



FACILITY  
FOR BLUE GROWTH  
IN THE BLACK SEA

# National Workshop Moldova

Chisinau, February 21<sup>st</sup> 2018



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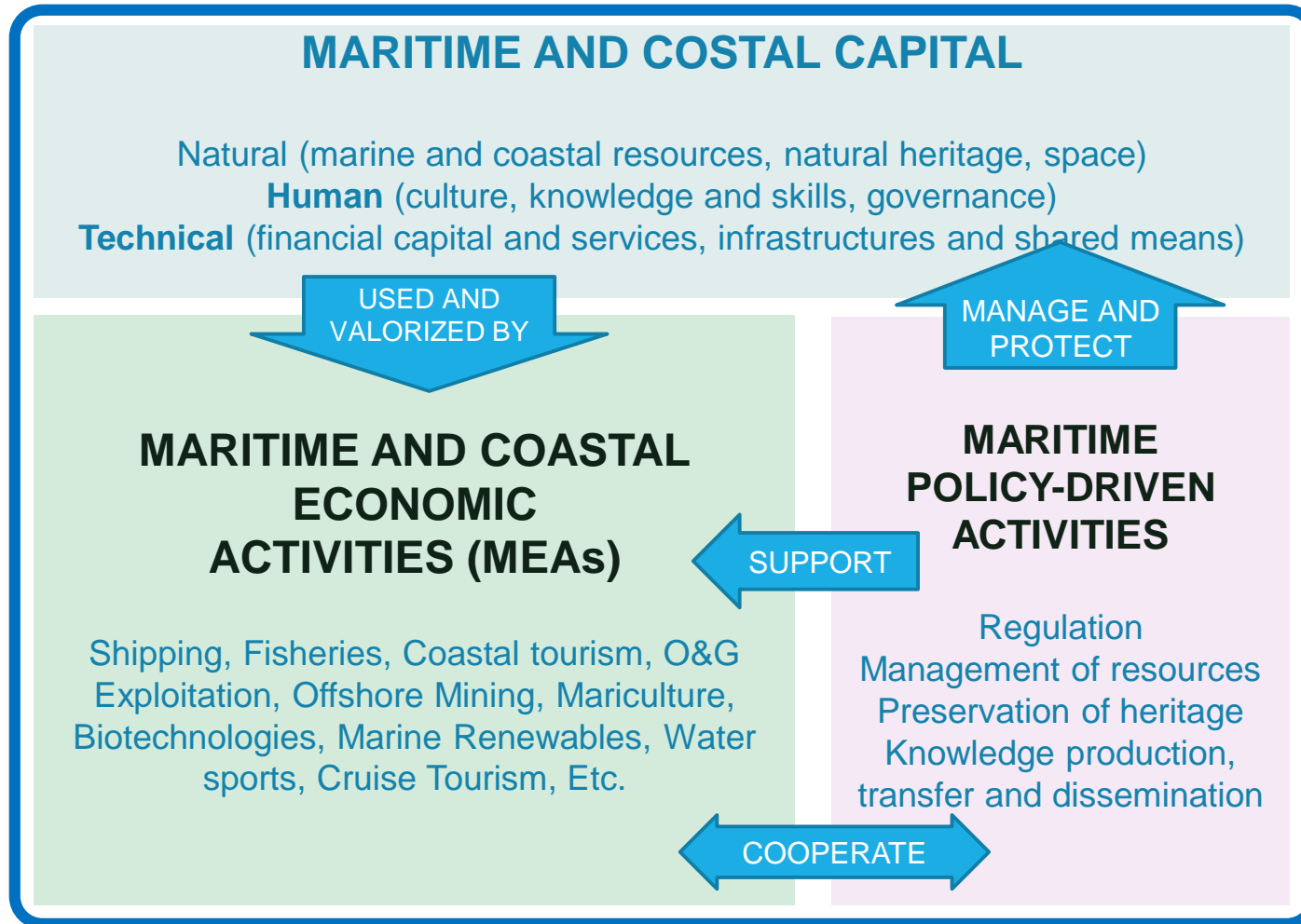
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# BLUE ECONOMY (SOME PRINCIPLES/CONCEPTS)

