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ECO-NautiNET



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Adriatic-Ionian Programme Interreg V-B (ADRION) 2014-2020

D T1.1.1

Aggregate assessment report on SMEs needs in all of the involved territories

(Containing SWOT analysis - phase 1)

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1. INTRODUCTION

The objective of the specific deliverable was to identify and evaluate the experiences and possibilities of the SME's of the nautical sector (including also SME's active in the Blue Economy) in the Adriatic-Ionian region represented by domiciliary territories of the six project partners: Western Greece region, Slovenian coastal region, Istrian and Dubrovnik-Neretva county in Croatia, Emilia-Romagna region in Italy, and both Adriatic and Ionian coastal areas of Albania.

The specific deliverable established the foundation for the emergence of possible opportunities in the realisation of the ECO-NautiNET network model of organisation of the SME's.

Although there were certain specifics in some project partners, most of the responses were obtained in direct conversation with entrepreneurs' representatives, either by personal contact or by phone, and the questionnaires were filled directly through Google forms.

The number of SMEs contacted and the number of SMEs answered to the questionnaire are shown in the table:

	Project partner	number of SMEs contacted	number of SMEs that answered to the questionnaire
1	LP - Chamber of Achaia, Greece	100	25
2	PP2 - Regional Development Centre Koper, Slovenia	80	35
3	PP4 - CCE – Pula County Chamber, Croatia	86	27
4	PP5 - CNA Ravenna, Italy	34	25
5	PP6 - DURA – City of Dubrovnik development agency, Croatia	100	25
6	PP8 - Chamber of Commerce & Industry Tirana, Albania	70	24
	TOTAL	470	161



2. PROFILE OF TERRITORY

The area covered by this report occupies 67.654 square kilometres, with the population of more than 8.4 million inhabitants of which by far the largest share (both in the surface as well as in the number of inhabitants) belongs to Emilia Romagna and Albania, followed by Western Greece. Other represented parts of countries are significantly smaller.

Detailed data for each partner are given in the table:

	Project partner	Area (m2)	Population
1	LP - Chamber of Achaia, Greece	11.350	679.796
2	PP2 - Regional Development Centre Koper, Slovenia	1.044	113.193
3	PP4 - CCE – Pula County Chamber, Croatia	2.280	206.340
4	PP5 - CNA Ravenna, Italy	22.451	4.451.000
5	PP6 - DURA – City of Dubrovnik development agency, Croatia	1.781	122.568
6	PP8 - Chamber of Commerce & Industry Tirana, Albania	28.748	2.870.324
	TOTAL	67.654	8.443.221

Economic indicators are very varied - while Emilia Romagnia and the Istrian region are among the most developed in their countries, Western Greece is the second poorest area in the country. Therefore, it can be concluded that the economic development is uneven and inconsistent, as per GDP and other relevant indicators.

It is important to note that the nautical sector in all areas is an important factor in the economy, and it has a significant share in revenue, either through the tourism, marine transport or through technical-technological segment of the nautical business. The nautical sector has been hit by the economic crisis of the previous years, but the general conclusion is that the companies in this sector responded well to the challenges and showed a significant ability to find innovative ways to overcome the obstacles.

Almost all of the examinees pointed out that it is necessary to strength synergies among companies as well as enhance links between SMEs and business supportive agencies and research centres/universities for innovation of products, processes and technology integration.



3. PROFILE OF SMEs AND THEIR KEY NEEDS

In a questionnaire involving companies from all the countries, most involved companies (68% of respondents surveyed) are micro entrepreneurs (employ 10 or less employees), and then companies with 11 to 20 employees (16%), as shown in the pie chart:

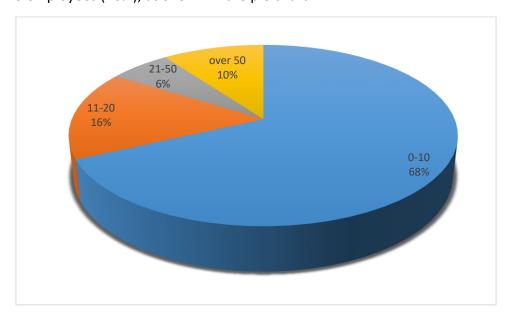


Chart 1. Number of the employees

A great number of the companies (44%) listed services (maintenance, reparation, managements of the marinas, etc.) as the main activity while the rest of the companies is inhomogeneous, according to the panel of products and/or services provided by the companies themselves. It is possible to count manufacturing companies (e.g. construction of boats and ships), equipment producers, engineering and design, etc...

