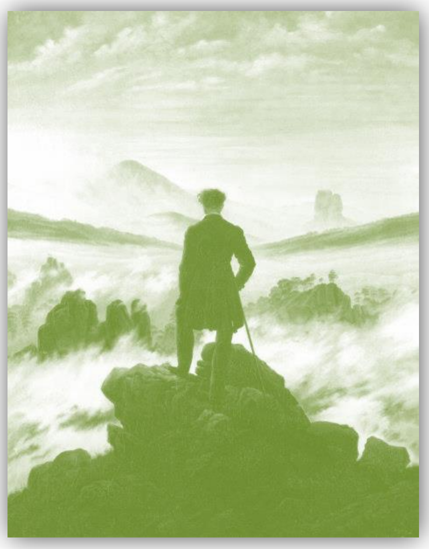
Report on Territorial context analysis

Partner n. 4
(MALTA: Planning Authority)



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The template includes 8 suggested steps for executing the TCA.

1. General Description of your Region and its Demography

The Islands, located within the central Mediterranean - 93 km away from the island of Sicily (Italy) and 290 km from Libya in North Africa, are geographically peripheral to the European mainland but serve as a strategic bridge between North Africa, Europe and the Middle East.

The Maltese archipelago is made up of three islands of which the two larger ones are populated. Malta, the largest island, with over 92% of the population is by far the most urbanized, and Gozo which is home to the rest of the population. Malta has experienced a population growth of almost 25% over the last 30 years, from about 325,000 in 1990 to a population of 429,344 in 2015. With population density standing at 1,361 individuals per square kilometre, population density in Malta is one of the highest in the world. Within the European Union, the Netherlands is a far second with 480 individuals per square kilometre. This demographic density is further compounded by over 1.6 million tourists that visit the islands every year. The native population, which peaked during the last decade, is now set to decrease in the coming years and has largely met its basic material needs. However, the Islands are experiencing a constant influx of non natives which are boosting the population figures and creating pressures for additional consumption (mainly related to leisure, transport, energy, water and land use). This is placing significant strain on natural resources creating pressures on land use, traffic congestion and pollution.

The small size of the islands, the high population density and the transition experienced in the last decades from a predominantly agrarian society to industrialised and urban communities have led to significant change in land use patterns. The expansion of urban settlements and new built-up areas up until the designation of the Temporary Provisions Schemes in 1988 has led to the coalescence of towns and villages. This has had an adverse impact on the distinct characteristics of rural areas and resulted in a reduction of open countryside; damage to natural habitats, wildlife and natural hydrological processes; conflicting activities; soil erosion and soil sealing; risks of pollution, such as from ground level ozone; contamination of soil and water catchments; and the scarring of traditional landscape. Other significant threats come from dumping, indiscriminate blocking of access, and fragmentation resulting from urban development, roads, obnoxious industries and agriculture mal practices.

Whilst, according to Eurostat, the Maltese Islands are considered to be two fully urban regions, in reality Malta still exhibits a distinction between the western part which is dominated by unbuilt open areas accommodating agricultural activities and the eastern part which is more densely developed containing major residential areas and prime commercial, industrial and service functions. Within this broad area there is a large conurbation centred around the historic Grand Harbour together with a number of satellite towns. This area houses the bulk of the population and is the economic motor of the island. Further away, a scatter of small settlements roughly marks the rural and urban limits. The distinction between urban and rural is less clear in Gozo, which with the exception of the town of Rabat, the built up areas are mostly small centres of population set in a wider rural area.

This rapid urbanization, mainly due to the growth of the tourism and industrial sectors and later through the emerging transformation of the economy into tertiary services sectors, has since the 1970s fast-growth period been a main agent for shaping the present economy, social structure and natural environment. The gross national product (GNP) per capita doubled from €10,608 in 2000 to €20,394 in 2015. Unemployment currently averages around 5.1% (slightly more than 4,000 people) in contrast to the EU average of 10.3%1.

[1] Eurostat, 2016, Unemployment Statistics: http://ec.europa.eu/eurostat/statistics-explained/index.php/Unemployment_statistics;

Some sectors of the growing tertiary services have been attracting a significant amount of workers from - but far from limited to - the EU member states. Foreign workers in Malta have increased to over 8,000 EU nationals and more than 4,000 other third country nationals by 2012. In comparison, immigrants amounted to 533 in 2002 increasing to 8,426 immigrants in 2013.

With a predominantly urban population, housing is the major urban land use. Slum and squatter areas in Malta are practically negligible as the country has a high home ownership tradition. Eurostat figures indicate a Home Ownership Rate of over 80% of the population. Dwelling acquisition is supported by a strong banking model for housing finance. However, notwithstanding the significant economical development experienced over these last 40 years and an existing over-supply of vacant housing, pockets of the population are still facing difficulties in securing affordable quality housing. This is a complex issue; the considerable number of foreign workers has caused housing prices to rise. Some of this housing is also not readily available due to multi-ownership and inheritance issues creating long term legal conflicts and court proceedings and inheritance matters that freeze the property long term; particular market forces including owners' preference not to release immediately some of their property on the market or because of the need to upgrade ancillary infrastructure (roads, water, energy, sewerage, telecommunications etc). Moreover, a proportion of this housing supply which is located within the older urban core areas is substandard and inadequate.

The geographical characteristics of the Maltese Islands, particularly influenced by geomorphology, have shaped our history throughout centuries and as a result also influenced development trends. The natural harbours on the south east gave rise to fisheries and port development whereas agriculture mainly dominated the rest of the land territory. The Northwest tilt on mainland Malta and the karstic topography particularly on Gozo, played an important role in the growth of settlement patterns and the location of marine related activities which are concentrated along the shallower parts of the north east shores.

Malta still exhibits a distinction between the western part which is dominated by unbuilt open areas accommodating agricultural activities and the eastern part which is more densely developed containing major residential areas, prime industrial and service functions and showcases of history, identity and culture. Within this broad distinction there is a large conurbation centred around the historic Grand Harbour from Pembroke in the North, to Qormi in the centre and up to Zabbar in the South, which houses the bulk of the population; a number of satellite towns such as St. Paul's Bay, Mellieha, Rabat, and Zurrieq being major residential and tourism hubs and providing a service function to the surrounding settlements; and a scatter of small settlements around them such as Dingli, Safi, Qrendi and Mqabba.

Gozo and Comino have a population density of only 452 individuals per square kilometre; around one third of that for Malta. Rabat dominates the island in terms of population concentration and non-agricultural functions, the remaining built up areas being small centres of population such as Xewkija, Nadur and Xaghra, and even smaller settlements such as Ghasri and Gharb in the wider rural area. Other settlements are dominated by the tourism and leisure function with low resident population.

On the basis of natural characteristics, existing uses and their interactions as well as administrative boundaries, the Urban Area (Development Zone), the Rural Area (Outside the Development Zone), the Coastal Zone (up to 12 nautical miles), the Marine Area (between 12 and 25 nautical miles) and Gozo have been identified as distinct spatial areas as shown on Map 1. The current Development Zone and consequently the Outside Development Zone boundaries have been delineated through the Local Plans Rationalisation Exercise of 2006. The terrestrial limits of the Coastal Zone broadly reflect those identified by the 2002 Coastal Strategy Topic Paper. The seaward limit of the Coastal Zone extends to the 12 nautical miles boundary of the Maltese territorial waters. The Marine Area addressed by the SPED corresponds to the limit of 25 nautical miles of the Fisheries Management Conservation Zone. Gozo is treated as a distinct spatial area in line with

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National Statistics Office, 2016, News release - Registered Unemployed: March 2016, pg 1: http://nso.gov.mt/en/News_Releases/View_by_Unit/Unit_C2/Labour_Market_Statistics/Documents/2016/News2016_071.pdf the thrust of the NRP, Vision 2015 and the NEP. It is important to recognise the distinctive characteristics of Gozo and thus to ensure that policies for Gozo are not just a replication of a 'one size fits all' approach but are created with Gozo's specific needs at the centre of policy making.

Like many other countries, Malta faces an ageing population, mainly due to a lower fertility rate and an improvement in longevity. The 65+ age group represents 13.7% of the population, up from 11.4% in 1995. On the other hand, persons under 25 years of age make up 31.5% of the population, compared to 36.6% in 2005 (Demographic Review, NSO, 2010). This trend which resulted in an increasingly elderly population has been observed since the 1967 Census and is expected to continue in the foreseeable future. Focus is required on the demand on the limited financial resources of the State, including the pensions system, their need for supportive services, their risk of dependence, and the housing and social environment.

