

Illustrations to develop Blue economy strategies and to support integration



Coastal zone: essential for maritime activities

Coast: not just the end of land, but the beginning of sea



**Intensity of maritime activities
is maximum in CZ**

**Ressources
biodiversity
costs
Distance...**

**Ports, shipyards
Shallow waters
Cables and pipes landings...**



**All maritime activities
need access to the
coast and to the land**

**Coastal maritime zones are crucial for
maritime activities**

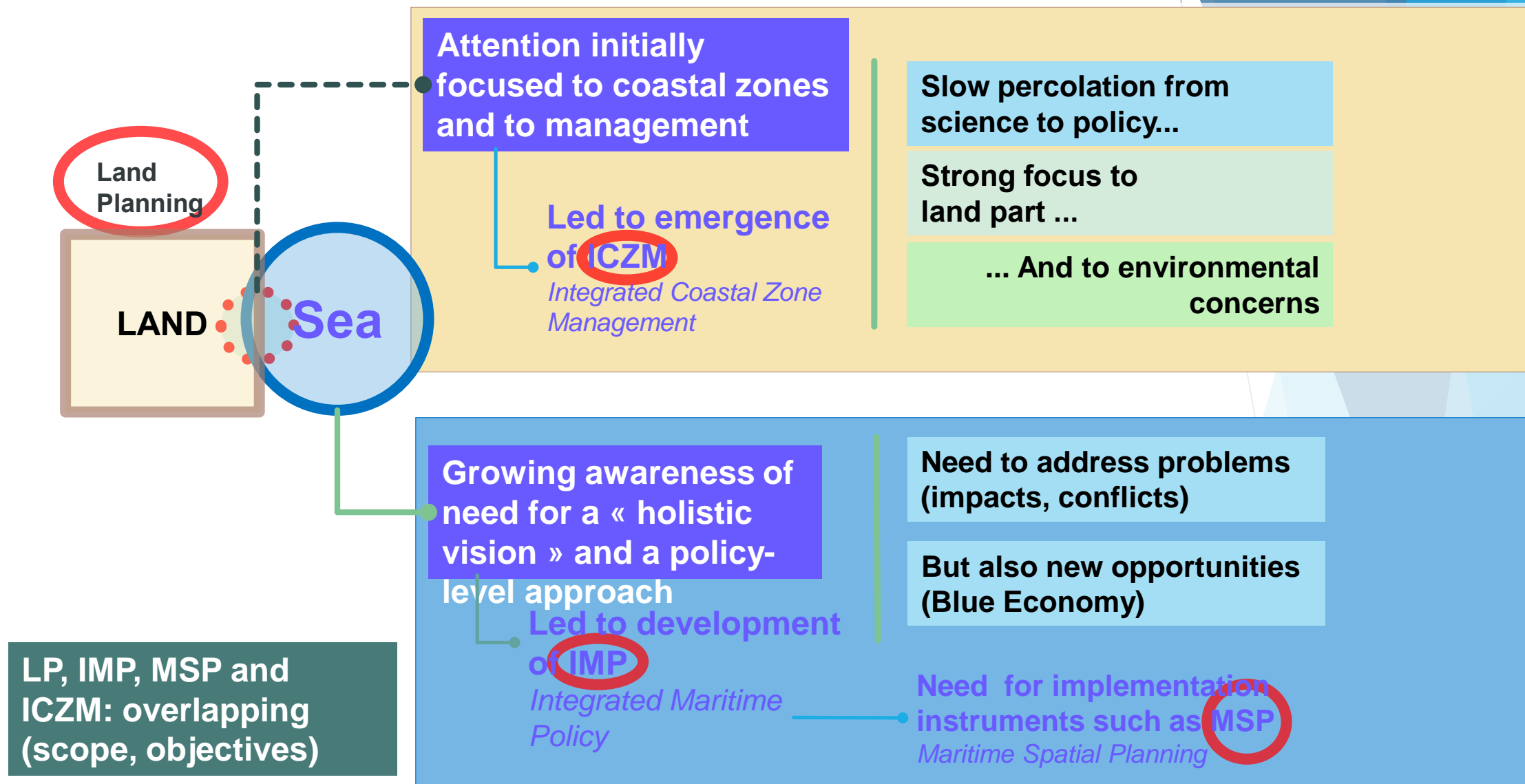
**No maritime activity can develop
without access to land**

Cannot be reserved to land-based activities...

