tourism

Marine aquaculture

Country Fiches: MONTENEGRO



6 Largest activities	Maritime activity	Number of enterprise	GVA	Score
	1 Coastal tourism	696	2,47	16,67 (hotels and restaurants in general)
	2 Passenger ferry services	109	n.a.	n.a.
	3 Shipbuilding and ship repair	192	n.a.	n.a.
	4 Fishing for human consumption	54	n.a.	n.a.
	5 Water projects	37	n.a.	n.a.
	6 Short-sea shipping (incl. Ro-Ro)	2	n.a.	n.a.

7 Fastest Growing	Maritime activity	Source & Reference year	Score
	1 Cruise tourism	Estimation based on cruise passengers; MONSTAT (2011)	30,4
	2 Yachting and marinas	Estimation based on marina arrivals; MONSTAT (2012)	6,1
	3 Coastal tourism	Estimation based on tourist arrivals; MONSTAT (2010)	3,1
	4 Marine aquaculture	Estimation based on production ; MONSTAT (2012)	0,0
	5 Short-sea shipping (incl. Ro-Ro)	Estimation based on transported goods ; MONSTAT, (2012)	-6,1
	6 Passenger ferry services	Estimation based on n.of passengers;MONSTAT,(2010)	-12,0
	7 Fishing for human consumption	Estimation based on landings ; MONSTAT (2011)	-3,3

7 Most future potential	Maritime activity	Score
	1 Coastal tourism	++++
	2 Water projects	++++
	3 Passenger ferry services	++
	4 Yachting and marinas	++
	5 Marine aquaculture	++
	6 Shipbuilding and ship repair	0
	7 Short-sea shipping (incl. RoRo)	0



6 most relevant and promising Maritime Activities

- Coastal tourism**
- Yachting and marinas (including water projects)**
- Passenger ferry services**
- Marine aquaculture**
- Shipbuilding and ship repair**
- Short-sea shipping (incl. RoRo)**

Albania

4 Most future potential	Maritime activity	Score
	1 Marine aquaculture	+++++
	2 Coastal Tourism	++++
	3 Passenger services	++++
	4 Fishing for human consumption	++++

4 Most relevant and promising Maritime Activities

Maritime aquaculture

Coastal tourism

Passenger ferry services

Fishing for human consumption

7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	6,80	82,70	75,3
	2 Short Sea Shipping	3,60	17,50	26,9
	3 Fishing for human consumption	0,85	30,10	19,3
	4 Deep Sea Shipping	0,44	24,30	14,3
	5 Passenger ferry services	1,69	9,10	12,6
	6 Cruise tourism	1,60	6,50	11,2
	7 Yachting and marinas	0,21	8,90	4,8

7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Water projects	35,10	-4,10	15,5
	2 Cruise Tourism	-11,80	25,95	7,0
	3 Coastal Tourism	7,40	-0,89	3,2
	4 Marine aquaculture	12,30	-8,01	2,2
	5 Fishing for human consumption	0,68	1,53	1,1
	6 Yachting and marinas	-2,90	-1,60	-2,2
	7 Deep Sea Shipping	-14,70	-3,93	-7,4

7 Most future potential	Maritime activity	Score
	1 Marine aquaculture	+++++
	2 Deep Sea Shipping	++++
	3 Cruise Tourism	++++
	4 Coastal Tourism	++++
	5 Short Sea Shipping	++++
	6 Yachting and marinas	++++
	7 Offshore Wind	++++



6 Most relevant and Promising Maritime Activities

Marine Aquaculture

Deep Sea Shipping

Cruise Tourism

Coastal Tourism

Short Sea Shipping

Yachting & marinas

Country Fiches: MALTA



7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	0,27	14,03	8,4
	2 Passenger ferry services	0,15	3,52	2,5
	3 Shipbuilding and ship repair	0,08	1,32	1,1
	4 Traceability & security of good supply chains	0,01	1,76	0,9
	5 Securing fresh water supply	0,01	0,90	0,7
	6 Short-sea shipping (incl. Ro-Ro)	0,04	0,49	0,4
	7 Fishing for human consumption	0,01	0,77	0,4

7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Marine aquaculture	360,86	-7,23	179,8
	2 Protection: flooding and erosion	216,86	32,29	124,6
	3 Short-sea shipping (incl. Ro-Ro)	6,69	2,09	4,4
	4 Shipbuilding and ship repair	0,00	0,00	0,0
	5 Protection of habitat	0,00	0,00	0,0
	6 Environmental monitoring	0,00	0,00	0,0
	7 Fishing for human consumption	-5,33	5,10	-0,1