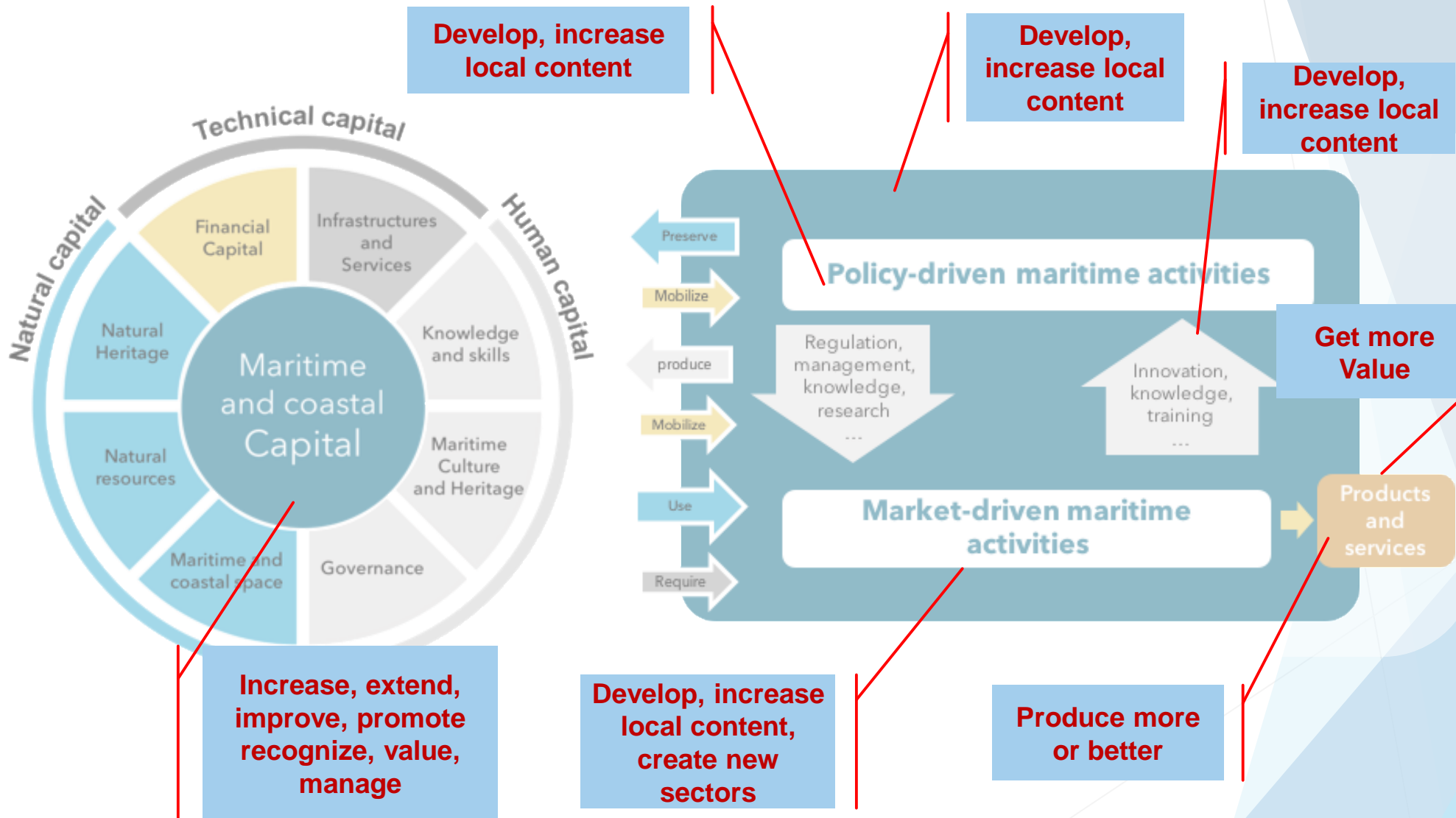


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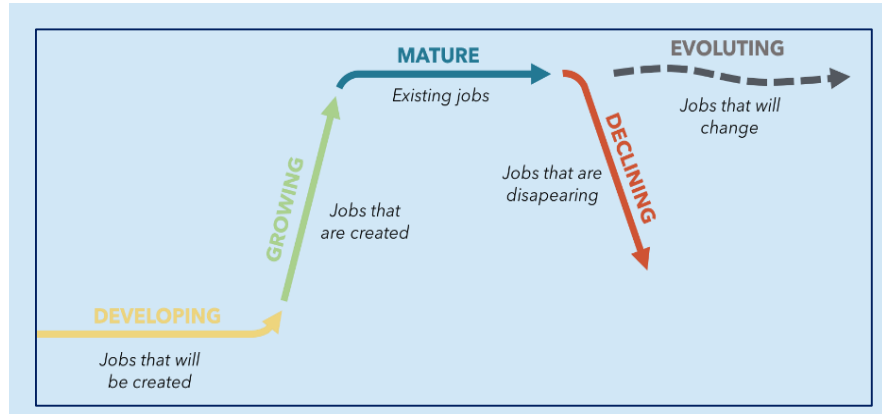
# Maritime activities depend on maritime and coastal assets



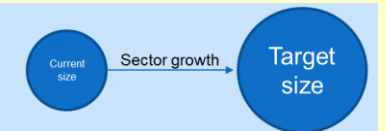
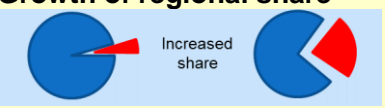
# Recommendations for developing Blue Economy



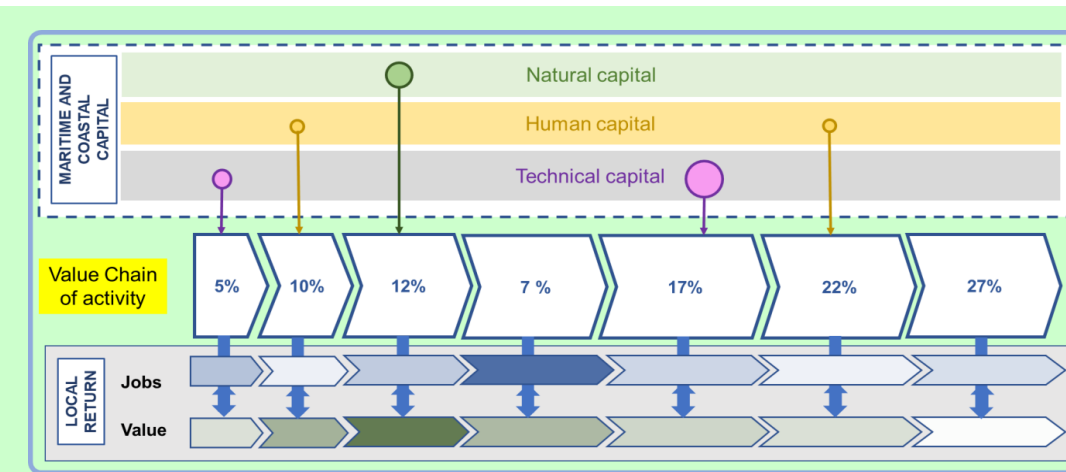
# Some ways to assess potential for development of MEAs



Assess status of activity in « life cycle »: is there a potential for further development, or a need for change?

<p><b>Growth of sector</b></p> 
<p><b>Growth of regional share</b></p> 
<p><b>Take larger share of the value chain</b></p>
<p><b>Change model</b></p>
<p><b>Develop new options</b></p>

Which strategic options are available ?



Is it possible to capture more value from the value chain?



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# BLUE ECONOMY REGIONAL ASSESSMENT



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# Maritime Economic Activities (MEA)

Sector	Status
Maritime transport	Well developed - potential improvement of connection with hinterland
Ferry - short sea shipping	Low development at regional level
Coastal and maritime tourism	Well developed but unevenly and mainly focused on " sun, sand and sea"
Cruise	Limited, mainly large ships and extension of Mediterranean trips
Fisheries	Fully developed - gaps in regulation, enforcement and safety
Aquaculture	Little developed but growing sector, with some potential
Oil & Gas	Emerging sector (only exploration (TBC))
Yachting and boating	Barely developed - some potential within the navigation basin
Marine renewable energy	Some potential (wind)
Marine mineral resource mining	Mainly research projects
Blue biotechnologies	Mainly research projects

