

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



CONTRACT NUMBER
MARE/2012/07 - REF. No 2

REPORT 1 - ANNEX 2.6

COUNTRY FICHE - ANNEX

CROATIA

JANUARY 2014

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1. Selection of the most important regions

All Croatian coastal area is located in one NUTS 2: Sjeverozapadna Hrvatska.

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	0,27	15,57	9,14	EUROSTAT
0.2	Water projects	0,06	3,36	2,00	EUROSTAT
1. Maritime transport					
1.1	Deep-sea shipping	0,04	0,74	0,55	EUROSTAT. No data available for 2010 NACE code 50.20 - Use data from Croatian Chamber of Commerce
1.2	Short-sea shipping (incl. Ro-Ro)	0,16	3,27	2,43	EUROSTAT. No data available for 2010 NACE code 50.20 - Use data from Croatian Chamber of Commerce
1.3	Passenger ferry services	0,06	2,65	1,63	EUROSTAT No data available for 2008 and 2009 for NACE code 50.10 - Use data from Croatian Chamber of Commerce
1.4	Inland waterway transport	0,00	0,20	0,12	NACE code 50.40 Confidential on EUROSTAT - Use data from Croatian Chamber of Commerce
2. Food, nutrition, health and eco-system services					
2.1	Fishing for human consumption	0,06	6,37	3,49	EUROSTAT Estimate of the GVA for fishery based on volume of catches (estimate of fish price and % of GVA) No data on EUROSTAT for NACE code 47.23 – Use data from Croatian Chamber of Commerce
2.2	Fishing for animal feeding	0,00	0,01	0,01	----
2.3	Marine aquaculture	0,03	0,11	0,20	Estimate of the GVA based on the total sales (source : Ministry of Agriculture)
2.4	Blue biotechnology	0,00	0,00	0,00	----
2.5	Agriculture on saline soils	0,00	0,00	0,00	----
3. Energy and raw materials					
3.1	Offshore oil and gas	0,08	0,14	0,49	Confidential data on EUROSTAT - - Use data from Croatian Chamber of Commerce
3.2	Offshore wind	0,00	0,00	0,00	----
3.3	Ocean renewable energy	0,00	0,00	0,00	----
3.4	Carbon capture and storage	0,00	0,00	0,00	----
3.5	Aggregates mining (sand, gravel, etc.)	0,00	0,00	0,00	----
3.6	Marine minerals mining	0,00	0,00	0,00	----
3.7	Securing fresh water supply (desalination)	0,00	0,00	0,00	----
4. Leisure, working and living					
4.1	Coastal tourism	0,64	30,59	18,50	EUROSTAT
4.2	Yachting and marinas	0,01	0,44	0,25	----
4.3	Cruise tourism	0,06	2,65	1,63	----
5. Coastal protection					
5.1	Protection against flooding and erosion	0,00	0,00	0,00	----
5.2	Preventing salt water intrusion	0,00	0,00	0,00	----
5.3	Protection of habitats	0,00	0,00	0,00	----
6. Maritime monitoring and surveillance					
6.1	Traceability and security of goods supply chains	0,00	0,00	0,00	----
6.2	Prevent and protect against illegal movement of people and goods	0,00	0,00	0,00	----
6.3	Environmental monitoring	0,00	0,00	0,00	----