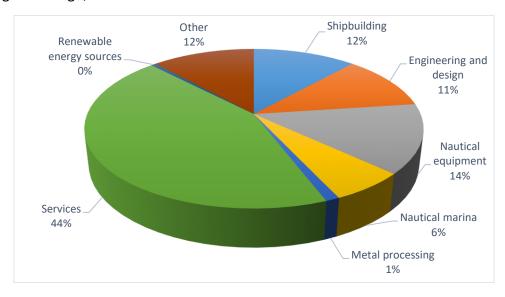


Chart 2. Main activity of the company

Having taken into account the in-depth interviews, useful key issues and challenges were identified and recorded. The SMEs of the nautical sector have different challenges and key issues to confront. The companies have stated that the main problems they are facing in the nautical sector are economic reasons (39%), and then lack of cooperation (21%). The lack of innovation is in third place as a significant problem (16%).

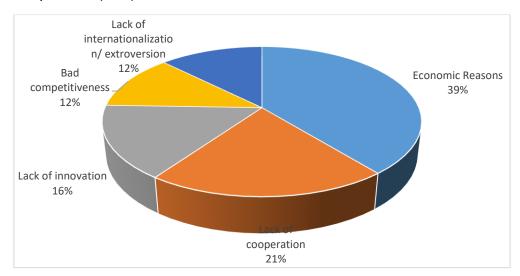


Chart 3. Main problems in the nautical sector

Referring to the target markets, small and very small companies mostly provide products and services at local level. The main objective of these SMEs is to increase the quality of services and products for local market, as they consider themselves too small for internationalize. Despite this situation, a great majority of them are interested in finding new business partners (62%). Establishing cooperation with business support organizations (19%) and discovering best available technologies (13%) are modestly represented, but the greatest challenge is the fact that only 6% of them are looking for cooperation with research institutions. There are many possibilities in improving this specific issue and therefore it represents a great opportunity for innovative changes.

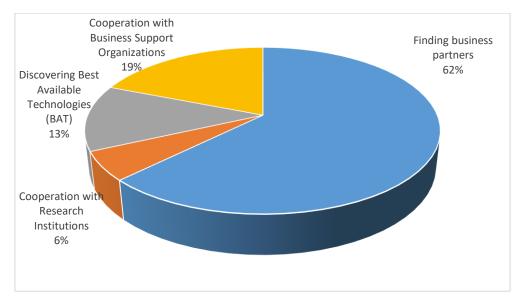


Chart 4. Cooperation needs of the SMEs



4. SWOT ANALYSIS

The Swot Analysis is based on the vis-à-vis discussions made with the SMEs that answered the questionnaire regarding the extraction of information of the assessment in the field of nautical sector.

This work resulted to the following SWOT Analysis depicting in short terms the basic strengths, weaknesses, opportunities and threats of the nautical sector in the Adriatic-Ionian region:

Strengths	Weaknesses
- Excellent geographic position	- Lack of cooperation between nautical
- Sea and coastline very attractive for sailing	sector stakeholders
and other nautical activities	- Small dimension of companies and
- Big nautical companies operating	fragmentation of the sector
international sea routes	- Lack of sufficient economic resources
- Tradition in nautical sector	- No clear development strategies due to lack
- Great number of companies operating the	of experts and influence of politics.
sector, well equipped with both HR and	- Problems regarding complex national and
technical resources	international regulations
	- Lack of access to innovation and lack
	of collaboration with research organizations
Opportunities	Threats
Opportunities - Use of IT technology and innovations in the	- Ecological degradation of the areas due to
- Use of IT technology and innovations in the	- Ecological degradation of the areas due to
- Use of IT technology and innovations in the sector	- Ecological degradation of the areas due to uncontrolled development and over-
 Use of IT technology and innovations in the sector Strengthening the cooperation with 	- Ecological degradation of the areas due to uncontrolled development and over-construction
 Use of IT technology and innovations in the sector Strengthening the cooperation with universities and research organizations 	 Ecological degradation of the areas due to uncontrolled development and over-construction Mass tourism (over tourism)
 Use of IT technology and innovations in the sector Strengthening the cooperation with universities and research organizations The willingness of all stakeholders to join a 	 Ecological degradation of the areas due to uncontrolled development and over-construction Mass tourism (over tourism) Political issues and instability
 Use of IT technology and innovations in the sector Strengthening the cooperation with universities and research organizations The willingness of all stakeholders to join a network to share common problems and find 	 Ecological degradation of the areas due to uncontrolled development and over-construction Mass tourism (over tourism) Political issues and instability
 Use of IT technology and innovations in the sector Strengthening the cooperation with universities and research organizations The willingness of all stakeholders to join a network to share common problems and find common solutions 	 Ecological degradation of the areas due to uncontrolled development and over-construction Mass tourism (over tourism) Political issues and instability
 Use of IT technology and innovations in the sector Strengthening the cooperation with universities and research organizations The willingness of all stakeholders to join a network to share common problems and find common solutions High demand for product and services, 	 Ecological degradation of the areas due to uncontrolled development and over-construction Mass tourism (over tourism) Political issues and instability