Tab. 1 - Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by
1.1	land area by type: Plain	sq km	316		PP
1.2	topographic diversity (geographic form and elevation variation)		Total Area: Terrain: mostly low, rocky, flat to dissected plains; many coastal cliffs - 316 sq km Highest point: Ta' Dmejrek (near Dingli) - 253 m Coastline extent: 196.8 km Malta / 56 km Gozo Maritime Claims: territorial sea - 22 km (area 11,354 sq km) contiguous zone - 44 km continental shelf - 200 m exclusive fishing zone - 46 km	http://www.economywatch.com/economic-statistics/Malta/Geography/	PP
1.3	Population on 31 December 2017 by age group, sex and NUTS 3 region	n.	See table 1	NSO (end 2017)	Lead Partner
1.4	Population: Structure indicators by NUTS 3 region		During the period 2010 and 2015, the population of the Malta region increased every year. Overall growth 19,035.	https://nso.gov.mt/en/publicatons/Publications_by_Unit/Documents/02_Regional_Statistics_(Gozo_Office)/Regional%20Statistics%20MALTA%202017%20Ed	Lead Partner

				ition.pdf	
1.5	Demographic balance and crude rates at regional level		The number of households in 2015 was estimated at 162 807 in MALTA of which: 92.6 % resided in Malta region and 7.4 % resided in the Gozo and Comino region. Being the most densely populated districts, the Northern Harbour and Southern Harbour accounted for 53.3% of the total households in Malta region with 50,243 and 30,058 households, respectively.	https://nso.gov.mt/en/publications/Publications_by_Unit/Documents/02_Regional_Statistics_(Gozo_Office)/Regional%20Statistics%20MALTA%202017%20Edition.pdf	Lead Partner
1.6	Conventional dwellings by occupancy status, type of building and NUTS 3	n.	223,850 dwellings in 2011 **Terraced house/ Townhouse** MALTA 59,400 Gozo and Comino 11,720 Total 71,120 **Semi- detached house** MALTA 5,802 Gozo and Comino 1,264 **Fully- detached house** Total 7,066 MALTA 3,667 Gozo and Comino 576 **Maisonette/ Ground floor tenement** Total 4,243 MALTA 53,019 Gozo and Comino 2,144 **Flat/ Apartment/ Penthouse** Total 55,163 MALTA 73,815 Gozo and Comino 8,780 **Semi-/Fully- detached farmhouse** Total 82,595 MALTA 1,678 Gozo and Comino 392 Total 2,070 **Other** MALTA 1,399 Gozo and Comino 194 Total 1,593 **Grand Total** Malta 198,780 Gozo and Comino 25,070 **TOTAL 223,850**	Census of the Maltese Islands (2011)	Lead Partner
1.7	Population density	n./sq. km	Malta – 1,361 individuals per square kilometre Gozo – 452 individuals per square kilometre	NSO (end 2017)	Lead Partner

1.8	Municipalities		LAU 1 divides MALTA into districts and LAU 2 into localities 6 Districts / 68 Localities		PP
1.9	Population in urban areas/total		98.5%	https://tradingeconomics.com/malta/rural-population-growth-annual-percent-wb-data.html	PP
1.10	Rural centres		1.5%	https://tradingeconomics.com/malta/rural-population-growth-annual-percent-wb-data.html	PP

TABLE 1: Population on 31 December 2017 by age group, sex and NUTS 3 region (extrapolated from NSO data)

	MALTESE ISLANDS			**Malta**			**Gozo and Comino**		
	Males	**Females**	**Total**	**Males**	**Females**	**Total**	**Males**	**Females**	**Total**
0-9	23,462	21,996	45,458	21858	20531	42390	1604	1465	3068
10-19	22,307	21,142	43,449	20583	19439	40022	1724	1703	3427
20-29	37,334	33,897	71,231	34654	31418	66071	2680	2479	5160
30-39	39,719	35,408	75,127	37256	33363	70623	2463	2045	4504
40-49	32,220	29,615	61,835	29912	27518	57430	2308	2097	4405
50-59	29,860	29,191	59,051	27491	26823	54314	2369	2368	4737
60-69	29,495	29,840	59,335	27246	27571	54817	2249	2269	4518
70-79	18,728	21,548	40,276	17221	19680	36896	1507	1868	3380
80-89	6,658	10,507	17,155	6013	9557	15564	645	950	1591
90+	826	1,958	2,784	729	1790	2519	97	168	265
Total	**240,609**	**235,102**	**475,701**	**22,2963**	**217,690**	**440,646**	**17,646**	**17,412**	**35,055**

2. Economy and Labour Market

Full-time employment in the Maltese Islands is subdivided into private and public sectors whereby the former is further divided into self-employed and employees. Part-time employment is also segregated into self-employed and employees. Total number employed persons (full-time and part-time as a primary job) in MALTA, has grown steadily throughout the period 2010 to 2018. In 2018, this stood at 207,749.

Employed persons in Malta region (by place of work), was greater than the total number of employed persons resident in Malta region (by place of residence). The contrary prevailed in the case of Gozo and Comino region. The difference represents the net balance of commuter workers between respective regions.

The majority of commuter workers were Gozo and Comino residents working in the Malta region. On average, during the period 2010-2018 these amounted to 2,800. This implies that one out of every five employed persons resident in Gozo and Comino region worked in the Malta region. Year-on-year the number of commuter workers resident in Gozo and Comino region continued to increase, with the exception of a drop in 2013, mainly attributed to movements across regions in the public sector.

The highest proportion of employed persons in MALTA throughout the six-year period were in wholesale and retail trade; repair of motor vehicles and motorcycles; transportation and storage; accommodation and food services activities and the public administration. Full-time employment in Malta in 2018 stood at 207,749. Full-time employment in the private sector accounted for 75.2 per cent of the total, the remaining 24.8 per cent being in the public sector. The private sector contributed to 85.8 per cent of the total increase in employment when compared to 2010 levels. Full-time self-employed persons accounted for 8.2 per cent of the total employment in jobs.

In 2015, the Gross Value Added (GVA) at basic prices in the regions of Malta and Gozo and Comino was valued at €7,767.3 million and €348.2 million, respectively, reflecting a corresponding increase of 10.0 per cent and 9.8 per cent over 2014.

Labour Force Survey estimates indicate that, during the third quarter of 2017, total employment numbered 200,636 accounting to more than half the population aged 15 and over. Unemployed persons stood at 8,377 (2.3 per cent) while inactive persons totalled 161,164 (43.5 per cent). The activity rate for the quarter under review was estimated at 71.1 per cent with the highest rate recorded among persons aged 25-54 (83.6 per cent).

Table 2 - Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by
2.1	Gross domestic product (GDP) at current market prices by NUTS 3 regions	National currency	€11.29 billion	Eurostat	Lead Partner
2.2	Gross value added at basic prices by NUTS 3 regions	National currency	€9.78 million (2017)	N.S.O. (Malta)	Lead Partner
2.3	Employment (thousand persons) by NUTS 3 regions	n.	210 (in 2015)	N.S.O. (Malta)	Lead Partner
2.4	Dispersion of regional employment rates of age group 15-64 by NUTS 3 regions	n. or %	Not applicable (only 1 region)	Eurostat	Lead Partner
2.5	Dispersion of regional unemployment rates by NUTS	n. or %	Not applicable (only 1 region)	Eurostat	Lead Partner

	3 regions				
2.6	Business demography and high growth enterprise by NACE Rev. 2 and NUTS 3 regions	n.	16.19 (2016)	Eurostat	Lead Partner
2.7	Business demography by size class and NUTS 3 regions	n.		Eurostat	Lead Partner
2.8	Employer business demography by NACE Rev. 2 and NUTS 3 regions	n.		Eurostat	Lead Partner
2.9	Employer business demography by size class and NUTS 3 regions	n.		Eurostat	Lead Partner
2.10	Employer business demography by size class and NUTS 3 regions	n.		Eurostat	Lead Partner

3. Environment and Climate Change

Although the size of the Maltese Islands is comparable to other islands which can be considered entirely coastal, our status as a Sovereign state coupled with the intensity and diversity of development as a result of a high population density creates a clear spatial distinction from the inner part of the islands where activities are purely terrestrial and do not depend on the sea. A distinctive feature of the coast is that part of it is predominantly developed for urban uses such as the stretch of coast between Ricasoli and St. Julians, while the rest is dominated by cliffs, sandy beaches and rocky coastlines such as Dingli, Ghajn Tuffieha and the Xghajra to Marsaskala stretch where the major use is agriculture. As the coastal zone extends to the sea and the wider marine environment, the geo-morphological and biological diversity present on the coast together with centuries of human activity create a distinctively rich landscape. The marine space up to 25 nautical miles covers an area of 11,354 sq km, which for a small archipelago with a land area of 316 sq km, attributes a higher spatial significance to the marine area.

