

# Spatial demands and future trends

## Maritime sectors briefing notes

January 2019

Version 2



Co-funded by the  
European Union

Supporting Implementation of Maritime Spatial Planning in the Western Mediterranean region

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European Commission  
Directorate-General for Maritime Affairs and Fisheries  
Grant Agreement: EASME/EMFF/2015/1.2.1.3/02/SI2.742101





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Directorate-General for Maritime Affairs and Fisheries**

**Grant Agreement:** EASME/EMFF/2015/1.2.1.3/02/SI2.742101

**Component:** C1.3.2 – Spatial demands and future trends for maritime sectors and marine conservation

**Deliverable Lead Partner:** Cerema

**Start Date of Project:** 01/01/17

**Duration:** 24 Months

**Version:** 2.0

**Contributors (in alphabetical order):** Borg, Michelle; Campillos-Llanos, Mónica; Cervera-Núñez, Cristina; Dilasser, Julien; Giret, Olivier; Gómez-Ballesteros, María; Moirano, Coraline

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**Document information**

<b>Deliverable title</b>	Spatial demands and future trends – Maritime sectors briefing notes
<b>Coordinator</b>	Moirano, C.
<b>Authors (in alphabetical order)</b>	Moirano, C.
<b>Recommended citation</b>	Moirano, C. (2018). Spatial demands and future trends – Maritime sectors briefing notes. EU Project Grant n°.: EASME/ Grant EMFF/2015/1.2.1.3/02/SI2.742101. Supporting Implementation of Maritime Spatial Planning in the Western Mediterranean region (SIMWESTMED). Cerema. 45 pp. DOI: 10.5281/zenodo.2598559

**Version History**

Date	Document version	Reviewer	Revision
27/11/2018	1.0	Cerema	Initial draft
29/11/2018		IEO	Suggestions and comments on aquaculture
30/11/2018		IEO	Suggestions and comments on fisheries
04/12/2018		IEO	Suggestions and comments on and submarine cables
18/01/2019	2.0	Cerema	Final version

## Tables of contents

<b>Foreword.....</b>	<b>iv</b>
<hr/>	
<b>Fishing.....</b>	<b>1</b>
<b>Aquaculture.....</b>	<b>9</b>
<b>Offshore Oil &amp; Gas.....</b>	<b>15</b>
<b>Marine aggregates.....</b>	<b>19</b>
<b>Ports &amp; Shipping.....</b>	<b>23</b>
<b>Submarine cables and pipelines.....</b>	<b>29</b>
<b>Marine renewable energies.....</b>	<b>33</b>
<b>Maritime tourism.....</b>	<b>39</b>

## List of figures

- Figure 1 – Fishing sectors organization in France
- Figure 2 – Representative structures of fishing sectors involved in MSP process in France
- Figure 3 – Fishing sectors organization in Spain
- Figure 4 – Aquaculture sectors organization in Spain
- Figure 5 – Penned tuna sector timeline example
- Figure 6 – Closed cycle species sector example

## List of tables

- Table 1 – Number of fishing vessels by fleet segment and country
- Table 2 – Employment on fishing vessels by country

## Foreword

The aim of this report was to investigate current and potential future spatial demands of key maritime sectors and when possible with reference to cross-border.

In order to be able to meet such objective, it was at first written on the grant agreement to base such analyse on literature review and to refine it through workshops with representatives of government and industry, and other economic sectors involved.

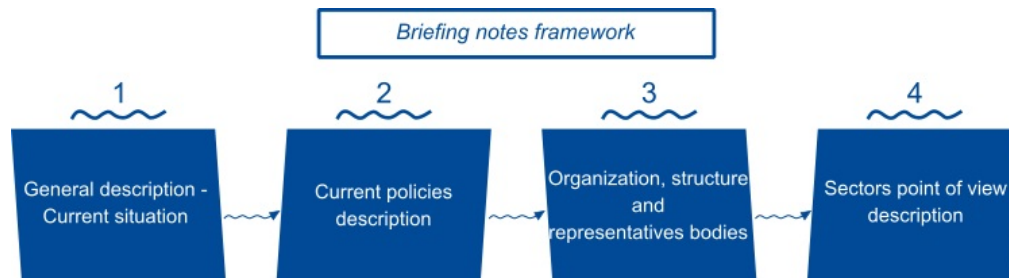
However and following both February and June Steering Committees, it was decided to not carry out any stakeholders workshops or meetings. Such decision was made by partners in order to not interfere in national Maritime Spatial Planning current consultation when already ongoing.

Thus only literature review was undertaken in order to meet, as much as possible the task objective.

Regarding now the methodology uses to synthesize this literature review, it was decided in line with works undertaken in C.1.1.1 "Initial Assessment" task of this SIMWESTMED project, and reflections led at European level, to focus it on the following key maritime sectors:

- Fishing,
- Marine aquaculture,
- Offshore Oil & Gas,
- Marine aggregates,
- Ports & Shipping,
- Submarine cables and pipelines,
- Marine renewable energies,
- Maritime tourism.

Then, after collaborative reflection the following structure of briefing note for each maritime sectors was proposed and accepted.



### 1. General description – Current situation.

Based and drawn from C.1.1.1 "Initial Assessment".

Description of the existing activity and recent trends. Key figures and various indicators state (socioeconomic ones like employment, turnover, value added...; sectors-specific ones based on sectors specific features...). Spatial and temporal distribution.

### 2. Current policies.

Main international, trans-national, European and national policies and legal framework influencing the development of the sector.

### 3. Organization, structure and representation of the sector

If applicable, this chapter aims to describe the organization, structure and representatives structures of the sector.

Is the sector well clustered through established networks, clusters or associations, or is there one large corporation as an obvious major representative of the given sector? At which level? National, regional, others...?

If so, are they involved in the formal maritime Spatial Planning process? Which are the governing bodies relevant to maritime spatial planning process in which representatives of the sector are involved?

### 4. Sector's point of view

As far as possible, and based on available documents (position papers, press articles...), this chapter should try to address sector's point of view on:

- the future trends of the activity and their spatial implications,
- the main drivers and barriers to the development of the activity; the potential drivers of changes in sociopolitical, economic, environmental and technological matters,
- the relationship with other sectors: main other existing or potential conflicts/synergies with other maritime sectors. Their needs, opportunities and threats, and especially regarding coordination across sectors.
- constraints and opportunities provided by the Maritime Spatial Planning process to sector needs.



# **Fishing Maritime sector briefing note**

## General description – Current situation

The Mediterranean Sea resources are since long ago being lusted after by humans. The fishing sector has always been an important share of the all humans activities happening in the Mediterranean Sea. Although it does not represent an economic value as important as the one from tourism or gas and oil exploitation, it's relevant enough to be mentioned as an "important employment opportunities" sector (*Initial Assessment MSP oriented & The State of Mediterranean and Black Sea Fisheries*). Different kinds of fisheries have been developed throughout time and nowadays small-scale fisheries share the resources with industrial and semi-industrial ones. Following Recommendation GFCM/33/2009/3, there are thirteen different kinds of fleet segments, from polyvalent small-scale vessels without engine no longer than 12m to trawlers, tuna seiners or polyvalent vessels longer than 12m.

All fleet segments together, it seems to appear there is around 75 000 fishing vessels operating in the Mediterranean Sea (this figure includes Turkey which bordered with both the Mediterranean and Black Seas, yet data used to estimate it did not distinguished fishing fleet from one to the other sea). Also this figure might be underestimated as there is a lack of data regarding some fleet segments.

Then as regards to the four partners countries of the SIMWESTMED project, fishing fleets are as follows:

**Table 1 – Number of fishing vessels by fleet segment and country**

Country	Fleet segments												Total		
	Polyvalent SS w/o engine <12m	Polyvalent SS w/ engine <6m	Polyvalent SS w/ engine 6-12m	Trawlers <12m	Trawlers 12-24m	Trawlers >24m	Pure Seinners 6-12m	Pure Seinners >12m	Long Liners >6m	Pelagic Trawlers >6m	Tuna Seinners	Dredgers >6m		Polyvalent >12m	Unlocated
France		361	856	16	36	30	16	12	73	5	20	10	26		<b>1 461</b>
Italy		2 608	5 819	188		218	13	174	170	145	12	698	439		<b>12 468</b>
Malta		504	413		15	6		3	53	1	1		19		<b>1 014</b>
Spain		113	946	20	459	137	26	219	389			180	174		<b>2 664</b>

> Source: *The State of Mediterranean and Black Sea Fisheries, GFCM, 2016*

In the four countries, small-scale fisheries fleet segment appears as the most developed one. In Spain, it represents 40% of all the fleet segments, and in France, Malta and Italy, it's up to 50% of them. Also even though there is a kind of lack of available data, small-scale fleet segments seem to represent 55% of the fisheries direct employees (*The State of Mediterranean and Black Sea Fisheries*).

In terms of employment, data highlights a difference between the four countries. Indeed it appears fishing sectors employees represent a more important share of the total working population in Malta and Italy than in Spain and France.

**Table 2 – Employment on fishing vessels by country**

Country	France	Italy	Malta	Spain
Employment	1 494	28 216	341	6 672
Fishing sector employment as a percentage of the total working population	0,0040%	0,10%	0,16%	0,02%

> Source: *The State of Mediterranean and Black Sea Fisheries, GFCM, 2016*

Although small-scale fleet segments are the ones with the higher percentage of employment, trawlers and purse seiners & pelagic trawlers fleet segments are the ones with the greatest percentage in terms of landing value, respectively 38% and 27% of percentage of landing value of the four groups of GFCM fleet segments.

Data from the GFCM shows that average landing value per vessel (in constant 2005 US\$) is up to \$55 000 for France, Italy and Spain but around \$12 000 for Malta. Data from year 2013 show that in terms of landing species at least 30 different species contribute to 90% of the all landings areas. There is only an exception to it with the Adriatic Sea where there are only 15 species that represents most of the catches (*The State of Mediterranean and Black Sea Fisheries*). From 2000 to 2013, the most important group of species landed with 51% of the total species landed, was composed of herrings, sardines and anchovies.

In the Mediterranean Sea, landings per year were increasing until the mid nineties, but then decreased irregularly until 2013 and then sort of stabilized. On average, from 2000 to 2013, average landings in tons for France, Italy, Malta and Spain were respectively equal to 29 900, 249 500, 1 419 and 108 100. However, it seems as a future trends forecast that professional fishing sectors will be still decreasing in the future (*Blue growth in the Mediterranean sea & The State of Mediterranean and Black Sea Fisheries*).

Regarding temporal and spatial distribution, it seems that regarding the size and type of engine on small-scale fleet segments, most of these fishing activities happens relatively close to the coast with not too bad weather condition.

## Current policies

At an international scale, there is the General Fisheries Commission for the Mediterranean (GFCM) which establishes several objectives for the members States such as the monitoring of the Mediterranean living resources status, keeping review of several aspects of fishing industries such as social and economics ones. It also propose and recommend appropriate measures regarding conservation and exploitation of living resources. Lately, with its 40<sup>th</sup> session, the GFCM set up more regulation regarding the urgency to act for certain type of over-exploited and threatened stocks.

Also there is the International Commission for the Conservation of Atlantic Tunas (ICCAT) (*International Commission for the Conversation of Atlantic Tunas*). Likewise its name doesn't speak clearly about the Mediterranean, it also concern tunas like species in a vast international area including the Mediterranean Sea. Its objectives are to monitor tunas and tuna-like species, publish management advice following stock knowledge collated/collected, and communicate management notice.

In Europe, all European fishing fleets have to follow and respect the common rules implemented through the Common Fisheries Policy (CFP). Indeed since the 70s, this policy, that evolved throughout the years, insured an equal access to the European water and to its resources to the European fishing fleets. It also insured a sustainable management of the resources through TACs (Total Allowable Catches) implementation (*Common Fisheries Policy*).

Along with what was mentioned above, the CFP tend to limit fleet capacity and also authorized fishing areas with the application of fishing period and areas (spawning and nursery spaces) when it was highlighted as a necessity. In conjunction with the CFP and throughout regulation (EU) n°1380/2013, fishing discards tend to be eliminated with the implementation of a landing obligation.

Finally, the CFP includes a funding part called the European Maritime and Fisheries Fund (EMFF). It especially aims to support fishermen regarding the development of sustainable fishing practices, coastal communities to develop different kinds of coastal economy, and to finance sustainable coastal project development.

In March 2017, all Mediterranean countries ministers also signed the Malta MedFish4Ever ministerial declaration. It states that all government agreed to strengthen stakeholders engagement of the management of fisheries, to preserve food quality and security, insure equal distribution of fishing opportunities... (*MedFish4Ever*).

There is also the "Mediterranean Regulation", Council Regulation n°1967/2006. It concerns conservation measures, specific management of fishing activities when necessary (above knowledgeably habitat, regarding hooks size, minimum fishes size...)

At last but not least, there is a proposal for a European Parliament and Council regulation regarding the elaboration of a multi-annual plan for demersal stocks fisheries in the western Mediterranean. This proposal aims to resolve high levels of over-fishing and legal framework inefficiency with the implementation of a pluriannual plan at European scale (2018/0050 (COD)).

Apart from rules directly enforced by the CFP and other international rules and/or agreements, European countries also have to establish management plan and implement national rules to regulate fishing activities. Indeed although European States members are submitted to the community management of fisheries, which means that all the waters and resources of the European union are equally accessible to all fishermen, there is an exception when it comes to territorial waters of a country. Actually within this country area they are allowed to keep it only for the ones coming from the country itself. In such case, regulations and management rules are implemented by the country as long as it is in respect with the community regulation of fisheries. Obviously these national adjustment have to be in line with the European ones.

In Spain, The Spanish Constitution of 1978, gives to the central State the exclusive competency in maritime fisheries without prejudice of the competences in sector management that may be attributed to the Autonomous Communities. However, it will be exclusive competence of the Autonomous Communities: fisheries activities in interior waters, aquaculture and seafood fishing. The main regulation is the Act 3/2001, March 26, of State's Maritime Fisheries. Moreover, several management plan regarding specific species are in forced, control and ban of different kind of gears are also implemented at national level. Regarding local fishes stocks and targeted fishes, additional fishing prohibited days are fixed and thus in order to keep a sustainable fishes population size. Finally, some rules regulated technical aspects such as vessel length, engine power..

In Malta, fishing activities are managed through the application of Council Regulation n°1967/2006. Indeed, in line with the article 19 of it, Malta entered into force 3 management plans regarding 3 types of fisheries: lamapra fishery, bottom otter trawl fishery and lampuki fish aggregating device fishery. These plans aims to provide financial stability to fishermen in case of needs and help along stock monitoring to insure sustainable stock management (*Scientific, Technical and Economic Committee for Fisheries*).

In Italy, fisheries management plans are mostly based on the European Council Regulation (EC) n°1967/2006 as well as for Malta. Several national plan have been adopted like the ones about bottom trawling, purse seine, or again about hydraulic dredge. Also, and within the scope of the European Maritime and Fisheries Fund (EMFF), through its operational program for Italy, actions regarding fleet capacity lead to fleet capacity decrease. At last and as for now, fisheries management in Italy is not based on the implementation of TACs and quotas regarding catches control. It is rather more based on limited license delivering, limited gear type and limited landed sizes.

In France, fisheries are also been managed through the implementation of fishing licenses, but on the contrary to Italy, TACs and quotas implementation are part of the management tools used too. In France since 2010, at national scale, the ninth book of the rural legislation is the fishing regulation framework.

