



Blue Growth boosting sustainable development of marine and maritime economy : the case of Adriatic-Ionian Region

Blue Growth needs and potential in the Adriatic-Ionian Region

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Study reference

“Study to support the development of sea-basin cooperation in the Mediterranean, Adriatic and Ionian, and Black sea”

committed to

in 2014



by



Background

At the end of 2012, the European Commission – DG MARE launched a study aimed at analysing the maritime dimension in the EU, both at country and sea-basin level.

The purpose of this Study was to:

- Identify the **needs and potential of the blue economy in each country and sea basins**;
- Define which are the **most promising maritime activities in terms of socio-economic impact** on the local economies
- Provide **policy recommendations to fulfill that potential**

Scope of the analysis

The Study only analysed the **maritime dimension of EU Strategy for the Adriatic and Ionian Region (EUSAIR)** in the following countries:

**Italy – Slovenia – Croatia – Montenegro
Bosnia & Herzegovina – Albania – Greece**

Data were not equally available and homogeneous in all countries. Structural business statistics often presented some gaps.

Proxies were elaborated and adopted by EUNETMAR analysts bridge the gaps

Methodological keys of the Study

The study used quantitative and qualitative data and was structured in two main parts:

1. Thematic Reports

assessment of the maritime component of the EUSAIR and of its specific objectives for the 4 pillars, based on:

1. **Specificity** of the pillars to the Adriatic-Ionian macro region
2. **Level of existing cooperation** in the area
3. **Key investments** and **research priorities**
4. **Gap analysis**, comparing the current needs of the area with the specific objectives of the EUSAIR

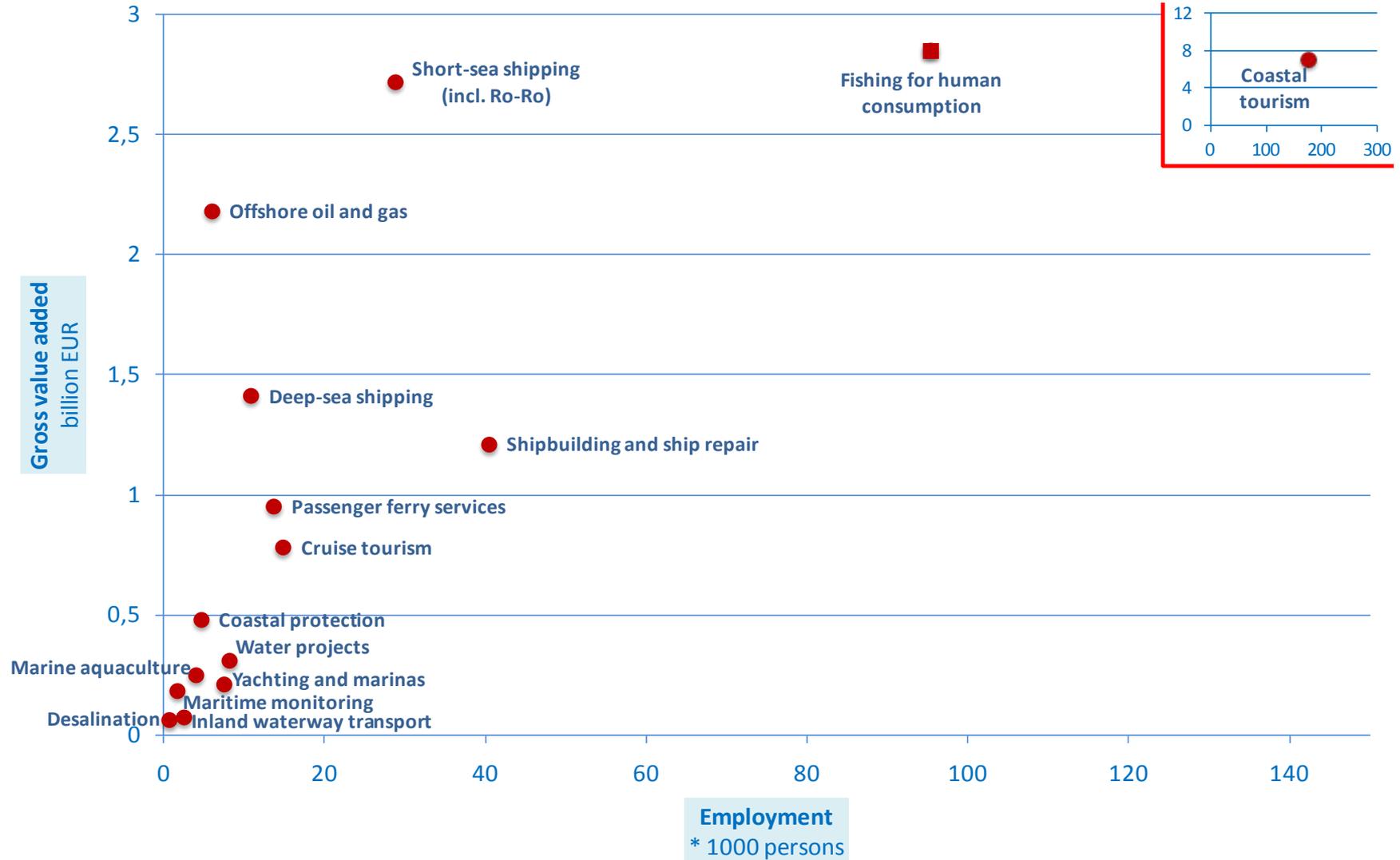
1. Overall assessment of the EUSAIR

cross-cutting issues affecting maritime components of each pillars were analysed, namely:

1. **Effectiveness of the governance**
2. **Added value for the EU** to be involved in the Strategy
3. **Assessment of social, economic and environmental impact**