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	-2,67	-6,22	-16,46	EUROSTAT
0.2	Water projects	-13,62	-7,68	-71,93	EUROSTAT
1. Maritime transport					
1.1	Deep-sea shipping	-31,76	-23,93	-170,78	EUROSTAT. No data available for 2010 NACE code 50.20 - Use data from Croatian Chamber of Commerce
1.2	Short-sea shipping (incl. Ro-Ro)	-19,25	-9,98	-101,23	EUROSTAT. No data available for 2010 NACE code 50.20 - Use data from Croatian Chamber of Commerce
1.3	Passenger ferry services	16,56	27,61	96,61	EUROSTAT No data available for 2008 and 2009 for NACE code 50.10 - Use data from Croatian Chamber of Commerce
1.4	Inland waterway transport	-7,07	1,38	-34,64	NACE code 50.40 Confidential on EUROSTAT - Use data from Croatian Chamber of Commerce
2. Food, nutrition, health and eco-system services					
2.1	Fishing for human consumption	-1,27	-1,73	-7,20	EUROSTAT Estimate of the GVA for fishery based on volume of catches (estimate of fish price and % of GVA) No data on EUROSTAT for NACE code 47.23 – Use data from Croatian Chamber of Commerce
2.2	Fishing for animal feeding	-4,96	-8,64	-29,10	----
2.3	Marine aquaculture	21,76	21,76	119,67	Estimate of the GVA based on the total sales (source : Ministry of Agriculture)
2.4	Blue biotechnology	0,00	0,00	0,00	----
2.5	Agriculture on saline soils	0,00	0,00	0,00	----
3. Energy and raw materials					
3.1	Offshore oil and gas	-40,62	0,00	-203,12	Confidential data on EUROSTAT - - Use data from Croatian Chamber of Commerce
3.2	Offshore wind	0,00	0,00	0,00	----
3.3	Ocean renewable energy	0,00	0,00	0,00	----
3.4	Carbon capture and storage	0,00	0,00	0,00	----
3.5	Aggregates mining (sand, gravel, etc.)	0,00	0,00	0,00	----
3.6	Marine minerals mining	0,00	0,00	0,00	----
3.7	Securing fresh water supply (desalination)	0,00	0,00	0,00	----
4. Leisure, working and living					
4.1	Coastal tourism	0,09	-5,89	-2,49	EUROSTAT
4.2	Yachting and marinas	-18,76	-24,09	-105,84	----
4.3	Cruise tourism	12,62	23,30	74,77	----
5. Coastal protection					
5.1	Protection against flooding and erosion	0,00	0,00	0,00	----
5.2	Preventing salt water intrusion	0,00	0,00	0,00	----
5.3	Protection of habitats	0,00	0,00	0,00	----
6. Maritime monitoring and surveillance					
6.1	Traceability and security of goods supply chains	0,00	0,00	0,00	----
6.2	Prevent and protect against illegal movement of people and goods	0,00	0,00	0,00	----
6.3	Environmental monitoring	0,00	0,00	0,00	----

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	++++
	0.2 Water projects	0	-	+	+	0	-	0
1. Maritime transport	1.1 Deep-sea shipping	0	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	0	0	+	++
2. Food, nutrition, health and eco-system services	2.1 Fishing for human consumption	0	-	+	+	0	-	0
	2.2 Fishing for animal feeding	0	-	0	+	0	-	-
	2.3 Marine aquaculture	+	+	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	+	0	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)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
4. Leisure, working and living	4.1 Coastal tourism	0	+	+	+	+	+	+++++
	4.2 Yachting and marinas	0	0	+	+	+	+	++++
	4.3 Cruise tourism	0	+	+	+	+	+	+++++
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 ¹	Growth drivers	Barriers to Growth
Maritime research	No drivers identified	No barriers identified
Development and innovation	Environmental protection policies; business support policies	No barriers identified
Access to finance	Financial public support	Difficult access to credit
Smart infrastructure	Effective port system on the coast with many connection with Italy notably International airport in Zagreb	No barriers identified
Maritime clusters	No drivers identified	No maritime clusters linked to coastal tourism
Education, training and skills	Good standard of schooling	No barriers identified
Training and skills	Widespread presence of vocational schools and universities for tourism	No barriers identified
Maritime spatial planning	No drivers identified	No barriers identified
Integrated local development	Advanced urban development planning	No barriers identified
Public engagement	Marketing and advertising investments	No barriers identified

¹ The benchmark instance is "Coastal Tourism in Sardinia (Italy)".