The rural areas of the Maltese Islands reflect the continuum of activities from very rural to very urban which blurs the distinction between the two. In general, the rural areas are characterised by low population densities, agricultural activities and natural resources. Agriculture land accounts for almost half of Malta's land area whilst woodlands account for less than 1%. Rural areas have three distinguishing spatial features influenced by the geomorphology of the islands namely ridges and valleys to the north of the Great Fault, the Rabat-Dingli uplands and the hills and plains to the south-east. These features have made the rural area north of the Great Fault and the central parts more varied in terms of rural functions and landscape features while the south east is more homogeneous in character dominated by agricultural buildings and other structures and activities.

Legal designation of protected areas

In Malta legal designation of protected areas is important to safeguard species and habitats of high conservation value. The various types of protected areas will be annually updated in a Common Database on Designated Areas (CDDA) inventory which is being created. The table below lists the different national designations reported by Malta, and provides the number of sites that fall under these designations, as submitted to the EEA by Malta.

Designation type	Number of sites*
Area of Ecological Importance	22
Area of Ecological Importance and Site of Scientific Importance	41
Area of High Landscape Value	13
Bird Sanctuary	26
List of Historical Trees Having an Antiquarian Importance	6
National Park	1
Nature Reserve	3
Protected Beaches	11
Site of Scientific Importance	10
Special Areas of Conservation - International Importance	35
Special Areas of Conservation - National Importance	7
Special Protection Areas	21
Tree Protection Areas	60

Climate data for Malta

Climate data for Malta [hide]

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Record high °C (°F)	22.2 (72.0)	26.7 (80.1)	33.5 (92.3)	30.7 (87.3)	35.3 (95.5)	40.1 (104.2)	42.7 (108.9)	43.8 (110.8)	37.4 (99.3)	34.5 (94.1)	28.2 (82.8)	24.3 (75.7)	43.8 (110.8)
Record low °C (°F)	1.4 (34.5)	1.7 (35.1)	2.2 (36.0)	4.4 (39.9)	8.0 (46.4)	12.6 (54.7)	15.5 (59.9)	15.9 (60.6)	13.2 (55.8)	8.0 (46.4)	5.0 (41.0)	3.6 (38.5)	1.4 (34.5)

Source: Malta Airport Meteorological Office (extremes 1947–2010)[28]

Climate data for Malta (Balzan in the central part of the island. 1987-2010) [hide]

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Year
Record high °C (°F)	22.2 (72.0)	24.1 (75.4)	33.5 (92.3)	31.7 (89.1)	37.3 (99.1)	40.1 (104.2)	43.1 (109.6)	43.0 (109.4)	39.2 (102.6)	33.5 (92.3)	28.9 (84.0)	24.9 (76.8)	43.1 (109.6)
Record low °C (°F)	3.9 (39.0)	2.6 (36.7)	4.8 (40.6)	6.5 (43.7)	10.5 (50.9)	14.7 (58.5)	17.4 (63.3)	18.0 (64.4)	15.4 (59.7)	11.3 (52.3)	5.7 (42.3)	3.6 (38.5)	2.6 (36.7)

Source: MaltaWeather.com[14]

Renewable Energy

Directive 2009/28/EC requires each Member State to reach a share of renewable energy in gross final energy consumption by 2020 which is set at 20%. The Directive requires Member States to publish a National Renewable Energy Action Plan (NREAP) explaining how the national overall renewable energy target and the transport target shall be achieved. Malta submitted its first NREAP in 2011. However, technological advancement, studies and experience prompted the Government to update Malta's national plan. The document issued in 2017 presents a revised National Renewable Energy Action Plan for Malta, incorporating new priorities, projects and initiatives put forward for the energy sector.

Results are expected to be achieved through a number of renewable energy technologies, photovoltaic installations, solar water heaters, waste-to-energy, heat pumps, biomass imports and bio-fuels. The government has also devised a number of support schemes to incentivise the general public to opt for renewable energy installations such as the PV grant scheme, the Solar water heater scheme, and the Heat pump water heater scheme.

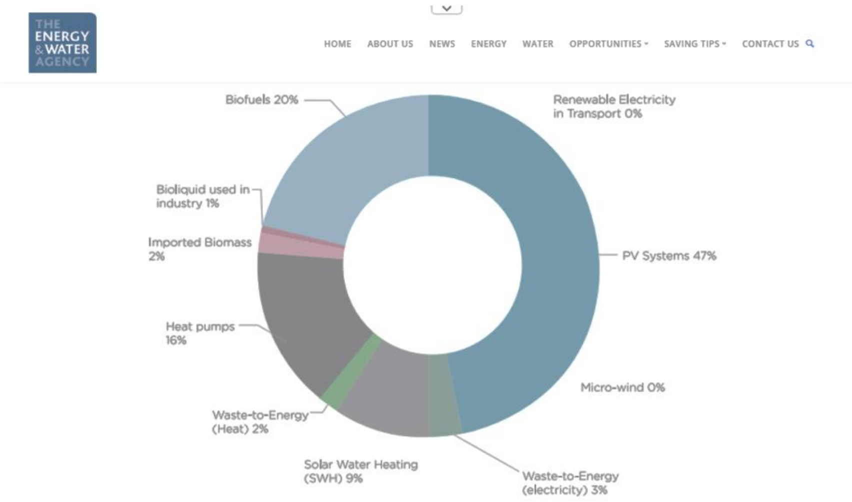


Table 3 – Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by
3.1	Land and marine protected areas (by category)	No. / sq. km	26 bird sanctuaries 3 nature reserves 39 Special Areas of Conservation (SAC) of international and national importance 74 Areas of Ecological Importance (AEI) and Sites of Scientific Importance (SSI) 30 Tree Protection Areas (TPA) - 5.35 km2 4,138 sq. km (marine environment)		PP
3.2	Wildlife (biodiversity)				PP
3.3	Flora (biodiversity)				PP
3.4	Maximum, minimum and mean temperature (by	See “Climate Data for Malta” table above			PP

	month)				
3.4	Variation of exceptional climatic adverse events against previous year	% (or n.)	N/A		PP
3.4	Incidence of renewable energy on total energy production	%	PV systems 47% Solar water Heating 9% Heat pumps 16% Bio-fuels 20%		PP

4. Infrastructure and Mobility

Urban development patterns over the past 50-60 years have resulted in a very challenging situation with regards to urban mobility. The provision of transportation has primarily been car focused resulting in the development of infrastructure and a resultant urban morphology which is designed to accommodate and prioritise private vehicular use. Concurrently, urban areas developed prior to the advance of the motor vehicle where not designed as such and cannot provide for the growing demands of vehicular traffic. Current transportation patterns are therefore private car dependent making it quite challenging to create a modal shift towards sustainable forms of mobility.

As at the end of 2018, the number of licensed vehicles in MALTA amounted to 375,000. The largest proportion of the stock was recorded in the Northern Harbour district, 27.7 % of the total licensed motor vehicles. Passenger cars totalled 275,380 or 79.4 %, however, the stock of motorcycles saw the highest percentage increase (9.3 %) over 2014. Newly-licensed motor vehicles amounted to 21 260; of these, 9,321 were newly-licensed ‘new’ vehicles and 11,939, were newly licensed ‘used’ one.