## Organisation, structure and representation of the sector

At European level, there is the COGECA which stands for General Committee for Agricultural Cooperation in the European Union. It represents several kinds of fishing and agricultural activities stakeholders before European decision-making bodies. It also supports different kinds of studies regarding its sector-specific competencies (*General Committee for Agricultural Cooperation in the European Union*).

There is also the association of national organizations of fishing enterprises in the European Union. Its aims are to promote sustainable and responsible fishing practices. It enhances talks between European decision-making bodies and fishing activities stakeholders (*Europêche*).

In France, the fishing sector is well structured with different ranges at different scales. First there are two kinds of "categories" but they're working together. They are political and administrative structures in charge of regulation appliance and professional structures in charge of fisheries management. Thus fisheries are jointly managed by administration and professional structures.

So concerning political structures, their organization is as follows:

Firstly, at national scale, it's both the Ministry of the Agriculture and Foods, and the Ministry of the Ecological and United Transition that are in charge of fisheries and fishermen management.

There are two directions, they are in charge of different tasks. The first one, called the Aquaculture and Maritime Fisheries direction has, briefly, to take care of the translation and implementation of European regulation at national scale; define resources conservatory rules; define fisheries inspection rules... This one is part of the Agriculture and Foods Ministry.

The second one is called the Direction of Maritime Sectors and is part of a bigger direction of the Ecological and United Transition Ministry called the General Direction of Infrastructures, Transport and Sea. Shortly, its tasks are related to maritime security, maritime education, professional license and vessel registration delivery.

Secondly, at regional and inter-regional scale, that's a devolved direction that's in charge of the implementation of national policies about sustainable development of marine resources, marine activities regulation... It is also this direction that is in charge to validate or not regulation project coming from the professional structures mentioned above. They are called Inter-regional direction of sea and are on the authority of the regional Prefect.

Thirdly, at department scale, it's another devolved direction that has to take care, this time, of regulation respect and fisheries control.

Now regarding the representative professional structures organization, fisheries management, inside territorial waters, is awarded to what's called maritime fisheries and marine farming committees by the French government. Professionals have to join, pay dues... These committees are in charge of resources management, and they have to represent and support fisheries sector interest about different themes. Elected fishermen and permanent employees employed by committees composed them.

These committees stand at different scales (national, regional and local). There is one national committee, fourteen regional ones and twelve departmental ones. They are private structures but with missions delegated from public authority.

At national scale, the committee represent fisheries to the public authorities and councillors. It's called the National Committee of maritime fisheries and marine farming. Such organization allows professionals to contribute to the national regulation about gears uses and marine professionals activities, marine resources management for the ones not under European quotas or TAC (Total allowable catch), environmental public policies involvement, actions (social and economic) in favor of professionals, scientific and technical support to professionals.

At regional scale it is also called Committee of maritime fisheries and marine farming but the word regional replace the national one. Such organization allows professional to be represented at this scale too. Also these regional committees work and support departmental committees or regional committees local office. These committees, both regional and/or departmental are the ones that set opening and closure fishing dates for some species. They're also the ones that deliver fishing licenses, that implement measures to control fishing effort, that forbid some types of gears or the size of net's mesh. Departmental and local office of regional ones are both financially and juridically independent. Regional committees have to determine skills and missions that they can transfer to them (departmental and local office ones).

On the Mediterranean seaboard, there is another kind of professional fishery organization concerning what's called small fishery scale. They are called "prud'homie". There are thirty three prud'homies along the seaboard. It represents an old tradition based on fishing community management. They are composed of fishermen from their limits areas, and led by an elected fishermen called "1st prud'homme". In terms of organization, all fishermen in the area of the prud'homie have to be member of it and respect the rules. This allows to share resources equally between all of them. Most of their role nowadays is to take care and resolve difficulties between fishermen, to share legal quotas between all of them (it can be quotas from EU, national legislation but also from their own rules as long as they are conform with above regulations).

At last, there is another type of professional structure (not just on the Mediterranean seaboard) and are called producers organizations. Their aims are to insure sustainable fisheries and sales conditions improvement for members. These producers organizations are association and there are around twenty of them in France. All of them are mostly gathered within two producers federation, one called the National association of producers organizations and the second one called the federation of the traditional fisheries producer organization. These producers organization are mentioned within the European regulation concerning the shared fishing and aquaculture markets organization (regulation (EU) n°1379/2013 of the European Parliament and of the Council of 11 December 2013 on the common organization of the markets in fishery and aquaculture products). They are in charge of the allocation to fishermen and control of catches for species under European quotas. They also have to elaborate and implement management plan in terms of production and sales. To do so they can rely on the European Maritime and Fisheries Fund (EMFF).



Finally they play a part in scientific monitoring of the several fisheries.

Membership to them is not a requirement for fishermen, but in some cases measures implemented by one of them can be ordered to fishermen who are not members.

As previously mentioned, quotas are being determined, in order to respect stocks sustainability, at European level but also at national, regional and even local scale when it's about small fishing scale fishery within territorial waters.

This kind of species regulation is considered and decided within a specialized committee. This one is composed of fishermen representative at different scale (national and regional ones).

Thus at national scale, the aims of these specialized committees are to elaborate and submit projects about different kinds (depend on what the specialized committee was created for) of subjects (practice conditions, species management...) to the National Committee of maritime fisheries and marine farming council. They can submit everything but they can't take any decision. It is only the Ministry in charge of fisheries management that's able to take decision and decree based on their propositions.

Then at regional scale, it's about the same. There are specialized committees at local or regional scale created to debate and submit proposition. As for the national ones, they are specialized on one kind of gear type or specie or group of species. They are also composed of local or regional fishermen representatives. These commission once they have agreed on a proposition submit it to the Regional Committee of maritime fisheries and marine farming council. This one can accept the proposition or no. If it does accept, it submits it to the regional State authority. This one can, on the regional Prefect authority transfer, approved it or no.

Finally, the last thing that allow to manage and control fisheries and fishermen at a European scale but also at a State scale when its within its territorial waters, is the fishing license system.

First at European scale, and in order to be allowed to fish, fishermen have to get a European community fishing license. This license allows fishermen to fish within European waters throughout an established period, for a determined fishery and within a specific area.

Then at State scale, specific fishing license are being delivered at national or regional/local scale. Within the territorial French waters, these licenses are fixed by the national or regional Committee of maritime fisheries and marine farming. License acquisition conditions are also determined at national and regional scale. The implementation of these kinds of license allows to manage stocks, sales and social aspects equally between all. The license is delivered for both a fisherman and a vessel. Criterion to obtain such license can be really various and depend on the kind of fishery and/or specie they are supposed to regulate. Requirements to get a license for example can concern the type of gear, the size of the vessel, fishing time allowed (*Document stratégique de façade Méditerranée & Picault at al., 2014.*).

In France, fishing sectors are rather like well clustered, and thus at all the different scales (national, regional or local ones).

Figure 1 – Fishing sectors organization in France

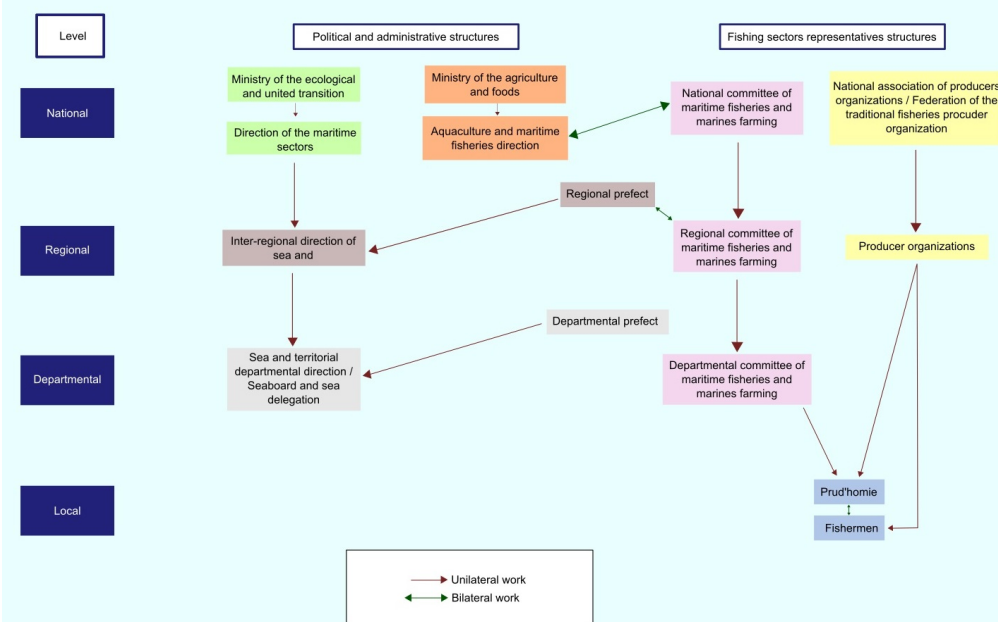
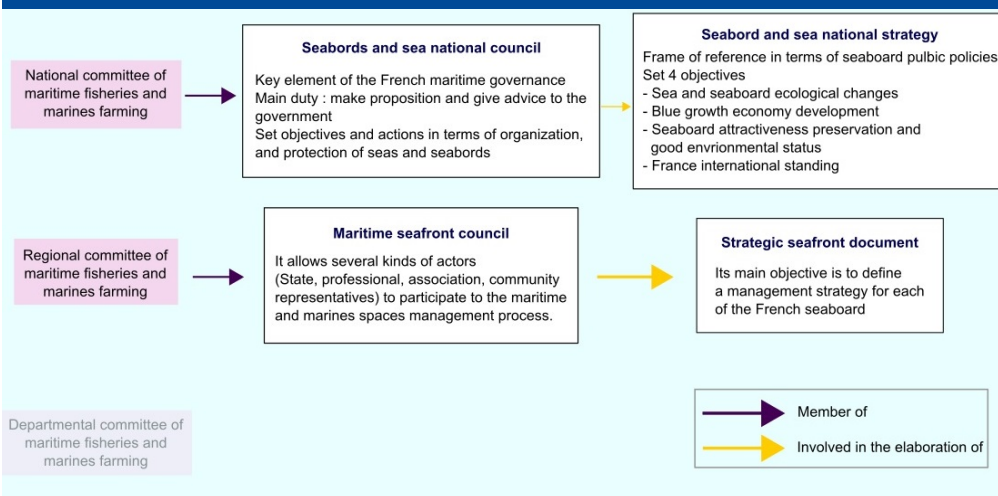
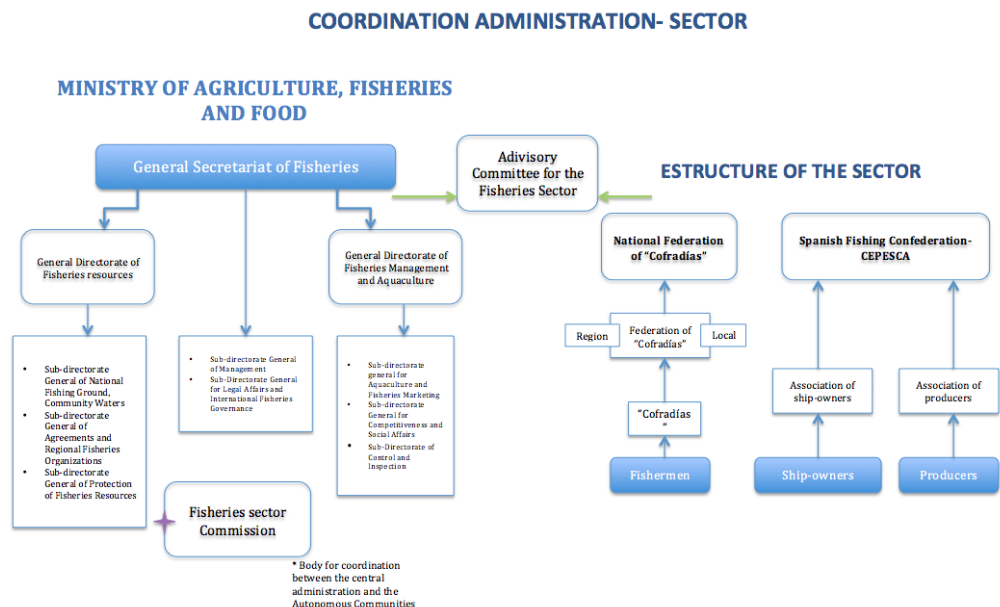


Figure 2 – Representative structures of fishing sectors involved in MSP process in France



In Spain, fishing sectors are organized as follows:

Figure 3 – Fishing sectors organization in Spain



> Source: Spanish Institute of Oceanography (IEO), 2018

In Spain, Professional fishing organizations and other associative entities, representative of the sector, participate in consultative bodies of the European Union, international institutions and the General State Administration, especially the Ministry of Agriculture, Fisheries, and Food, as institutional interlocutors of the permanent dialogue that is required to configure a fisheries policy and a general planning of the economy for the benefit of the general interest (*Fisheries*).

In particular, the Act 3/2001, March 26, of State's Maritime Fisheries recognize the traditional implantation of the "Cofradías de Pescadores" (Fishermen's Associations) on the coast, and their legal nature of public non-profit corporations, and establishes the bases of their democratic composition and operation regime that will be developed, expanded and controlled by the Autonomous Communities. The antecedents of the "Cofradías" go back to the eleventh century.

Section 2 of the law regulates the "Cofradías" that are "Corporations of public law, non-profit making, representing economic interests, which act as consultation and collaboration bodies of the competent administrations in matters of maritime fishing and of the management of the fishing sector." Owners of fishing vessels and workers in the extractive sector are allow to be members of the "Cofradías".

Article 46 establishes the functions of the "Cofradías" that will be, among others, to act as consultation bodies for the competent public administrations and to provide services to its members and represent and defend their interests.

Article 48. The representative organs of the "Cofradías" are the "Junta General", the "Cabildo" and the "Patrón Mayor".

The National Federation of Fishermen's "Cofradías" may integrate, if applicable, the "Cofradías" and its federations and act as an interlocutor between them and the General State Administration on maritime fishing, performing those actions that the General State Administration may delegate to it.

The National Federation of Fishermen's "Cofradías" has among other functions:

- coordinate, manage and represent the socio-economic interests of all "Cofradías",
- channel as many actions, projects or programs carried out by the Administration that affect the socioeconomic interests of the fishing sector.

Nowadays it represents 225 Cofradías, that means 40 000 workers, 9 000 of them, shipowners.

Section 4. of the law is dedicated to "Other entities representative of the fisheries sector". Article 56 of "associative entities and union organizations" says that shipowners's associations and union organizations will be considered for interlocution and collaboration in decision making when it may affect the interests that they represent.

There is also the CEPESCA (Confederación Española de Pesca). It defends the interests of the sector in European forums as well as in front of the Spanish Administration. Its General Secretariat is the president of *Europêche*. CEPESCA also assist as representative of the sector to other forums in which Spain is involved with the fisheries sector, as the Moroccan Hispanic commission. It also make communications and direct proposals as the document for the general elections of 2016, whose proposals are summarized in T1.2. They are quite pro-active.

Created in 2007, is the most important national fishing business organization in Europe and one of the most representative in the world. It agglutinates: 37 shipowners' associations, 800 fisheries enterprises, 861 vessels, 10.000 workers, 311.674,88 GT, 1.000 millions euros o business volume and the 50% of captures at national level.

In summary it groups 95% of the deep-sea fleet, a high percentage of coastal fleet of medium size and a 64% of GT of the Spanish fleet.