When aggregating the results of the six SWOT analysis, the most outstanding strength was the geographic position close to maritime gateways and in the area where big and well-known nautical companies operate international sea routes. At the same time, despite big sea traffic, the coastal area and sea itself are quite pure and very attractive for sailing and other forms of nautical tourism. Also, all of the countries have a rich heritage and tradition in maritime business.

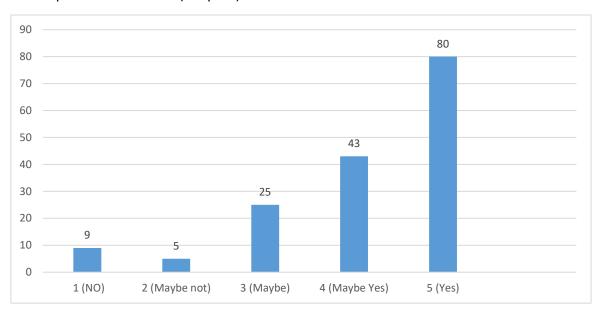
Strongest weaknesses are represented in very small dimensions of the companies, along with lack of cooperation between nautical sector stakeholders, which at the same is also an opportunity because there is a great deal of willingness of all stakeholders to join a network. Since there are no clear development strategies due to lack of experts and influence of politics (which are recognized as some of the major weaknesses) there is also a strong threat that over-construction an mass tourism (which are in line with the big demand that exists on the market) could lead to ecological degradation of the areas.

In order to unlock the development potential of the sector it is evident that some changes have to be done. The necessity to improve bureaucratic and administrative issues, simplify and enhance the legislation framework and amends some of the existing rules regulating nautical sector are necessary as it is evident that problems regarding complex national and international regulations with lot of bureaucracy and political barriers are also very common.

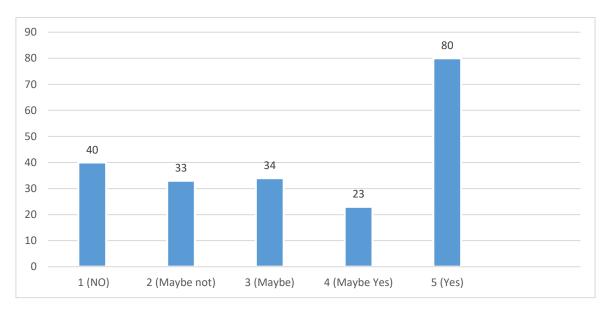


5. RESULTS OF QUESTIONNAIRE

It is clear from the results of the questionnaire that there are significant possibilities for improvement in many areas, as a large number of companies currently does not cooperate enough with each other, as well as with research institutions (Graph 7) and business support organizations (Graph 8), but are willing to participate in quick training and tutoring session to familiarise with network's operation and tools (Graph 6)

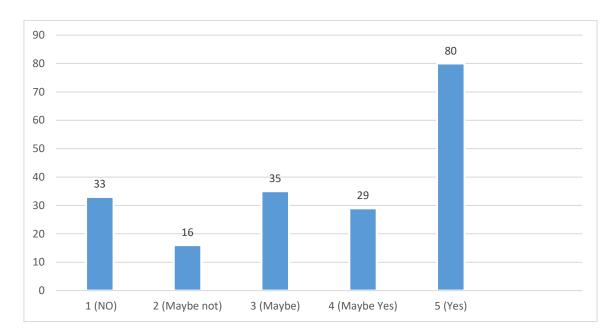


Graph 6. Willingness to participate in quick training and tutoring session to familiarise with network's operation and tools