Transport Indicators

As at end 2016, the population in Malta and Gozo reached 460,297. The number of vehicles per 1,000 inhabitants totalled 780 in 2016, an increase of 1.3 per cent over 2015. This value drastically increases to 940 vehicles per 1,000 inhabitants aged 18 years and over (Table 3.4) As at end of 2016, more than half of the inhabitants held a road driving license. Year 2016 registered 42 road traffic accidents per 1,000 licensed vehicles and 60 road traffic accidents per 1,000 license holders. Road traffic fatalities per 100,000 inhabitants were recorded at 5.0, more than double over 2015. Almost 70 per cent of male inhabitants held a driving license while slightly less than 50 per cent of female inhabitants do. Gozo and Comino district registered the highest amount of vehicles per 1,000 inhabitants with 1,028, while this value of passenger cars per 1,000 inhabitants registered in this district amounted to 692. As at end 2016, there were approximately 1,136 vehicles per square km of land in contrast with approximately 15,715 vehicles per square km of roads

3.4. Transport indicators: 2016

Indicators	2014	2015	2016
Population*	439,691	450,415	460,297
Number of vehicles per 1,000 total residents	762	770	780
Number of vehicles per 1,000 residents aged 18 and over	924	931	940
Number of passenger cars per 1,000 total residents	606	611	615
Number of passenger cars per 1,000 residents aged 18 and over	735	739	741
Number of vehicles per 1,000 driving license holders	1,382	1,400	1,423
Number of driving license holders per 1,000 total residents	552	550	548
Number of driving license holders per 1,000 residents aged 18 and over	669	665	661
Road traffic accidents per 1,000 licensed vehicles	43	45	42
Road traffic accidents per 1,000 licensed holders	60	63	60
Road traffic casualties per 1,000 road traffic accidents	124	110	123
Road traffic fatalities per 1,000 road traffic accidents	0.7	0.7	1.5
Road traffic fatalities per 1,000 road traffic casualties	5.6	6.4	12.4
Road traffic fatalities per 100,000 population	2.3	2.4	5.0

*Revisions in population data has been published in 2018. Therefore, all values have been revised accordingly.

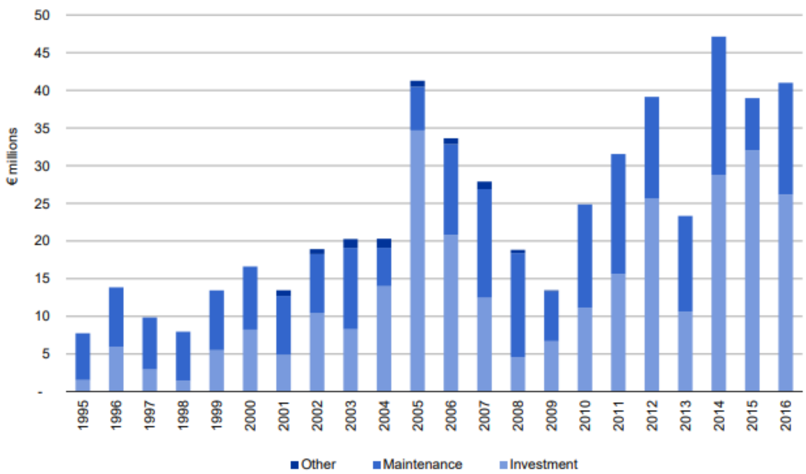
3.42. Stock of licensed motor vehicles

Year	Agricultural	Coach and private bus	Minibus		Route bus	Motorcycle / E-bike			Quad and ATV		Passenger car					Commercial vehicle			Total
			Garage hire	Other		Self-drive	Leased	Other	Leased	Other	Garage hire	Self-drive	Leased	Taxi	Other	Goods carrying vehicle	Special purpose vehicle	Road tractor	
2014																			
Q1	1,775	343	256	878	241	46	225	16,074	35	928	915	2,453	4,189	293	250,416	42,042	2,923	1,126	**325,158**
Q2	1,798	353	249	891	285	44	242	16,515	37	942	944	2,636	4,744	293	252,772	42,209	2,946	1,153	**329,053**
Q3	1,815	362	246	896	284	35	266	16,892	45	957	953	2,614	4,900	293	255,359	42,232	3,153	1,153	**332,455**
Q4	1,830	362	236	913	284	32	236	17,287	40	963	974	2,293	4,958	293	257,817	42,417	3,157	1,157	**335,249**
2015																			
Q1	1,838	365	231	925	311	32	247	17,591	58	966	980	2,241	5,280	292	259,278	42,562	3,156	1,153	**337,506**
Q2	1,865	365	229	943	309	27	307	18,126	71	988	1,010	2,327	5,628	293	261,389	42,809	3,161	1,134	**340,981**
Q3	1,875	370	222	951	420	28	333	18,510	78	1,009	1,043	2,300	5,792	292	263,918	43,108	3,167	1,127	**344,543**
Q4	1,905	353	220	971	408	19	289	18,898	81	1,003	1,057	1,974	5,774	291	266,081	43,281	3,188	1,125	**346,918**
2016																			
Q1	1,922	359	217	986	408	14	297	19,635	89	988	1,076	1,884	6,309	293	267,207	43,391	3,199	1,112	**349,386**
Q2	1,954	361	214	995	441	16	388	20,516	110	1,005	1,105	1,947	6,708	293	268,763	43,534	3,211	1,110	**352,671**
Q3	1,965	362	206	1,020	410	17	425	21,338	131	1,021	1,148	1,913	6,789	292	270,934	43,808	3,241	1,126	**356,146**
Q4	1,989	363	199	1,029	405	14	398	21,874	131	1,018	1,157	1,655	6,762	290	273,069	44,194	3,256	1,144	**358,947**

Road investment and maintenance by Government

In the year under review, the government spent almost €41 million (5.2 per cent more than 2015) between investment (€26 million) and maintenance (€15 million). Since 2013, the government has spent over €150 million in investment and maintenance on roads.

Chart 3.18. Road investment and maintenance



Public Transport

Even if the number of public transport passengers have been increasing since 2015 it is very difficult for the public transport provider to cater for the various individual needs of commuters. Public transport is thus mainly used by foreigners who live on the Islands and who find it difficult to purchase and maintain a private car. The most common mode of payment for public transport is a pre-paid Tallinja Card.

During 2016, the number of commuters using Public Transport amounted to 43,253,238. August registered the highest amount of commuters with 4,275,915 or 9.9 per cent of the total. To the contrary January registered the least amount of commuters totalling 2,853,593. Onboard Tickets tallied the largest amount of commuters using this system amounting to 8,385,812. Almost all the rest of the commuters used a Tallinja Card to travel on Public Transport. Adult Cards tallied 15,900,960 entries, followed by Concession (https://nso.gov.mt/en/publicatons/Publications_by_Unit/Documents/B3_Environment_Energy_Transport_Agriculture_Statistics/Transport_Statistics_2017.pdf)

The total number of Tallinja Card issued as at end of 2016 amounted to 264,325 with Adults type of card being the largest proportion with 51.7 per cent of total.

3.3. Tallinja Card issued by type as at end 2016

Type of card	Amount	Percentage
Student	34,919	13.2%
Child	11,577	4.4%
Adult	136,770	51.7%
Concession/ Disability	1,793	0.7%
60+	71,563	27.1%
Gozo	7,703	2.9%
Total	**264,325**	**100.0%**

3.98. Public transport commuters by month and Tallinja Card/ticket type: 2016

Month / Card type	Passengers								
	Student	Child	Adult	Concession	Gozo	Non Personalised	Onboard Tickets	Other	Total
January	414,589	14,770	1,181,764	559,532	47,711	181,653	447,246	6,328	**2,853,593**
February	444,884	19,228	1,175,022	555,279	46,710	221,530	525,658	5,903	**2,994,214**
March	398,417	18,368	1,230,991	572,619	46,839	309,264	638,351	8,741	**3,223,590**
April	413,480	16,209	1,264,269	595,879	49,590	411,828	751,827	9,748	**3,512,830**
May	404,592	17,344	1,329,546	629,987	51,150	431,361	820,755	12,374	**3,697,109**
June	363,171	18,774	1,297,854	604,294	47,391	482,897	793,612	22,795	**3,630,788**
July	378,451	27,035	1,413,195	618,063	49,419	716,346	865,842	26,988	**4,095,339**
August	363,179	26,446	1,433,383	622,402	48,478	863,185	886,592	32,250	**4,275,915**
September	368,905	25,747	1,389,323	602,847	46,568	711,963	714,010	33,463	**3,892,826**
October	592,267	18,835	1,471,534	648,478	51,995	600,164	726,366	42,509	**4,152,148**
November	567,514	18,554	1,412,992	613,294	46,845	350,511	626,346	46,614	**3,682,670**
December	430,477	18,553	1,301,087	569,398	41,604	249,316	589,207	42,574	**3,242,216**
Total	**5,139,926**	**239,863**	**15,900,960**	**7,192,072**	**574,300**	**5,530,018**	**8,385,812**	**290,287**	**43,253,238**

Cycling

Cycling is a popular hobby and is practiced extensively as a pastime. However, commuting on a bicycle still represents a challenge in these islands. Studies are being undertaken by Transport Malta (the local agency in charge of transport matters) to create 'safe' cycle corridors between towns and villages and work and study destinations. A National Cycling Strategy and Action Plan has been published in November 2018 and is currently out for public consultation. The draft document can be viewed at: https://news.transport.gov.mt/national-cycling-strategy-and-action-plan/

As at 2018 in Malta, 25km of designated cycle lanes were in place, with another 7.7km of designated cycle lanes being planned for implementation along the main road network. These cycle lanes however, are not interconnected, are limited in length and do not form a continuous safe cycling network. In addition, most of these are outside the urban centres and located instead on the arterial and distributor road network.

