

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

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. Othe	er 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. Mari	itime 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	l, nutrition, health and eco-system ser	vices			
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. Ener	gy 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. Leisu	are, 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. Coas	tal 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. Mari	itime 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		(CAGR, %) (CAGR, %)		Source & Reference year	
0. Othe	er 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. Mari	itime 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	l, nutrition, health and eco-system se	vices	· · ·		
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. Ener	gy 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. Leisu	ire, 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. Coas	tal 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. Mari	itime 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. Other sectors	0.2 Water projects	0	-	+	+	0	-	0
	1.1 Deep-sea shipping	0	0	0	+	0	+	++
1. Maritime transport	1.2 Short-sea shipping (incl. RoRo)	0	+	+	+	0	+	++++
1. Mantime transport	1.3 Passenger ferry services	0	+	+	+	+	+	+++++
	1.4 Inland waterway transport	0	+	0	0	0	+	++
	2.1 Fishing for human consumption	0	-	+	+	0	-	0
2 Food within booth	2.2 Fishing for animal feeding	0	-	0	+	0	-	-
2. Food, nutrition, health	2.3 Marine aquaculture	+	+	0	+	0	+	++++
and eco-system services	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.
	3.1 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. Energy and raw	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.
materials	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.
	4.1 Coastal tourism	0	+	+	+	+	+	+++++
4. Leisure, working and	4.2 Yachting and marinas	0	0	+	+	+	+	++++
living	4.3 Cruise tourism	0	+	+	+	+	+	+++++
	5.1 Protection against flooding and erosion	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
5. Coastal protection	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.
	6.1 Traceability and security of goods supply chains	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
6. Maritime monitoring and surveillance	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 innovationEnvironmental protection policies; business support policies		No barriers identified
Access to finance	Financial public support	Difficult access to credit
Smart infrastructureEffective 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

 $^{^{\}overline{6}}$ The benchmark instance is "Marine aquaculture in Greece".

Coastal tourism

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

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

Cruise tourism

Maritime Research Specific research on passenger transport Reduced funding due to the economic crisis Opportunities Threats		Strenghts	Weaknesses	
Opportunities Threats Opportunities	Marchitere Deserved		Reduced funding due to the economic crisis	
Image: strengths Image: strengths Weaknesses Development and innovation Opportunities Threats Access to finance Strengths Weaknesses Access to finance Public funding for infrastructure Limited funding Smart infrastructure Public funding for infrastructure to match with tourism development Inadequate berthing infrastructure in some seaports Smart infrastructure Renovation of the infrastructure to match with tourism development Inadequate berthing infrastructure in some seaports Maritime clusters Opportunities Threats Opportunities Threats Strengths Weaknesses Maritime spatial planning/Integrated Coastal Zone Maritime education (Rijeka, Dubrownik, Split) Skilled people Difficulties to hire Integrated local development Strengths Weaknesses Integrated local development Opportunities Threats Integrated local development Goportunities Threats Public engagement Strengths Weaknesses Integrated local development Opportunities Threats Opportunities Opportunities Threat	Maritime Research		Threats	
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Smart infrastructure Renovation of the infrastructure to match with seaports Inadequate berthing infrastructure in some seaports Opportunities Threats Opportunities Threats Maritime clusters Strenghts Weaknesses Maritime clusters Strenghts Weaknesses Education, training and skills Maritime education (Rijeka, Dubrovnik, Split) Difficulties to hire Maritime spatial planning/Integrated local dubristies Strenghts Weaknesses Integrated local development Strenghts Weaknesses Maritime spatial planning/Integrated local development Strenghts Weaknesses Integrated local development Strenghts Weaknesses Maritime affairs, Transport and in coastal areas Strenghts Weaknesses Public engagement Strenghts Weaknesses Integrated local duborities Threats Threats Opportunities Threats Threats Integrated local ducal development of tourism in islands and in coastal areas Weaknesses Maritime affairs, Transport and infrastructure) and local authorities Public engagement of Ministry (Ministry of Maritime affairs, Tran		Strenghts	Weaknesses	
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Maritime clusters Strenghts Weaknesses Maritime clusters Opportunities Threats Opportunities Education, training and skills Maritime education (Rijeka, Dubrovnik, Split) Skilled people Difficulties to hire Maritime spatial planning/Integrated Coastal Zone Management Opportunities Threats Marities grated local development Strenghts Weaknesses Integrated local development Role in the development of tourism in islands and in coastal areas Highly seasonal activity Public engagement Strenghts Weaknesses Public engagement Strenghts Weaknesses Opportunities Threats Opportunities Threats Maritime difficience Maritime affairs, Transport and Infrastructure) and local authorities Strenghts		Opportunities	Threats	
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	and skills Maritime spatial planning/Integrated Coastal Zone Management Integrated local	Strenghts Maritime education (Rijeka, Dubrovnik, Split) Skilled people Opportunities Strenghts Implementation of physical planning Act Opportunities Strenghts Role in the development of tourism in islands and in coastal areas Opportunities	Weaknesses Difficulties to hire Threats Weaknesses Conflict of interests with marinas Threats Weaknesses Conflict of interests with marinas Highly seasonal activity Threats Conflict of interest with other MEAs	
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Passenger ferry services

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

Short-sea shipping (incl. Ro-Ro)

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

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

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 sImages/Strategy- tourism.present.pdf