# Coastal and maritime capital

	component	Status
Natural capital	Marine and coastal heritage	Unique marine environment (numerous habitats but relatively low biodiversity under high anthropic pressures)
	Marine natural resources	<u>Biological resources</u> : unsustainable exploitation <u>Mineral resources</u> : regional competition rather than cooperation <u>Marine Energy</u> : Limited assessment of resources
	Maritime and coastal space	High attractiveness High coastal erosion and climate change effects
Human capital	Knowledge and skills	Gaps in basic marine knowledge - Limited innovation maritime education is good but not enough developed for emerging sectors of BE
	Maritime culture	Limited - limited promotion of maritime heritage
	Governance	no “integrated” regional maritime governance Business oriented clusters Limited maritime focus (BESC) monothematic (BSC) or sectoral (GFCM)
Technical capital	Infrastructures and services	Numerous but low regional coordination and shared services Limited land-sea connections
	Financial capital	No specific maritime financial instruments or services



# Maritime Policy Driven Activities (MPDA)

Sector	Status
Maritime safety and risk management	limited at both national and regional level; gaps
Marine protection	Few marine protected areas - little regional cooperation
Marine and maritime information dissemination	Few examples of integration of maritime and/or marine knowledge
Monitoring of the marine and coastal environment	Underdeveloped monitoring of environment and impacts
Maritime surveillance	Good cooperation between national Coast Guards
Research and education	Limited strategies - gaps, limited coordination
Planning and management	No (or very little) integrated planning or management despite some capacity and experience (ICZM)

# First conclusions

- ▶ There are many marine and maritime shared issues (e.g. fisheries, environment), calling for *coordinated actions*.
- ▶ The Black Sea region maritime and coastal capital is very significant, relatively unexploited, and could be used to support potential opportunities, through both sustainable development/adaptation of existing activities and creation of new activities.
- ▶ There is a well-established record of cooperation, with a number of regional organizations already mobilized on maritime issues, or which could extent their scope towards maritime and coastal issues.
- ▶ There is need for coordinated actions to promote the Black Sea (e.g. maritime and coastal tourism) beyond the region itself.
- ▶ Many benefits could be expected from enhancing synergies between sectors (e.g. environmental protection, fisheries and maritime and coastal tourism).



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# BLUE ECONOMY NATIONAL ASSESSMENT MOLDOVA



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# Maritime Economic Activities (MEA)

Sector	Status
Maritime transport	Main developed maritime sector
Ferry - short sea shipping	Not developed
Shipbuilding, repair and deconstruction	Limited activity in this field
Coastal and maritime tourism	No activity in this field - only rural and historical tourism in land
Cruise	Limited - Danube cruises
Fisheries	No activity in this field
Aquaculture	No activity in this field - only in land
Oil & Gas	No activity in this field
Yachting and boating	No activity in this field
Marine renewable energy	No activity in this field
Marine mineral resource mining	No activity in this field
Blue biotechnologies	No activity in this field

# STRENGTHS/ WEAKNESSES MEA MOLDOVA

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Good connections with Black sea countries and EU MS with good infrastructures (port - networks (cf. Capital))</li> <li>• Port undergo development</li> <li>• <u>Political will to develop maritime transport</u> with institutional and legal reform and action plan</li> <li>• Existing cooperations with neighbouring countries in economic sectors (fi. maritime transport - short sea shipping)</li> <li>• On going development of intermodality (maritime and railway)</li> <li>• Efforts to reduce administrative pressure on business</li> </ul>	<ul style="list-style-type: none"> <li>• No sea shore line or maritime space, no marine resources</li> <li>• Narrow MEAs spectrum based on national resources or space : maritime transport</li> <li>• Landlocked country - connected to Black sea only by rivers : Dnjestr, Prut and Danube</li> <li>• Moldova still being on Black list on Paris MOU on Port State control (on going action plan to improve the situation)</li> <li>• Moldova is not considered as “maritime Country“ or with a low potential for investors compared to its neighbours</li> <li>• Lack of knowledge on commercial fishing species stocks</li> <li>• Difficulties for SME to access to fundings</li> <li>• High rates of mortgage in Moldova</li> </ul>

# OPPORTUNITIES/ THREATS MEA - MOLDOVA

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"><li>• Maritime Tourism development based on small/medium cruise</li><li>• Linkage maritime and land tourism offer</li><li>• Inland wet transport development</li><li>• Connections to the other Black Sea ports like Odessa, Poti and Istanbul for goods &amp; passengers transport</li><li>• Association Agreement with the EU including maritime issues for transport</li><li>• Maritime jobs (cruises, transport, tourism...) linked to development of MEAs in the Black Sea</li><li>• Land- River - Sea link valorization</li><li>• Cooperation within TRACECA</li></ul>	<ul style="list-style-type: none"><li>• Low level of fundings to develop Blue Economy</li><li>• Environmental degradation and impacts on economy (tourism)</li><li>• Political instability and corruption as brake for investors</li><li>• Lack of investors' interest in Blue economy</li><li>• Difficulty to align national legislation with EU or international legislation</li></ul>

