
National Workshop Romania

Bucharest, July 6th 2018

BLUE ECONOMY PRINCIPLES & CONCEPTS

BLUE ECONOMY REGIONAL ASSESSMENT

Maritime Economic Activities (MEA)

Sector	Status
Maritime transport	Well developed – potential improvement of connection with hinterland
Ferry – short sea shipping	Low development at regional level
Coastal and maritime tourism	Well developed but unevenly and mainly focused on "sun, sand and sea"
Cruise	Limited, mainly large ships and extension of Mediterranean trips
Fisheries	Fully developed - gaps in regulation, enforcement and safety
Aquaculture	Little developed but growing sector, with certain potential
Oil & Gas	Emerging sector (only exploration (TBC))
Yachting and boating	Barely developed - some potential within the navigation basin
Marine renewable energy	Some potential (wind)
Marine mineral resource mining	Mainly research projects
Blue biotechnologies	Mainly research projects

Coastal and maritime capital

	component	Status
Natural capital	Marine and coastal heritage	Unique marine environment - numerous habitats but relatively low biodiversity under high anthropic pressures
	Marine natural resources	<u>Biological resources</u> : unsustainable exploitation <u>Mineral resources</u> : regional competition rather than cooperation <u>Marine Energy</u> : limited assessment of resources
	Maritime and coastal space	High attractiveness High coastal erosion and climate change effects
Human capital	Knowledge and skills	Gaps in basic marine knowledge – Limited innovation maritime education is good but not enough developed for emerging sectors of BE
	Maritime culture	Limited - limited promotion of maritime heritage
	Governance	No “integrated” regional maritime governance Business oriented clusters Limited maritime focus (BESC), mono thematic (BSC) or sectoral (GFCM)
Technical capital	Infrastructures and services	Numerous but low regional coordination and shared services Limited land-sea connections
	Financial capital	No specific maritime financial instruments or services

Maritime Policy Driven Activities (MPDA)

Sector	Status
Maritime safety and risk management	limited at both national and regional level ; gaps
Marine protection	Few marine protected areas - little regional cooperation
Marine and maritime information dissemination	Few examples of integration of maritime and/or marine knowledge
Monitoring of the marine and coastal environment	Underdeveloped monitoring of environment and impacts
Maritime surveillance	Good cooperation between national Coast Guards
Research and education	Limited strategies – gaps, limited coordination
Planning and management	No (or very little) integrated planning or management despite some capacity and experience (ICZM)

First conclusions

- There are many marine and maritime **shared issues** (e.g. fisheries, environment), calling for *coordinated actions*.
- **Significant maritime and coastal capital**: relatively unexploited; could be used to support potential opportunities, through sustainable development/adaptation of existing activities and the creation of new activities.
- **Well- established record of cooperation**: a number of regional organizations already mobilized on maritime issues, or which could extend their scope towards maritime and coastal issues.
- There is **need for coordinated actions to promote the Black Sea** (e.g. maritime and coastal tourism) beyond the region.
- Many **benefits could be expected from enhancing synergies** between sectors (e.g. environmental protection, fisheries and maritime and coastal tourism).

BLUE ECONOMY NATIONAL ASSESSMENT ROMANIA

Latest Blue economy facts and figures for Romania

Blue economy (only maritime economic activities):

- Over 71600 people and EUR 956 million (2016)

Blue Economy GVA:

- 0,63% of national GVA
- **Decreasing contribution to national GVA: - 28,7% versus GVA in 2009**

Blue jobs:

- 0,88% of national jobs
- **Large decrease of jobs since 2009 with significant gaps between sectors: -12,7% versus status in 2009**

[Source : Annual 2018 Annual Economic report on EU Blue Economy economy report](#)

Maritime Economic Activities (MEA)

Sector	Status
Maritime transport	Mainly Deep-sea shipping (decreasing) – ports services (strong sector in GVA and jobs creation)
Ferry – short sea shipping	Ferry lines with Georgia (Batumi) and Ukraine (Chronomorsk) - Short sea shipping (mainly for O&G (Midia))
Shipbuilding, repair and deconstruction	1 st blue sector with 6 shipyards on Black sea (2) and Danube (4) maritime area - very well represented in Romania (37% jobs and 34% GVA)
Coastal and maritime tourism	2 nd economic sector in terms of GVA and employment, potential for a wide range of tourist activities, including mass tourism (south) and ecosystem-based tourism in the DanubeDelta
Cruise	Link with Danube cruise – port of Constanta used for river and maritime cruise vessels berths
Fisheries	Limited, mainly artisanal
Aquaculture	Marine aquaculture in the northern part of Constanta
Oil & Gas	Large maritime activity with high potential regarding new offshore gas deposit but highly dependent of O&G prices (direct impact on direct jobs and GVA)
Yachting and boating	Real potential with favourable location and infrastructure
Marine renewable energy	Development priority postponed
Marine mineral resources	No marine aggregate mining