CRUISE TOURISM ²	Growth drivers	Barriers to Growth
Maritime research	No drivers identified	Limited resources
Development and innovation	No drivers identified	No barriers identified
Access to finance	No drivers identified	No barriers identified
Smart infrastructure	No drivers identified	Conflict of interests
Maritime clusters	No drivers identified	No barriers identified
Education, 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 pressures Congested destinations
Public engagement	No drivers identified	No barriers identified

PASSENGER FERRY SERVICE ³	Growth drivers	Barriers to Growth
Maritime research	Extensive involvement and experience in maritime research	Reduced funding due to the economic crisis
Development and innovation	No drivers identified	Limited funding
Access to finance	Financial public support for specific “public services”	No barriers identified
Smart infrastructure	Good general infrastructures	No barriers identified
Maritime clusters	No drivers identified	No organized maritime clusters linked to passenger ferry services
Education, training and skills	Good standard of schooling	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	Red tape

² The benchmark instance is “Cruise Tourism in Italy”.

³ The benchmark instance is “Passenger ferry services in Greece”.

SHORT-SEA SHIPPING (incl. Ro-ro) ⁴	Growth drivers	Barriers to Growth
Maritime research	Extensive involvement and experience in maritime research	Reduced funding due to the economic crisis
Development and innovation	No drivers identified	Strong competition from the Far East
Access to finance	No drivers identified	No barriers identified
Smart infrastructure	Good general infrastructures	No barriers identified
Maritime clusters	No drivers identified	No barriers identified
Education, training and skills	No drivers identified	Attractiveness of jobs
Maritime spatial planning	No drivers identified	No barriers identified
Integrated local development	No drivers identified	No barriers identified
Public engagement	No drivers identified	Budgetary restrictions

YACHTING AND MARINAS ⁵	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	Public financial support	Difficult access to credit
Smart infrastructure	No drivers identified	No barriers identified
Maritime clusters	No drivers identified	No barriers identified
Education, training and skills	No drivers identified	No barriers identified
Maritime spatial planning	No drivers identified	High environmental pressure in some areas
Integrated local development	No drivers identified	No barriers identified
Public engagement	No drivers identified	No barriers identified

⁴ The benchmark instance is "Short-Sea Shipping in the Netherlands".

⁵ The benchmark instance is "Yachting and marinas in Italy".

MARINE AQUACULTURE ⁶	Growth drivers	Barriers to Growth
Maritime research	Significant number of research programs focused on aquaculture	No barriers identified
Development and innovation	No drivers identified	No barriers identified
Access to finance	No drivers identified	Limited access to finance
Smart infrastructure	No drivers identified	No barriers identified
Maritime clusters	No drivers identified	No barriers identified
Education, training and skills	Good level of schooling	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

⁶ The benchmark instance is “Marine aquaculture in Greece”.

5.2 SWOT analysis

Coastal tourism

	Strengths	Weaknesses
Maritime Research	Specific research on tourism in Croatia: marinas, cruising, hostel...	No global approach of coastal tourism in the researches
	Opportunities	Threats
	----	----
Development and innovation	Strengths	Weaknesses
	Attractiveness of Croatia for EU people : Germany, Slovenia, Italia, Austria... due to its assets : Mediterranean climate and seacoast	Lack of qualitative offer
	Opportunities	Threats
	Upgrading the accommodation structure and quality Reinforce attractiveness for domestic tourists	Decrease of nights spent by Croatian people Strong competition with other Mediterranean countries
Access to finance	Strengths	Weaknesses
	Financial public support	Low level of investments Limited access to finance due to crisis and high number of small and medium companies Difficult access to credit
	Opportunities	Threats
	Investment support through national strategy for tourism	----
Smart infrastructure	Strengths	Weaknesses
	Effective port system on the coast with many connection with Italy notably International airport in Zagreb	Insufficient rail and road public transport
	Opportunities	Threats
	----	----
Maritime clusters	Strengths	Weaknesses
	----	No maritime clusters linked to coastal tourism
	Opportunities	Threats
	----	----
Education, training and skills	Strengths	Weaknesses
	Education for marina managers Good standard of schooling Widespread presence of vocational schools and universities for tourism	----
	Opportunities	Threats
	Adaptation of the education in the relation to the evolution of tourism sector	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	Progressive implementation of the Physical Planning Act	Conflict of interests High environmental pressure in some areas
	Opportunities	Threats
	----	Unmanaged development of tourism in coastal area
Integrated local development	Strengths	Weaknesses
	Progressive implementation of the Physical Planning Act	Highly seasonal activity
	Opportunities	Threats
	----	----
Public engagement	Strengths	Weaknesses
	Strong public engagement	----
	Opportunities	Threats
	National strategy for tourism	----