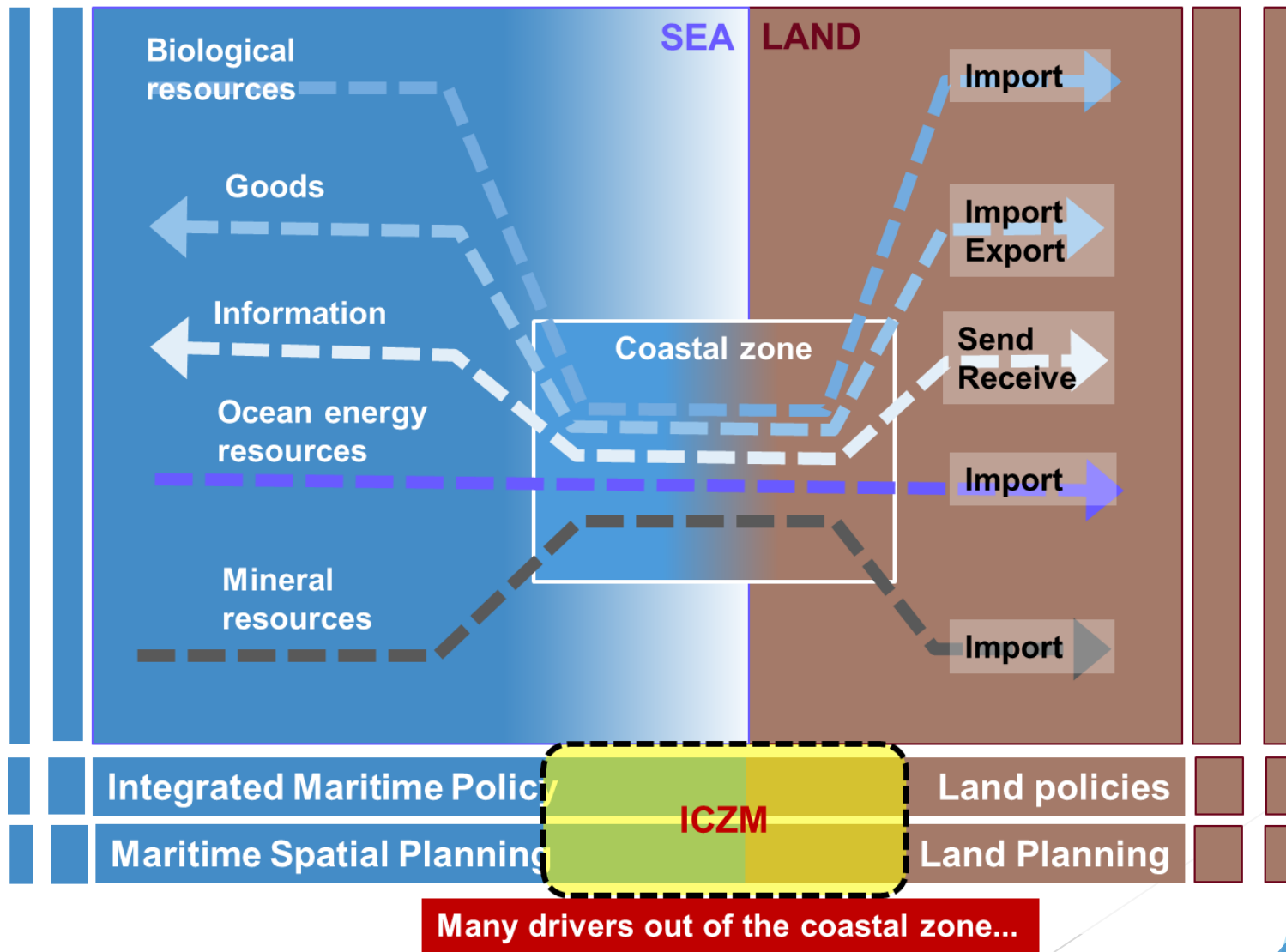
Some coastal space **MUST** be reserved to
maritime activities...