7 Most future potential	Maritime activity	Score
	1 Marine aquaculture	++++
	2 Bluebiotechnology	++++
	3 Construction of water projects	++++
	4 Fishing for human consumption	++++
	5 Offshore wind	++++
	6 Ocean renewable energy	++++
	7 Coastal Tourism	+++

4 most relevant and promising maritime activities

- Marine Aquaculture*
- Offshore wind*
- Coastal tourism*
- Maritime surveillance*

Country Fiches: CYPRUS



7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	0,46	16,87	10,8
	2 Deep Sea Shipping	0,18	3,25	3,0
	3 Short Sea Shipping	0,11	2,00	1,6
	4 Fish for human consumption	0,04	2,26	1,3
	5 Cruise Tourism	0,11	0,57	0,9
	6 Water projects	0,01	0,35	0,3
	7 Securing fresh water supply	0,03	0,07	0,2



7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Water projects	69,30	106,50	87,9
	2 Short Sea Shipping	36,40	16,90	26,6
	3 Deep Sea Shipping	26,40	17,40	17,4
	4 Cruise Shipping	25,70	-8,20	8,6
	5 Securing fresh water	6,90	8,60	7,8
	6 Shipbuilding and ship repair	-2,30	5,30	1,5
	7 Fishing for human consumption	-13,10	10,90	-1,1

7 Most future potential	Maritime economic activity	Score
	1 Deep-sea shipping	+++++
	2 Securing fresh water (desalination)	+++++
	3 Marine aquaculture	++++
	4 Coastal tourism	++++
	5 Cruise tourism	++++
	6 Offshore Oil and gas	+++
	7 Environmental monitoring	+++

6 most relevant and promising Maritime Activities

- Deep sea shipping
- Securing fresh water supply
- Marine aquaculture
- Coastal tourism
- Cruise tourism
- Offshore oil and gas

Figures at national level

7 Largest activities	Maritime activity	GVA (eur billion)	Empl. (*1000)	Score
	1 Coastal tourism	1,60	125,18	70,6
	2 Fishing for human consumption	0,59	37,75	21,8
	3 Shipbuilding and ship repair	0,49	34,49	19,7
	4 Short-sea shipping (incl. Ro-Ro)	0,58	30,72	18,3
	5 Water projects	0,29	15,53	9,2
	6 Passenger ferry services	0,38	11,21	7,5
	7 Deep-sea shipping	0,17	8,92	5,3

7 Fastest growing	Maritime activity	GVA (CAGR, %)	Empl. (CAGR, %)	Score
	1 Marine aquaculture	11,67	1,70	6,7
	2 Cruise tourism	3,48	3,48	3,5
	3 Water projects	5,28	1,12	3,2
	4 Deep-sea shipping	3,60	-0,16	1,7
	5 Passenger ferry services	0,84	0,00	0,4
	6 Fishing for human consumption	-2,43	0,53	-1,0
	7 Short-sea shipping	-1,37	-1,11	-1,2

7 Most future potential	Maritime activity	Score
	1 Marine aquaculture	++++
	2 Shipbuilding and ship repair	++
	3 Coastal tourism	++
	4 Yachting and marinas	++
	5 Cruise tourism	++
	6 Water projects	++
	7 Offshore oil and gas	0



6 most relevant and promising maritime economic activities	Estimated breakdown between sea-basins	
	Med	Black
Coastal tourism	93%	7%
Marine aquaculture	11%	90%
Shipbuilding and ship repair	76%	24%
Cruise tourism	99%	1%
Short-sea shipping	93%	7%
Yachting and marinas	100%	0%

