

Interreg MEDITERRANEAN Programme

Priority axis-Investment Priority-Specific Objective 1-1-1

Priority Axis 1: Promoting Mediterranean innovation capacities to develop smart and sustainable growth

PI 1.b

1.1 To increase transnational activity of innovative clusters and networks of key sectors of the MED area

iBLUE

Investing in sustainable blue growth and competitiveness through 3-Pillar Business Model (3-PBM)

Project No. 830

DATA COLLECTION ON NATIONAL SYSTEMS

WP/ACT related to the Deliverable: WP3/ACT3.3

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Executive summary

The main objective of this report is to present data coming from the analysis of yachting system in Med area. The collected data initially concern population and coastline. In addition, information about protected marine areas, ports, marinas and moorings are presented as well as data about recreational boat fleets.

A three-step process has been used for the research. At first a data collection from European sources has been conducted. Secondly, data have been collected from published materials by boating associations. Finally, information has been gathered from national sources.

It is possible to distinguish three groups of countries on the basis of population as well as a sub-group of small countries with short length of coastline. The biggest countries in terms of population have the highest number of infrastructures, while the most populous countries record the greatest fleets.

In the course of the research there were difficulties due to lack of availability and uniformity of data among countries. For instance, lack of uniformity in the classification and mooring size leads to problems in comparing information from different national sources.

Introduction

This activity is related to deliverable 3.3.2 “Data Collection about yachting in Med area” of Application Form. The objective of this deliverable is the collection and organization of data about the yachting sector. The data contained in this deliverable concerns economic impact, employment, strengths, weaknesses and sustainability level.

The first step is the search of data through European sources, boating associations and national sources. This phase will be followed by an interview phase: companies, which are examples of best practice in the yachting sector, will be interviewed. This search for information aims to fill the gaps due to lack of data in the yachting sector.

The final goal is the creation of a database useful for the project, as well as for the whole Med area, containing a list of Med area yachting companies.

Methodology

Designed data inquiry included several aspects useful to conduct a transnational analysis of yachting system in a broad sense. More in detail, required data aimed at depicting the environment in which yacht industry develops in each country and comparing national situations. The following table lists the required information.

Table 1: Data requested

Population	Number of inhabitants (thousand persons)	
Coast	Km of coastline	
	Km2 of coastal regions	
	Km2 of non-coastal regions	
Protected marine areas	Number of protected marine areas	
	Km of coastline in protected areas	
	Km2 of marine protected areas	
	Specially protected areas of Mediterranean importance (SPAMIs)	
Ports and marinas	Number of ports and marinas	
Mooring availability	Number of moorings below 10 m (or not specified)	
	Number of moorings 10,01-24 m	
	Number of moorings above 24 m	
	Total	
National recreational boat fleet	Number of recreational boats for each category	Sailboats
		Motorboats (inboard engine)
		Motorboats (outboard engine) and rigid units
		Inflatables (>2,5m, >20kg)
	Total	
Annual boat production	Number of recreational boats produced in one year for each category	Sailboats for pleasure or sports
		Motorboats for pleasure or sports
		Inflatable vessels for pleasure or sports
Added value of yacht industry	Added value of yacht industry (€)	
Share of yacht industry on GDP	Share of yacht industry on GDP (%)	

Data collection have been designed upon a three-step process:

1. Data collection from European sources;
2. Data collection from published materials by boating associations;
3. Data collection from National sources.

Step 1 and 2 have been conducted entirely by Uniud. Step 1 has been developed by searching and analyzing data available in European databases, such as “mare_d3area” and “prom2” (Note: complete source list is included in the last section of this report). Followingly, in step 2, Uniud has collected additional information proceeding from boating associations.

Step 3 has seen the joint effort of the entire partnership. All the partners of iBlue have been designated to collect the missing data through National sources, such as ministerial sources or national statistic institutes. All the partners have thus provided the available data on own countries.