**Consequence:
it is essential for coastal management to consider maritime activities (first !)**

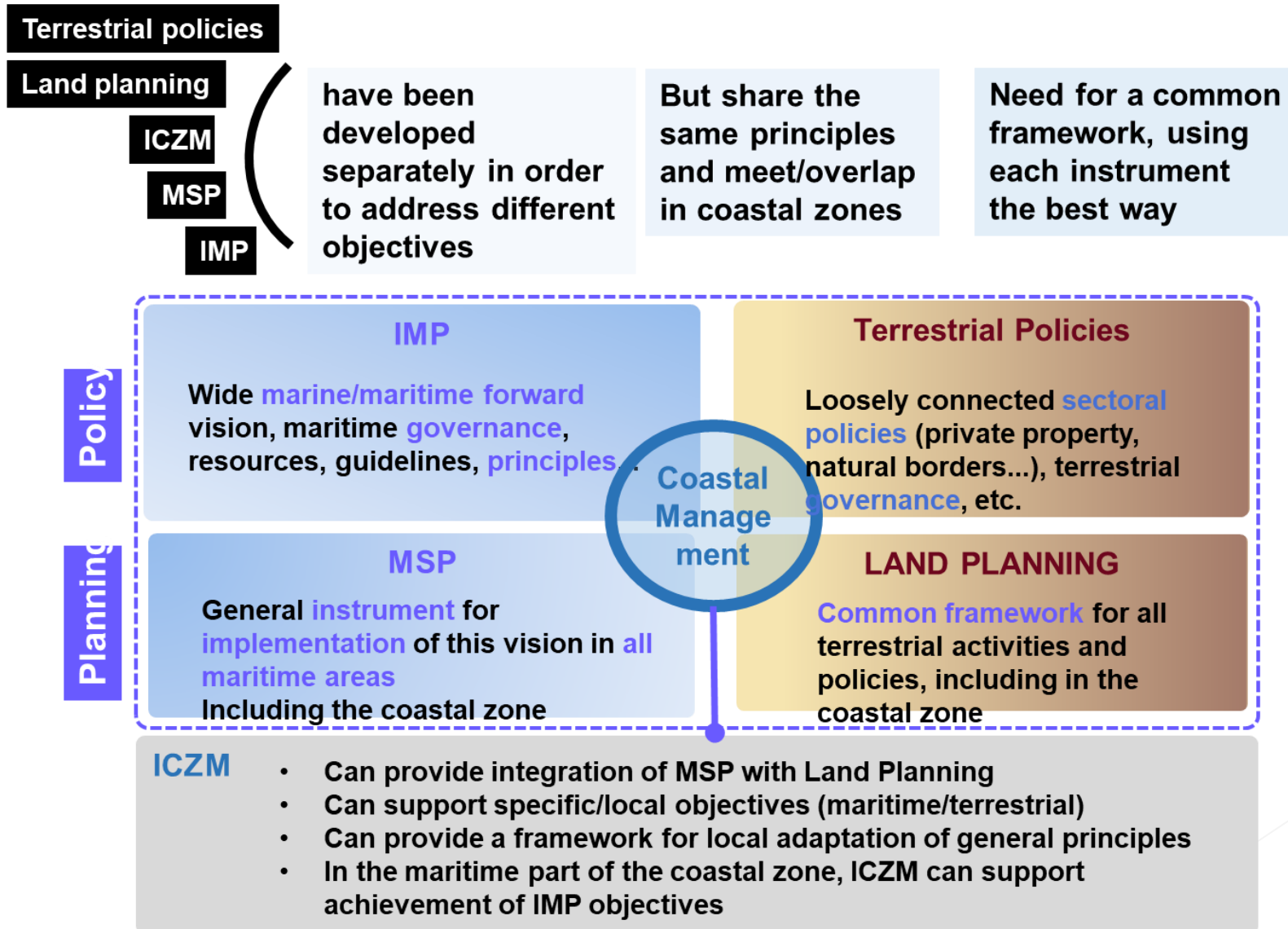
Towards sea and coast management



Land-sea (sea-land?) interactions: the full picture...



What is missing? A common framework



Examples

▶ ICZM

- ▶ projects in Mediterranean Sea but mainly more coastal than marine - CAMP project map
- ▶ in Black Sea
 - ▶ Some projects : Gelendzhik- RU, Akçakoca-TR and Tskaltsminda-GE
 - ▶ BSC Advisory Group on the Development of Common Methodologies for Integrated Coastal Zone Management
 - ▶ [National and regional report and propositions](#) (BSC)

▶ MSP implementation

- ▶ at national level
- ▶ at transboundary level : MARPLAN (Romania and Bulgaria)
- ▶ At regional level : Baltic
 - ▶ [BALTIC SEA BROAD-SCALE MARITIME SPATIAL PLANNING \(MSP\) PRINCIPLES](#)
 - ▶ [REGIONAL BALTIC MSP ROADMAP 2013-2020](#)
 - ▶ [HELCOM-VASAB MSP WG](#)

▶ MPA

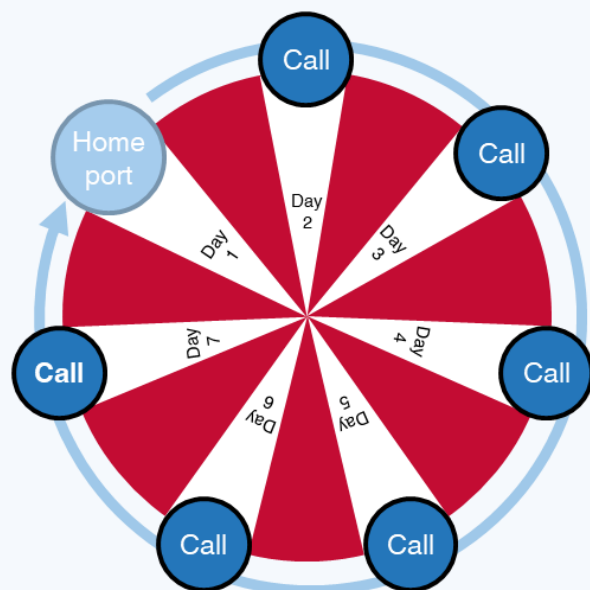
- ▶ protection but also sustainable use for existing activities (artisanal fisheries) and emerging ones (marine renewable energies - specific objectives to be included in MSP