Among its objectives:

- join forces to make a better defence of the economic and professional interests of the Spanish fishing sector,
- be a privileged interlocutor of the different administrations, encouraging dialogue and collaboration with them.

The Order of 10 June 1998 creates the Consultative Committee of the Fishing Sector as a body for consultation, deliberation and advice of the Ministry of Agriculture, Fisheries and Food in matters within its competence relating to maritime fishing, the management of the fishing sector, management of the marketing of fishery products, fisheries research and aquaculture. It will have the following composition :

- the President, who will be the General Secretary of Maritime Fishing,
- four Members representing the General Secretariat of Maritime Fishing, which will be appointed by the President among the officials of the same,
- four Members representing the public law corporations of the fishing sector, nationwide,
- four Members representing the business sector to the extractive fishing industry, nationwide,
- four Members representing the trade union organizations of the national fishing sector,
- four Members representing the transformation and marketing sector, nationwide.
- two Members representing the aquaculture sector, nationwide.
- two Members with free appointment of the President, chosen from professionals of recognized prestige.

## Sector's point of view

In France, it is rather a common thing to find fishermen point of view regarding their activity and their trends in local papers. They are usually words from small scale fisheries or trawlers professional and/or representatives ones. Although there is a sort of division between these two kind of fisheries, there is a general concern about their activities, the previous 1<sup>st</sup> Prud'homme of Toulon was telling a local paper "they are killing us" talking about their situation. Indeed fisheries have been facing a crisis for several years now. Stocks have been falling down, gas prices exploded/ went up, European and national laws have been strengthened and enforced in order to limit this resources over-exploitation but this also lead to some economic and/or employment impact. In Sète back in 2007 fishermen representative already talked about a "nth rescue plan" and describe fishermen feelings as "at the chasm's edge".

Recently in France, the enforcement of a 2016 regulation is worrying small scale fishermen. This regulation, about fishermen vessel fishing license delivering terms, set different types of condition to obtain it, yet these conditions seem almost impossible to meet for this kind of fishermen. They think a lot of them will not be able to get their fishing license renewed, the 1<sup>st</sup> Prud'homme of Martigues says "40% of this small boats could be concerned" in a local paper in May 2018.

A Secretary, who will be the Deputy Director General of Support and Coordination of the General Secretariat of Maritime Fishing.

The Fisheries Sector Commission will be the cooperation body between the general administration of the state and the Autonomous Communities.

In Italy, no further information could be really found regarding fishing activities representative. Nonetheless, it seems there is the National Fisheries Association – Federcoopesca, which the aim is to represent and protect fisheries actors. It represents them nationally and locally but also at European level (*National Fisheries Association*).

No further information could be found regarding fishing activities representatives and organizations in Malta.

In Spain CEPESCA redacted a document with propositions to the political parties in Spain for the elections in 2016. Some of the proposals are as follows:

- It is necessary to get more possibilities of fisheries for the species whose scientific data shows that this increment will not alter in a significant manner its "good status" following the objective of getting the maximum sustainable yield for all species by 2020.
- A system should be established in the EU that guaranties that the quotas of some countries will not be underutilized while other member state don't have enough.

In the "Report on the fishing sector of 2017" from CEPESCA some ideas regarding future trends:

- The Spanish fisheries sector has been experienced a continuous adjust since the entrance of Spain in the European Union in 1986. That means a reduction in the number of vessels and GT in the different fishing grounds and different fishing gears.

Some objectives of the sector are to get better fisheries possibilities. This means not to increase the number of the vessels but to get better quotas from EU.

No further information could be found for Italy and Malta.

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# **Aquaculture Maritime sector briefing note**

## General description – Current situation

Marine aquaculture is the breeding of marine animal and/or plants. It happens in environmental controlled conditions and devoted to commercial sales (both for human consumption and animal ones). On the Mediterranean coasts, traditional aquaculture does exist since long ago but the modern one emerge around the 70s and continue to grow widely ever since. Nowadays, a lot of wild fishes stocks have been quickly declining and the development of aquaculture has been a way to keep fish industries total value stable or even increasing. Indeed it appears that between 1994 and 2014, the Mediterranean aquaculture total value presents a 250% increase (*Blue economy in the Mediterranean*). In the Mediterranean sea, fish farming represent two thirds of aquaculture output and the last remaining third comes from mollusc farming. All around the Mediterranean, aquaculture sectors represented in 2014 up to 120 000 direct jobs and more than 750 000 indirect jobs from processing, transport or else industries. Regarding all the Mediterranean countries where aquaculture take place, production are mainly concentrated around six different countries and 3 of them are part of the SIMWESTMED project (Spain, Italy and France) (*Blue growth in the Mediterranean sea*). Although not part of this six ones, Malta presents several aquaculture farms too.

As regard to the wild fishes stocks declining and growing demand for fishes and seafood, aquaculture is expected to keep increasing in the future. It could possibly growth to 100% according to future trends models and thus allow around 10 000 jobs development (*Blue growth in the Mediterranean sea*).

In Spain, on its Mediterranean coasts, marine aquaculture total value production was estimated around 240 000 000 Euros in 2015. The production in tons was around 33 000 and represented around 2 350 direct jobs. There are four different main kinds of aquaculture segments in Spain, and three of them are part of marine aquaculture: mussel rafts, bass and bream cages and "other marine fish in cages" (*Initial Assessment MSP oriented*).

In 2014, mussel rafts were the most profitable segment. In terms of value, sea bass and sea bream are the most valuable ones. Although it faced a reduction process over the last 10 years, this segment shown since 2012 a significant improvement regarding its economic performance indicator.

At last, segment of "other marine fish in cages" is mainly composed of Atlantic Bluefin tuna fattening farms. People employed in such farm are more qualified than in the other segments and so there is a higher stability throughout the year in terms of employment.

Most of the aquaculture production in Spain comes from marine farms, producing fish and shellfish. Shellfish production represents 84% and fish production the 16 remaining percent, but in terms of economic value it is the fish production that is more valuable than the shellfish one.

Regarding industry structure and employment, most of the structures were small ones (less than 5 employees). It is worth noting that mussels production farms are mostly based on family businesses or on less than 5 employees businesses. However, since a few years, businesses with more than 10 employees have known an increase. Concerning employment, after a decrease during the economic crisis, it is now showing an increase in terms of full time employment equivalence.

Lately, both the production and value of aquaculture in Spain have showed a positive evolution. (STECF).

In Italy, in 2014, aquaculture sectors seems to have known an increase both in terms of volume and value, but looking closely at the figures since 2008, the value did well increased but the volume slightly decreased. However, concerning now only marine aquaculture both volume and value increased.

Italian aquaculture presents 9 main segments and regarding marine aquaculture, shellfish segment is the most important one in terms of volume. Indeed in terms of clams production, Italy is the main European producer and comes second at international level. Regarding selling prices, the main segment is the sea bass and sea bream one. It is also the segment in which employment is relatively high in terms of full time employment equivalent and in which employment are more stable all over the year (not as seasonal employment as in the other segments).

As in Spain, small businesses (less than 5 employees) dominated the sector. Indeed it represents 55% of the aquaculture businesses, followed by 24% of the businesses with 6 to 10 employees and the last 20% one with more than 10 employees.

Regarding figures in terms of employment, aquaculture faced an increase according to the figures but in terms of full time employment equivalent it shows a decrease up to 20% in 2014.

As regard to future trends, Italian aquaculture is still adapting from the crisis of these previous years, but indicators forecast a growth in terms of fish farming production as well as an increase regarding employment.

In Malta, aquaculture businesses are only based on marine fishes production. It is mainly based on Atlantic Bluefin tuna capture and fattening farms and breeding of sea bass and sea bream. There are 6 businesses related to aquaculture in Malta, and 5 of them employed more than 10 workers. The last one employed less than 5 ones.

Regarding employment figures, in 2014, employees number decreased (compared to 2013) as well as the number of full time employment equivalent. The fact that aquaculture sector in Malta is only composed with 6 businesses might "consequently" influence and/or bias figures and forecast ones. Indeed if one of the 6 businesses faces a rather major change it can lead to figures or trends significant variation.

In terms of spatial distribution, sea bass and sea bream cages are mostly set one kilometer away from the coast, and tuna farms and their tuna pens were at first set 2 and 6 kilometers away from the coast. However public outcry regarding oil fish and fish feed remaining led the authorities to act and relocate these kind of farms farther from the shore.

Finally, in France turnover and total sales in tons decreased in 2014 compared to 2013. However this result is a general one and explain a general tendency but not necessarily trends of all the sub-sectors. Indeed and in respect to available key figures, French aquaculture consist of 7 main segments. Five out of them happen in marine areas and mainly concern shellfish production (oysters and mussels different kinds of production). It is the same observation with businesses number and employment, it globally decreased but not necessarily or not at the same rate in between the different sub-sectors.

But anyway, the major one in terms of production concerned bivalve molluscs farming. Oysters productions are the most important one both in terms of production in weight and value. Actually in 2014, it respectively represented 49% and 65% of them.

For all that, oysters businesses are facing a crisis with high rate of spat mortality since 2008. It takes at least 3 years to rear oysters, it will take time/years for these businesses to recover from this crisis, thus the production of them is not expected to rise in the coming years. Despite it, France is the first oyster producer of Europe with 90% of the EU oysters production (*Summary of the 27 Multiannual National Aquaculture plans*), and research are being done on oysters genetic to be able to get out of this crisis as it seems to be the consequence of a virus attack.

Now regarding the second segment, it regards mussel bottom production. Although it is the second most important one, it has been declining since 2010. Indeed damaging weather condition led to production loss and poor quality of grown mussels. However as there are different techniques to rear mussels, the overall production over the last decade remain in progress (*STECF*).

## Current policies

In Spain, the Spanish Constitution of 1978 gives to the Autonomous Communities (regions) the management competences in fisheries activities in interior waters, aquaculture and seafood fishing. The documents issued by the national government on the regulation of marine and continental aquaculture are of a supplementary and general nature, since the Autonomous Communities apply their own regulation although the autonomic legislation regulates the shellfish and marine culture activity in line with the State. Some Autonomous Communities have developed specific regulations for aquaculture, and most have integrated aquaculture into the regulatory development of the fishing sector. Domestic trade is also competence of the Autonomous Communities.

The definition of marine aquaculture is developed in Law 23/1984 on Marine Crops, which provides that "marine cultures are understood as the carrying out of appropriate actions and tasks for the reproduction or growth of one or more species of marine fauna and flora or associated with them ". The main objective of this Law is "the regulation and management of marine crops in the national territory, maritime-terrestrial zone, estuaries, lagoons and lagoons in permanent or temporary communication with the sea, territorial sea and exclusive economic zone, both in public property and private property, all without detriment to the powers and faculties assumed by the Autonomous Communities. "

In Malta, L.N. 157 of 2017 fisheries conservation and management act take part of aquaculture operation regulations. Also there is an aquaculture strategy for the Maltese Islands (2014-2025). It is worth to note it presents two timelines briefly explaining road maps of action regarding the closed cycle species sector and the penned tuna sector. These timelines have been reproduced in this paper in order to give a few hints about Maltese aquaculture currents policies (*Fisheries conservation and management act (Cap. 425)*).

At the end, and regarding European countries aquaculture production, key figures and trends, it is worth noting that even though all the project partners have their own challenges, they all four ones agree on their need to review legislation about aquaculture and to simplify it. They also agree about their need to develop aquaculture added value through diversification of, and promotional activities.

Regarding marine spatial planning, it is expected, by all countries, to set up a common framework tools in order to support concerned administration in their decision-making process for this sector management.

At last but not least, they all think it is a necessity to enhance competitiveness, to develop R&D and stakeholders engagement, and to boost sustainable practices.

Figure 5 – Penned tuna sector timeline example

	2014	2015	2016	2017	2018	2019
Regulatory Issues		*Updating National Aquaculture Policy *Improving Governance	*Identifying and Applying for New Aquaculture Sites/ Zones		*Standardisation of Concession Conditions *Preparation of Area Management Agreements	
Operational Issues		*Baitfish Feeding Practices	*Production of Codes of Good Practice *Enforcement of Operating Conditions incl. Site Marking	*Production of Codes of Good Practice *Market Development	*Improving the Image of Aquaculture *Improved Fish Disease Diagnostic Capabilities	*Review of Tuna Offal Disposal *Vocational Training Forum
Environmental Issues		*Independent Review of Environmental Monitoring Programme	*Develop Environment Quality Standards and Allowed Zone of Effects Criteria			
Innovation Issues			*Review of Research Priorities and Funding	*Alternative Tuna Feeds		
	2020	2021	2022	2023	2024	2025
Regulatory Issues	*Preparation of Disease Contingency Plan	*Identifying and Applying for New Aquaculture Sites/ Zones				
Operational Issues		*Market Development				
Environmental Issues						
Innovation Issues	*Review of Research Priorities and Funding					*Review of Research Priorities and Funding

**Figure 6 – Closed cycle species sector example**

	2014	2015	2016	2017	2018	2019
Regulatory Issues		*Updating National Aquaculture Policy *Improving Governance	*Identifying and Applying for New Aquaculture Sites/ Zones		*Standardisation of Concession Conditions *Preparation of Area Management Agreements	*Preparation of Area Management Agreements
Operational Issues		*Hatchery Development	*Hatchery development *Production of Codes of Good Practice *Enforcement of Operating Conditions incl. Site Marking	*Hatchery Development *Production of Codes of Good Practice *Market Development	*Hatchery Development *Improving the Image of Aquaculture *Market Development *Improved Disease Diagnostic Facility *Vocational Training Forum	*Hatchery Development *Vocational Training *Market Development
Environmental Issues		*Independent Review of Environmental Monitoring Programme	*Develop Environment Quality Standards and Allowed Zone of Effects Criteria			
Innovation Issues		*Amberjack Research *Tuna Research *Hatchery/R&D Centre PPP Model and Business Plan	*Amberjack Research *Tuna Research *Hatchery/R&D Centre PPP Model and Business Plan *Review of Research Priorities and Funding	*Amberjack Research *Tuna Research	*Amberjack Research *Tuna Research	*Amberjack Research *Tuna Research
	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>
Regulatory Issues	*Preparation of a Disease Contingency Plan	*Identifying and Applying for New Aquaculture Sites/ Zones				*Identifying and Applying for New Aquaculture Sites/ Zones
Operational Issues	*Market Development	*Market Development	*Market Development	*Market Development		
Environmental Issues						
Innovation Issues	*Review of Research Priorities and Funding					*Review of Research Priorities and Funding

Aquaculture in Malta also required an authorization license in order to settle the farm. This license is delivered by three gathered entities, the aquaculture director with the consultation of the environment and resources authority and the planning authority.

In terms of disease prevention (chapter 36), veterinary services (chapter 437) and animal welfare (chapter 439) are regulated by act under aquaculture operations regulation 2004 and aquaculture regulations 36.34.

In France, aquaculture activities are mainly ruled under the rural and maritime fishery code.

In terms of professional organization and practices authorization are ruled by the IX book: maritime fishery and marine aquaculture, chapter III (it include both a legislative and a regulatory part).

There are also specific regulations regarding maritime public property and fixing marine cultures exploitation system (Decree n°83-228 of 1983, March 22<sup>nd</sup>)

Finally, aquaculture is also ruled in terms of sanitary question. There are different European regulations (all gathered in what's called the "Food Law", CE regulation n°178/2002) regarding food control and human health. In this package there are two main regulations concerning specifically animal products, CE regulation n°853/2004 and CE regulation n°854/2004. In 2015, an update on the 854/2004 leads to a new regulation, CE regulation n°2285/2015, for some specific species.