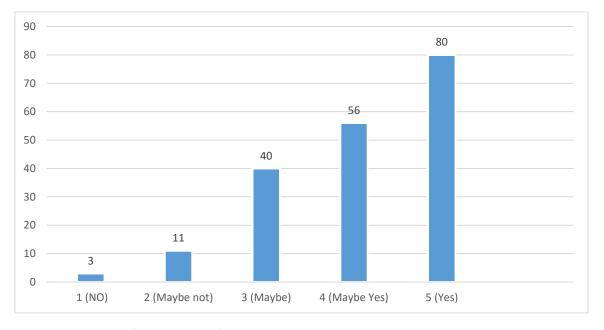
Graph 7. Cooperation with research institutions





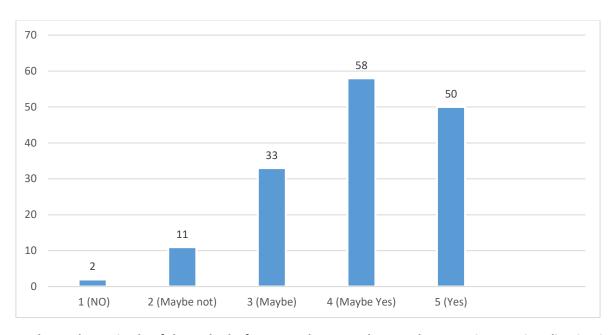
Graph 8. Cooperation with business support organizations

There is positive feedback from companies that are greatly interested in joining the web platform, which will enable improvements in innovation and the competitiveness of the nautical sector (Graph 9), its strengthening and internationalization of business (Graph 10). The SMEs think that the involvement in a web platform will possibly tackle the lack of their collaboration with other SMEs in the nautical sector (Graph 11) and most important they believe that involvement in a web platform will lead to the innovation of their products and services (Graph 12).

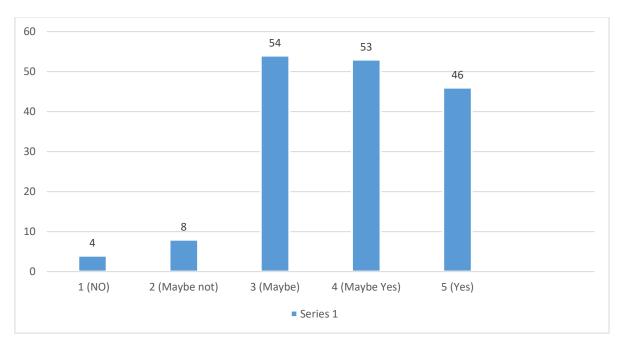


Graph 9. The aptitude of the web platform to improve competitiveness and innovation in nautical sector

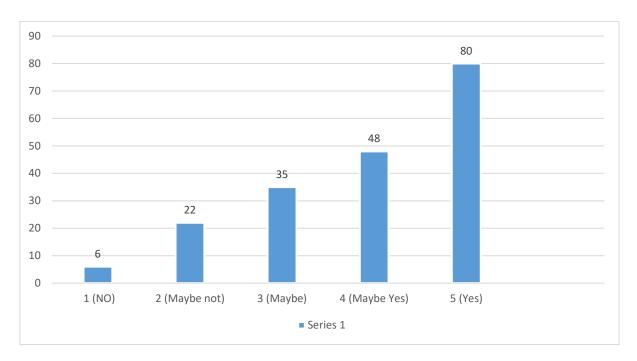




Graph 10. The aptitude of the web platform to enhance and strengthen your internationalization in nautical sector



Graph 11. The aptitude of the web platform to tackle the lack of collaboration among SMEs in the nautical sector



Graph 12. The aptitude of the web platform to tackle the lack of collaboration among SMEs in the nautical sector

According to the main objective of the ECONAUTINET PROJECT, concerning the development of a digital platform aimed to create new business opportunities and clusters of companies in the nautical sector within and outside the Adriatic Ionian area, the survey shows that even if the companies are not highly expanding in new markets, they consider useful using this kind of tools for reinforcement of local, national and regional networking. Therefore, a new functional, user-friendly platform with concrete tools for cooperation will be highly appreciated and used by the SMEs.