# (Coastal and maritime) capital for Moldova

	component	Status
Natural capital	Marine and coastal heritage	The territory of Moldovan wetlands are important for the Black Sea coastal fish stock, as breeding ground. Several of the lower Dnjestr wetlands and Prut wetlands are in the need of rehabilitation to fulfil their basin function.
	Marine natural resources	No access
	Maritime and coastal space	Landlocked country, the link with the Black Sea is formed by the rivers. Danube is bordering Moldova bordering for only 480 meters. Main connection is Dnjestr and Prut. Other small rivers flow into the Danube and Black Sea limans. Giurgiulesti International Free Port is situated at 133.8 km / 72.2 nautical miles from the Black Sea on the maritime section of the river Danube
Human capital	Knowledge and skills	No maritime education. Depending on maritime education in Romania and Ukraine No dedicated institute (education and training) but regional cooperation No dedicated portal for knowledge dissemination
	Maritime culture	No maritime culture and heritage
	Governance	Sectoral governance (maritime transport and tourism) - unbalanced situation between private ports and public ports NGO involvement mainly in land and river environment protection - low in marine and maritime issues
Technical capital	Infrastructures and services	Port Giurgiulesti capacities are over 500.000 ton of cargo per year Oil Product Terminal with a tank farm consisting of eight tanks, truck-loading facilities and, from mid 2012 mixed-gauge rail loading/unloading facilities. The total storage capacity of 63,600 cubic meters. The mixed gauge rail terminal for oil products that is currently under construction to transship oil products directly to/from the CIS and European Union markets by railway. The annual transshipment capacity of the oil terminal exceeds 1 million tons. Port Giurgiulesti on Rhine- Danube and TRACECA corridors. 330 ships registered in Moldova
	Financial capital	No specific maritime financial instruments or services Level of national control? Private investors - European Bank for Reconstruction and Development financial support for Port Giurgiulesti development in 2006

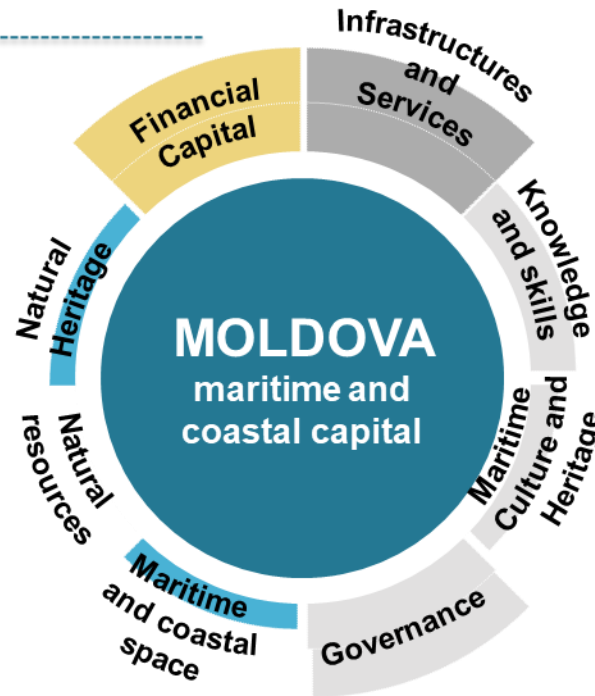
# (Coastal and maritime) capital for Moldova

No specific maritime financial instruments or services  
Foreign support (EU) for port development  
**Moderate** level of national control **with PPP**  
Private investors

Very Low but increasing/expected protection (limans / rivers)

No natural marine resources

No coastal and maritime space  
Constraints of river management on link to the Black Sea



Good port infrastructures with international free port status located on the Rhine-Danube and TRACECA transport corridors

Low maritime education  
No dedicated institute (education and training)  
No dedicated portal for knowledge dissemination

No maritime culture and heritage  
Low valorisation

No interministerial committee or dedicated governance for maritime issues  
Sectoral public action  
Danube Logistics SRL, private port operator