SWOT of MEA in Romania

STRENGTHS

- Good availability of infrastructures (cf. capital) to support BE activities (Maritime Transport/maritime and coastal tourism, shipbuilding,...)
- Increasing Offshore O&G exploration and exploitation
- Romanian maritime cluster
- National sectoral strategies (maritime transport, energy,...)
- EU CFP and national plan for fisheries including aquaculture

- National Strategy for a Sustainable Transport 2007–2013, 2020, 2030
- TEN-T axis development with a nodal link in the Port of Constanța using the Danube and Danube canals, railway, and road transport to develop interconnectivity and intermodality
- Synergies within sectors to develop new offers : Ecotourism, pescaturism, ...
- Offshore O&G resources availability and energetic independence
- Regional and EU cooperation
- Digitalisation
- Diversification of existing sectors and priorities on marine topics

WEAKNESSES

- Sea, Sun & Sand model for coastal tourism even if evolving
- Coastal erosion effects
- Sectoral approach
- Low innovation even if supported
- High dependence on Oil & Gas price for offshore exploration and exploitation
- Lack of workforce in sectors
- Lack of attractiveness (salaries, skills)
- Unbalanced situation between coastal counties

- Lack of resilience for mature sectors (fisheries, coastal tourism, shipbuilding)
- Environmental conditions degradation
- Lack of transfer from public research outputs to MEA
- Inadequacy of education with BE sectors needs
- Increase of cost of living (inflation)
- Low skilled migration (impact on labour market)