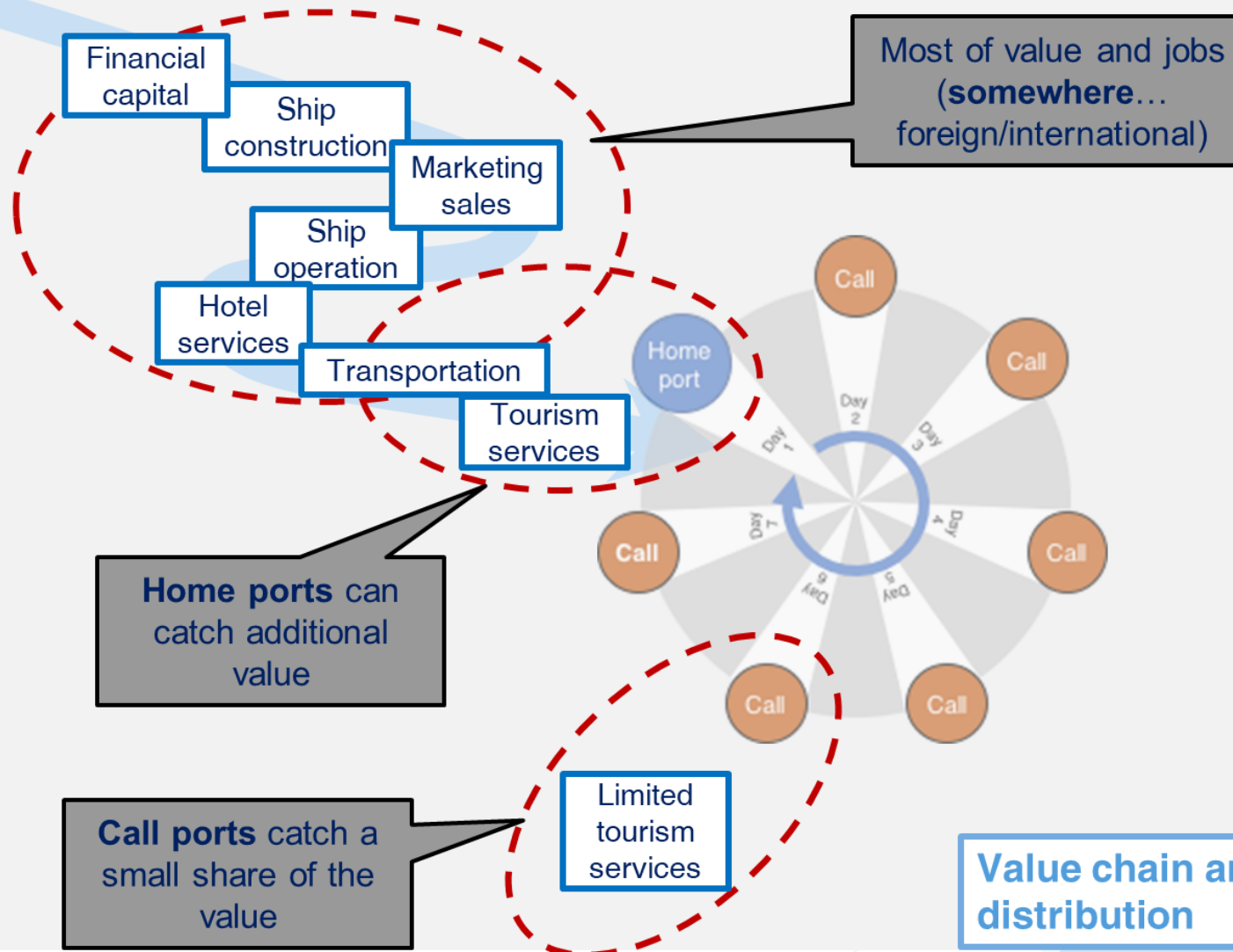
Cruise & tourism

Cruise tourism: increase local return (1)

« Standard » MED cruise

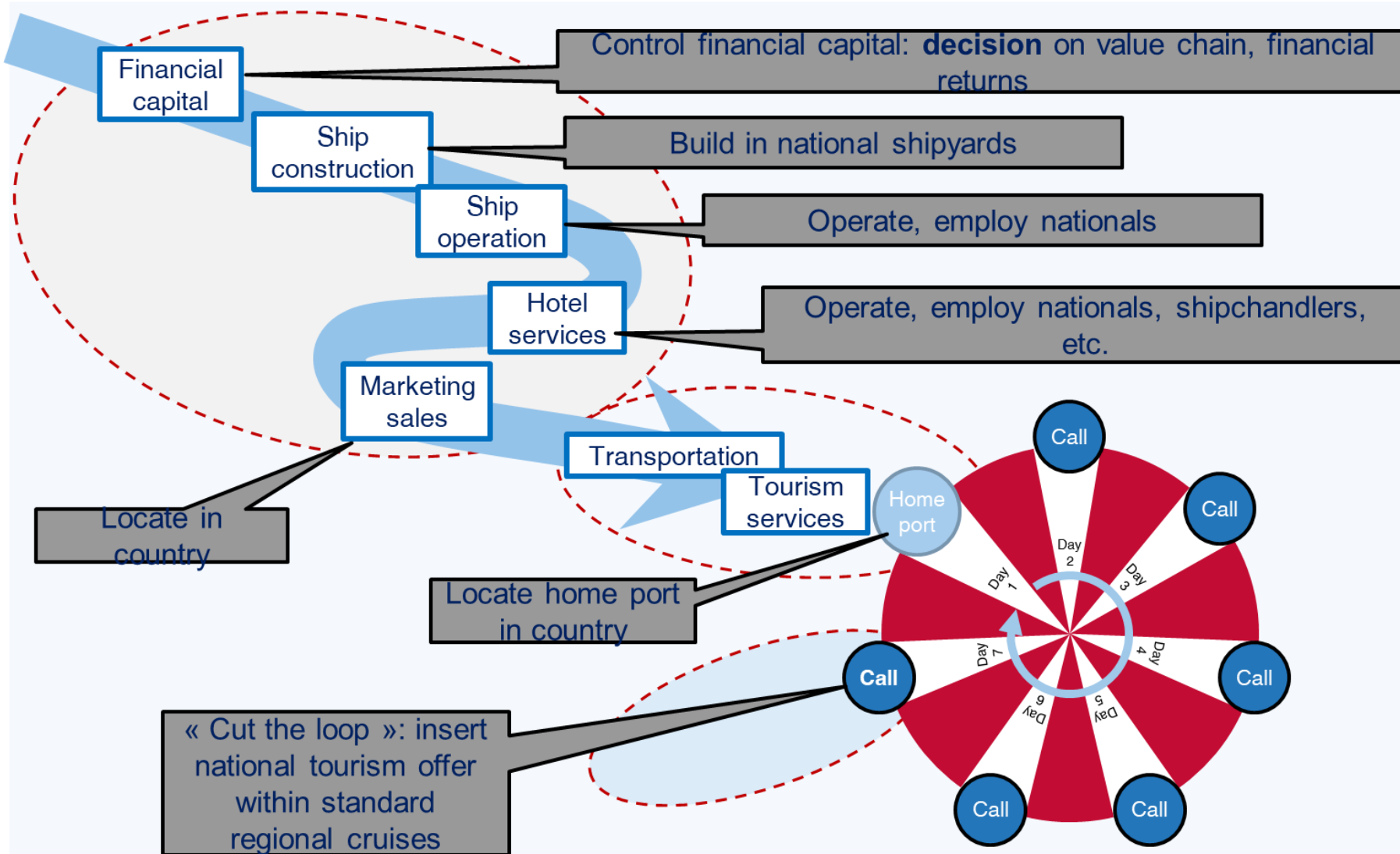


- 1 week, 6 calls. Sail overnight
- Calls: a few short circuits/visits
- Not all passengers disembark