Internal Sea Transport

A total of 1,674,618 passengers travelled between Malta and Gozo during the third quarter of 2017, up by 1.9 per cent when compared to the corresponding quarter in 2016. The highest number of passengers was recorded in August - 582,199 or 34.8 per cent of the total for the quarter. The number of vehicles increased by 3.7 per cent, totalling 463,585.

Table 4 - Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by
4.1	Transport infrastructure (by type and length)	km	Paved: 2704 Unpaved: 392	OpenStreetMap	Lead Partner
4.2	Modal split of passenger transport	%			PP
4.3	Existing trails (type, length, conditions, …) *[each partner to insert]*	km	***Bicycle Trails*** Malta North West – 34km Malta South West – 27km Gozo Coastal – 42 km ***Walking Trails*** Dingli - Fawwara - Wied iż-Żurrieq Walk – 11.2km Mdina Walk – 9.63km Baħrija Walk – 9.9km Watch Towers Walk – 14.45km Ħal Millieri Walk – 5.6km Tas-Silġ Walk – 6.92km Tal-Maqluba Walk – 6km Girgenti Walk – 7.7km Windmills Walk – 8.8km	*https://www.visitmalta.com/en/cycling* *https://www.visitmalta.com/en/walks*	PP
4.4	Transport-related accidents (by mode of transport, other characteristi		The number of reported traffic accidents in the third quarter of 2017 reached 3,891, up by 1.9 per cent over the comparative period in 2016. Between 2012 and 2016, there	NSO https://nso.gov.mt/en/News_Releases/View_by_Unit/Unit_02/Regional_and_Geospatial	PP

	cs)		were a total of 221 accidents resulting in injuries to cyclists.	Statistics/Documents/2017/News2017_165.pdf and National Cycling Strategy for the Maltese Island (Malta Transport Authority)	
4.5	Percentage of population riding a bike	%	Negligible		PP

5. Tourism and Leisure

Eversince the 1950s tourism has been a pillar of the Maltese econocy. The mild climate and rich historical/culteral heritage are the two most attractive elementes bringing visitors to th Islnds. Available accomodation varies between a number of holtes in all star categories, holiday complexes, guesthouses, renovated farmhouses and in recent years boutique hotels and agro-tourisim facilities.

- Inbound tourists, guest nights and expenditure in years 2016-2018

	January-December			Change	Percentage change
	2016	2017	2018	2018/2017	
Inbound tourists	1,965,928	2,273,837	2,598,690	324,852	14.3
Guest nights	14,961,366	16,509,141	18,569,716	2,060,575	12.5
Average length of stay	7.6	7.3	7.1	-0.1	-1.6%
Expenditure (000s)	1,708,952	1,946,894	2,101,765	154,871	8.0

Source: NSO

Tourist Accommodation

Tourist Accommodation Capacity, December 2018	Malta & Gozo		Malta		Gozo	
	Units	Beds	Units	Beds	Units	Beds
Hotels	**138**	**33,658**	**122**	**32,032**	**16**	**1,626**
5 Star	13	6,476	11	6,034	2	442
4 Star	42	15,334	38	14,788	4	546
3 Star	57	10,152	50	9,570	7	582
2 Star	26	1,696	23	1,640	3	56
Tourist village	1	612	1	612	0	0
Guest houses/hostels	95	3,888	84	3,592	11	296
Total Serviced Accommodation	**234**	**38,158**	**207**	**36,236**	**27**	**1,922**
Self-Catering Accommodation	**3,339**	**14,109**	**2,246**	**8,341**	**1,093**	**5,768**
Total Tourist Accommodation	**3,573**	**52,267**	**2,453**	**44,577**	**1,120**	**7,690**

Source: MTA Licensing Administration Office (as at 1 January 2019)

Additionally, over recent years natural sites (apart from beaches and swimming spots) have attracted an increasing number of visitors. It is estimated that in year 2017, 440,920 tourists went trekking/hiking, equivalent to 19.4% of inbound tourists. (source: MTA Traveller Survey, 2017).

- Activities engaged by tourists whilst in Malta (Year 2017):

Activities engaged in (Multiple responses)	Year 2017
CULTURAL ACTIVITIES	
Sightseeing	89.9%
Visit temples/archeological sites	47.6%
Visit historical buildings	78.0%
Visit museums	44.1%
Visit churches	69.5%
Visit arts/crafts sites	19.8%
Visit local produce sites/agro-experiences	8.2%
Visit National Aquarium	10.5%
Attend theatre/musical/opera/dance	2.4%
Attend live music event/concert	4.5%
Attend local festival/event	13.5%
Attend traditional religious feast	6.6%
Attend visual arts event	2.2%
OUTDOOR/SPORTS ACTIVITIES	
Swimming/sunbathing	62.1%
Leisure boat trip/tour	46.0%
Scuba diving	7.2%
Watersports	4.3%
Trekking/hiking	19.4%
Cycling	1.0%
Rock climbing	0.9%
Training/tournament	0.6%
Attend/participate in sport event	5.8%
RECREATIONAL ACTIVITIES	
Spa/wellness	15.0%
Shopping	49.6%
Nightlife/clubbing	6.6%
Dine at restaurants	68.7%
Visit amusement park	2.4%
Casino	1.8%
Cinema	2.5%

Source: MTA Traveller Survey, 2017

Table 5 - Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by
5.1	Number of establishments, bedrooms and bed-places by NUTS 3 regions	no.	41 237 (BEDS)	Eurostat	Lead Partner
5.2	Nights spent in tourist accommodation in 2017	no.	18,569,716	file:///C:/Users/joazz/Downloads/MTA_Statistical_Report_2018_(no_marks)pdf_FINAL.pdf	PP
5.3	Endowment of cultural and natural heritage of tourist interest (pls list and specify by category)	See "CULTURAL ACTIVITIES" table above		MTA Traveller Survey, 2017	PP
5.4	Area of regenerated open spaces and regenerated public buildings	N/A			PP
5.5	Tourist visits (year) and other information of tourist value	See table above		file:///C:/Users/joazz/Downloads/MTA_Statistical_Report_2018_(no_marks)pdf_FINAL.pdf	PP
5.6	Duration of the period favourable to green mobility				PP
5.7	Tourist who go hiking	%	19.4% (2017)	MTA Traveller Survey, 2017	PP
5.8	Other activities tourists carry out while staying in the region (by type and %)	See "OUTDOOR/ SPORTS ACTIVITIES" table above		MTA Traveller Survey, 2017	PP
5.9	Availability of a visitor card (if yes, number of cards issued per year)	N/A			PP
5.10		Visit local produce sites/agro-experiences			
		Visit National Aquarium			
		Attend theatre/musical/ opera/ dance			
		Attend live			

		music event/concert			
		Attend local festival/event			
		Attend traditional religious feast			
		Attend visual arts event			

6. Existing policies related to Threet project features. Projects

Priority Axis 5 – Protecting our Environment – Investing in Natural and Cultural Assets

Investment Priority	IP6 c – Conserving, protecting, promoting and developing natural and cultural heritage.						
Specific Objective	SO 1 - Improve the Maltese competitiveness standing within the tourism sector through the promotion, protection and preservation of natural/cultural/historical assets in the public domain intended to improve the Maltese cultural tourism experience whilst maintaining increased tourist flows.						
Result Indicator	Baseline Value	Baseline Year	Target	Unit of Measurement	Output Indicator	Target	Unit of Measurement
Overall rating of the Maltese experience (PSR5b)	62.80	2013	66	Percentage	Rehabilitated / preserved land (PSR5a)	5,000	Square Metres

Which are the existing policies on transport (in particular green and human-powered) transport vis-à-vis the natural and cultural heritage in your region? Please refer to existing documents, in particular updated contents of the Policy you have selected at the time of the Application Form.