# Maritime Policy Driven Activities (MPDA)

Sector	Status
<b>(Maritime) safety and risk management</b>	Port and river safety - flooding management ? Port risk management. Improvement of ship registration
<b>(Marine) protection</b>	River Basin Management is a priority under the environmental policy
<b>(Marine and) maritime information production and dissemination</b>	The exchange of information is fragmented, sporadic and limited The situation is to be improved through strengthening the relevant legal framework and ensuring legal enforcement
<b>Monitoring of the (marine and coastal) environment</b>	Monitoring system covers environmental quality, the quality of natural resources (such as soils, forests and wildlife) and pollution and other emissions.
<b>Maritime surveillance</b>	Limited to port and Danube surveillance
<b>Research and education</b>	Education on shipping and environment is limited and not matching the professional needs. There is a need for cooperation in student maritime formation for instance with Romania, Ukraine, Bulgaria (good illustration Varna naval academy within Vasco De Gama project) Education for tourism?
<b>Planning and management</b>	Environmental issues, like solid and liquid waste collection and treatment are identified to be strengthened. The national programme for solid waste collection and regional waste management under execution might hook this up.

# STRENGTHS/ WEAKNESSES MPDA MOLDOVA

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> <li>• Good connections with Black sea countries and EU MS with good infrastructures (port - networks (cf. Capital))</li> <li>• Port undergo development</li> <li>• <u>Political will to develop maritime transport</u> with institutional reform (Maritime Commercial Code of the Republic of Moldova) and action plan on</li> <li>• On going legal alignment with EU legislation</li> <li>• Local authorities willingness for sustainability</li> <li>• Growing public awareness and education on environmental issues and sustainability</li> </ul>	<ul style="list-style-type: none"> <li>• No general policy framework for the national maritime policy</li> <li>• Low port control as Port Giurgiulesti</li> <li>• No maritime sectoral strategy identified even if Port harbour master (safety and environment) is State</li> <li>• Poor institutional cooperation in environmental monitoring</li> <li>• Education not in line with BE sectors needs and depending on neighbouring countries</li> <li>• Lack of capacities for enforcement and regulation in fisheries</li> <li>• Public action mainly supported by projects - lack of sustainability</li> <li>• Monitoring is more data collection that policy implementation monitoring</li> </ul>

# OPPORTUNITIES/ THREATS MPDA MOLDOVA

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"><li>• Association Agreement with EU : Financial and thematic support</li><li>• EU legislation alignment (environment , sustainability, workforce)</li><li>• Integration in public processes</li><li>• Regional cooperation (education)</li><li>• Development of local projects( bottom up initiatives) in accordance with national priorities (vision)</li></ul>	<ul style="list-style-type: none"><li>• Lack of public interest in maritime issues versus land and rivers ones</li><li>• Inability to implement all EU and international legislation related to maritime and marine issues</li></ul>

# First conclusions

- ▶ **Maritime and coastal governance**
  - ▶ Most of maritime issues are related to only three sectors: transport, tourism and environment. Governance could be improved in both fields.
- ▶ **Maritime and coastal policies**
  - ▶ Sectoral policies could be develop with priority for education and training
- ▶ **Blue Economy**
  - ▶ Policies could be enhanced (more integrated) in maritime transport or tourism based on technical and human capital taking into account needs and opportunities beyond national ones (Black Sea and global opportunities for national ones)
- ▶ **Cross-cutting or integrated instruments**
  - ▶ Integration of river management in a regional cooperation

# Potential - Preliminary assessment

- ▶ **(Maritime and coastal) capital**
  - ▶ Potential linked to better protection, management and valorisation in a regional approach based on Danube management and on land pollution reduction
  - ▶ Potential to develop integration between Danube & Black Sea (protection & use)
- ▶ **MEAs: need for innovation and capacity building**
  - ▶ Only on limited and existing activities: potential for development but also (mainly?) for new models (more local value, better use of capital)
    - ▶ Potential for urban river/maritime transport (domestic use)
    - ▶ Potential for passenger transport (ferries) in addition to Maritime transport (goods)
    - ▶ Potential for small cruise (nature, culture, small ships) and tourism (culture, nature, quality)
- ▶ **Policy-driven activities**
  - ▶ Potential for new high-skilled jobs (maritime transport, port management, environment monitoring)
  - ▶ Development needed to better manage national assets and support MEAs

# The Facility team & contacts

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