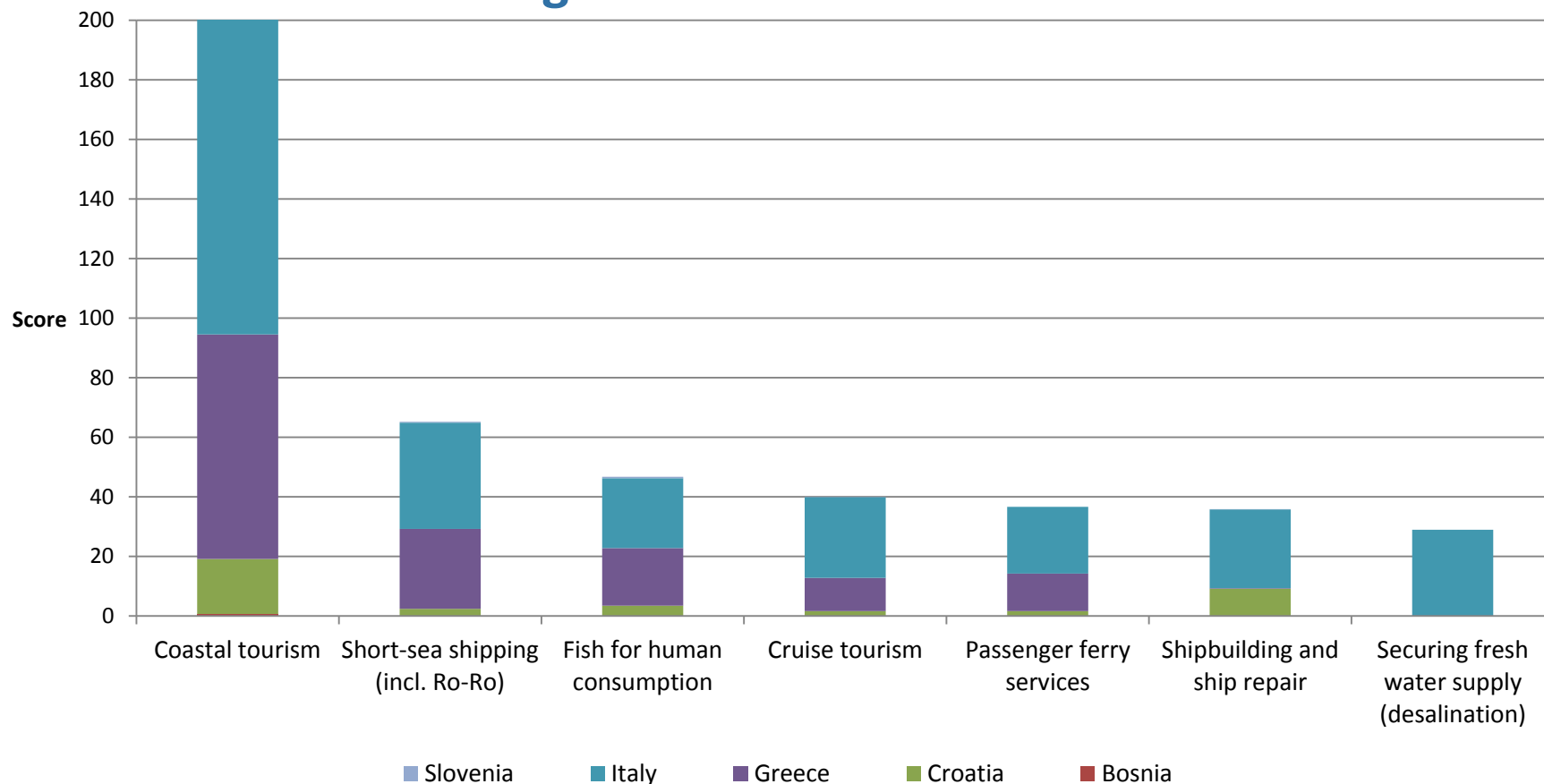
PRELIMINARY RESULTS by sea basin



Function		AL	SI	BA	HR	EL	IT	ME
Activity								
0. Other sectors	Shipbuilding and ship repair		L		L - F - P		L	P
	Water projects		L		L	F		P
1. Maritime transport and shipbuilding	Deep-sea shipping		L - F - P			L - F - P	F	
	Short-sea shipping (incl. RoRo)		L - F - P		P	L - P	L - F - P	F - P
	Passenger ferry services	P			L - F - P	L	L - P	F - P
	Inland waterway transport		L		L		F	
2. Food, nutrition, health and eco-system services	Fishing for human consumption	P	F	F - P	L - F	F	L - F	F
	Fishing for animal feeding				F	P		
	Marine aquaculture	P		L - F - P	F - P	F	P	F - P
	Blue Biotechnology		F - P					
3. Energy and raw materials	Offshore oil and gas							
	Offshore wind					P		
	Securing fresh water supply (desalination)						F	
4. Leisure, working and living	Coastal tourism	P	L - F - P	L - F - P	L - F - P	L - F - P	L - P	L - F - P
	Yachting and marinas				F - P	L - F - P		F - P
	Cruise tourism		F - P		L - P	L - F - P	L - F - P	F
5. Coastal protection	Protection against flooding and erosion		F - P				P	
	Protection of habitats		P				P	
6. Maritime monitoring and surveillance	Traceability and security of goods supply chains							
	Prevent and protect against illegal movement						F	
	Environmental monitoring							