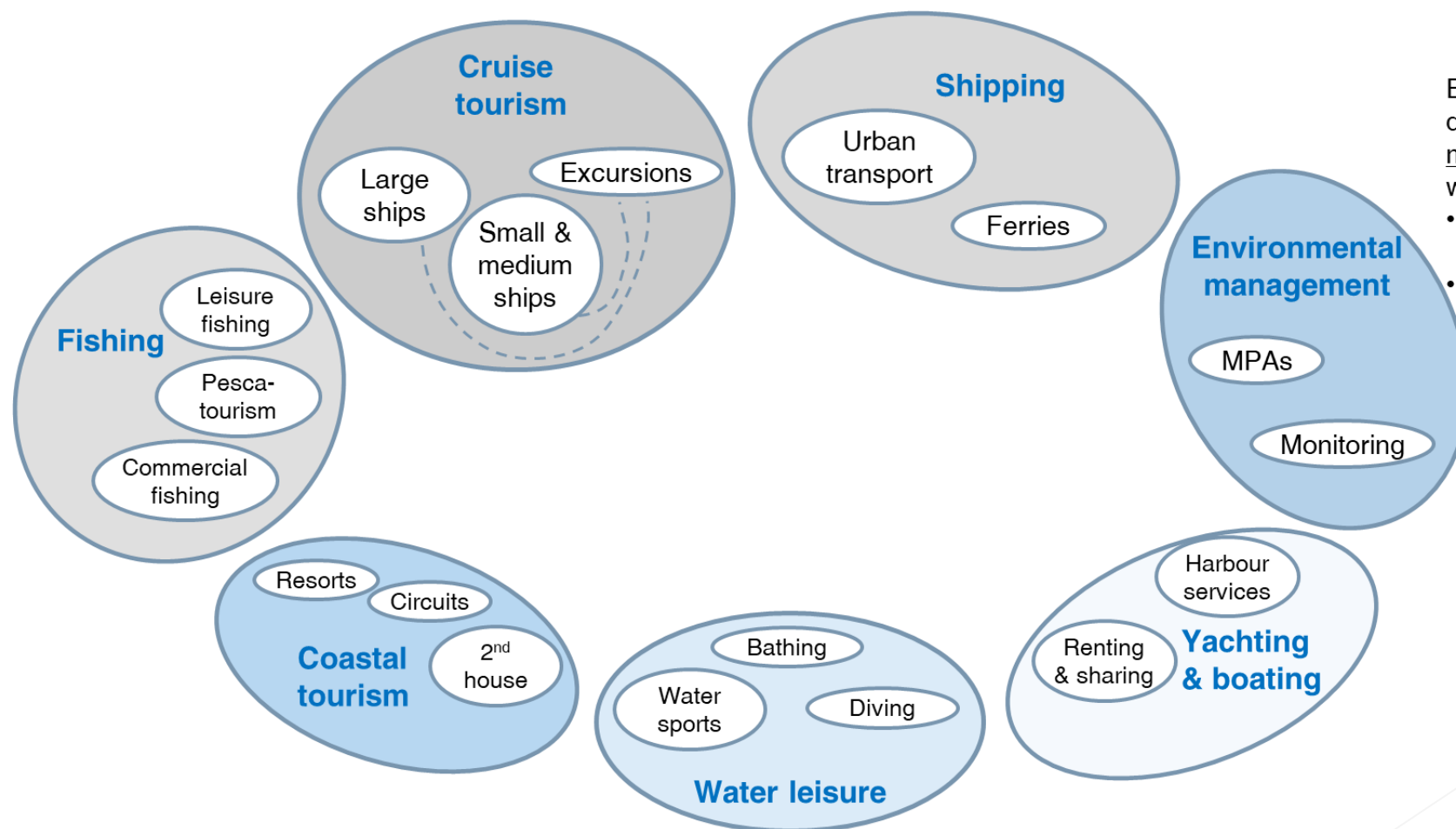
Cruise tourism: increase local return (2) -