Cruise tourism

Maritime Research	Strengths	Weaknesses
	----	No specific research on cruise tourism
	Opportunities	Threats
	Development of research on cruise tourism	----
Development and innovation	Strengths	Weaknesses
	Attractiveness of Croatia of international cruises in the Mediterranean Sea Sector in progress of development in Croatia	----
	Opportunities	Threats
	----	----
Access to finance	Strengths	Weaknesses
	Large companies with investment capacities	Limited resources
	Opportunities	Threats
	----	----
Smart infrastructure	Strengths	Weaknesses
	Infrastructure in Dubrovnik and Split to welcome cruise vessels	Conflict of interests High costs for the infrastructure
	Opportunities	Threats
	Development of cruise activity in other seaports	----
Maritime clusters	Strengths	Weaknesses
	----	No cluster
	Opportunities	Threats
	----	----
Education, training and skills	Strengths	Weaknesses
	Maritime education (Rijeka, Dubrovnik, Split)	----
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strengths	Weaknesses
	----	Conflict of interests Concentration of the activity in a few seaports
	Opportunities	Threats
	----	----
Integrated local development	Strengths	Weaknesses
	----	International cruising companies, not located in Croatia Environmental pressures Congested destinations Highly seasonal activity
	Opportunities	Threats
	----	----
Public engagement	Strengths	Weaknesses
	Involvement of local authorities	----
	Opportunities	Threats
	----	----

Passenger ferry services

Maritime Research	Strenghts	Weaknesses
	Specific research on passenger transport	Reduced funding due to the economic crisis
	Opportunities	Threats
	----	----
Development and innovation	Strenghts	Weaknesses
	----	Limited funding
	Opportunities	Threats
	----	----
Access to finance	Strenghts	Weaknesses
	Public funding for infrastructure	Limited funding
	Opportunities	Threats
	----	----
Smart infrastructure	Strenghts	Weaknesses
	Renovation of the infrastructure to match with tourism development	Inadequate berthing infrastructure in some seaports
	Opportunities	Threats
	----	----
Maritime clusters	Strenghts	Weaknesses
	----	No cluster
	Opportunities	Threats
	----	----
Education, training and skills	Strenghts	Weaknesses
	Maritime education (Rijeka, Dubrovnik, Split) Skilled people	Difficulties to hire
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strenghts	Weaknesses
	Implementation of physical planning Act	Conflict of interests with marinas
	Opportunities	Threats
	----	----
Integrated local development	Strenghts	Weaknesses
	Role in the development of tourism in islands and in coastal areas	Highly seasonal activity
	Opportunities	Threats
	----	Conflict of interest with other MEAs
Public engagement	Strenghts	Weaknesses
	Public engagement of Ministry (Ministry of Maritime affairs, Transport and Infrastructure) and local authorities	----
	Opportunities	Threats
	----	Limited funding

Short-sea shipping (incl. Ro-Ro)