7 Largest MEAs at sea-basin level

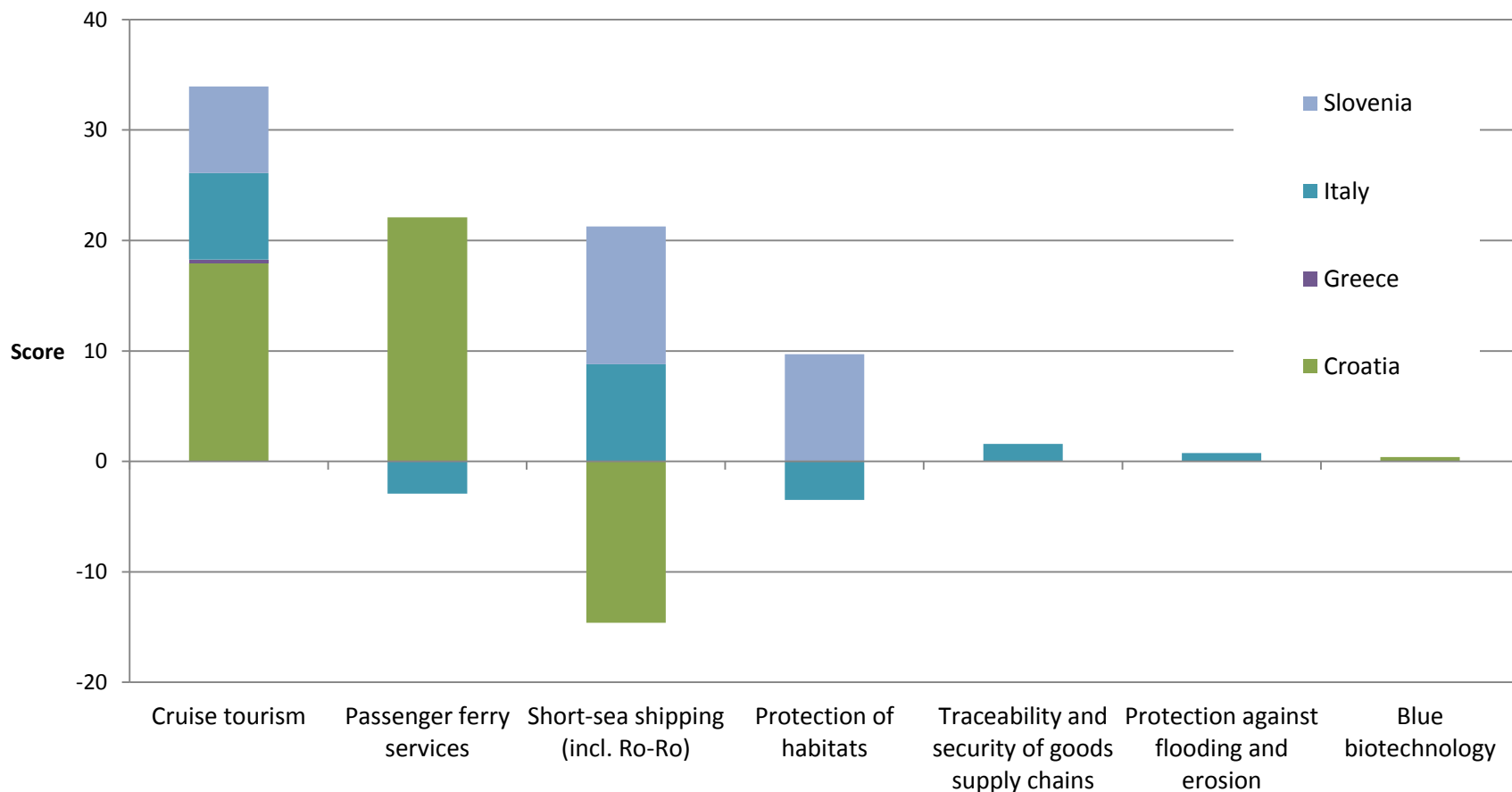


No homogenous data available for Albania, Montenegro, and Bosnia Herzegovina

Greece and Italy are part of 2 sea-basins. However it is not possible to split national data by sea basin. Therefore in this graph we report national data

Score = $[(\text{GVA billion} \times 10) + (\text{number of persons employed} / 1000)] / 2$

7 Fastest MEAs at sea-basin level



No homogenous data available for Albania, Montenegro, and Bosnia Herzegovina

Score = (CAGR GVA + CAGR Empl)/2

Greece and Italy are part of 2 sea-basins. However it is not possible to split national data by sea basin. Therefore in this graph we report national data

6 most promising at sea-basin level

Rank	MEA	Score
1	Coastal tourism	38
2	Marine aquaculture	31
3	Passenger ferry services	17
4	Cruise tourism	15
5	Short-sea shipping (incl. Ro-Ro)	13
6	Shipbuilding and ship repair	12

6 most promising MEAs have been identified in each country, and a score has been assigned based on the rank of a MEA in its country (first ranked: 6 points, last ranked, 1 point).