For each Thematic report and for each section of the overall assessment, “**Specific conclusions**” were drafted and then summarised into the final “**General conclusions**”

Maritime context in the sea basin – socio-economic figures



Maritime context in the seabasin - observation

Occurrence of *most promising maritime activities*

	Coastal tourism	Marine aquaculture	Short-sea shipping (incl. Ro-Ro)	Passenger ferry services	Cruise tourism	Yachting and marinas	Deep-sea shipping	Fishing for human consumption	Shipbuilding and ship repair	Blue biotechnology	Protection of habitats
ITALY	★	★	★	★	★						★
GREECE	★	★	★		★	★	★				
CROATIA	★	★	★	★	★	★					
ALBANIA	★	★		★				★			
SLOVENIA	★	★	★		★		★			★	
MONTENEGRO	★	★	★	★		★			★		
BOSNIA/ HERZEGOVINA	★	★									
TOTAL	7	7	5	4	4	3	2	1	1	1	1

Main findings

It emerged that the **most promising activities** in the Region are still “traditional” activities:

coastal tourism & cruise tourism

It has a significant impact for **employment** and in terms of Gross Value Added (**GVA**)

short-sea shipping *(and maritime transport in general)*

It generates a significant **GVA**. It is important for the **development of other activities** (e.g. Tourism)

marine aquaculture

It can contribute to better **regulate fishing effort** and increase the **consumption of farmed products**

In order to fulfil the Blue Growth potential of the Region
**a number of possible actions were identified for each of the 4 EUSAIR pillars
in terms of key investments & research priorities**

Main findings

Key investments & research priorities in the Adriatic-Ionian macro-region

were identified based on the analysis of stakeholders workshops, as well as interviews with relevant players in the area.

The proposals identified were grouped by main maritime activity for each pillar.

PILLAR 1 – BLUE GROWTH

Key Investments and Research priorities

FISHERY	AQUACULTURE	BLUE R&D
Establishment of a database of fisheries resources	Promotion of aquaculture products from the Adriatic-Ionian region	Stimulate the formation of blue clusters at Adriatic-Ionian region level
Creation of a network and market-monitoring tool to quickly respond to crises in the food industry	Investments in the private sector for increasing product quality and meeting market standards	Scientific cooperation and integrated approach to promote research and studies on fish stocks
Set up of fishery management plans		Support countries to increase data collection and scientific capacity in fishery
Diversification and improvement of fishing activities		
Creation of an authority (monitoring station) to monitor fishing activities at sea-basin level		

MARITIME TRANSPORT & INTERMODAL CONNECTIONS	MARITIME SAFETY AND SECURITY
Foster the development of Motorway of the Seas in the Adriatic-Ionian region	Amend current ADRIREP and implement a new one
Improving multimodal connectivity , especially focusing on railway connections	Further development of Traffic Separation Schemes
Technological upgrade of infrastructure in the area	Common regional platform to streamline and exchange AIS information
Increasing efficiency of ports as intermodal nodes by promoting the use of advanced technologies	Establish an experts' working group to develop an Integrated Traffic monitoring system
Improve connections with islands and in general ferry/ro-ro connections	Development of educational programmes in maritime safety and security
Capitalize lessons learned from the past concerning projects encouraging maritime transport	
Implementation of the new environmental regulations and “Green upgrading” of ships and ports infrastructure	

MARINE AND COASTAL PROTECTION	MARINE LITTER
Development of a Web-GIS Observatory Network for the Adriatic-Ionian region	Promotion and further implementation of cleaning programmes to reduce marine litter
Adoption of ICZM and MSP for all countries in the Adriatic-Ionian region	Fishing for litter in the Adriatic-Ionian region linked with derelict fishing gear recycling
Marine and coastal environment monitoring system	Optimisation of sewage management , in all countries of the the Adriatic-Ionian region
Adriatic network for shared educational and community awareness programmes	
Develop a study on the possibility of developing Marine Protect Areas (MPA)	
Training the new generation of managers of Marine Protected Areas	

PILLAR 4 – SUSTAINABLE TOURISM Key Investments and Research priorities

COASTAL TOURISM	CRUISE TOURISM	CULTURAL HERITAGE
Enhance and enforce collaboration and cooperation for scientific research in key sectors, also adopting KIEZ - <i>Knowledge, Innovation and Entrepreneurship Zones</i>	Reinforcing regulation for sewage treatment on board	Integrated scheme for the strategic planning and funding of cultural tourism
Development of a harmonised tourism spatial planning	Establishment of proper monitoring mechanisms and legislation for the protection of the Adriatic-Ionian ecosystem	Development of a common label/trademark at Adriatic - Ionian region level
Common tourism strategy in order to facilitate promotion of the area abroad		
Limit environmental footprint of tourism		
Reduce seasonality of demand		

General conclusions

- ✓ the proposed **EUSAIR is specific** to the Adriatic and Ionian geographical area under quantitative and qualitative points of view → **the EUSAIR concretely addresses the Blue Growth needs of the area**
- ✓ **existing cooperation** in the area proved to be particularly intense between EU Member States while candidate/potential candidate countries tend to be less involved in cooperation projects → **the EUSAIR could improve cooperation in the area and increase the involvement of candidate/potential candidate countries towards Blue Growth goals**
- ✓ there is a clear **added value for the EU** to be involved → **its involvement creates a value beyond the value that would result from spontaneous cooperation between stakeholders to fulfil the Blue Growth potential of the area;**
- ✓ in **terms of impact**, economic and environmental benefits are expected to flow from the concept of the macro-regional strategy → **the economic, social, and environmental impacts of EUSAIR strategy, would contribute to unleashing the Blue Growth potential**

Thank you

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Consulenti per la Gestione Aziendale