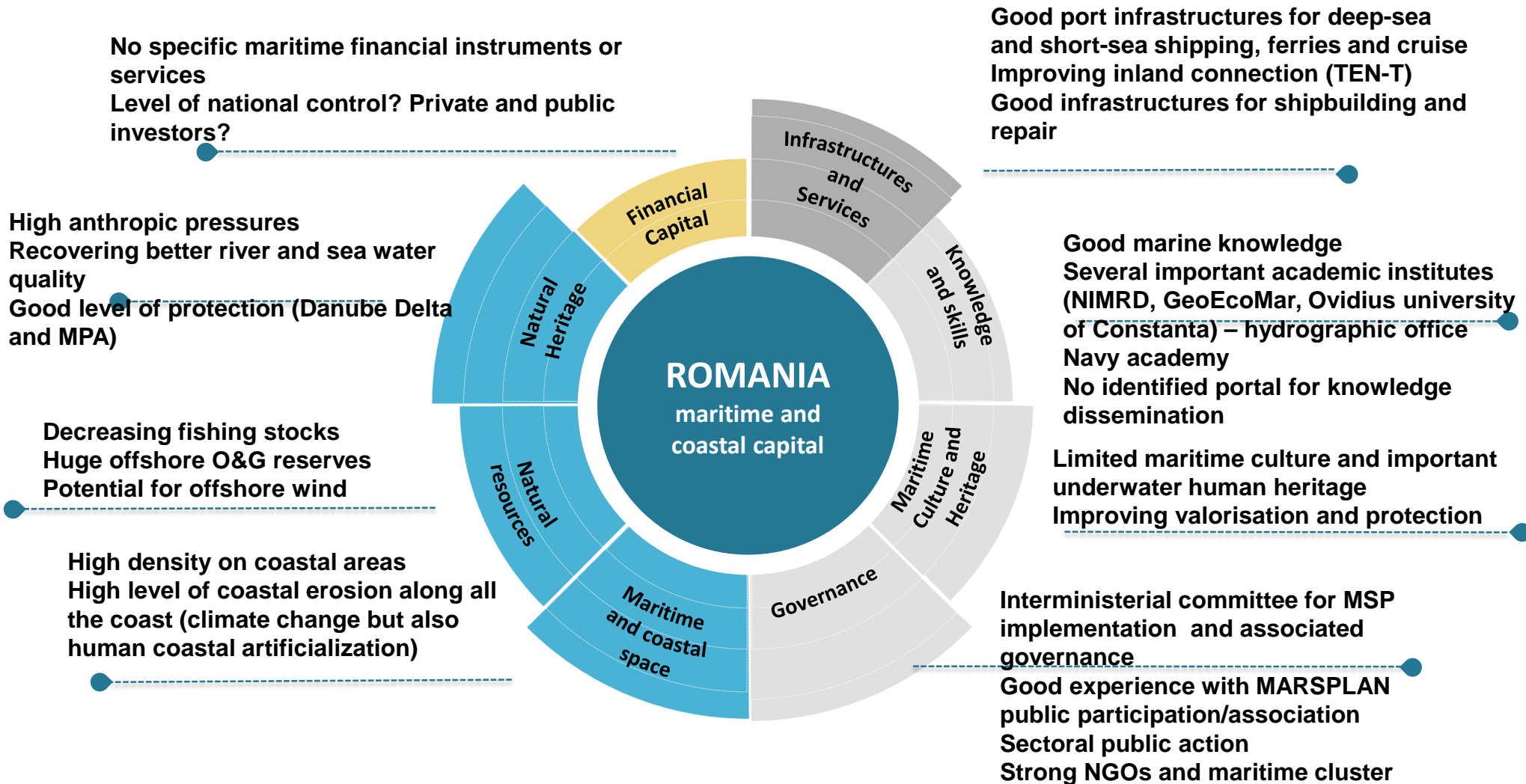
OPPORTUNITIES

THREATS

Coastal and maritime capital

	component	Status
<u>Natural capital</u>	Marine and coastal heritage	High , including Danube Delta (biosphere reserve UNESCO world heritage) but under high level of anthropic pressures (land based pollution and increasing eutrophication) and climate change effects (MS level rise, erosion)
	Marine natural resources	Biological: decreasing stocks Mineral: important offshore O&G resources Potential for offshore wind to be assessed regarding inland wind resources
	Maritime and coastal space	Space diversity – coastal zones threatened by coastal erosion and climate change effects (mostly on Deltaic coast) but also anthropogenic effects (building of non properly harbour structures, coastal zone highway constructions, run-off rivers regulation and beach sediment removal)(ZORAN & al 2006)
<u>Human capital</u>	Knowledge and skills	A number of maritime research institute and universities , mainly in Constanza such as National Institute for Marine Research and Development "Grigore Antipa", National Institute for Marine Geology and Geoecology (GeoEcoMar) of Romania, "Ovidius" University of Constanta Good regional cooperation and involvement to support public polices and EU legal implementation (MSFD, WFD) (cf. Black Sea Integrated Monitoring System (MISIS)) Good knowledge and skills for integrated management of rivers
	Maritime culture	High underwater heritage to be protected and valorized – partial mapping (EU project Heras) RO party of UNESCO Convention on the Protection of the Underwater Cultural Heritage
	Governance	Interministerial committee for MSP implementation sectorial structuration under the umbrella of major sectors (transport, energy) maritime cluster associating firms and business associations in the maritime sector, educational and research institutions, national authorities.
<u>Technical capital</u>	Infrastructures and services	Constanța , part of the TEN-T network with its two satellites (Midia (O&G) and Mangalia) - the main ports for cargo traffic Good connections with hinterland: TEN-T axis development with a nodal link in the Port of Constanța Several underwater pipelines and electric cables projects
	Financial capital	No specific maritime financial instruments or services. Level of national control? Private and public investors?

Coastal and maritime capital for Romania



Maritime Policy Driven Activities (MPDA)

Sector	Status
Maritime safety and risk management	Need for common disaster response exercises, to increase the effectiveness of cooperation Coastal protection is a national matter. Master Plan for Protection and Rehabilitation of Coastal Area for the protection of the coastal habitats and the coastal economic and social infrastructure.
Marine protection	Good level of protection (Danube as a biosphere reserve - dedicated administration, management and monitoring) - set up of a joint managed MPA with Bulgaria
Marine and maritime information dissemination	No identified portal for dissemination
Monitoring of the marine and coastal environment	important issues to be addressed under the Bucharest Convention, WFD and MSFD about the general influence of the Danube River and RO sources of pollution/eutrophication on the GES of BG waters NIMRD leader in MSFD Guiding improvements in the Black Sea Integrated Monitoring System Non-public environmental monitoring carried out by several non-governmental institutions, but legal obligations for industry with potential hazard on environment
Maritime surveillance	Romania needs a better fishing monitoring and surveillance Integrated surveillance, in cooperation with Bulgaria and potential with Ukraine, is a priority.
Research and education	The level of maritime education is good, with good expertise in some marine fields No specific policy for marine research – strong network of institutes and universities involved in projects (answers to national or international calls)
Planning and management	The ICZM strategy still being in the preparatory stage – existing law for ICZM implementation A unique national actor responsible for coastal protection and integrated coastal zone management : Ministry of Environment and Sustainable Development (MESD) Maritime spatial planning legislation - ongoing implementation Good cooperation with Bulgaria within a Cross-Border Maritime Spatial Plan (MARSPLAN BS) and lessons learnt