In terms of animal well-being there are also rules applied under the 2006/88/CE European directive. This one was transcribe in France rights with a decree (n°2008-1141).

In Italy, 9<sup>th</sup> January 2012 legislative decree n°4 regulates aquaculture. Also there is a national plan to organize it.

No further information could be found about aquaculture current policies in Italy (*Législation Nationale sur l'aquaculture*).



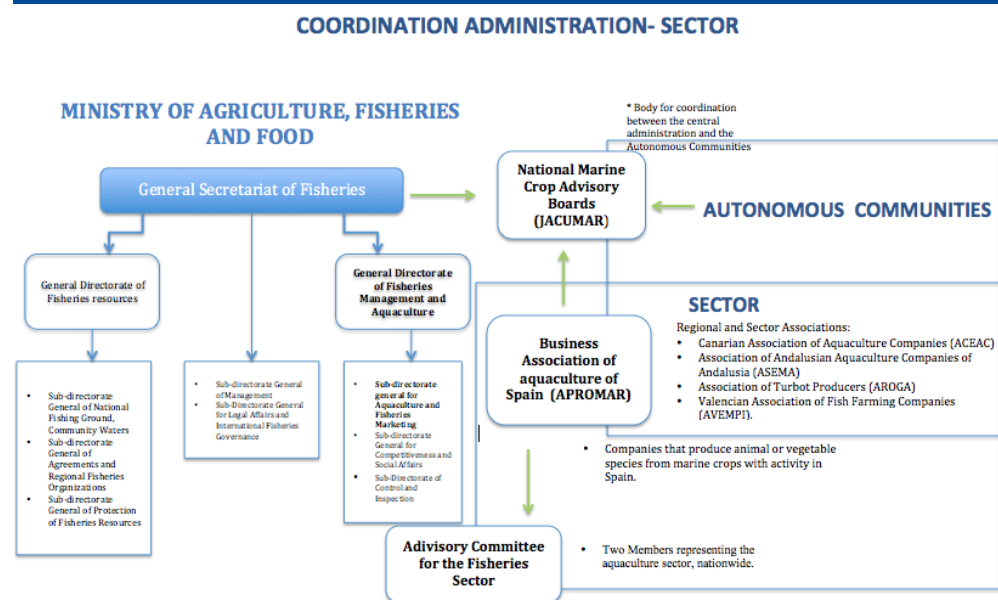
## Organisation, structure and representation of the sector

In Spain, JACUMAR- for its initials in Spanish (Juntas Nacionales Asesoras de Cultivos) is the body for coordination of the former Ministry of Environment, Rural and Marine Environment constituted by the General Secretariat of the Sea and the bodies managing aquaculture in the Autonomous Communities, and whose main mission is to facilitate coordination and cooperation in the field of marine aquaculture between the Central Administration and the Autonomous administrations.

On the other hand, APROMAR, by its acronym in Spanish (Asociación Empresarial de Acuicultura de España) is recognized by a Ministerial Order of December 30, 1986 as Organization of Producers (OP-30) for national and European Union purposes. This Commercial association of aquaculture of Spain is a professional organization and working at national level. It also gathers regional and local associations related to aquaculture companies representation. APROMAR defends and promotes aquaculture producers common interests in front of any assembly and/or meeting.

For instance, for the development of the Strategic Plan for Spanish Aquaculture 2014-2020, bilateral meetings were held with the Autonomous Regions and the main producer organizations, in which the needs and challenges of the sector were analyzed in terms of Autonomies and sub-sectors, specific meetings were held too with JACUMAR and JACUCON (analogous to JACUMAR but dedicated to continental aquaculture).

Figure 4 – Aquaculture sectors organization in Spain



In Malta, it seems there is only one producers federation (the federation of Maltese aquaculture producers). There is no website so any further information could be found.

In Italy, aquaculture sector is represented by different professional associations which aim to promote and protect the activity in political discussion.

The most important ones are:

- AGCI PESCA (Associazione Generale Cooperative Italiane della Pesca),
- API (Associazione Piscicoltori Italiani),
- FEDERCOOPESCA (Federazione Nazionale Cooperative della Pesca),
- LEGAPESCA (Associazione Nazionale delle Cooperative di Pesca).

In France, there is also a specific organization regarding shellfish farming. Professional must join this organization. There is one national committee and several regional ones (*Document stratégique de façade Méditerranée*). Their objectives are to:

represent and promote general interests of the activity

- work in the organization of a sustainable resources management
- work in the implementation of measures to develop activities interests harmonization
- work in the production condition improvement
- enhance collective interest work
- work in the defence of the aquaculture water quality

It is also worth to note that fisheries and farming activities in France are mainly represented within common committees, thus further information are available on the French fisheries sectors organization in the Fisheries briefing note.

## Sector's point of view

In Spain, the Strategic Plan for Spanish Aquaculture 2014-2020, approved at the Fisheries Sectoral Conference on April 16, 2015, establishes actions aimed at promoting the competitiveness of Spanish aquaculture. Therefore its likely that the sector expands its spatial demands in the coming years including the movement to more offshore areas.

Within this Plan it is found the objective of the improvement in spatial management of aquaculture. Thanks to ACUIVISOR it is possible to consult the distribution of aquaculture activity throughout Spain, access information on their establishments or perform online spatial analysis for the study of potential areas.

This plan also includes four strategic objectives, among them, the Strategic Objective 2: *"Increase Spanish aquaculture production, based on productive investments and the improvement of sectoral planning within the framework of integrated management of coastal zones and the selection of new Zones of Aquatic Interest and to support and promote continental aquaculture in the national hydrological planning."*

In this regard, and in the context of the Integrated Management of Coastal Zones (IZCM), there are the Allocated Zones for Aquaculture (AZA) that have been proposed as a necessary and useful tool for the sector to favor its orderly growth.

Regarding Malta the only information found was about slime released from the feeding of fishes pens. Only one paper could be found of an aquaculture farms owner saying that *"yes they will have to move their structure further from the coast"* (which they were asked by the Maltese government and have done since 2017).

Regarding the French aquaculture sector, the most threatening issue producers face is production mortality. Indeed with water temperature increase, they face mortality incident every few years. In the Occitanie region for example they faced it in 2006 and this last summer in 2018. Such issue tends to weaken their exploitation and their economic resources.

Any further information could be found for Italy.

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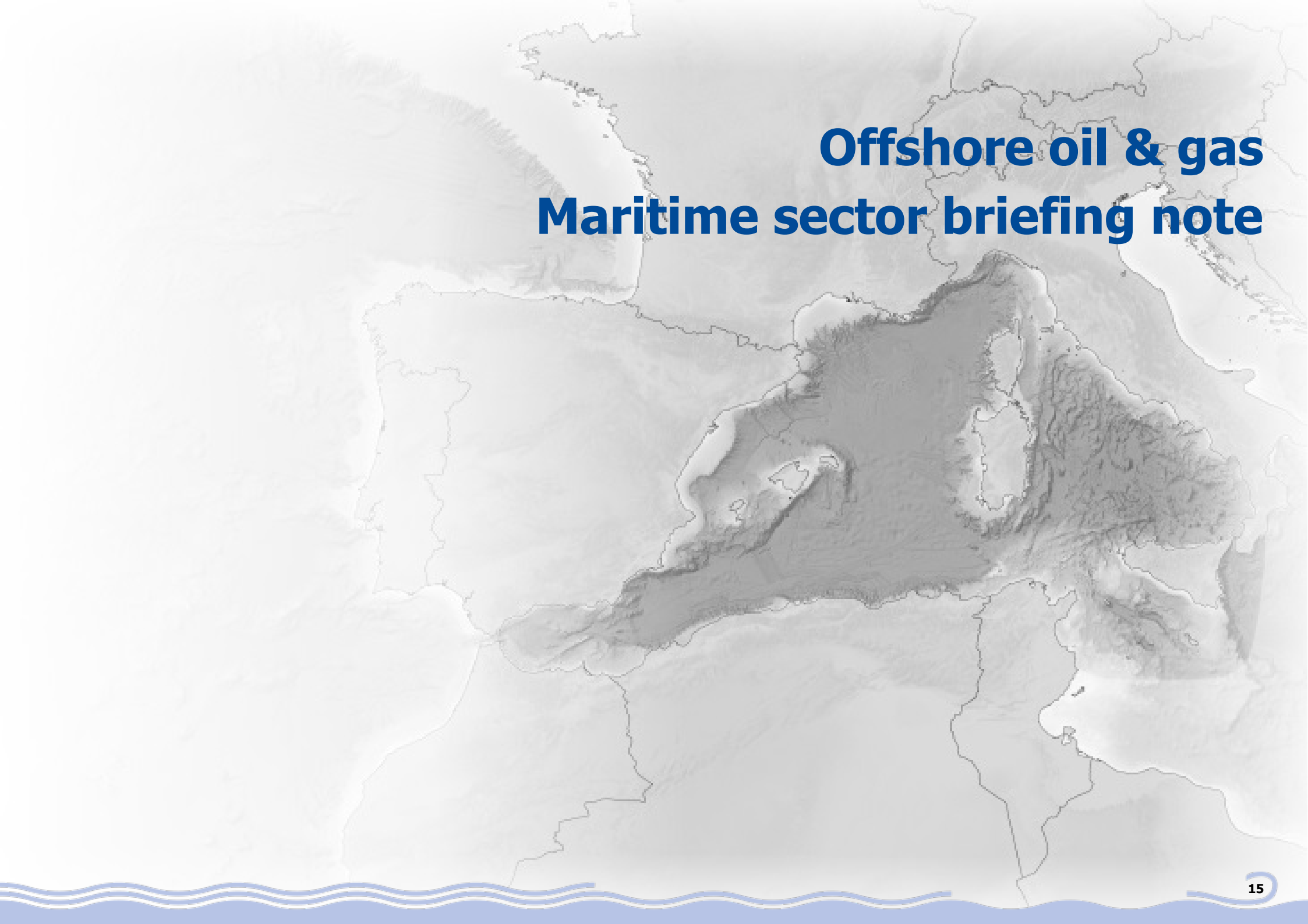
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# **Offshore oil & gas Maritime sector briefing note**

## General description – Current situation

In France, there is currently neither exploratory nor exploitation licenses.

In Spain, last updated data point out a total of 237 exploratory campaigns and 228 exploratory drills.

There is a permanent oil extraction platform called "Casablanca". Its exploitation began in 1978. They are also one called "Montanazo", which was partially added to "Casablanca" in 1980 and another one called "Angula". In total, there are 7 concessions around the area of the "Casablanca" one.

Also it is worth to note, there is currently an ongoing demand regarding possibilities to carry searches on an area partly located on the so called "grey area" between the Spanish and French maritime undefined boarder. It is also underlined that Spain territory is kind of unexplored. Indeed, hydrocarbons production in Spain represents 0.18% of crude oils and 0.16% of natural gas needs of the country.

In Italy, exploration and exploitation areas are designated by capital letters from A to G. Both kinds of licenses are granted by the Ministry of Economic Development in the areas of the continental shelf government. 40% of the total area governed by Italy is being opened to mining activities. On December 31<sup>st</sup> 2016, 111 exploration licenses, 24 of which offshore, were registered and 202 exploitation licenses, 69 of which offshore, were registered too (*Databook2017, activity 2016*).

Offshore oil production represented in 2016 19% of the total domestic production of it, while offshore gas production represented 71% of the total domestic production of it (*Databook2017, activity 2016*).

In Malta, offshore exploration began around the 70's. There are seven areas to where exploration and exploitation might take place. Two of these areas are subdivided. Although there are ongoing exploration, there is currently no exploitation activity in Malta. However it is worth to note, Maltese' government intend to promote this activity, thus this activity is probably going to increase in the future (*MSFD Initial Assessment*).

## Current policies

At international level, there is no real regulation regarding exploration and/ or exploitation of offshore hydrocarbons. However it can be worth to note, through the UNCLOS (United Nations Convention on the Law of the Sea) of December 10<sup>th</sup> 1982, some of its articles mostly regards sea water pollution from these activities and the obligation for every States to prevent or organize actions in case of pollution (articles 194, 208, 214...) (*United Nations Convention on the Law of the Sea of 10 December 1982*).

At European level, the union acceded the Offshore protocol, declining from the Barcelona Convention, on December 17<sup>th</sup> 2012 (Council Decision 2013/5/EU). This protocol covers different aspects of these activities like permit requirements, harmful substances uses and removal, safety questions, the becoming of abandoned installations and also planning and monitoring issues. It provides minimum prerequisite to avoid or decrease accidents or their consequences (*MSFD Initial Assessment*).

In France, following the National Strategy for the Sea and Coast, approved on February 23<sup>rd</sup> 2017, by decree n°2017-222 and published at the official journal on February 24<sup>th</sup>, 2017, a law about the end of exploration and exploitation of hydrocarbons was elaborated. It is the law n°2017-1839 of December 30<sup>th</sup> 2017 and published at the official journal on December 31<sup>st</sup>, 2017, and under n°0305, text n°4.

In Spain, it is the Ministry of Industry and Tourism that issues offshore exploratory permits. Regarding exploitation permits, it is also this minister that issues them. In July 20<sup>th</sup>, 2015 the National Security Council approved the National Energetic Security Strategy. The future trends of this activity in Spain will be conditioned by the ongoing discussion about a law regarding Climate Change and Energy Transition.

In Italy, exploitation and exploration licenses are issued by the Ministry of Economic Development in the area of the continental shelf where the Italian laws and ministerial decrees are applied. The five previously described marine areas are determined by law N° 613/67. It is the National Mining Office for Hydrocarbons and Georesources that is in charge of evaluation and control of offshore hydrocarbons exploration and exploitation activities. Since the enforcement of decree n° 145/2015, which transposed the Directive 2013/30/EU, regulatory functions on safety and regulatory functions regarding the economic development of offshore natural resources including licensing and revenues management have been separated. Thus, there are now the Directorate General for Security of energy supply and energy infrastructures (DGSAIE) concerned by mining licenses delivering, royalties management and, the Directorate General for Safety of mining and energy activities – National Mining Office for Hydrocarbons and Georesources (DGS UNMIG), concerned by safety, control, surveillance and technical management of activities (*Annual Report 2016, Activity 2015*).

In Malta, three main regulations allow Maltese' government to regulate offshore oil exploration and exploitation. There are the Petroleum (production) Act of 1958, the Continental shelf Act of 1966 and the Petroleum (production) Regulations of 2001. Maltese' government uses Production sharing contracts and Exploration study agreements to control and regulate exploration and exploitation permits (*MSFD Initial Assessment*).

## Organisation, structure and representation of the sector

Information were difficult to obtain regarding the economic aspect of such sector. However it seems there is an international association called "International association of oil and gas producers". One of its aim seem to be to discuss with legislators and regulators about rules and regulations. As it is explained on its website, it seems they mostly discuss with the European Parliament, the Council of European Union and the European Commission as often decision which took place in Europe also have influence on the rest of world (*International Association of Oil & Gas Producers*).

## Sector's point of view

There is no available information.

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# **Marine aggregates**

## **Maritime sector briefing note**

## General description – Current situation

In Spain, sand extraction for beach regeneration is vital for touristic economy. Thus from 2000 to 2010 main sand extraction projects were located in Barcelona coast. Three marine deposits were exploited, they were away from the active profile of the beach (meaning it happened deeper than 15 m depth). This activity was combined with sand bypass mainly from ports areas and/ or with sand supply from river mouths.

Also there is an important sand borrow area in the Valencia coast and combined with dredged material from local ports to beaches nourishment.