Data analysis has been conducted by Uniud. After having received and aggregated national data per country, Uniud has analyzed the results as follows. Each following section presents the findings on the topics and discusses emerging issues on data collection, such as the unavailability of certain kinds of data to conduct transnational analysis.

Both data collection and data analysis have been conducted with the use of Excel tools.

Countries, coastlines and protected marine areas

The partnership of iBlue sees the presence of nine countries, namely: Albania, Croatia, Cyprus, France, Greece, Italy, Portugal, Slovenia, and Spain. The following table (Table 2) illustrates the population, the coastline (length and area), and protected marine areas.

Table 2: Overview on population and coasts

	Population	Coast			Protected marine areas			
	Number of inhabitants (thousand persons)	Km of coastline	Km2 of coastal regions	Km2 of non-coastal regions	Number of protected marine areas	Km of coastline in protected areas	Km2 of marine protected areas	Specially protected areas of Mediterranean importance (SPAMIs)
Albania	2.876,59	476	300	n.a.	3	n.a.	n.a.	1
Croatia	4.145,94	5.835	33.200	n.a.	n.a.	n.a.	4.986	0
Cyprus	940,1	862	9.253	0	13	n.a.	10.439	1
France	67.086,60	5.700	252.350	380.836,1	6	1.450	41.685	4 (+1)*
Greece	10.727,28	15.000	111.557	20.492	6	2.336	7.199	0
Italy	60.529,60	7.375	182.052	120.021	27	~700	6.806	10 (+1)*
Portugal	10.304,67	2.601	40.207	52.020	29	500	113.252	0
Slovenia	2.064,84	46,6	4.825,60	15.447,4	3	5,6	11	0
Spain	46.527,43	7.880	155.703	350.241	81	n.a.	84.404	9
*: One area covers the territories of Italy, France, and Monaco n.a.: not available								

The table is an own elaboration based on several sources. Data on population comes mainly from the Eurostat database “namq_10_pe” (year 2017, 2nd quartile), with the integration of national sources from Albania and Cyprus. The length of coastline is derived by the report of UCINA (2016) and from national data coming from Albania, Cyprus, Portugal, Slovenia, Spain. Areas of coastal and non-coastal regions come from the Eurostat database “mare_d3area” with integration of

national data from Albania, Croatia, and Cyprus, where available. Estimation of Croatian coastal sea area is derived from Duplančić Leder et al. (2004). The data sources for protected marine areas are mainly originated by national sources. In Eurostat indeed, it is only available the information on the area of marine protected areas (km²) for all the countries but Albania (database: “env_bio1”). Information on Specially Protected Areas of Mediterranean Importance (SPAMIs) are retrieved directly from UNEP (2016).

According to population, it is possible to distinguish three groups of countries:

1. Population over 45 million persons: France, Italy, Spain;
2. Population around 10 million persons: Greece and Portugal;
3. Population under 5 million persons: Albania, Croatia, Cyprus, Slovenia.

The length of coastline depends on several factors, such as the presence of many islands (as in the case of Croatia and Greece) or, on the contrary, the limited area comprised within national borders (as in the case of Slovenia). It is possible to distinguish here a sub-group of small countries with short length of coastline, namely: Albania, Cyprus and Slovenia.

Information on protected marine areas are not available with uniformity among countries. Nonetheless, it is possible to identify a wide area covered by marine protection in all the partner countries. SPAMI areas are mainly present in Italy and Spain.

Ports, marinas and moorings

To evaluate the infrastructures of the countries involved in the project, data on ports, marinas and moorings are here presented in Table 3. The table is an own elaboration based on UCINA (2016) and national sources. The main difficulty in comparing information from different national sources is the lack of uniformity in the classification of mooring size. Despite the paucity of data, number of ports and marinas as well as the total number of moorings are available almost completely. The three biggest countries in terms of population (France, Italy, and Spain) are also the ones with the highest number of ports and marinas, as well as moorings. Interestingly, Greece, despite having an average number of moorings, has a high number of ports and marinas. Unfortunately, due to lack of data, it is not possible to compare the diffusion of moorings above 24 m (aimed at super-yachts) among countries.