The ranking at sea-basin level is based on the sum of MEAs' scores in each country.

6 most promising at sea-basin level

Black sea

Rank	MEA	Score
1	Coastal tourism	15
2	Short-sea shipping (incl. Ro-Ro)	10
3	Offshore oil and gas	9
4	Inland waterway transport	8
5	Shipbuilding and ship repair	6
6	Marine aquaculture	5

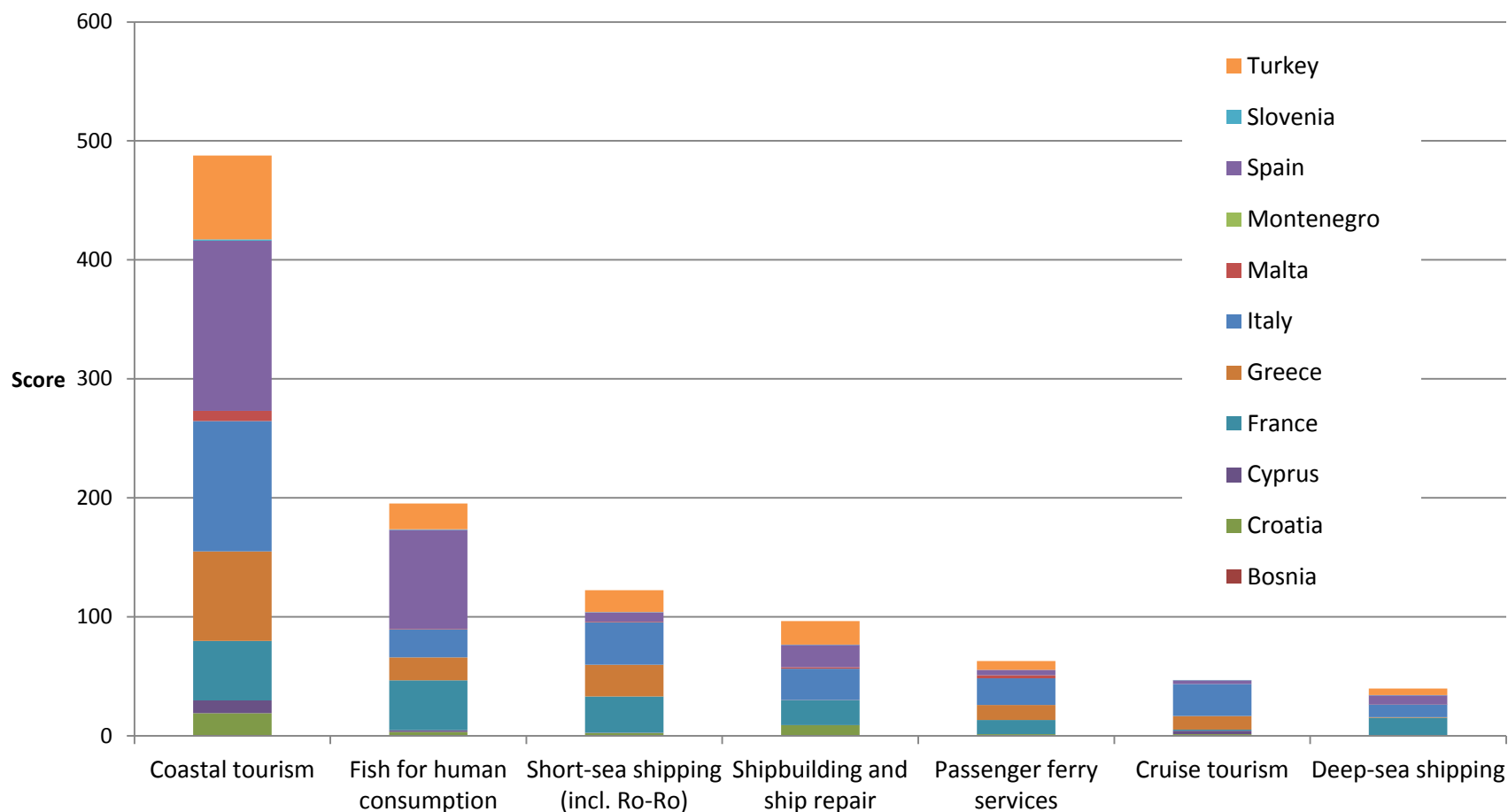
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The ranking at sea-basin level is based on the sum of MEAs' scores in each country.