Nowadays, there are others but minor sand borrow areas in Balearic Islands, in Malaga and Granada.

Finally, a European project launched in 2007, and which aim is to enhance the implementation of a scientifically based sustainable coastal erosion management in Europe, selected one of its six pilots sites in Spain. Within this pilot site, 90 million m<sup>3</sup> of sand should be extracted and then use to future regeneration of Valencian' community beaches. This site is located in a deep waters marine reservoir in the Mediterranean sea. It was considered as a strategic one as there is a large amount of exploitable sand, it is free of chemical and bacterial contamination and it is closed to the sand demand areas.

## Current policies

There is no specific regulation at international scale regarding marine sand extraction but there are regulation regarding the obligation to preserve and protect marine environment through the Barcelona Convention (1976) and its 1995 amendment "the Convention on coastal and marine Mediterranean sea environment protection". This convention foresee caution principle application, polluter pays principle, impacts assessment for "activity projects able to lead to major negative consequences on marine environment". (*Analyse économique et sociale*)

At European scale, the Habitat Directive 92/43/CE contributed to the establishment of the Natura 2000 network. It aims to natural habitats conservation. As it also concern marine environment and contribute to marine species habitats classification, it thus limit sites available for marine aggregate extraction. (*Analyse économique et sociale*)

In Spain, industrial extraction of seabed materials for construction purposes is prohibited under 1988 Coastal Law. Only a few specifics and well framed sand extraction activities can be carried out in Spanish marine areas. They are the following ones:

- Creation and regeneration of beaches. Regulated by the Coastal Law.
- Maintenance or construction of ports or waterway through dredging activities. They are regulated by the Law of economic regime and provision of services or ports of General Interest of 2003 and also by the Coastal Law if needed.
- Dredging work carried out outside of public port domain. They are regulated with the same above mentioned laws.

In France, there is no industrial sand extraction activity on its Mediterranean coast. However sand extraction for beaches regeneration are regularly carried out. (*Initial Assessment MSP oriented*)

In Italy, sand extraction is an important activity for beaches nourishment. Indeed it must contrast with coastal erosion phenomenon which is even worsened by climate change effects.

Regarding marine aggregate extraction for industrial purposes, there are no detailed monitoring systems neither precise spatial distribution of sites extraction. (*Initial Assessment MSP oriented*)

In Malta, there are no sand extraction activities. However dredge activities are carried out of port infrastructures in order to maintain navigation safety. Dredged materials are carried away offshore, outside of the Grand Harbor. Other ports like Marsaxlokk and Cirkewwa are interested by this kind of dredging activity.

Also depending on their magnitude and/or if they are closed to areas of special environmental protection, projects might be subjected to environmental impact assessment procedures developed by the General Administration or Autonomous communities.

Environmental management of port dredging occurs within the framework of the international Convention for the Protection of the Marine Environment. Throughout this convention, guidelines were developed. In Spain and in order to follow them, "Recommendations for the Management of Dredged Material at Spanish Ports" were adopted in 1994. In April 2014 they were replaced by the Guidelines for the characterization of the dredged material and its relocation in waters of the public maritime-terrestrial domain.

Now regarding beaches nourishment or port fillings, the only guidance adopted is the ICES Guidance for the management of marine sediment removals. It was adopted in 2003 by the OSPAR Convention.

Also and although it is not a national one, there is since 2010, a Spanish regulation called "Spanish Technical Instruction of Environmental Management of the Marine Extractions for beach nourishment. It includes environmental variable to sand extraction projects. (*Initial Assessment MSP oriented*)

In France, no marine extraction activities take place within or outside territorial waters, there are several existing regulation to frame them (they can be community, legislative or regulatory ones). Exploration and exploitation of marine aggregates require several authorizations.

- A mining title delivered by the Ministry in charge of Mines (n°2006-648 of June 2<sup>nd</sup>, 2006 decree, modified). This title can be an exclusive research license, an exploitation license or a preliminary exploration one (this last one is not exclusive and is not concern with concurrency terms and public consultation).
- Research or exploitation opening work authorization delivered by the prefect.



- If the site is located within territorial waters, there is a need of a maritime public domain temporary occupancy authorization (n°80-470 of June 18<sup>th</sup>, 1980 decree, modified). This authorization leads to a payable tax.

Decree n°2006-798 of July 6<sup>th</sup>, 2006 allows a simultaneous instruction of these three above mentioned administrative certificate. The file must also contain an impact assessment as defined by article R. 122-3 of the environmental code. The whole demand is subjected to public consultation.

Regarding, beaches regeneration, local authorities are allowed to undertake studies, execute and explore general interest work and aiming to protect the territory against sea storm (Article L. 211-7 of the environment code).

Marine aggregate extraction for coastal management is not subject to payable tax no matter if the extraction site is located on the maritime public domain or not (*Document stratégique de façade Méditerranée & Extraction sélective de matériaux en France*).

However beaches regeneration projects are also being concerned with declaration or authorization procedures (Article L. 211-7 of the environment code). Thus, if the total work cost is higher than 1, 900, 000 euros or if the quantity exceed 2 000m<sup>2</sup> then the project is subjected to impact assessment (article R. 122-8 of the environment code). If not, only an impacts note is required (Article R. 122-9 of the environment code) (*Analyse économique et sociale*).

In Italy, sand extraction is authorized through “national maritime concessions” from case to case by Italian Regions.

Regarding beaches nourishment, authorization is also delivered by Region authorities on a case-by-case basis and focus on scientific research regarding activities impacts on the environment.

Some official documents exist at regional scale regarding the management of these activities. At national level there is only one existing document that was adopted and is called “Manual for Handling Marine Sediments of ICRAM-APAT”.

There is no national strategy regarding aggregate extraction in Malta.

## Organisation, structure and representation of the sector

At a European level, there is the Raw Materials Supply Group. Its aim is especially to support the European Commission regarding politic or legislation production. It coordinates point of view exchanges between members states, support the Commission with expert knowledge when it comes to measure projects production. It also follows national policies development and the implementation of European policies by national authorities. (*Raw material supply group & Politique Européenne*).

There is also the European Aggregates Association (UEPG). It promotes the sector interests in front of different European instance body.

In France, there is the National union of aggregates producers. However it represents industrial extraction sector and there is none of it across the Mediterranean coast of France. Anyway this professional organization represent this sector in front of national authorities and make sure interests of the sector are being preserved.

No information could be found for Spain, Italy and Malta.

## Sector’s point of view

As it is mostly not an industrial activity in the Mediterranean sea, sector’s point of view could not really be found. However it is worth to note, that beaches nourishment, also vital for touristic economy of these countries, have an impact on marine environment. Today’s stake is to fully measure and understand the magnitude of these impacts.

Many studies have been and/or are still being done to meet this objective.

Throughout the last decade, European regulation but also national ones gradually took into account environmental aspects when it came to regulation implementation.

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# **Ports & shipping**

## **Maritime sector briefing note**

## General description – Current situation

Shipping includes all activities involving goods transports by ships mainly through large distances. These activities are mostly the main reason for port facilities and updates.

There are mainly two kinds of shipping traffic, the "import/export" one and the "in transit" one.

Import/export kind of traffic applies when the port is the departure or arrival point of a sea route. Such activities are essential for port as it has a direct effect on employment rate, services development and industrial activities. It concerns and sort of links different kinds of activities within and without ports boundaries.

In transit kind of traffic is more related and depending of world trade variation rather than of local national economies.

However traffic of goods and mainly "import/export" kind of one, are closely related to countries economics activities. The greater are the activities intensity, the greater are the volume traffic and reciprocally. Such kind of traffic is also a good indicator to the economic countries health (*Initial Assessment MSP oriented*).

In Spain, the 2014 economic recovery has been joined with a traffic goods growth. Total merchandises traffic reaches 482 million tons. It was 5,12% more than the previous years. Containerized goods and liquid bulk accounted for respectively 155 and 161 million tons. Solid bulk goods reached the higher growth with a 12% rises over 2013 with 89 million tons. Others goods, tons of fishing and internal traffic and supplies gathered as for them 77 million tons.

70% of these traffics have been transported within 46 Spanish ports of State ownership bounds, and they are mainly located in the Mediterranean Spanish basin.

Indeed Valencia and Algeciras ports occupied rather important positions in the international ranking. Algeciras port accounted for about 20% of total transported goods in volume and for about 30% of containers moved within the port infrastructure also in volume. Valencia port as for it is the second most important port of Spain after the Algeciras ones. Its volumes are about the same of the Algeciras ones. The one on the third rank is the port of Barcelona.

There is another kind of traffic which deserve to be mentioned, it is the one called ro-ro traffic. Ro-ro traffic involves the traffic of goods which are inside motorized vehicles, which are parked on a ship. In 2014 in Spain, this kind of traffic has known an 8% rises compared to the previous year.

Finally, liquid bulk and general cargo are the two kind of main cargo in Spanish ports (*Initial Assessment MSP oriented*).

Regarding shipping traffic in France, on its Mediterranean basin, nine ports were taken into account in the following given figures. In 2015, goods traffic was up to 95 million tons. 50% of them were petroleum products. It constitutes 28% of the national good traffic in France (excluding French overseas territories and departments).

85.7% of this goods traffic happen in the port of Marseilles (GPMM). This port is the first French one and the 6<sup>th</sup> European one in terms of volume. In 2014, goods traffic was up to 78.52 million tons, 55.6% of it were petroleum products. Regarding containerized goods, 1.18 million of TEUs (twenty foot equivalent) had transited.

Regarding petroleum goods transit, there is a regular decrease, whereas regarding containerized goods there is a constant growth. 9% of the containerized goods which transit toward the hinterland are transiting by train in 2014 and 8,4% by inland navigation.

Regarding the others French ports,

- Toulon: goods traffic in 2014 was equal to 2,48 million tons. It is rather a roll-on/ roll-off kind of good traffic port.
- Nice: goods traffic in 2014 was equal to 0,49 million tons. It is mostly a cement kind of goods traffic port. Traffic is currently decreasing and some uses conflicts are arising.
- Sète: goods traffic in 2014 was equal to 3,27 million tons, 32,6% of which were of petroleum. It is rather a multipurpose port in terms of good traffic kinds.
- Port-la-Nouvelle: goods traffic in 2014 was equal to 1.78 million tons, 55,9% of which were of petroleum. It is rather heading towards petroleum import and cereals export. It is the 1<sup>st</sup> French port of cereal on its Mediterranean basin.
- Port-Vendres: goods traffic in 2014 was equal to 0,26 million tons. It is rather heading towards fruits and vegetables goods traffic.
- Bastia: goods traffic was equal to 3,06 million tons, 8,3% of which were of petroleum.
- Ajaccio: goods traffic was equal to 1,49 million tons, 14,8% of which were of petroleum.
- L'Île-Rousse: goods traffic was equal to 0,25 million tons, 1,1% of which was of petroleum.

Corsican ports mainly head towards roll-on/ roll-off goods traffic. Traffics are mainly linked to import, 69% of import against 31% of export. 11% of the goods traffic is being dealt with Italy. Bastia is the 1<sup>st</sup> port of Corsica in terms of import/export traffic. Its activity with Italy is up to 20% of its overall activity (*Document stratégique de façade Méditerranée*).

Regarding now passengers traffic, in 2014 they were 12,4 million of passengers. This kind of traffic includes 3 main types of activities: the connection with Corsica, international connection, especially with Maghreb and regarding cruise ship. On its Mediterranean basin, passengers traffic represents 42% of the metropolitan traffic, and concerned especially cruise activity.

They were 7,93 million passengers without taking into account cruise passengers. They were 3,95 million of passenger from a cruise ship and undertaking an excursion. And then, they were 0,55 million passengers from a cruise ship beginning or ending their cruise.

In Italy, ports traffics in the project area are mainly about ro-pax type. Ro-pax type traffic is defined by both passengers and roll-on/roll-off movements on the same ship.

With a value of 11,8 billion euros and a productivity labor of 339 thousand euros/employee, maritime transports are 1<sup>st</sup> in terms of production among other industrial activities of the maritime cluster (*V rapporto sull'economia del mare. Federazione del Mare*).

Civitavecchia port in 2013 represents 22,4% of the national cruising traffic and 19,2% of the total number of registered ships in Italy.

Genova is the 2<sup>nd</sup> port of Italy regarding in transit goods total volume. It is also the 10<sup>th</sup> over twenty top major ports of Europe.

Regarding containerized traffic, the first one of the Italian port, is the port of Gioia Tauro with a total volume of 3 100 million TEUs. Within the top 20 are also the port of Genova and La Spezia.

Regarding passenger traffic, it is a really important one for national movements and for the connection with Italian's island and Western Mediterranean.

## Current policies

International level: At international level, maritime transport is regulated through various convention like the United Nations Convention on the Law of the Sea. It is an international treaty and it covers various aspects of maritime activities and their consequences. It was signed in 1982 and came into effect on 1994. Nowadays there are 162 parties which have signed and ratified it (*United Nations Convention on the Law of the Sea (UNCLOS)*).

There is also the Safety of life at Sea international convention (SOLAS) and whether it rather concerned the safety of merchant ship, it also rules/frames maritime transport regarding goods carriage (*International Convention for the Safety of Life at Sea*).

In 1948 the IMO convention was signed and came into effect on 1958. This convention allowed to establish the International Maritime Organization (IMO).

At European level, there are many different regulation aimed to frame maritime transports activities. They are based and respect free traffic principle for ship among national waters. Also they have to insure the respect of competitions rules, support high security level, good working conditions and environmental preservation. Some of this regulation concerned market access, other competition rules but also working conditions ones and environmental standards for sea transport.

Also European directives and regulations act also on subject like training and qualification of seafarers, marine equipment, security on ships and in port, and on passenger safety and ship inspection (*Maritime transport*).

It is worth to note there is a project called the Med Atlantic Ecobonus and aiming to the Motorways of the Sea policy development. The main aim of this action is to create a new effective and sustainable incentive scheme in order to support inter-modal freight transportation. Also it has to align with the framework and new priorities of the Trans-European Transport Network. The implementation of such action will require the cooperation of Transport Ministries of Spain, France, Italy and Portugal. (*Initial Assessment MSP oriented*)

In Spain, there is the National Maritime Security Strategy (2013). It is a Spanish environment analysis and reflects national maritime security interests and vulnerabilities. It establishes shared objectives. It allows to develop institutional framework to encourage and facilitate cooperation between different organizations and to include private sector when appropriate.

In Malta, by the end of 2015, the total number of registered ships was of 7 249 under the merchant Shipping Act. It represents a total gross tonnage of 66,2 million. Malta is the largest register in Europe and one of the 10<sup>th</sup> largest registers of the world in terms of gross tonnage. Malta's ship traffic is mainly composed of cargo, bunkers and then conveyance and passengers ships. Up to 65 000 ships pass within 20 nautical of the Maltese Islands. Malta is located along several main shipping lanes.

In Malta, maritime transport is essential in order to link the main Island with Gozo Island and its residents.

The basics principles of this strategy are as follows:

- unity of action of all the State actors and resources under the direction of the Prime Minister,
- anticipation and prevention as to detect situations of potential National security risk or threat,
- efficient and sustainable resources uses,
- resilience and/or ability to resist and/or recover

In accordance with the above mentioned principles, the strategy was divide into five line of actions. They are as follows:

- to adopt a comprehensive approach that allow to gather and coordinate actions from different authorities regarding maritime security problems,
- to adopt effective and efficient measures for a sustainable use of the resource,
- to foster international cooperation,
- to collaborate with private sector,
- to improve cyber security regarding maritime sector.