Table 3: Ports, marinas and moorings per country

	Ports and marinas	Mooring availability			
		Number of moorings below 10 m (or not specified)	Number of moorings 10,01-24 m	Number of moorings above 24 m	Total
Albania	6	n.a.	n.a.	n.a.	n.a.
Croatia	74	4.703	12.725		17.428
Cyprus	22	713	829	103	1.645
France	388	n.a.	n.a.	n.a.	252.500
Greece	223	n.a.	n.a.	n.a.	14.666
Italy	432	103.494	50.163	3.910	160.568
Portugal	39	10.975	0	0	10.975
Slovenia	3	n.a.	n.a.	n.a.	1.425
Spain	375	n.a.	n.a.	n.a.	134.725
n.a.: not available					

National recreational boat fleet

In order to estimate the impact of yachting within each country, we have examined the national recreational boat fleet (Table 4).

The table is an own elaboration based on several sources. The main source is UCINA (2016) based on data from ICOMIA. National sources have integrated data for Cyprus, Portugal and Slovenia. As in the previous section, also detailed data on recreational boat fleet lack of uniformity in the classification and availability. Nonetheless, it is possible to notice that the three most populous countries (France, Italy, Spain) are also recording the greatest fleets. Greece, Croatia and Portugal record notable numbers.

The subsequent Table 5 shows the calculation of few indexes related to yachting.

Table 4: National recreational boat fleets

	Sailboats	Motorboats (inboard engine)	Motorboats (outboard engine) and rigid units	Inflatables (>2,5m, >20kg)	TOTAL
Albania	n.a.	n.a.	n.a.	n.a.	n.a.
Croatia	n.a.	n.a.	n.a.	n.a.	102.475
Cyprus	243	2.911	7.076	830	11.060
France	103.550	383.261	27.617	n.a.	514.428
Greece	3.860	13.418	121.037	21.000	164.915
Italy	27.985	83.328	354.265	n.a.	465.578
Portugal	n.a.	n.a.	n.a.	n.a.	80.000
Slovenia	1.808	n.a.	n.a.	n.a.	13.146
Spain	87.000	50.600	46.000	n.a.	183.600
n.a.: not available					

Table 5: Indexes on yachting and infrastructures

	Number of inhabitants (thousand persons)	Number of moorings	National recreational boat fleet	Index of yachting	Index of infrastructure	% of recreational boats with mooring
Albania	2.876,59	n.a.	n.a.	n.a.	n.a.	n.a.
Croatia	4.145,94	17.428	102.475	24,72	5,88	17,01 %
Cyprus	940,1	1.645	11.060	11,76	6,72	14,87 %
France	67.086,60	252.500	514.428	7,67	2,04	49,08 %
Greece	10.727,28	14.666	164.915	15,37	11,24	8,89 %
Italy	60.529,60	160.568	465.578	7,69	2,9	34,49 %
Portugal	10.304,67	10.975	80.000	7,76	7,29	13,72 %
Slovenia	2.064,84	1.425	13.146	6,37	9,23	10,84 %
Spain	46.527,43	134.725	183.600	3,95	1,36	73,38 %
n.a.: not available						

Index of yachting is the ratio between the national recreational boat fleet and thousands inhabitants. The result is the number of recreational boats for 1.000 inhabitants. The result shows that Croatia, Cyprus and Greece have the highest ratios. The index on infrastructure measures the ratio between national recreational fleet and moorings. Thus, it estimates the number of boats per mooring. The highest the ratio, the highest is the likelihood of overcrowding in the infrastructures. A similar measure is the percentage of unit of recreational boats with moorings. The lowest the percentage, the greatest is the likelihood of unavailability of moorings for yachts. These two measures show that the three most populous countries perform differently in terms of infrastructure, with low index and high percentage. According to the data at disposal, most critical situations are in Greece and Slovenia.