Activity	AL	SI	BA	HR	CY	EL	IT	MT	ME	TR	FR	ES
Shipbuilding and ship repair		L		L-F-P	F		L	L-F	P	L-P	L-F-P	L-F
Water projects		L		L	L-F	F		P	P	L-F-P		L
Deep-sea shipping		L-F-P			L-F-P	L-F-P	F			L-F	L	L-F-P
Short-sea shipping (incl. RoRo)		L-F-P		P	L-F	L-P	L-F-P	L-F	F-P	L-F	L	L-F-P
Passenger ferry services	P			L-F-P		L	L-P	L	F-P	L-F	L-F	L
Inland waterway transport		L		L			F					F
Fishing for human consumption	P	F	F-P	L-F	L-F	F	L-F	L-F-P	F	L-F	L-F	L-F
Fishing for animal feeding				F		P					F	F
Marine aquaculture	P		L-F-P	F-P	P	F	P	F-P	F-P	P-F	F	P
Blue Biotechnology		F-P						P			P	P
Offshore oil and gas					P					P		P
Offshore wind						P		P			P	
Ocean renewable energy								P			P	P
Aggregates mining											F	
Marine minerals mining											P	
Securing fresh water supply (desalination)					L-F-P		F	L				P
Coastal tourism	P	L-F-P	L-F-P	L-F-P	L-P	L-F-P	L-P	L-P	L-F-P	L-P	L	L-F
Yachting and marinas				F-P	P	L-F-P			F-P	P	L-P	
Cruise tourism		F-P		L-P	L-F	L-F-P	L-F-P		F	P-F	F	F-P
Protection against flooding and erosion		F-P					P	F				
Protection of habitats		P					P	F				
Traceability and security of goods supply chains								L				
Prevent and protect against illegal movement of people and goods							F					
Environmental monitoring								F				