In Spain, port regulations come from law n°27/1992, of November 24<sup>th</sup>, on State Ports and Merchant Marine. This law has also been partially reformed throughout the years by others. Law n°62/1997 of December 26<sup>th</sup> modified the previous one; Then there is also the law n°48/2003 of November 26<sup>th</sup>, on ports financial structure and on provision of services of general interest. This one has also been modified and by law n°33/2010, of August 5<sup>th</sup>.

There are 46 ports of general interest from the State-owned Spanish Port System, and managed by 28 Port Authorities. Their coordination and efficiency control is relevant to the government agency "Puertos del Estado". It has to implement the government port policy according to the Royal Legislative Decree 2/2011 and is under the administration supervision of the Ministry of Public Works (*Initial Assessment MSP oriented*).

In France, and regarding port infrastructure management, the Marseilles port has elaborated its second strategy project. It enhances new growth perspective in order to get new customers, satisfied current ones, port connectivity increases.

With law n° 2015-991 of August 7<sup>th</sup>, 2015, local authorities, regarding decentralized ports, have to modernize and renovate existing infrastructures. They have to enhance port servicing, reduce noise pollution and develop port capacities. These actions can be engaged through the frame of local public investment programs.

In Italy, the Ministry of Transport and Infrastructures (MIT) through the port's authorities and the coast guard is in charge of maritime transport, port activities, their regulation and management. Management and organization of goods and services in port are responsibilities of the port authority. It is a public body with legal personality. Within the area of the project, there are 14 different Port authorities.

## Organisation, structure and representation of the sector

At a European level, there is the Maritime cluster network. Its aim is to promote all maritime sectors, their developments and to represent them.

It stimulates cooperation and coordinated work between national maritime clusters. It gathers around ten national maritime clusters throughout European countries. (*The European Network of Maritime Cluster( ENMC)*)

Regarding now national maritime cluster, they are present in all the four project countries (Spain, Italy, Malta and France). Their aims are about the same as the European one but at national level. Indeed their main objective is to promote the development of a sustainable blue economy, to gather all the maritime sectors actors and make them collaborate (*Cluster Maritime Français*).

In Spain, many associations (gathering mainly stakeholders of private companies) structure the defence of the interests of the private sector in this area:

The Association of Spanish Ship-owners (ANAVE) is a national business organization, constituted for the coordination, representation, management, promotion and defence of the interests of the Spanish shipping companies. It actively participates in international and national associations and organisations (e.g. ECSA European Community Shipowners' Associations, ICS International Chamber of Shipping, ISF International Shipping Federation, or BIMCO The Baltic and International Maritime Council, among others) while provides a meeting/ discussion space for maritime transport's stakeholders and ensures relations between the sector and the national and European administrations.

The Shortsea Promotion Center-Spain, established in 2002, has consolidated a series of activities that have contributed to the dissemination of short sea shipping, of the advantages and opportunities it offers, and the necessary coordination between the different agents that form part of one same sea-land chain. Shortsea's strategic goal is to consolidate a meeting point between the public and private agents responsible for forming sea-land transport chains, with a vocation for coordination, identification and promotion of initiatives that contribute to materializing the potential of intermodal-based maritime transport in order to establish integral door-to-door transport solutions, always respecting the purposes, goals and skills of each of its (28) members.

Also, Italy has implemented several plans and programs to frame shipping activities. There is the National Strategic Plan for Ports and Logistics under the Legislative decree n°169 of August 4<sup>th</sup>, 2016. The National Maritime Technology Platform of 2005. Also the National Operational program Infrastructures and Networks 2014-2020 and finally the EU Strategy for the Adriatic and Ionian Region (*Initial Assessment MSP oriented*).

In Malta, maritime transport was framed within the publication in 2016 of the Transport Masterplan 2025. This plan covers all the transports kinds on the Maltese Islands. It set measures and objectives to reach. Most of them are about governance and existing coastal/port infrastructures improvement (*National Transport Masterplan 2025*).

Presidency is currently held by ANAVE and there are two vice presidencies held, respectively, by CETM (Spanish Confederation for the Transport of Goods) and the State Ports Public Authority.

PIPE, the Platform of Investors in Spanish Ports, was created in 2013 with the aim of becoming the opinion forum within the Spanish port sector, i.e. to propose changes and improvements to boost competitiveness, development and sustainability within the Spanish economy. The platform is composed of the most important business groups that have invested in the Spanish port system, the premises of which are found in major Spanish ports.

The E/ROM Forum (Participatory methodological procedure for channelling, collecting and disseminating studies and technical-scientific analysis) is an open discussion forum for the ROM Program, established by the Spanish Port Administration, aiming at providing Recommendations for Maritime Works (R.O.M). The purpose of this instrument is to promote a broader scope of the discussion process regarding the documents associated with the Normative Program, generating channels for a continuous and structured debate in order to progressively improve the quality of port infrastructure.

On the other hand, the Spanish Maritime Cluster Association (CME) also provides room for the association and collaboration of the varied Spanish maritime industries and players, while allows and fosters discussions on different sector needs and issues of interest. On the whole, the CME targets the promotion and development of the Spanish maritime sector, to achieve a higher level of competitiveness of the entire sector and provide a general defence of its interests. The cluster has a national scope and aims to have in its bosom all associations, companies, public or private institutions and non-for-profit legal-private entities that are involved, directly or indirectly, in the maritime sector. The CME is integrated into the European Network of Maritime Clusters (ENMC) that brings together maritime clusters of main European countries: Belgium, Holland, France, United Kingdom, Germany, Italy, Norway, Finland and Denmark.

Within the CME, different working groups created to improve the competitiveness of the Spanish maritime sector, depending on the different interests of (and manifested by) the CME partners. These working groups constitute a meeting-point for different (maritime) sector stakeholders with similar concerns and needs, and provide a place to discuss topics of interest and find solutions to problems in the sector, as well as to find partners to carry out business initiatives. Through the activities of each WG, political and institutional relations are also facilitated, the CME being the qualified voice before the administration to defend the interests of the members.

In this sense, the Working Group on Transport Logistics and Fuel (GT TLyC) was created to improve the competitiveness of the Spanish maritime sector, in particular in matters relating to port services, bunkering and other port costs as well as to encourage the application of liquefied natural gas (LNG) as fuel in ships. The objectives of this group are the following:

- benchmarking in relation to the operating costs of Spanish and European ports (conditions and renewal of concessions, port costs, services and the costs of bunkering),
- reduction of NOx, SOx and CO2 emissions in ships and ports,
- reduction of the cost of fuel in ships,
- creation of a port bunkering system for LNG.

Besides the channels opened by the abovementioned structures, representing the interests of the maritime sector stakeholders, a variety of National Maritime Congresses have been held for many years, being an essential debate forum for the national maritime sector. Discussions have focused on highlighting the importance of synergies, the search for solutions and contributions that boost growth, recognition and visibility of the sector, or the search for common solutions, in order to promote the maritime sector as strategic within the Spanish economy.

## Sector's point of view

In France, the Maritime cluster explains there is a need to develop maritime sectors. There is a need for investment and R&D. They are not expressing fears for their future but they are explaining that it is the time to act now or then it will be too late. It is essential to promote maritime sectors and their growth and development them now to insure their competitiveness for the future (*Cluster Maritime Français*).

The Royal Spanish Naval League, in collaboration with the Spanish Maritime Cluster, is organizing the IV National Maritime Congress to be held in 2019 in Madrid, aimed at addressing the *status quo* of the Spanish maritime sector as well as at analysing its most immediate future according to available trends.

The objectives of this Congress are the following:

- provide a global vision of the Spanish maritime sector and the main developments that emerge from it.
- address challenges and opportunities in the maritime sector and highlight its role as an engine of economic growth at the national scale.
- preparation of a 'Conclusions Book' that will be sent to the Government, political parties, the press and maritime associations, gathering the conclusions presented in the Congress.

No further information could be found for Malta and Italy.

No information could be found regarding Spain, Italy and Malta.

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# **Submarine cables and pipelines**

## **Maritime sector briefing note**

## General description – Current situation

### Submarine cables

Submarine cables are used to transmit electricity or carry telecommunication signals over long distances. They are laid onto the sea bottom. These cables often connect different countries. In our study area some of these cables connect European countries to other European ones and some other to non-European countries one. Even though there are a certain number of them laying on the bottom of the sea, most of them are concentrated over a few specific lanes.

Regarding this activity operators, there are only a few of them worldwide, they may be specialized or not in cable installation and/or maintenance.

In Spain, there are multiple telecommunication cables. The first one was installed in 1989 between Barcelona and Palma de Mallorca. The second one connected Valencia, Ibiza and Mallorca. In 1992, a fiber cable was installed between Barcelona and Marseille. In 1994, another one was installed between Palma de Mallorca and Algiers.

In France, there are 10 cable vessels, it is the largest cable fleet worldwide (about 50<sup>th</sup> vessels around the world, all members of the International Cable Protection committee, ICPC). Most of the submarine cable in France are telecommunication ones. Most of these cables are located around Marseille harbor, they are about a dozen linking the Middle East, Africa, and Asia.

In Italy, and in terms of electricity transport cable, they are connecting the mainland of Italy with Sardinia, or Sardinia – Corsica and Italy's main land. Nowadays, plans are being developed in order to strengthen existing cross border connection, but also to connect Tunisia and Italy. This cable will be 200 km long.

In Malta, telecommunication cables are located within 3 different areas along Malta's North-Est coast. Two of these three areas are located within Natura 2000 site and the other one within the main harbour area.

Regarding, submarine electric cable they are connecting the main island of Malta with all the islands of the Maltese archipelago. Thus there are submarine cables laying between the two main channels between Malta and Comino and Comino and Gozo.

In April 2015, Malta was connected to the European grid throughout Sicily and using a 120 km long high voltage submarine cable. In Sicily this cable is linked to the Italian mainland network (*Initial Assessment MSP oriented*).

### Submarine pipelines

Subsea pipelines are used to mainly transport hydrocarbons over consequent distances and usually they connect different countries.

There is few available information about these activities and there is no available data about socio-economic value or employment rate.

On the Mediterranean coasts of Spain, there are two pipelines. One used to transport gas and connecting the Balearic islands with the Spanish peninsula coast. It is about 146 km long. The second one is used for hydrocarbons and connects the "Casablanca" platform to the Repsol's refinery on the mainland.

According to the document "Marine human activities in Spanish Natura 2000 sites" (WWF-Spain, 2013) (from LIFE+ INDEMARES), there are two petitions of exploration natural gas near SCI "South-West Gulf of Lions canyons system":

"Prospección sísmica en la Cuenca de Valencia; permisos de investigación de hidrocarburos "Nordeste 1, Nordeste 2, Nordeste 3, Nordeste 4, Nordeste 5, Nordeste 6, Nordeste 7, Nordeste 8, Nordeste 9, Nordeste 10, Nordeste 11 y Nordeste 12"

"Campaña Sísmica 2D en áreas libres del Mediterráneo Noroccidental – Mar Balear"

In addition, there is a new construction of a gas pipeline to connect Martorell (Barcelona) and Figueres (Girona), 167,5 km in total. The objective is connecting the French pipeline connection crossing Cataluña.

In France, there is no pipelines on its Mediterranean coasts. There is however a project regarding Corsica connection to the European Gas Transmission Network throughout the subsea gas pipeline GALSI.

In Italy, there are four seaports connecting underwater pipes. They are located at Mazara del Vallo (Trapani), Messina, Favazzina and Palmi (Calabrian region).

In Malta, there is only one offshore pipeline linked with energy transport and its connect Sicily with Libya. The other ones are linked to fuel transfer from ship to land based installations. They are located in Marsaxlokk harbor and used to transfer fuel from specific points within the bay to land based installations. There are two main companies using these pipelines. The first one has 7 pipelines (5 for fuel, 1 for fresh water and the last one for ballast water but is no longer in service). The second one uses 3 sub-aquatic pipelines to transport fuel oil, light cycle oil and gas oil between vessels and its facility in the bay.

Also it is worth to note, Malta's government is looking to connect the country to an about 155 km long pipeline to Sicily in order to end Malta's isolation from the trans-European Natural Gas Network. This project has been twice recognized as a "Project of Common Interest" by the European Commission (*Initial Assessment MSP oriented*).

## Current policies

At international or even European level there is no real specific regulation regarding pipelines and submarine cables installation or exploitation. However they are concerned by regulation regarding marine environment and its preservation. Mostly it is about habitat destruction and/or pollution risks.

In Spain, to protect Natura 2000 areas, it is regulated by the Management Plan of each site (declared by Royal Decree), and requires an Environmental Impact Assessment for any activity in its area, according to the Law for Natural Heritage and Biodiversity. It also should fulfill the Law 41/2010, of December 29th, of Marine Environment Protection, to achieve or maintain good environmental status in the marine environment.

In France, pipelines and submarine cables installation and exploitation are regulated by order n°2016-1687 of December 8<sup>th</sup> 2016 regarding maritime areas under French Republic national sovereignty or jurisdiction. Article 28, chapter III of it especially rules these activities installation regarding the environment.

In Italy, the Ministry of Economic Development is in charge of policies regarding energy and telecommunications. However, gas infrastructures development are regulated throughout the "Ten-year development plan of the natural gas transmission network 2017 – 2026" established by SNAM RETE GAS.

Also there is the National Energy Strategy which was approved in November 10<sup>th</sup>, 2017. One of the main action expected throughout this strategy regards the development of infrastructures to improve routes and sources of supply. The development of a new supply route through the development of a Trans Adriatic-Pipeline project is for example expected (*Ten-years development plan of the natural gas transmission network 2017-2026*).

Regarding telecommunications and electricity transmission and dispatching at national scale, a Ministerial Decree on December 15<sup>th</sup>, 2010 delegated it to a private enterprise. It has to develop a Development plan every year to provide guidance regarding sector development.

Finally in Malta, it is the Malta Communications authority which is responsible of submarine cable although there is no national strategy. This authority is currently carrying a feasibility study to examine the possibility of an additional submarine cable.

Regarding pipelines, the authority in charges of it is the energy and water agency of Malta.

## Organisation, structure and representation of the sector

The only information which could be found was about a society which gather many cables enterprises across Europe and represent them. It is called Eurocapable (*Eurocapable*).

## Sector's point of view

There is no available information about the sector's point of view.