Production of recreational boat fleet

The following data are provided by Eurostat and deal with the production of pleasure and sporting boats. It is examined the NACE category 3012, labelled “building of pleasure and sporting boats”.

Table 6: Building of pleasure and sporting boats (NACE: 3012). Year 2015.

	Number of firms	Turnover or gross premiums written (millions €)	Production value (millions €)	Value added at factor costs (millions €)	Number of persons employed	Number of employees
Albania	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Croatia	76	14,2	14,6	1,6	333	310
Cyprus	5 (2014)	1,7 (2014)	2,1 (2014)	0,8 (2014)	26 (2014)	26 (2014)
France	340	1.210,60	1.119,80	389,6	7.027	6.944
Greece	87	18,8	18,4	6,4	254	186
Italy	547	1.733,10	1.769,30	338,6	7.034	6.635
Portugal	60	41,5	40,3	13,8	493	467
Slovenia	47	9,6	9,9	3,8	111	90
Spain	50 (2013)	65,3 (2013)	64,9 (2013)	17,9 (2013)	580 (2013)	568 (2013)
n.a.: not available						

Source for the previous table is the database of Eurostat called Structural Business Statistics (SBS), with year of reference 2015, apart from Cyprus (2014) and Spain (2013) due to the unavailability of more recent data. The two countries mainly involved in the production of

recreational boats are France and Italy, followed with distance by Portugal and Spain. The following table shows the detail of the product production.

Table 7: Building of pleasure and sporting boats (NACE: 3012). Detail by PRODCOM. Year 2015

	Production value (millions €) - 30121100 - Sailboats (except inflatable) for pleasure or sports, with or without auxiliary motor	Production value (millions €) 30121200 - Inflatable vessels for pleasure or sports	Production value (millions €) 30121930 - Motor boats and motor yachts, for pleasure or sports (excluding outboard motor boats)
Albania	n.a.	n.a.	n.a.
Croatia	2,23	0,38	4,37
Cyprus	0	0	0
France	572,73	23,04	238,56
Greece	0	0,35	n.a.
Italy	183,01	49,01	1.719,85
Portugal	n.a.	n.a.	1,75
Slovenia	n.a.	n.a.	0
Spain	5,25	n.a.	n.a.
n.a.: not available			

The source of overall production value is the SBS database, while the detailed production value per product category derives from the PRODCOM database of Eurostat, with reference to year 2015. Due to lack of data, it is possible to do few comparisons in the business structures. Indeed, while France and Italy are great producers among partner countries, France shows high production value of sailboats, while Italy mainly on motorboats.

Conclusions

The activity of data collection related to national data has been successfully conducted by all the partners, with a joint effort in order to access information from a wide variety of sources, such as publications, national institutions, and websites. One of the main consideration is that the paucity of uniformity in data availability has limited the analysis of some issues. For instance, despite the almost complete comparison of national production of recreational boats, information on detailed production (i.e., kind of boats) was diffusely missing. A second consideration is the role of European data collection by Eurostat. Indeed, where data are collected within the Eurostat databases, the information are often more detailed and available than in the case of data gathered

by other institutions. In particular, Eurostat guarantees a uniformity in the data collection in terms of methods and units of measure. A third consideration is that data availability is not necessarily dependent from the country size or structure, but it is more related to the structure of the statistical data collection by both public and other institutions, such as industrial confederations. The last consideration emerges from the results of the detailed analyses presented above. The investigated Med-area witnesses a great variety of scenarios from country to country. Few recurrent phenomena are detected by comparing the national cases, whereas individual peculiarities of each of the nine examined countries result from the cross-analysis. To conclude, from a European perspective, it could be desirable for the future to implement joint statistical systems of data collection. Moreover, it could be useful to detect and promote individual country physiognomies within the European yachting system as different features of a whole rather than observing each country as a separate entity in terms of characteristics.

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