Maritime Research	Strenghts	Weaknesses
	Specific research on shipping in Croatia	Reduced funding due to the economic crisis
	Opportunities	Threats
	----	----
Development and innovation	Strenghts	Weaknesses
	Renovation of infrastructure	Connections with rail and road is not sufficient for each seaport
	Opportunities	Threats
	----	----
Access to finance	Strenghts	Weaknesses
	Public funding for infrastructure	Limited resources
	Opportunities	Threats
	----	----
Smart infrastructure	Strenghts	Weaknesses
	Renovation of infrastructure : Zadar, Split	----
	Opportunities	Threats
	----	----
Maritime clusters	Strenghts	Weaknesses
	----	No specific cluster
	Opportunities	Threats
	----	----
Education, training and skills	Strenghts	Weaknesses
	Maritime education (Rijeka, Dubrovnik, Split) Skilled people	Difficulties to hire
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strenghts	Weaknesses
	----	Conflict of interests
	Opportunities	Threats
	----	----
Integrated local development	Strenghts	Weaknesses
	----	----
	Opportunities	Threats
	----	----
Public engagement	Strenghts	Weaknesses
	Public engagement of Ministry (Ministry of Maritime Affairs, Transport and Infrastructure)	----
	Opportunities	Threats
	----	Limited funding

Yachting and marinas

Maritime Research	Strenghts	Weaknesses
	Research on nautical tourism	----
	Opportunities	Threats
	----	----
Development and innovation	Strenghts	Weaknesses
	----	----
	Opportunities	Threats
	Adaptation to the new demand	Evolution of the demand
Access to finance	Strenghts	Weaknesses
	Public financial support	Difficult access to credit
	Opportunities	Threats
	----	----
Smart infrastructure	Strenghts	Weaknesses
	Good network of marinas	----
	Opportunities	Threats
	Specialisation of ports in marinas activity	----
Maritime clusters	Strenghts	Weaknesses
	----	No specific cluster
	Opportunities	Threats
	----	----
Education, training and skills	Strenghts	Weaknesses
	Maritime education (Rijeka, Dubrovnik, Split)	----
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strenghts	Weaknesses
	Few marine protected areas	Conflict of interests with passenger ferry services and fishery
	Opportunities	Threats
	----	----
Integrated local development	Strenghts	Weaknesses
	Marinas are very important for tourism in coastal areas	Highly seasonal activity
	Opportunities	Threats
	----	----
Public engagement	Strenghts	Weaknesses
	Public engagement of Ministries (Ministry of Maritime Affairs, Transport and Infrastructure and Ministry of Tourism)	----
	Opportunities	Threats
	----	----

Marine aquaculture

Maritime Research	Strenghts	Weaknesses
	Specific research on aquaculture (for instance Institute of Oceanography and Fisheries)	----
	Opportunities	Threats
	----	----
Development and innovation	Strenghts	Weaknesses
	Increase of seabass and seabream productions	Decrease of pelagic fish and shellfish productions
	Opportunities	Threats
	Opening markets due to integration to the EU	----
Access to finance	Strenghts	Weaknesses
	Small and medium sized companies, family owned	Limited access to finance
	Opportunities	Threats
	----	----
Smart infrastructure	Strenghts	Weaknesses
	Modernisation of the farms	----
	Opportunities	Threats
	----	----
Maritime clusters	Strenghts	Weaknesses
	----	No maritime cluster
	Opportunities	Threats
	----	----
Education, training and skills	Strenghts	Weaknesses
	Each aquaculture farm is obliged to employ technical staff who has passed special exam for fish farmers Good level of schooling	----
	Opportunities	Threats
	----	----
Maritime spatial planning/Integrated Coastal Zone Management	Strenghts	Weaknesses
	Effective spatial planning scheme Potential sites for aquaculture have been included in physical planning	Conflict of interest with other MEA, notably tourism
	Opportunities	Threats
	----	----
Integrated local development	Strenghts	Weaknesses
	----	Grey economy in shellfish production
	Opportunities	Threats
	----	----
Public engagement	Strenghts	Weaknesses
	Public engagement to facilitate the development of the sector: licence... Aquaculture identified as a strategic sector	----
	Opportunities	Threats
	----	----

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
Croatian Tourism Development Strategy until 2020	National	Ministry of Tourism	MEA related to tourism	Summary with power point http://www.mint.hr/UserDoc/Images/Strategy-tourism.present.pdf