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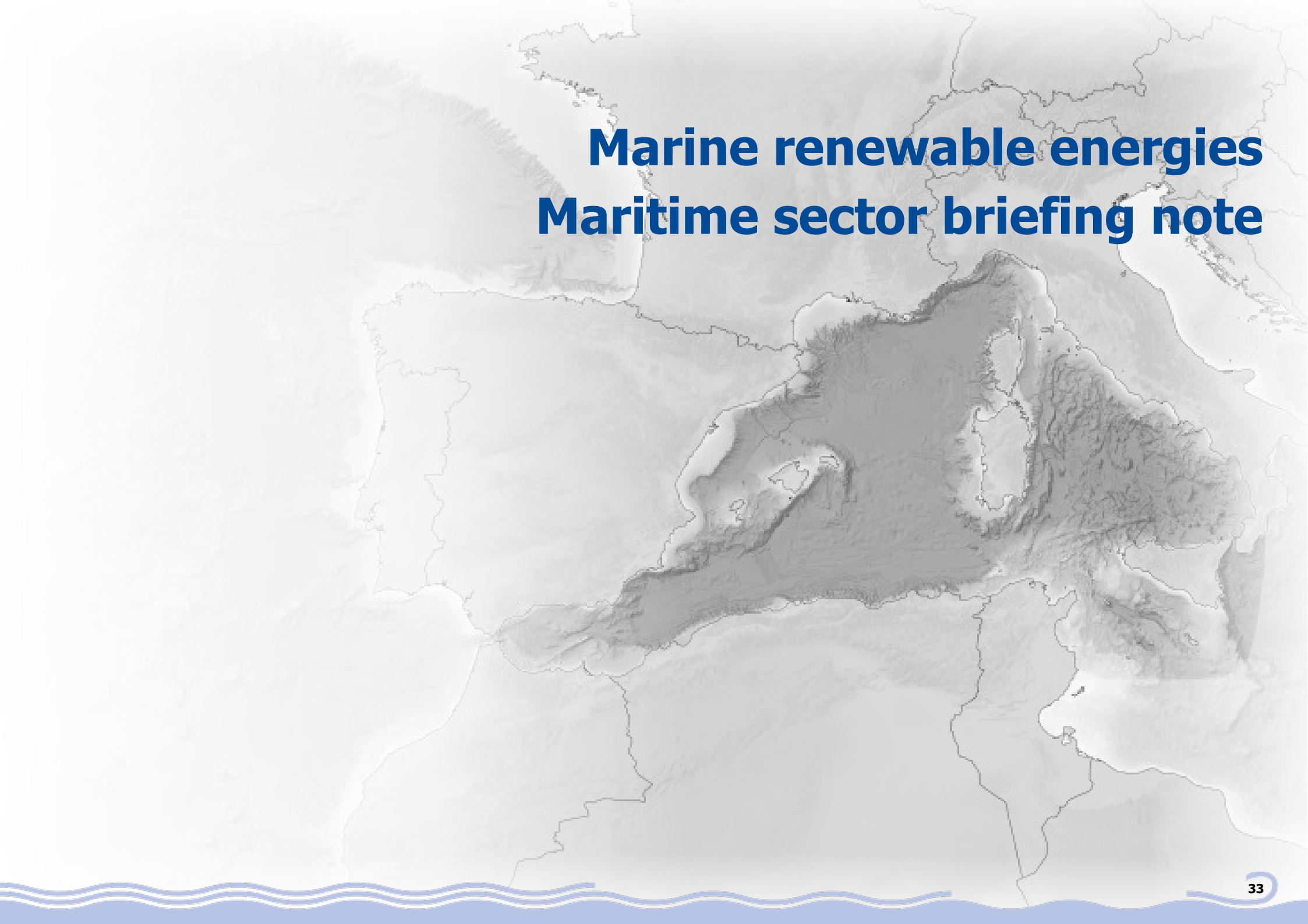
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# **Marine renewable energies**

## **Maritime sector briefing note**

## General description – Current situation

Marine renewable energy covers different types of systems and/or technologies. Indeed there are all kinds of them which enable the production and use of energy collected from marine environments:

- fixed offshore wind farms (fixed on the sea soil when depth does not exceed 40m)
- floating wind farms (when depth exceed 40m),
- marine current,
- wave power,
- tidal power,
- temperature gradient power (different temperature between warm surface water and cold deep water).

In Spain, there is currently no offshore infrastructures regarding energy production. Also there are no legislation or framework regarding this sector, but maybe except for wind farms.

However it is worth to note there are about 30 offshore wind projects on their way in Spain. However immature technologies, cost, social, environmental studies needs, and sea depth are currently challenging these wind farms installations (*Spain's national renewable energy action plan 2011-2020*).

Also regarding wave power, prototypes too were being developed when the report was published in 2010. It was expected to obtain promising result by 2016 in order to then be able to set bases for commercial plan development. It seems more time is needed/required.

In France, there is currently no offshore infrastructures regarding energy production in the Mediterranean sea. However, there are on going projects and the State launched several calls to help the development of offshore marine renewable energy systems. As for Spain the development of such technologies request time and investments.

Also, regarding the marine environment of the Mediterranean sea under French authorities, marine current, wave, and tidal power are not really interesting technologies to develop. However floating wind farm were highlighted as interesting ones to be developed. It is worth to note that as well as in Spain, sea depth do not allow to develop fixed wind turbine in the French Mediterranean sea. Sea depth is greater than 50m deep near the shoreline.

In 2015, the government through the Energy control and environmental agency (ADEME) launched a call for projects for the development of pilot floating wind farms. Potential future commercial ones will depend on the results obtained with pilot projects. Four pilot projects were selected in 2016, three of them will be taking place in the Mediterranean sea. Pilot sites as well as commercial potential sites were determined throughout different consultation within concerned bodies. (both dsf and french report to the European commission about renewable energy).

In Italy, no information could be found. It seems Italian's government expect energy production from different kinds of marine renewable energy technologies by 2020 (offshore wind farms, tide, wave and ocean) according to the "Italian National Renewable Energy Action Plan (in line with the provisions of Directive 2009/28/EC and Commission Decision of 30 June 2009)".

In Malta, marine renewable energy are considered as too immature technologies to be included in their action plan regarding the implementation of renewable energy system by 2020 in order to reach the percentage fixed for this country by the European directive 2009/28/EC. Thus, there is currently no marine energy production system in Malta. Few offshore wind farm project were considered but they all have been dismissed due to their potential impact on the environment (negative impact on birds population).

Also it is worth to note that regarding tidal power energy, Maltese's waters present no significant tides which could lead to the use of such system to produce energy, thus it is not likely to be developed there (*The national renewable energy action plan 2015-2020*).

## Current policies

Regarding the regulation of marine renewable energy projects within the European community, there are numbers of directives which aims are to set basics rules for their development. Indeed, there is the Renewable Energy Directive, Directive 2009/28/EC) which promotes the use of renewable energies. It sets minimum share of energy from renewable sources for each Member State.

Directive 2014/89/EU on Maritime Spatial Planning also take part in renewable energy framing.

Also, Directive 2014/52/EU on Environmental Impact Assessment (EIA) has its place in energy projects framing as it applies to a wide range of different public and private projects. Indeed National authorities under this directive have to decide if the project needs an EIA or not. There are annexes of this directive which list the kind of concern projects and energy ones are part of them.

Then there is also Directive 2001/42/EC on the assessment of different types of plans and programs effects on the environment.

At last, both the Birds Directive (2009/147/EC) and the Habitats one (92/43/EEC) are to take into account during marine renewable projects environmental impact assessment.

In Spain and as previously mentioned, there is no really specific legislation regarding marine renewable development and implementation within Spanish's waters, but maybe apart for wind farms.

Indeed, there is only an administrative frame which was established to rule electrical generation farms (wind farms) installation within territorial sea. It was established through Royal Decree 1028/2007 and allows areas reservation where offshore installation may be settled in the future. Also in 2009, the Ministry of Energy, Tourism and Digital Agenda published the "Strategic study of the Spanish coast for the installation of marine wind farms". It allowed to determine areas where wind farms platform could be settle regarding habitats nature, marine protected areas, fishing activities areas and resources hotspots (*Renewable energy*). However this decree also rules other kind of marine renewable energy technologies (article 32).

Nonetheless, it should be highlighted there are two other main regulations which have to be applied when it comes to consenting process for marine renewable energy systems.

There is the law 21/2013 of December 9<sup>th</sup> and concerning environmental impact assessment. This one states all marine renewable energy projects have to be evaluated through a simplified environmental impact assessment process.

The second one is the coastal law of July 28<sup>th</sup> 1988. It especially defines a legal framework regarding territorial sea occupation

In France, marine renewable energy structures/ projects are ruled by the environment and energy code, but also by the public authority property code.

Decree n°2016-9 of January 8<sup>th</sup>, 2016 also rules marine renewable energy infrastructures and transport at sea, and the April 24<sup>th</sup>, 2016 order set national productivity objectives regarding marine renewable energy development (it does not concern sea soil fixed wind turbine).

Also, law n°2018-727 of August 10<sup>th</sup>, 2018 in its 58<sup>th</sup> article set a new sub-section to the 8<sup>th</sup> title of the 6<sup>th</sup> section of the unique chapter of the environment code. This new sub-section is called "marine renewable energy production installation" and establish a set of rules to the establishment of such projects.

As for now regarding the permitting process, there are different step to follow according to the type of project. For all of them, a unique permit regarding environmental issues is needed and delivered by the maritime Prefect. This step require a public consultation phase.

If the project is located within the territorial waters, then it will need to obtain a license to occupy the maritime public domain. This license is also delivered by the maritime Prefect. It also again require a public consultation to obtain it.

Finally if the project exceed a 50 MW production, then it needs to get an authorization to generate electricity. This one is delivered by the Ministry of Energy. A grid connection convention is also signed between the project's manager and the French Transmission System Operator (TSO) (*Tethys*).

Regarding Italian legislation on marine renewable energy no specific and relevant information could be found. The only information found concern renewable energy common legislation. On March 3<sup>rd</sup>, 2011 the Italian's government adopted the European Directive 2009/28/EC on renewable energy.

Legislative decree n° 112/1998 made regions responsible of administrative duties regarding energy (which include renewable ones).

Constitutional law n° 3/2001 gave the State responsible of legislative matters regarding renewable energy and the regions are responsible for administrative ones.

Regarding production, transportation and national distribution of energy, both State and regional legislation occurs. The State establishes laws regarding fundamental principles and the regions exercise their legislative power within the limits of these fundamental principles.

As there are also obligations from the European Community, the State also has the responsibilities of transverse aspects such as environmental protection and competition.

Municipalities and provinces also have administrative duties assigned regarding energy sector. When it is not them, it is relevant of the region. Indeed regions are also able to establish their own regulatory measures. (*Italy's Fourth Progress Report under Directive 2009/28/EC*)

In Malta, as most of the marine renewable energy technologies are not yet enough technically and economically viable, there is no regulation or framework to rules these kind of technologies.

## Organisation, structure and representation of the sector

In Spain, wind energy is promoted by the Wind Business Association (AEE). It represents and defends interests of the sector in Spain of course but also in Europe and internationally. There are about 200 companies member of this association. It gathers different types of stakeholders concerned with wind power (promoters, manufacturers, consultants, lawyers...).

It participates to the establishment of framework regarding this sector in order to develop it within the best possible conditions.

Then the association is also the secretariat of the Spanish Wind Industry Technological Platform, REOLTEC and so on coordinates the presence of Spanish companies in international fairs and conferences with the ICEX Spain Trade and Investment (it is a government body chaired by the Secretary of State for Trade of the Ministry of Economy, Industry and Competitiveness with the aim of attracting foreign direct investment (FDI) to Spain).

REOLTEC is a non-for-profit organization which was born in 2005 with the challenge of integrating and coordinating research, development and innovation actions aiming at answering the wind industry needs. Collaboration within REOLTEC is free and counts with members from the academic and governmental fields, technological centers and companies.

The platform is also in charge of identifying industry research and development priorities as well as of disseminating advancements. In this sense, in conferences such as 'Perspectives for offshore wind technologies in Spain organized by REOLTEC and held in November 2017 in Madrid, the sector actively debated on current topics such as the future of marine wind energy in Spanish offshore waters.

There is also the Spanish Maritime Cluster Association (CME) which provides room for the association and collaboration of varied Spanish maritime industries and actors, while it allows and fosters discussions on different sector needs and issues of interest. On the whole, the CME targets the promotion and development of the Spanish maritime sector, to achieve a higher level of competitiveness of the entire sector and provide a general defense of its interests. The cluster has a national scope and aims to have in its bosom all associations, companies, public or private institutions and non-profit legal-private entities that are involved, directly or indirectly, in the maritime sector. The CME is integrated into the European Network of Maritime Clusters (ENMC) that brings together maritime clusters of main European countries: Belgium, Holland, France, United Kingdom, Germany, Italy, Norway, Finland and Denmark.

Within the CME there are different working groups created to improve the competitiveness of the Spanish maritime sector, depending on the different interests of (and manifested by) the CME partners. These working groups constitute a meeting-point for different (maritime) sector stakeholders with similar concerns and needs, and provide a place to discuss topics of interest and find solutions to problems in the sector, as well as to find partners to carry out business initiatives.

Through the activities of each working groups, political and institutional relations are also facilitated, with the CME being the qualified voice before the administration to defend the interests of the members.

In this sense, the Working Group on Marine Wind Energy was created to facilitate the reorientation of the traditional maritime sector in Spain towards a new emerging sector such as offshore wind, taking advantage of the existing infrastructure and the technological capabilities of national companies.

The objectives of this group are the following:

- Identification of business opportunities for the offshore wind energy
- Identification of business opportunities for marine energies
- Establish a structure of companies capable to provide a response to the needs of the actors, forming consortium able to address each element of the value chain.

In addition, the Spanish Technological Platform of the Maritime Sector (PTME) constitutes another meeting-point for exchanges and discussions among maritime sectors and stakeholders. The platform was born at the beginning of 2005 at the request of the MINETUR, with the support of the Spanish Administration and in line with European initiative "Waterborne".

At present, the Spanish Maritime Cluster, as the Management Committee of the Platform, assumes the direction of the PTME as well as administrative and coordination functions of the Technical Secretariat, with the collaboration of the School of Naval Engineers of Madrid.

The main goals of the PTME are:

- Definition of a common perspective of the predictable evolution of the maritime sector in Spain.
- Collaboration with the Administration in the design of the national and European technological policy for the preparation of:
  - A strategy that helps to define the sector-specific policy.
  - A strategy that helps to define the R&D+i aid policy of the sector.
  - Encourage companies to carry out and maintain their own research activity in Spain.

The main mechanism of the Technological Platform is to bring together the sector's stakeholders, put them in contact and facilitate the generation of multi directional relationships and interactions for the use of the knowledge generated and the new necessary initiatives of research projects. The Platform is developed with the intention of including the entire Spanish maritime sector, meaning all stakeholders whose activity is strongly related to the sea or aquatic means of livelihood, both public administration and private sector etc (*Renewable energy*).

In France, the association French wind farm is important in terms of wind energy sector structuring.

There is also the renewable energy syndicate which gathers hundred of businesses working in renewable energy sector. It serves French professionals and industrial interests.

They are both privileged representative of the sector in front of public authorities. They represent them to facilitate the production and implementation of renewable energy development programs. (*Document stratégique de façade Méditerranée*).

No information could be found for Malta and Italia.



## Sector's point of view

In France, professionals seem to be rather in a positive mood regarding the development of their sector of activity. However they seem to wait on national authorities to enhance the development of the sector especially through regulation simplifying.

Lately the sector has also been scared with government announcement regarding their will to renegotiate previous contract between them and the offshore wind farm sector.

No further information could be found for Spain, Italy and Malta.

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# **Maritime tourism**

## **Maritime sector briefing note**

## General description – Current situation

### Cruise

Cruise is defined, according to the Cruise Lines International Associations (CLIA), as a traveling activity involving a minimum of 48 hours all-inclusive stay on cruise ship with a well scheduled itinerary and ships call in many ports.

Cruising activity is globally increasing around the world. According to the CLIA 2018 report, 26.7 millions of people went on a cruise in 2017, and 28 millions are expected in 2018. The Mediterranean Sea is the second cruise destination after the Caribbean with 15,8% of the Available Lower Berth Day<sup>1</sup> (ALBD) at an international scale.

In 2016, cruise activity represent at an international scale 1 021 681 FTP and a total worldwide output reaching \$126 billion. Around the world cruising demands had known a 20.5% increase between 2011 and 2016 (*2018 Cruise industry outlook*).

In the Mediterranean region, 166 cruise ship were active in 2017. It represents 215 697 lower berths capacity with 1 296 berths on average per ship. It is also worth to note that in 2017, North American operators deployed 57 cruise ships in the Mediterranean (*Contribution of cruise tourism to the Economies of Europe 2017*).