Regarding to the training designated to SMEs involvement to the creation of new innovative sustainable nautical clusters, all entrepreneurs are interested for themselves or better, for some of their employees.



6. LIST OF COMPANIES THAT FULFILLED THE QUESTIONNAIRE

LP - Chamber of Achaia, Greece

#	COMPANY NAME	EMAIL	CONTACT PERSON	PHONE NUMBER	LOCATION
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PP2 - Regional Development Centre Koper, Slovenia

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C	ONE S.R.L.	.IT	Cellini Massimiliano	0544537571	Italy
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11	bluelagooncroatia@gmail.co OBRT MAX NAUTICA m		Marko Pavkovic		Croatia
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7. QUESTIONNAIRE





The present survey is developed in the framework of the implementation of ECO-NautiNET Project of program Interreg ADRION, and mainly addresses to SMEs related to the Nautical Sector, in each partner's intervened area.

The purpose of the specific survey is to identify and evaluate the experiences and real needs of SMEs and through a SWOT analysis to extract opportunities for the organization of ECO-NautiNET's network, which will minimize the risks for the participation of SMEs, leading to the establishment of a benchmark for the entire Adriatic – Ionian sea area, setting also the point of reference for the design of the training of actors involved.

More specifically, the survey aims to gather data in order to detect the disadvantages of the involved SMEs across the Adriatic – Ionian sea, so as to tackle the lack of innovative collaboration among them, to reinforce and encourage the cooperation among related SMEs, business support organizations and research institutes, to improve their competitiveness and innovation and to contribute to the establishment and boost of stable networks and a shared management system, and to the training of the actors involved.

Confidentiality and Privacy:

Completion of this questionnaire is optional but necessary for the effective implementation and completion of the specific survey.

The collection and processing of the information provided is realized in accordance with the regulations and guarantees of the legislation on the protection of personal data (Law for Data Protection - EU Regulation 2016/679) as it stands.

The information provided regarding the completion of this questionnaire is treated as confidential and communicated exclusively to the persons entrusted with the above-mentioned investigation and is bound by explicit confidentiality obligations. This data is not passed on to third parties.



The data collected will be used solely for the purposes of the specific research and will not be published in a form that permits the identification of natural or legal persons.

The confidentiality of your answers will be respected.

Company name:					
Contact person:					
Contact person Telephone:					
Contact person mail:					
1. Your location Greece ltaly Cr	oatia				
2. Number of employees: 0 - 10 11 - 20 2	1 - 50 over 50				
3. Your main activity:					
Shipbuilding Nautical equipment Metal processing Renewable energy sources	Engineering and design Nautical marina Services Others				
4. Name the main problems	of your area in Nautical Sector				
	Lack of cooperation Bad competitiveness cion/ extroversion				



5. V	Vould yo	ou like to ha	ve support fo	or:			
	Finding business partners				Cooperation with Research Institutions		
	Discover	ing Best Availa ogies (BAT)			Cooperation with Business Support Organizations		
6. Are you willing to participate in quick training and tutoring session to familiarise with network's operation and tools?							
(1 –	NO; 5 -	- YES)					
~	1	□ 2	□ 3	□ 4			
7. Do you cooperate with Research Institutions?							
	1	□ 2	□ 3	□ 4			
8. Do you cooperate with Business Support Organizations?							
	1	□ 2	□ 3	□ 4	□ 5		
9. Do you think that the involvement in a web platform will improve your competitiveness and innovation in Nautical Sector?							
	1	□ 2	□ 3	□ 4	□ ₅		
10. Do you think that the development and use of a web platform will enhance and strengthen your internationalization?							
	1	□ 2	□ 3	□ 4			
11. Do you think that the involvement in a web platform will tackle the lack of your collaboration with other SMEs in the Nautical Sector?							
	1	□ 2	□ 3	□ 4	□ ₅		
12. Do you think that the involvement in a web platform will lead to the innovation of your product and services?							
	1	□ 2	□ 3	□ 4	□ 5		

THANK YOU FOR YOUR COLLABORATION