L: largest activities F: fastest growing activities P: most potential activities

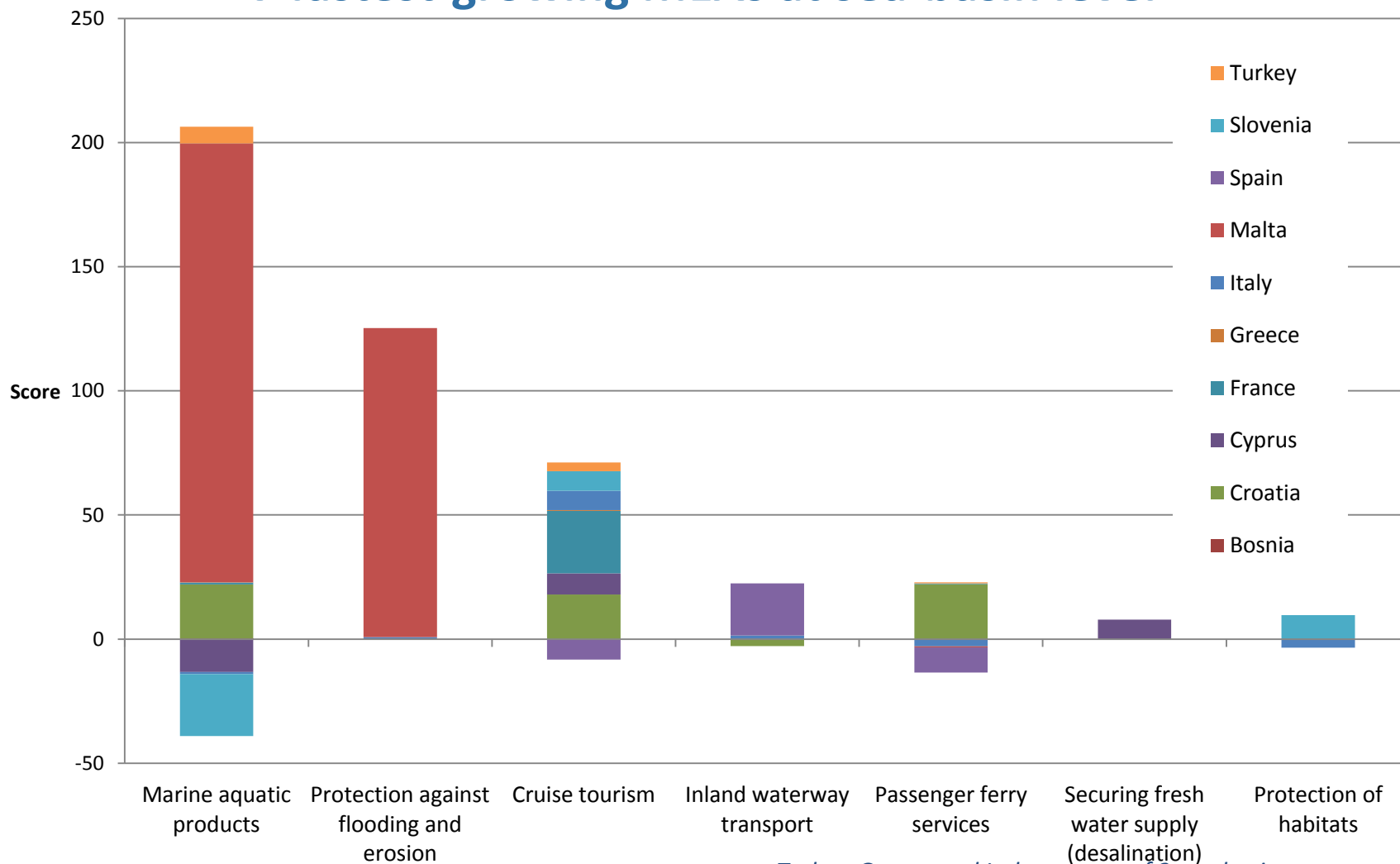
7 largest MEAs at sea-basin level



Score = $[(\text{GVA billion} \times 10) + (\text{number of persons employed} / 1000)] / 2$

Turkey, Greece and Italy are part of 2 sea-basins. However it is not possible to split national data by sea basin Therefore in this graph we report national data

7 fastest-growing MEAs at sea-basin level



Score = (CAGR GVA + CAGR Empl)/2

Turkey, Greece and Italy are part of 2 sea-basins.
 However it is not possible to split national data by sea basin
 Therefore in this graph we report national data

6 most promising at sea-basin level

Rank	MEA	Score
1	Coastal tourism	45
2	Marine aquaculture	41
3	Cruise tourism	20
4	Passenger ferry services	17
5	Deep-sea shipping	16
6	Short-sea shipping (incl. Ro-Ro)/Blue biotechnology	14

6 most promising MEAs have been identified in each country, and a score has been assigned based on the rank of a MEA in its country (first ranked: 6 points, last ranked, 1 point).

The ranking at sea-basin level is based on the sum of MEAs' scores in each country.