The Tourism Policy for the Maltese Islands (2012-2016) identifies Malta's rich cultural heritage as becoming increasingly known abroad.[2] The Valletta 2018 European Capital of Culture status has also offered a sterling opportunity to showcase our rich cultural and historical potential to the rest of Europe. However in the same document, it is also acknowledged that other less-known, local heritage sites are not living up to their potential and there is certainly scope for re-visiting the kind of

[2] Ministry for Tourism, *The Tourism Policy for the Maltese Islands* (2012-2016), pg. 26.

experience that is being offered.[3] Emphasis is made within this document on the promotion of sea transport in the Grand Harbour (which has been implemented) and also the promotion of Cultural Trails linking Malta to other European destinations.[4] Alternative modes of transport are mentioned as being appropriate to enhance the visitor experience, whilst improving air quality. The possibility of exploring the feasibility of public bicycle sharing system is also stated.[5]

In addition to the above, the most relevant policy document for this exercise is Priority Axis 5 (PA5) of the European Regional and Development Fund (ERDF) - Operational Programme I (OPI) - Fostering a competitive and sustainable economy to meet our challenges, aims at protecting our environment through investing in natural and cultural assets. This Policy Instrument (Thematic Objective 6: PA5 of OPI) specifically identifies the protection of the Maltese environment through investments in natural and cultural heritage, as a priority area under the ERDF. PA5 of Malta's OPI, describes the Maltese Islands as possessing a unique cultural landscape with rich heritage varying from museums, fortifications, multi-period architecture and archaeological sites.

Policy-related development progress (projects completed, ongoing…)

Please answer the following questions:

a) What is the intention?

The intention behind the Tourism Policy for the Maltese Islands (2012-2016) is to provide a strategy for the tourism sector, based on a number of studies and analysis which have been carried out. The intention behind PA5 of Malta's OP I is to protect our environment through investments in the natural and cultural habitat: this is in line with the overall thematic objective of fostering a competitive and sustainable economy to meet our challenges.

a) What are the objectives?

Given the growth potential of the cultural tourism sector, Government recognises the need to ensure ongoing investment towards the improvement of the tourism product through the preservation and promotion of cultural and historical sites and sets this as a clear objective in the OPI, through PA5. Malta is also rich in natural assets whose potential for tourism purposes remains untapped. During 2014-2020 programming period, Government intends to continue investing in natural, cultural and historical assets to sustain and enhance the valorisation of these assets for tourism purposes and improve accessibility to these sites, to exploit the potential of the country's cultural and natural heritage whilst undertaking the necessary interventions to create a new tourism experience.

b) At what feature/s is it aimed?

This measure is aimed at protecting a specific feature which consists of our natural environment, through investments in natural and cultural assets. Projects are therefore aimed at: conserving, protecting, promoting and developing natural and cultural heritage. Natural, cultural and historical sites can be better preserved and developed with a view to improve the Maltese tourism product and enhance the country's endowment and attractiveness.

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[3] *Ibid.*
[4] Ministry for Tourism, *The Tourism Policy for the Maltese Islands* (2012-2016), pg. 27.
[5] Ministry for Tourism, *The Tourism Policy for the Maltese Islands* (2012-2016), pg. 48.

c) *What is satisfactory and challenging in your earmarked Policy?*

Acknowledging Malta's rich cultural and natural heritage and the fact that it needs to be safeguarded is an imperative and satisfying starting point. This forms part of an overall European heritage, to which Malta contributes by enriching it. However this also comes with specific responsibilities to protect such assets and the fact that Malta is disproportionately small in comparison with the richness of its assets, it puts it at a disadvantage when it comes to investing in heritage conservation. Also, being one of the smallest states in the European Union, the human resources capacity required to adhere to EU rules and regulations also adds pressure on the limited capacity to meet the required targets. This challenge is partly assuaged by the European Union through the possibility of uptake of funds and access to Europe's best practices, aimed to address these shortcomings.

d) *What is missing?*

Cultural heritage is identified as an important niche market that contributes towards all-year-round tourism on the Islands. This has also been attested by the 2013 'Market Profile Survey' commissioned by the Malta Tourism Authority (MTA), stating that cultural heritage is one of the Maltese major attractions, with 77.6% of tourists visiting Malta tend to prefer sightseeing, whereas 50% of tourists also make it a point to visit historical sites/museums. Whilst OPI acknowledges the importance of increased competitiveness in cultural heritage in the local tourism sector, there is however a distinct lack of focus on a tangible strategy for the creation of a 'National Heritage Trail/s'. This is required to promote the actual individual sites, which are rich in both environmental and built heritage, consolidating their protection status, by creating greater accessibility to these sites, to be frequented and enjoyed by the general public and tourists alike. Modal links are required to create, facilitate, and increase accessibility from one site to the other.

What therefore needs to be improved in the territorial situation is to improve the limited accessibility of sites of tourist potential, due to lack of physical links via sustainable transport modes and a lacuna in easily available information on the actual heritage assets. This adversely affects strategies for an integrated and sustainable development of the national economy at large. There is also a lack of a *comprehensive* vision and direction for the creation, introduction and implementation of such National Heritage Trails. Piecemeal interventions on the local tangible cultural heritage assets have not yielded the desired results and therefore an effective suitable initiative is required to address this situation and improve the said policy instrument.

e) *Which projects, completed recently in your region or in progress, are most relevant to ThreeT aims and content?*

One of the most relevant projects carried out locally relevant to the ThreeT aims and content is the linking of historic urban centres with sea transport, together with an additional vertical link to Malta's capital city. This inner harbour (located at the Grand Harbour) ferry facility has improved existing ferry landing facilities and upgraded an abandoned service and together with the lift project at Valletta, has become a transport option for both locals and tourists alike. The Grand Harbour scheduled ferry service commenced its operation from the 1st October 2012 and its main objective was to ensure a reliable maritime transport which is operated on a fixed time schedule, offered at a regulated price and with a level of service aimed at stimulating its further increase in popularity.This project has increased accessibility to historic and cultural sites and at the same time, it has alleviated from further pressures to use traditional and polluting modes of transport. The lift project has provided a greater access between Valletta's Waterfront and the heart of the City through a vertical link, consequently encouraging a modal shift towards non-car modes when commuting to Valletta. This project sustained by the ancillary rapid sea ferries and therefore provides an integrated transport system to reduce the traffic congestion in and around Valletta.

Table 6 – Indicators

n.	Title	Unit of measure	Quantity	Source	To be provided by
6.1	Overall rating of the Maltese experience (PSR5b): The result indicator should measure the overall experience of tourists in Malta (in relation to their experience in the Maltese Islands of being up to expectations). Therefore, a study or questionnaire should be carried out once the intervention is completed, either on a representative sample or on all the visitors.	Sq. m	5,000	Cohesion Policy 2014 – 2020 Operational Programme I	Govt. of Malta
6.2	Rehabilitated / Preserved Year (PSR5a): The output indicator should provide the total surface area in square metres of rehabilitated/preserved land being funded through the Operational Programme.	Sq m	5000	Cohesion Policy 2014 – 2020 Operational Programme I	Govt. of Malta

	Policies	Self-defined performance indicators	Target
1. IT	Policy 1	Increased number of visits to natural and cultural areas and other areas of attraction receiving SF support (n.)	4,200
2. FI	Policy 2	Visits/year (n.)	10,000
3. MT	Policy 3	Rehabilitated / Preserved Land (% of Total target amount in OPI)	3
4. PL	Policy 4	Visitors using the new created/renovated trails (n.)	2,400
5. ES	Policy 5	Increased tourist visitors linked to hiking (%)	10
6. RO	Policy 6	Area of intervention (sq.km)	5,363
7. HU	Policy 7	Thematic packages/trails developed (n.)	3
8. DE	Policy 8	Enterprises in the sustainable tourism sector receiving financial supports (n.)	17