Also, some experts foresaw an all year-round development for Mediterranean cruise within a couple of year (*Initial Assessment MSP oriented*). Indeed this could be possible due to the rather quite stable weather conditions throughout the year in the Mediterranean regions. Such development could lead to an increase regarding worldwide operators operating in the Mediterranean regions.

Although the number of passengers decreased from a little 1,1% in 2016 compared to 2015, long term trends of the activity in the Mediterranean regions suggest a rather quite stable economic market in the coming years. Also it is worth to note that recently built cruise ships have more important berth capacity than older ones, thus cruise ship calls per year will slow down but with increasing passengers capacity. Services and on board activities have been developed too throughout the years.

Now regarding the activity regarding project partners countries,

In Spain, cruising activity has experienced a 6,5% growth in 2017 which leads it to the 4<sup>th</sup> place in terms of European market and thus overtakes France place.

In 2017, 510 000 passengers went on a cruise, it was 6,4% more than in 2016. On average passengers were 44 years old and cruises lasted for about 7,5 days in 2017. It is about the same as 2016. Most of the chosen cruise took place in Western/ Central Mediterranean with 265 000 passengers, followed by Eastern Mediterranean ones with 81 000 passengers and Northern Europe ones with 58 000 passengers. Caribbean, Bahamas and Bermuda ones reach the 4<sup>th</sup> place with 41 000 passengers in 2017 (*2018 Cruise industry outlook*).

In Italy, cruise passengers had known a 2,5% increase in 2017 compared to 2016. Indeed in 2017 they were 769 000 for 751 000 in 2016. The Mediterranean is the favorite Italians destination to cruise. Italians are traveling on cruise ship mainly all year round. It appears they were more than 300 000 on board between October and March in 2017. On average passengers in 2017 were 43 years old and cruises lasted for about 7,3 days. It is about the same as 2016. As previously noted, most of Italians went on Mediterranean cruises followed by Caribbean, Bahamas and Bermuda ones, and then at the third place in Northern Europe (*2018 Cruise industry outlook*).

In France, number of passengers decreased in 2017 compared to 2016. They went from 554 000 to 503 000 ones, and so being a 9,2% decrease. It can be explained by the "Croisière de France" closure and by a drop in capacity also from some other operators. This decrease mostly impacted Mediterranean cruises whereas it benefits destination like the Caribbean, Bahamas and Bermuda as well as Transatlantic and world cruise. There is also a notable increase regarding exploration cruise (Antarctic, Arctic, Galapagos, Greenland, Iceland, and North cape). On average passengers were 49 years old in 2017 so one year older than in 2016. Cruises lasted for about 7,7 days on average, although it is worth to note than increasing cruise destination like exploration or Transatlantic & worldwide ones respectively lasted more about 11 and 18 days (*2018 Cruise industry outlook*).

In Malta, passenger traffic during the first 6 months of 2018 amounted for 182 862 ones. It is a slight decrease of 0,2% compared to the same period in 2017. Also it is worth to note cruise ship port calls went from 149 in 2017 to 120 in 2018 during the first six months but on average passengers capacity went from 1 801 in 2017 to 2 105 in 2018. This figure agrees with what was explained above about cruise ship berths capacity increase.

With 83,8% of total passengers, being so 153 199 of them, transit passengers are the majority of them. Sixty-seven point one per cent of them came from EU Member States. However it is worth to note, European passengers number decrease while on the other hand non-European one increase. Regarding passengers ages, the most important share represent passengers within 60 to 79 years old followed by the ones between 40 to 59 (*Cruise passengers*).

<sup>1</sup> "ALBDs is a standard measure of passenger capacity for the period, which company uses to perform rate and capacity variance analyses to determine the main non-capacity driven factors that causes their cruise revenues and expenses to vary. ALBDs assume that each cabin company offers for sale accommodates two passengers and is computed by multiplying passenger capacity by revenue-producing ship operating days in the period". [https://csimarket.com/glossary/term\\_Available\\_Lower\\_Berth\\_Day\\_ALBDs.html](https://csimarket.com/glossary/term_Available_Lower_Berth_Day_ALBDs.html)

## Nautical activities:

In France, and based on the Nautical Industries Federation key figures of 2017, it seems that different kinds of nautical activities turnovers increased compared to the previous year. Indeed regarding equipment industries and, construction and boats import industries, their turnover is equal to 1,773.9 M€ (+8.6% compared to 2016). Regarding services industries, their total turnovers for 2017 is equal to 2,444.1 M€ (+2.8% compared to 2016). Total 2017 turnovers for riding and nature-connected companies is equal to 111 M€ (+6.3% compared to 2016). Finally, turnovers regarding leisure ports and associated services is equal to 523.3 M€ (+2.9% compared to 2016).

Leisure boat constructions are increasing in terms of turnover both regarding construction for french market and for export one. The total growth for 2017 is equal to 12.2% compared to 2016. It is worth to note that the export rate increase in 2016/2017 compared to 2015/2016 (respectively 75.1 % and 74.9%).

Now regarding watercraft sales evolution in 2016/2017, it increased to 40.9% compared to 2015/2016. It is also worth to note, sales of four-stroke engine speedboat are increasing while two-stroke engine speedboat sales are decreasing. Classical two-stroke engine speedboat sales decrease is even greater than reduced greenhouse gas emission two-stroke engine speedboat.

No further information could be found for Spain, Italy and Malta.

## Current policies

### Cruise

#### International level

Cruise sector is greatly ruled by many regulation whether at international level, European level or even at national one. It includes different aspects like security, safety, consumers rights responsibility and environment. The main organism in charge of maritime transportation regulation is the international Maritime Organization (IMO). It is a technical division of the United Nations. IMO counts 170 members countries. Rules from the IMO are applied throughout convention implementation once ratified by its members. Key convention regarding maritime security are the convention on Safety of Life at Sea (SOLAS) and the Convention on standards of Training, Certification and Watchkeeping for Seafarers (STCW).

The SOLAS one is about international building norms, vessel equipment and exploitation. It regulates rescue equipment availability and standards. It integrates and makes the International Safety Management Code mandatory. It also concerns vessel safety through the International Ship and Port Facility Code.

The STCW convention as for it regards training norms and seafarers work procedures. It prepares cruise ship seafarers to handle stampede in case of emergency.

Now regarding international travel, vessels obligations and rights are written in the Convention on the Law of the Sea (UNCLOS).

Operators responsibility regarding passengers claims is represented by the Athens Convention. However and regarding claims as well, every cruise ship is also insured by the Protection & Indemnity clubs international system which financially covers them.

Environmental damages are also covered by these Protection & Indemnity clubs. Worth to note, there are additional guaranty level regarding claims and liabilities insured by the Convention on limitation of Liability for Maritime Claims and by the Convention on Civil Liability for Bunker Oil Pollution Damage.

Regarding environmental impact from maritime transport, there is also the International Convention for the Prevention of Pollution from Ships. It is the main one. It covers marine environment pollution from ships whether it is due to operational reasons or accidental ones. It also concerns atmospheric pollution and wastes management. And at last, it also rules gas tanks position in protected areas on ship in order to reduce accidental liquid runoff (*Sécurité des natives de Croisières*).

## European level

Several European laws have been elaborated and passed in order to execute, at a European level, regulation established by the IMO. Many of these European rules establishes a stricter framework than the one passed by the IMO. All its members have to transpose it within their national regulation. The last one in terms of maritime security is called the Third Maritime Safety Package (3MSP). It gathers 8 European directives and regulations and it was passed in 2009. One of these directives implement rules regarding investigation organization in case of accidents. Another one regards classification society quality criterion. Indeed these society have a major role regarding vessel architecture and with a specific attention for vessel security.

At last the European Union passed a specific regulation regarding cruise vessel and Ro-Ro ones. Indeed domestic travel carried out by these kinds of ships are not covered by the IMO. In fact this regulation respect IMO standards and regards passengers ship and Ro-Ro ships security. It also sets specific rules in terms of ships stability.

## Nautical activities

At European level, there is the Directive 2013/53/EU of the European Parliament and of the Council of 20 November 2013 on recreational craft and personal watercraft and repealing Directive 94/25/EC. It stipulates Members State had have until January 18<sup>th</sup>, 2016 to adopt laws, regulations and administrative provisions to comply with this Directive (Chapter IX, article 54).

It is also worth to note on May 23<sup>rd</sup>, 2018 a proposal to harmonize safety rules for small passenger ships (less than 24m long), was passed by the European Commission. It proposes to Members State to follow a common framework to insure and improve safety on board of these kinds of passenger ships. If this project is developed and endorsed in the end then it will provide a common framework for passengers safety on domestic travel and so on it might open new market possibilities for operators and manufacturers (*Safety of passenger ships*).

In France, a boating license is required in order to navigate on motorized boat. It is also required to use watercraft. N°2007-1167 decree of August 2<sup>nd</sup>, 2007 legislates this boating license. This license is only valid to navigate within a 6nq distance from a secure shore spot. In order to navigate further with a motorized boat, it is mandatory to obtain the high-sea license extension.

Besides, as there is now a lot of these watercraft directly available from yachts, a national decree was passed on April 10<sup>th</sup>, 2013, in order to regulate the use of on-board watercraft on chartered yacht above 24m long and registered on the French international register (*Permis de bateau de plaisance option côtière*).

Although this regulation was established to rule domestic travel it also rules international ones (between European countries) as it was passed by the European Union (*Sécurité des natives de Croisières*).

Although Members States have until December 21<sup>st</sup> 2019 to transpose it at national level, it is worth to note that on November 30<sup>th</sup>, 2017 several numbers of legislative texts were published in the Official Journal of the European Union. They had been passed by the European Parliament and the Council on October 2017. These texts focuses on ships safety that carry passenger in European waters. It improve and simplify them (*Safety of passenger ships*).

At national level, cruise ships and cruise travels laws mainly come out of the transposition of the European ones.

Regarding pleasure-boat and on-board security, it is ruled by the decree of November 23<sup>rd</sup>, 1987 on ships security. It contains different divisions depending on boat length and type of uses (commercial or not). It was updated on December 2<sup>nd</sup>, 2014 (*Les divisions sécurité plaisance & Sécurité des passagers sur un bateau en mer*).

In Italy, it seems a license is required to use a watercraft. Only European license are accepted by the Italian authorities. Must be at least 18 years old. Specific equipment are required like helmet and life jacket. Specific distance must be respected when playing around fishing vessels, divers or else (*Jet-Ski (PCW) regulations & restrictions by country*).

In Spain, a license is required and must at least be 18 years old. There are possibilities to use watercraft under 18 years old but must be at least 16 years old and with guardians consent. Insurance and license must be always carried out on board. Driver and passengers must wear life jacket. Distances from swimming areas, buoys, other vessels must be kept at any time (*Jet-Ski (PCW) regulations & restrictions by country*).

In Malta, a license and an insurance are required. They have to be recognized by the Maltese authorities. This applies for specific type of watercraft (*Jet-Ski (PCW) regulations & restrictions by country*).

## Organisation, structure and representation of the sector

### Cruise

#### CLIA Worldwide

The Cruise Lines International Association represent cruise industry across the world. It is the most important cruise-related-firm around the world. It represents interests of all kind of cruise-related-businesses (cruise lines, travel agencies, port authorities) before legislative and regulatory policies makers. (*Cruise Lines International Association*)

#### CLIA Europe

CLIA Europe is the European branch of the Worldwide CLIA. It represents European cruise ship operators within the Europe and is closely collaborating with European Institutions. It also aims to enhance cruise activities before other cruise-related-business such as travel agency, shipping industry and even to a wider public range to promote cruise activities. (*Cruise Lines International Association*)

#### MEDCRUISE

There is at a Mediterranean sea basins scale an association which represents the cruise industry in these basins. It was founded in 1996 in Rome and is called MEDCRUISE.

Its mission is to enhance cruise industry in the Mediterranean sea but also in the Adriatic Sea, Red Sea, and near Atlantic Ocean. It gathers and represents about 100 ports and 30 associations and firms working within cruise industry from about 20 countries on 3 different continents. It enhances collaboration and cooperation between them. Throughout this association it helps the cruise industry to promote and defend a sustainable development of the activity before European Union organizations, national and local governments and also before other stakeholders. It also have several other objectives like members information and knowledge exchanges, to develop good professional relationship with other cruises industries worldwide. At last it also helps cruise-related-companies to develop marketing and others professional tools (*MedCruise*).

At national level, in three out of the four project partners countries (Spain, Italy and France), there are national CLIA agencies. Indeed it allows members to work and solve issues at national level. It also contributes to members interests as it provides a place for them to express easily their needs/voice. (*Cruise Lines International Association*)

No further information could be found for Malta.

### Nautical activities:

#### Internationally

##### ICOMIA - the International Council of Marine Industry Associations

ICOMIA was created in order to gather all national boating federations and other stakeholders involved in marine nautical activities. It represents them at international level.

It allows its members to consider and discuss common concern issues. It enables to collect data and so to elaborate agreed policies. It enhances trade, promotes the improvement of boating safety and globally tries to raise awareness about leisure marine industry's objectives and needs. It also represents recreational boating industry before national authorities and also international bodies. Also, it helps its member with international regulations, publishes opinions and recommendations.

At last, it promotes marine leisure activities for all, in harmony with the environment and in respect of it (*ICOMIA Members*).

#### France

In France, there is the French Nautical Industries Federation (FIN). This federation aims to represent and promote French nautical industries. Indeed the FIN has different contact with different authorities (regional, national and European ones) and uses them to assist and to advise its members in various domains of activities like legal, economic, technical and even social ones.

The FIN provides different places of expression for its members throughout the elaboration and organization of meetings and actions. Indeed it owns shows like the Paris International Boat show, the Cannes International Boat and Yacht show or the Maritima trade show. It also contributes throughout this different kinds of meeting to the development of water-based recreational activities practices.

At last and regarding its environmental involvement, it developed a Bateau bleu Program, which objective is to insert environmental thoughts and knowledges throughout boat life cycle. It also created an association for ecoresponsible pleasure boating (APER) which aim is to organise and coordinate a French network regarding the dismantling and recycling of old pleasure craft (*ICOMIA Members*).

Spain

In Spain, there is the ANEN (asociacion nacional de empresas nauticas), which aim is to represent its member interest before national and international bodies as a unique and common voice for all of them. It gathers more than 130 members as boat builders, marinas and yacht harbors, manufacturers and many other recreational boating industries (*ICOMIA Members*).

Italy

In Italy, there is the UCINA (Unione Nazionale dei Cantieri e delle Industrie Nautiche e Affini) which is a non-profit organization and which aim is to represent the interests of recreational boating activities. It is a member of the Italian industry confederation and also represents the industries in European Committees and internationally. It sits and plays an active part in the ELMIF (the European Leisure Marine Industries Federation).

It works in order to develop and enhance recreational boating activities, as well as it organizes events in order to do so. It collects and gathers data on ongoing production and recreational boating activities trends.

At last, it also supports educational activities in order to help young people who desire to work in maritime sectors (*ICOMIA Members*).

Malta

No further information could be found regarding Maltese organization, structure and representative of the sector.

## Sector's point of view

### Cruise

On its European website, CLIA has a press release page. It presents both press releases from CLIA itself and from other organizations (external to CLIA).

There is also a "news" page on MEDCRUISE website.

However in both case it seems it is rather a way to promote and enhance cruise industry development, economic statute than a way to let sectors' stakeholders express their point of views.

### Nautical activities

No further information could be found.



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