Some opportunities



Integrated Functionnal Cluster

« Maritime and coastal tourism and leisure

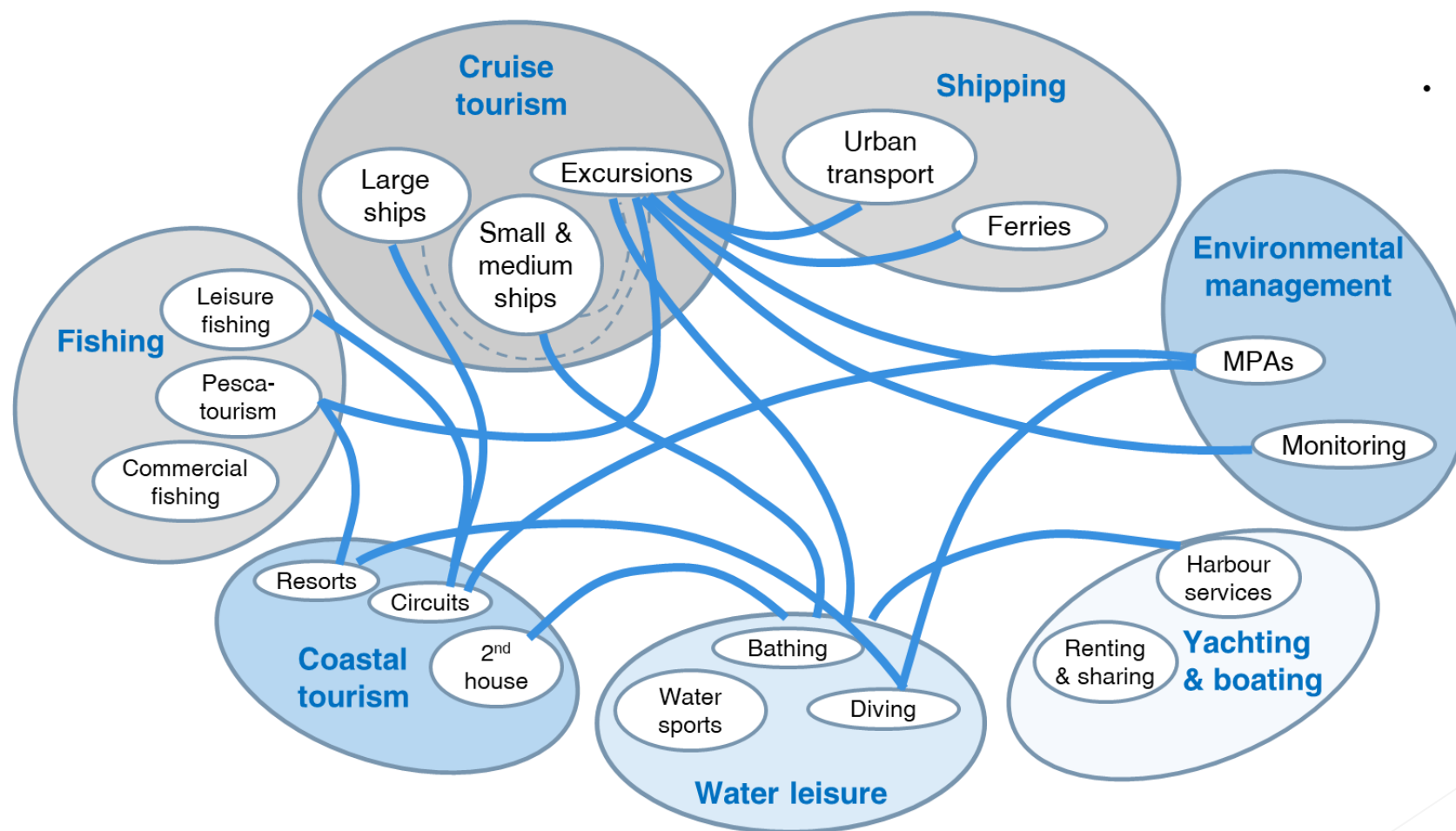


Each sector has its own dynamics, but there are many potential synergies within this cluster

- Driven by *tourism and leisure*
- Many possible links to be explored (only some represented here)
 - E.g. MPAs and excursions, diving, water sports, tourism circuits, yachting, leisure fishing....

Integrated Functionnal Cluster

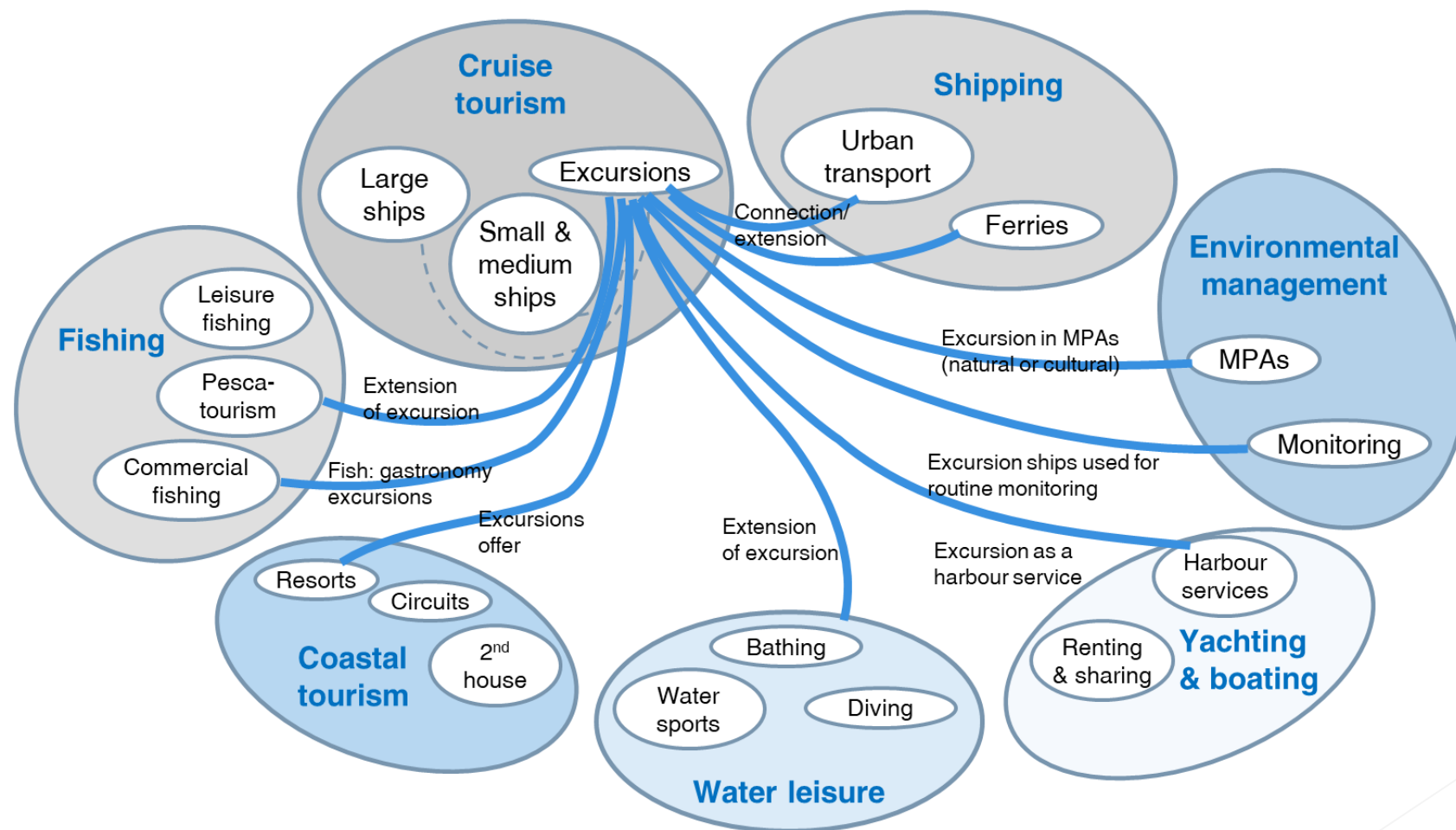
« Maritime and coastal tourism and leisure



- A national «cluster » may gather all these stakeholders: project developments, marketing (global offer), etc.