SWOT of MPDA in Romania

STRENGTHS

- EU legislation implementation (WFD, MSFD, MSPD) developing and supporting national public capacities for monitoring, protection, management
 - Starting /improving integration : coastal protection and ICZM – natural and human capital protection
 - Good cooperation within Black sea (Research, Environment, Maritime surveillance)
 - Law on ICZM since 2003
 - Full demonstration of MSP implementation with MARSPLAN BS project with cooperation with BG
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- EU legislation implementation (environment sustainability, safety and security)
 - Integration in public processes
 - Cross-border and cross-sectoral maritime surveillance
 - Growing integration of coastal and maritime policies/management
 - Measures to mitigate Climate Change
 - MSPD implementation, the frame for development of integration and maritime strategy

WEAKNESSES

- No national maritime strategy has been defined
 - No strategy for maritime and marine research and innovation
 - Lack of involvement/ responsibilities of local authorities in maritime topics
 - Competitive rules for research institutes to set up projects (even if stimulating) – brake for long term activity
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- Lack of public funding and means
 - Lack of interest in public action/priorities
 - Inability to meet EU objectives (WFD, MSFD, MSPD)
 - Further degradation of Black Sea marine and coastal environment
 - Impacts of climate change

OPPORTUNITIES

THREATS

First conclusions

Maritime and coastal governance

- **Maritime governance is improving, in particular through Maritime Spatial Planning implementation.** The representation of maritime stakeholders is still low for some sectors.
- There is a **need for building awareness** and capacity among public and private stakeholders and improving maritime governance at decision and implementation (e.g. cluster, networks) levels.

Maritime and coastal policies

- Specific and consistent policies should be developed for all major maritime and coastal activities, and implemented through **efficient national and local strategies taking the various assets of the coastal counties.**
- **Many thematic or sectoral strategies embed several IMP priorities** such as 1) Maritime Spatial Planning; 2) Marine Protected Areas; 3) need for increased port efficiency, safety and infrastructure development; 4) improved and integrated surveillance 5) need for fishery strategy; 6) tourism diversification; 7) climate change adaptation; 8) strengthening the science- business-administration network and socio-economy to **reduce brain and hand drain and mitigate low skilled migration.**

First conclusions

Blue Economy

- Sectoral policies should be more elaborated for coastal and maritime components, through a consistent set of sectoral strategies for each of the main maritime activities (including O&G and coastal tourism).
- Next opportunities for developing MEAs lie in an improved regional cooperation and synergies between marine and maritime activities (e.g. nature protection and tourism)

Cross-cutting or integrated instruments

The following instruments could be developed or improved:

- ICZM and MSP (on going process) based on the MARSPLAN BS experience and outputs (methodology, skills, governance, ...)
- National portal for maritime and marine information and knowledge
- Integrated surveillance (environment and activities) for management objectives

Potential – Preliminary assessment

Maritime and coastal capital

- Potential linked to better protection, management and valorisation
- Some maritime and coastal potential not fully exploited (heritage)

MEAs: need for innovation and capacity building

- Existing activities: potential for development but also (mainly?) for new models (more local value, better use of national maritime and coastal capital)
- Potential synergies for cruise (nature, culture, small ships, shipbuilding) and coastal tourism (culture, nature, quality)
- New activities: potential not assessed, model not yet developed
 - Unknown potential: marine energy, blue biotechnologies
 - Maritimization of land activities (biotechnologies, agrofood, IT)

Policy-driven activities

- Potential for new high-skilled jobs (protection, management, services, research, innovation...)
- Development needed to better manage national assets and support MEAs
- Dedicated support to implement EU legislation (MSFD, MSPD) and insure consistency in neighbouring countries (EU or non EU MS)