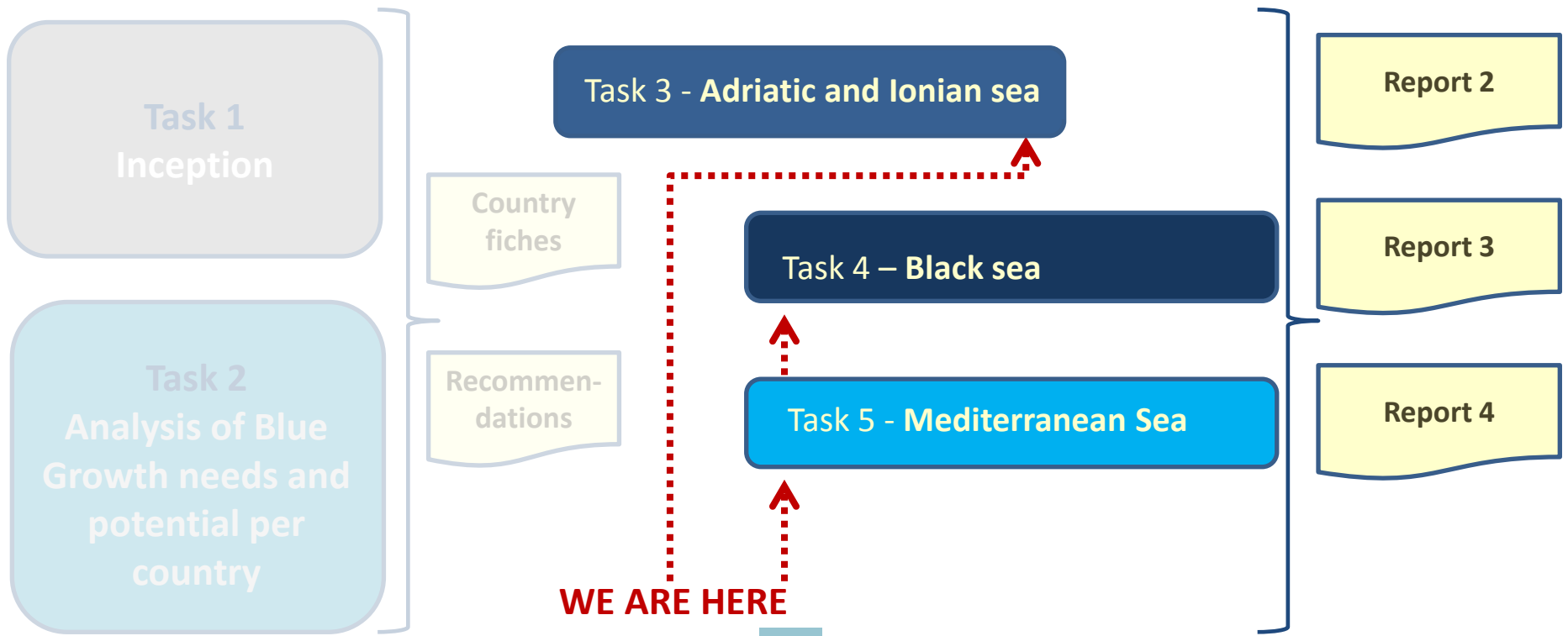


METHODOLOGICAL SOLUTIONS **STUDY PHASE 2**

Methodological roadmap

Phase 1
Identification and analysis of promising MEAs by Country

Phase 2
Identification of elements for a sea-basin cooperation



Overall objective of Phase 2

is to assess the potential for possible priorities for sea-basin cooperation if deemed appropriate by the countries in the Mediterranean and Black Sea regions

Specific objectives and analyses requested for each of the 3 sea basins :

- share a common approach
- are targeted and defined by specific needs for each sea basin

Data sources used for Phase 2

Country Fiches - Desk studies and analyses - Contacts with key country actors

Specific objectives and Methodological approach by sea basin

Task 3 - Adriatic and Ionian sea

Specific objectives

Supporting the identification of the possible elements of a sea-basin cooperation for the Adriatic and Ionian maritime strategy and putting the basis for the evaluation to be carried out during the implementation phase

Methodological approach for achieving objectives

1. Mapping of existing data and information at different levels (EU, cross-national, national and regional) for the four pillars of the EUSAIR strategy as defined in August 2013, and identification of data gaps for each pillar
2. Identification and analysis of the main issues where sea-basin cooperation is needed, following the lines of a set of “external prospective evaluation” and for each pillar of the EUSAIR strategy as defined in August 2013;
3. Assessment of the social, economic, legal and environmental impacts of the possible sea-basin cooperation;
4. Gap-analysis on the possible sea-basin cooperation and proposed actions to address these gaps
5. Development of recommendations and suggestions

at present ongoing

Task 4 – Black sea

Specific objectives

Supporting the identification of possible elements for sea-basin cooperation in the Black Sea

at present ongoing

Task 5 – Mediterranean sea

Specific objectives

Supporting the identification of possible elements for sea-basin cooperation in the Mediterranean Sea

Methodological approach for achieving objectives

1. Mapping existing initiatives and projects with a maritime dimension with a specific focus on blue growth and IMP-related initiatives, with special focus on maritime cooperation
2. Identification and analysis of the main issues where sea-basin cooperation is needed, following the lines of a set of “external prospective evaluation” questions
3. Development of suggestions and Policy Recommendations on feasibility, content, added value and methodology to follow for enhancing maritime sea-basin cooperation.
4. Pros and cons of possible sub-regional approaches vs sea-basin wide approaches

at present ongoing

Ending point of the present Study

Final outputs of Phase 2

Task 3 – Adriatic/Ionian seas

Report 2

- 4 thematic reports corresponding to the four pillars of EUSAIR
- Results of data mapping and answers to the 5 questions included in the “external prospective evaluation”
- Conclusions and suggestions

Task 4 – Black sea

Report 3

- Conclusions and suggestions

Background paper

for the Stakeholder Conference on Maritime Affairs and Fisheries in the Black Sea

Task 5 - Mediterranean Sea

Report 4

- Results of data mapping and answers to the 5 questions included in the “external prospective evaluation”
- Conclusions and suggestions



European
Commission

Thanks for your attention!



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