IFC « tourism-leisure » :

Examples of potential synergies with maritime excursions within a cluster



Get the best from maritime cruise

What is the best way to value your maritime and coastal capital through local jobs and local assets?

Situation : Low added value from cruise calls



**Proposed strategy:
2+3**

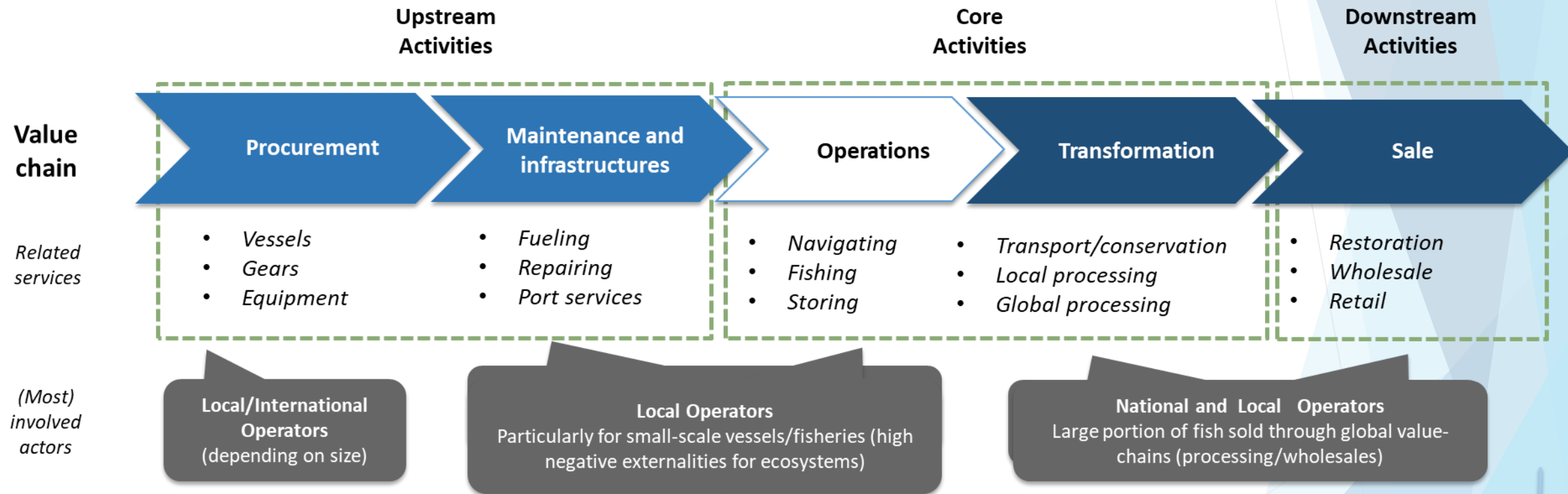
Strategy	Pros	Cons
1 - Development of cruise based attractiveness for foreign companies for calls	« global » model, in line with global market requirements (full availability of infrastructures, competitive prices) Valorization of natural & human heritage	Low medium basket at call , limited local value (few jobs, most value in cruise home port Environ. Impact & infras saturation (e.g. crowded call) High dependance (cruise companies
2 - Development of medium cruise at regional level with regional actors	Low investments Cruise program and call duration in accordance to discover the coastal capital. Low environmental impact	Need for national training and fleet (investments)
3 - Development of small cruise at regional & national level	Cruise program and call duration in accordance to discover the capital. Low environmental impact	Need for national training and fleet (investments)
<u>Local or subregional tours operated by locals</u> <u>Synergies with tourism and ferry passengers</u> <u>Regional & local maritime Cluster creation</u>	Human and natural capital valorization with sustainable cruise with low environment foot print and maximum added value along the value chain	Need for training and local capital - Common strategy needed with tourism, passengers transport