7. Stakeholders

- *The list of stakeholders include: policy makers (Ministry for Tourism), national authorities (Managing Authority, Malta Tourism Authority, Planning Authority, Transport Malta, Lands Authority,* *Commission for the Rights of Persons with Disability, Local Government Department), local authorities (Local Councils) and sectoral groups (such as researchers, NGOs).*

- *Main Stakeholder with the Planning Authority: Ministry for Tourism and Malta Tourism Authority*
- *Supporting Stakeholder: Funds and Programmes Division (Managing Authority)*
- *Other stakeholders: Transport Malta, Lands Authority, Commission for the Rights of Persons with Disability, Local Government Department, Local Councils, Cultural and Environment NGOs, Superintendence of Cultural Heritage, Environment and Resources Authority. The general public as the end users are also identified as stakeholders.*

Earmark the identified key-stakeholders

- *Main Stakeholder with the Planning Authority: Ministry for Tourism and Malta Tourism Authority*
- *Supporting Stakeholder: Funds and Programmes Division (Managing Authority)*
- *Other stakeholders: Transport Malta, Lands Authority, Commission for the Rights of Persons with Disability, Local Government Department, Local Councils, Cultural and Environment NGOs, Superintendence of Cultural Heritage, Environment and Resources Authority. The general public as the end users are also identified as stakeholders.*

Describe for their mobilization and ongoing involvement in project Phase 1 & 2

In order for the project to be a successful one, it is important that stakeholders participation is embedded in the project. These are recognised as being the drivers of the project: without them the project would not achieve its goals. An exercise in stakeholder involvement is planned, as detailed in the project budget through a number of stakeholder meetings, ranging from one to two per semester. The first stakeholder event was held in 2018 and it served to introduce the programme's and project objectives and also explain the workplan, together with the project ideas. These regular stakeholder meetings will ensure that project ideas and experiences are shared and amply discussed. It is envisaged that some of the stakeholders (eg. MTA) also participate in study visits to be exposed to good practices and sharing of knowledge. The final conference will also see the involvement of any interested general public.

(pls describe results of Stakeholder analysis)

Pls also refer to the two Presentations made on 26th September 2018 in Livorno, at Workshop n.1 :
ThreeT _Mod4C-3T-13
ThreeT _Mod4C-3T-14

PLANNING AUTHORITY

Three T
Interreg Europe

European Union
European Regional Development Fund

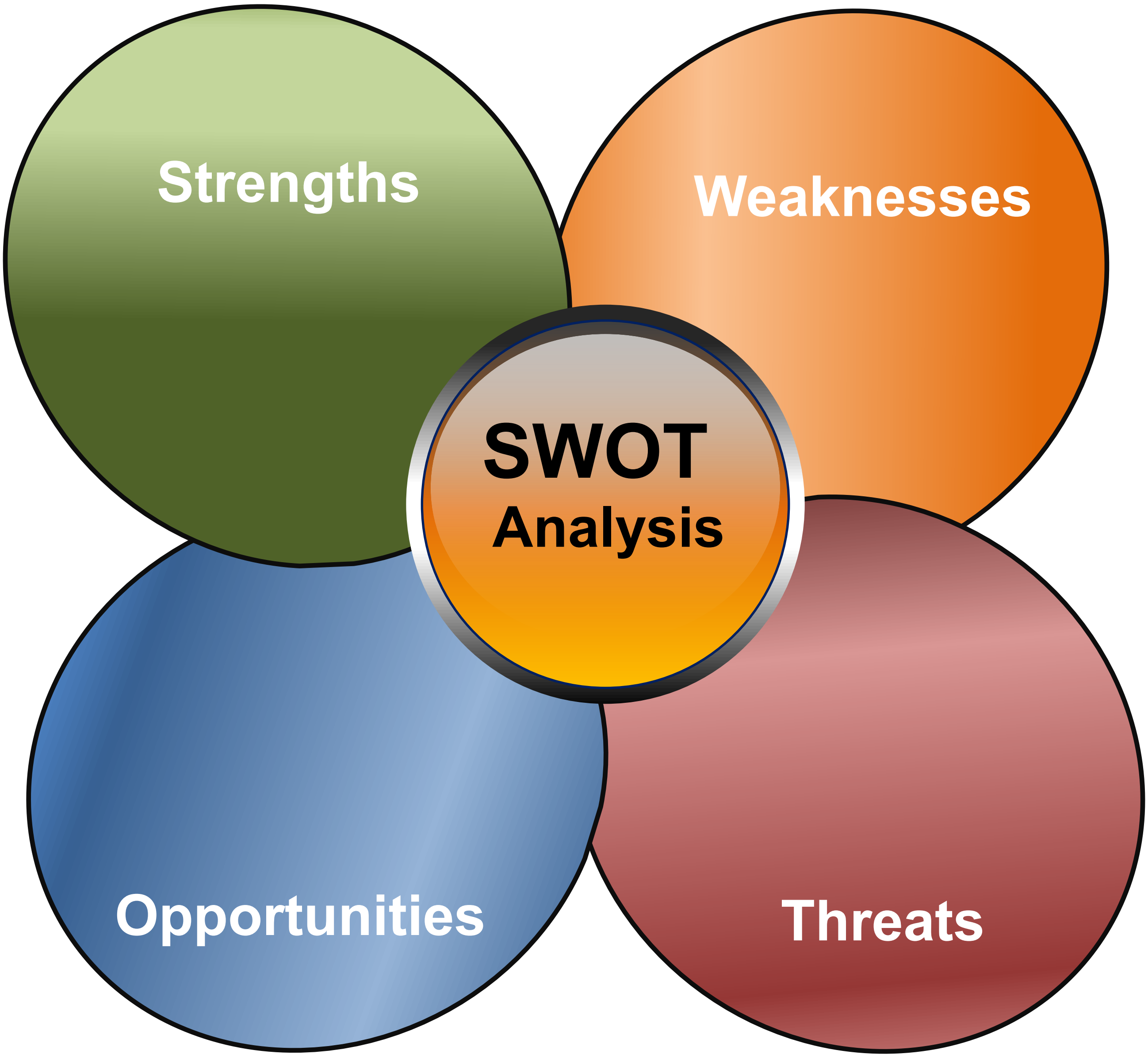
8. S.W.O.T. Analysis

[The objective of S.W.O.T. analysis is to identify and describe Regional:

- *Strengths*
- *Weaknesses*
- *Opportunities*
- *Threats*

to:

- *determine where your region stands on these four key strategic areas*
- *better determine what changes to make if and when needed].*



S <u>Strengths</u>

- *What are the identified advantages?*
  Identified advantages can be summarised into two: physical characteristics and administrative, that is those which result from Malta's advantageous geographic position (such as climate, location in terms of maritime transport, cultural heritage as a result of being in the centre of the Mediterranean and a base for a number of colonies) and those which result from a well establish governance structure (such as the education and social welfare system).
- *What can your Region do well?*
  Networking is facilitated through the scale of the country, as is the benefits of a close-knit society. Being a bi-lingual country, with thorough use of the English language throughout is also an advantage to the Region.
- *What relevant resources do you have access to?*
  Apart from language being a relevant asset for the region, the outstanding cultural heritage and diverse cultural product is a precious resource.
- *What do others see as your strengths?*
  Malta seized an opportunity to welcome a regulatory environment for the flourishing of a number of sectors: igaming, blockchain, AI, finance etc.

W <u>Weaknesses</u>

What could your Region improve?

The Region can continue to increase Malta's competitiveness by investing more in enterprises, capacity building. Efforts towards stronger social integration measures and better sustainable resource management could also be improved, together with access to finance, encouragement in investments in ICT and promotion of targeted investments in niche areas, particularly within the tourism sector, which can leverage further economic development. Furthermore, with the aim of reducing Malta's reliance on non-renewable sources of energy, and reducing GHG emissions, investments in low carbon in line with Europe's thrust to shift towards RES and increase energy efficiency may also be promoted.

What are the weak points?

Malta's small island state coupled with a high population density, which is exacerbated by the presence of an international community, puts huge pressure on the country's infrastructure and resources, such as water resource.

What should be avoided?

Inefficient bureaucracy, insufficient capacity to innovate, inadequate supply of infrastructure, access to financing, an inadequately educated workforce, poor work ethic in national labour force and corruption should be avoided.6

O <u>Opportunities</u>

Where are the good opportunities in front of your region?

There are good opportunities to map Malta internationally in the field of cryptocurrency, blockchain, DLT technology and Artificial Intelligence. The thriving economic situation coupled with wide-ranging employment opportunities are a driving force towards the country's success.

What are the interesting trends you are aware of? With stunning natural surroundings, a strategic location in the middle of the Mediterranean and unique cultural and historical assets, Malta is in a strong position for economic growth. The nation possesses a number of significant assets including a strong multi-lingual workforce, telecommunications infrastructure and a diverse industry base. While Malta experienced a slight slowdown during the recent global economic recession, it has weathered the storm well as evidenced by its low unemployment rate. Malta has been extremely successful in providing its residents with a high quality of life and its businesses with a competitive business climate.[6]

Useful opportunities can come from :

- *Changes in technology and markets on both a broad and narrow scale*
- *Changes in government policy and EU requirements*
- *Changes in social patterns, population profiles, lifestyles, tourist behaviour, etc.*

T *Threats*

- *What obstacles you may face to get the results you want?*
  The high pressure on land-use, infrastructure and resources are main threats for the economic and social growth of the country. The most long-term threat for Malta is low labour force growth, particularly in the 25–49 age group. This age group is representative of the island's future economic development capacity. This population possesses the skills that are requisite to the new types of businesses – brain power, knowledge, and skill in new technologies, and the energy to shape a new, knowledge-based economy. Areas that have large, educated populations in this age range are the regions considered "hot markets" for industries. Areas that lose this population have a very difficult time attracting and retaining businesses long term. Are the required conditions changing? The above trends present a formidable challenge to Malta, but one that business and political leadership can address if it moves quickly and decisively to adopt and implement policies to attract more talent and encourage entrepreneurship and innovation.

- *Do you expect financial constraints in Action plan implementation?*
  Financial constraints are a reality which may be surmounted by adequate planning through scrutinization of available funding sources.

- *May stakeholders lose their interest at the end of Phase 1?*
  Stakeholders have a direct interest in the implementation of the project and therefore it would be to their advantage to see through the project's actual implementation. This – coupled with a systematic approach towards stakeholder participation – should retain the stakeholder's interest throughout the whole duration of the project and beyond.

- *Could any of your weaknesses seriously threaten your Action plan?*
  Limited human resources and expertise may threaten the Action Plan, however this potential threat is being addressed by the allocation of a budget for external expertise to work on the Action Plan.

[6] The Malta Independent, *SWOT Analysing Malta*. Article dated 28.03.10 and accessed at: http://www.independent.com.mt/articles/2010-03-28/news/swot-analysing-malta-272350/

Summary table to be filled

Strengths	Weaknesses
Excellent climate conditions with no extreme weather events Long established democracy, political stability Strong social fabric, good civil society framework Social stability, rule of law, safe country Strategic location in the central Mediterranean Well established governance system with excellent international credit rating Well established market services economic structure Ongoing shift to high-value-added industrial sectors Established industrial base with a good reputation Outstanding cultural heritage for the size of the country Very diverse cultural product, spanning several centuries Excellent mix of historical attractions and events/festivals Excellent air and sea port infrastructure Established employment and training governance Excellent education system with free education for all High participation in private education in visual and performing arts Good social welfare system Widespread use of ICT Multi-lingual population Well established university	Malta's insularity and marginal EU location Small island state Population density very high Very small internal market Infrastructure conditions relatively poor Lack of branding of key economic sectors Inadequate support structures for micro-enterprises and SME's Low R&D spend Low environmental sustainability Skill shortages in certain economic sectors, particularly full-timers in art and culture Insufficient infrastructure conducive to a knowledge-based economy Insufficient expertise for strategic management of culture theme parks Lack of coherent strategy for cultural enterprise support Relatively high levels of early school leavers Low female employment rate Relatively large public sector Relatively high level of unskilled labour and illiteracy Limited child care services Declining birth rate, ageing population

Opportunities	Threats
Increased integration within EU Current diversification towards high value added economic activity Gozo as a region with distinct characteristics Expansion of growth sectors Globalization Cryptocurrency, Blockchain, DLT and AI Technology potential Increased possibility of international networking Recent increase in artistic and cultural activities EU and other legislation for cultural interventions and programmes Ongoing and upcoming mobility facilitation measures Increased importance of the broadcasting media Increased demand for cultural output Possibility of spin-offs and knowledge transfer to neighbour countries Improvement of infrastructure and services of general economic interest Life-long learning and further human resource development	Precarious over-use of finite resources Globalisation pressures Uncertainties in economic climate Rapid development of emerging economies Slump in demand due to financial crisis Uncertainties in credit management and finance Environment fragility Unpredictable labour marker shifts Brain drain to EU member states Competition from other EU cultural incubators Lack of coordination between culture research and market needs Demographic pressures in meeting future labour demand Illegal immigration and asylum seekers

Appendix 1 Open StreetMapData

This annex lists geo-referenced data that will be obtained from OpenStreetMap related to entities of project interest as located in the partner territories. All those data, together with the other identifiers, will be accessible via the "webGIS" interface to be made available shortly for use by the partners.

OBJECTID	CATEGORY	DESCRIPTION
1	Administrative boundaries	Torun_Poland
2	Administrative boundaries	Tenerife_Spain
3	Administrative boundaries	Livorno_Italy
4	Administrative boundaries	Jyväskylä_Finland
5	Administrative boundaries	Giessen_Germany
6	Administrative boundaries	Floriana_Malta
7	Administrative boundaries	Dunàntul_Hungary
8	Administrative boundaries	Brasov_Romania
9	Administration	public_building
10	Administration	town_hall
11	Administration	toponyms
12	Infrastructure	metro_station
13	Infrastructure	rail
14	Infrastructure	tram
15	Infrastructure	funicular
16	Infrastructure	light_rail
17	Infrastructure	routes
18	Infrastructure	footway
19	Infrastructure	farming_road
20	Infrastructure	lighthouse
21	Infrastructure	ice_rink
22	Tourism	travel_agent
23	Tourism	picnic_site
24	Tourism	attraction
25	Tourism	car_rental
26	Tourism	bed_and_breakfast
27	Tourism	outdoor_shop
28	Tourism	toilet
29	Tourism	alpine_hut
30	Tourism	cafe
31	Tourism	viewpoint
32	Tourism	artwork
33	Tourism	library
34	Tourism	bicycle_rental
35	Tourism	camp_site
36	Tourism	battlefield

37	Tourism	golf_course
38	Tourism	car_sharing
39	Tourism	waterfall
40	Tourism	castle
41	Tourism	mall
42	Tourism	arts_centre
43	Tourism	sports_centre
44	Tourism	chalet
45	Tourism	kiosk
46	Tourism	cinema
47	Tourism	track
48	Tourism	Christianworkshipplace
49	Tourism	Jewishworkshipplace
50	Tourism	Muslimworkshipplace
51	Tourism	orientalworkshipplace
52	Tourism	wayside_shrine
53	Tourism	cliff
54	Tourism	bus_stop
55	Tourism	fountain
56	Tourism	drinking_water
57	Tourism	fort
58	Tourism	cave_entrance
59	Tourism	hotel
60	Tourism	memorial_monument
61	Tourism	motel
62	Tourism	windmill
63	Tourism	museum
64	Tourism	hostel
65	Tourism	bench
66	Tourism	parking
67	Tourism	parking_bicycle
68	Tourism	park
69	Tourism	theme_park
70	Tourism	swimming_pool
71	Tourism	guesthouse
72	Tourism	marina
73	Tourism	shelter
74	Tourism	restaurant
75	Tourism	ruins
76	Tourism	slipway
77	Tourism	archaeological site
78	Tourism	caravan_site
79	Tourism	beach
80	Tourism	bus_station
81	Tourism	fuelstation
82	Tourism	taxi

83	Tourism	theatre
84	Tourism	ferry_terminal
85	Tourism	tower
86	Tourism	tower_observation
87	Tourism	tourist_infopoint
88	Tourism	trail, path
89	Others	sports_shop
90	Others	bicycle_shop
91	Others	wayside_cross
92	Others	ford
93	Others	water_mill
94	Others	weir
95	Others	spring
96	Others	peak
97	Others	volcano
98	Others	zoo
99	Others	river