Fisheries & tourism

FISHERIES - Value Chain Analysis

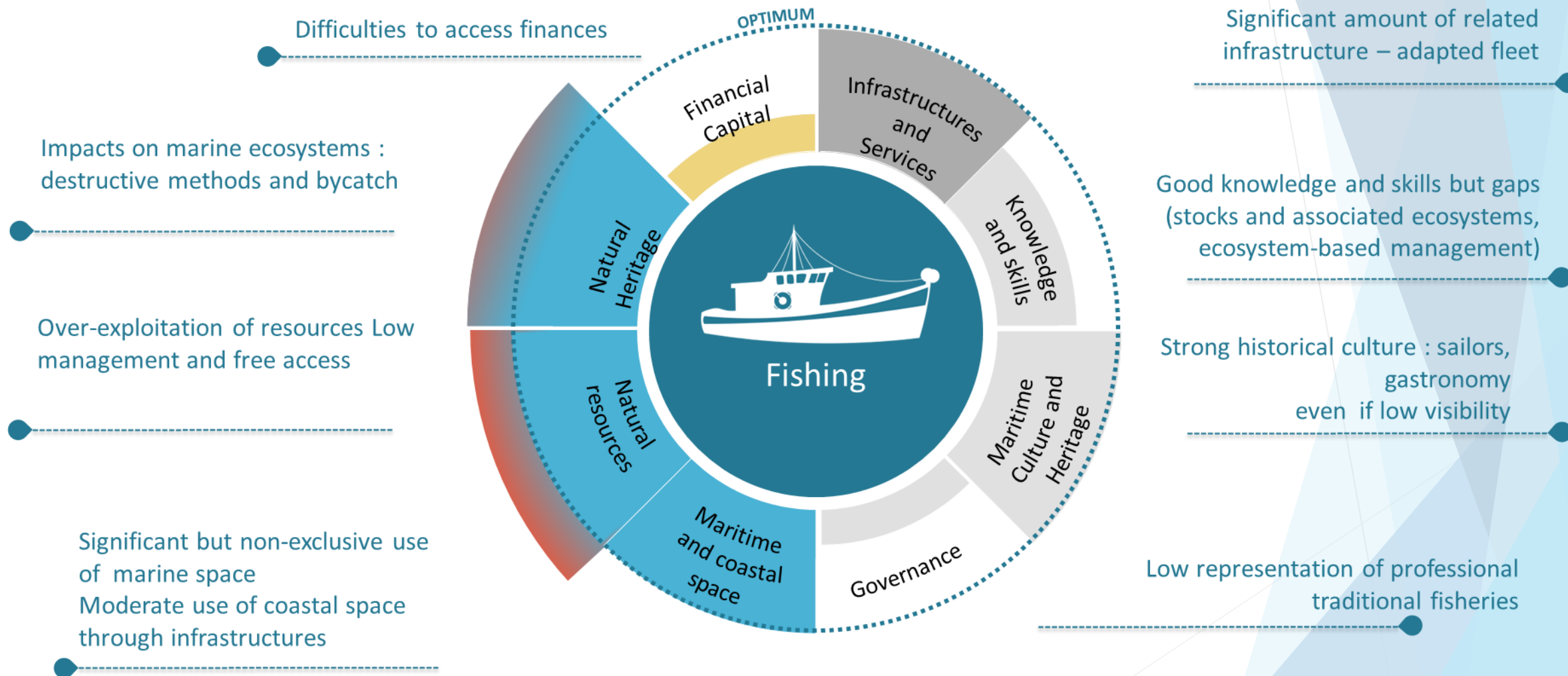
Added Value (from "low" to "high")



**bulk of economic gain remaining
"captured" by local operators**

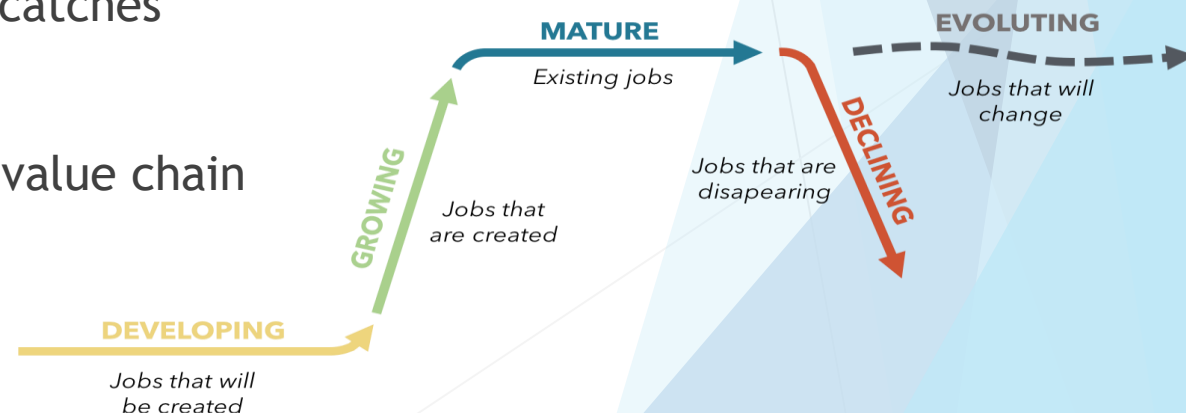
FISHERIES - National Capital Analysis

(illustration)



Statements

- ▶ Business model of fisheries is based on fish catches of commercial fish with low price for human or animal consumption.
- ▶ The sector faces with decreasing commercial fishing stocks (overfishing, illegal fishing, unselective fishing, environmental deterioration).
- ▶ In many countries :
 - ▶ fishing fleet adaptation and/or fishing practices are requested
 - ▶ high /mid employment - what about jobs if less catches
 - ▶ good level of infrastructures (ports)
 - ▶ National Added value gain more or less along the value chain
 - ▶ Fisheries a **mature sector** requesting **adaptation**



Get the best from limited fishery resources

What is the best way to value these resources through local jobs and local assets?

Situation : Small countries with limited coastline and limited marine areas have only limited fisheries resources.



**Proposed strategy:
2+3**

Strategy	Pros	Cons
1 - Optimize exploitation to maintain low price	« Standard » model, in line with global market requirements Global capital available	Low price at 1 st sale, limited local value (few jobs, most value in downward segment of value chain) Environ. impact (e.g. trawling)
2 - Allocate fish resources to artisanal local fleet for local market	Low investments, many jobs, higher value at first sale, potential synergies (tourism) Low environmental impact	Need for training and (moderate) local investments (fleet, port infras)
3 - Allocate some areas/resources to leisure fishing	Low environmental impact High local value - Potential synergies (tourism, MPAs)	Balance with local professional fishing
<u>MPAs</u> : leisure fishing only <u>Other areas</u> : low impact artisanal fisheries	Better protection, lower environmental impact, best value from limited resources, more jobs (leisure+fishermen) and more value	Need for training and local capital - Common strategy needed with tourism and environmental protection