



Coordination and Support Action

*Horizon 2020 - BG-13-2016
Grant Agreement 727453*

“BlueBoatsMed Report on Scoping of further activities”

D4.2

Due date of deliverable: 21-02-2021

Actual submission date: 05-01-2021

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Project Full title		Foresight on cruise & recreational boating, their potential for transition towards a blue economy in the Mediterranean and associated environmental challenges (BlueBoatsMed)	
Project Acronym		BLUEMED - BlueBoatsMed	
Grant Agreement No.		BLUEMED-SUA-003	
Coordinator		Enrico Brugnoli - CNR (Italy)	
Project start date and duration		01-10-2016 (48 months)	
Project website		www.blued-med-project.eu	
Deliverable Nr.	4.2	Deliverable Date	05/01/2021
Work Package No		n/a	
Work Package Title		n/a	
Responsible		Lina Tode, Plan Bleu	
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Status:		Final (F)	●
		Draft (D)	
		Revised draft (RV)	
Dissemination level:		Public (PU)	●
		Confidential, only for members of the consortium (CO)	

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EXECUTIVE SUMMARY / ABSTRACT

Cruise and recreational boating in the Mediterranean have experienced rapid changes over the last decade. The cruise industry has experienced a significant expansion with passenger traffic in major Mediterranean cruise ports increasing by more than 18% throughout 2008-2017 (MedCruise). The recreational boating sector is undergoing structural changes with a general slight downturn of new boat orders at the global level and at the same time doubling of global orders of megayachts (>60 m) between 2007 and 2014, of which approximately 50% sail in the Mediterranean (BoatInternational). Both sectors, while experiencing different development paths, are key tourism sectors, raising significant environmental and inclusion challenges. Further expansion and structural change can be expected in both sectors around the Mediterranean where opportunities for fostering a blue economy need to be seized.

The Start-Up Action BlueBoatsMed brought together a range of stakeholders with complementary expertise on the cruise and recreational boating sectors, involved in separate on-going initiatives, to analyse the prospects for the cruise and recreational boating sectors in the Mediterranean; agree on main environmental challenges linked to these sectors; for each challenge, present up to 3 promising innovations; and discuss the potential for further uptake of these innovations to accompany transitions.

Based on the results of the BlueBoatsMed project, this report envisages the drafting of “Guidelines for the sustainability of cruise and recreational boating in the Mediterranean region” as a follow-up activity nourished by the project BlueBoatsMed.

SCOPE

The deliverable provides useful information about trends and future developments of the cruising, yachting and recreational boating sectors in the Mediterranean relevant for several BLUEMED components:

1. MEDITERRANEAN SEA DYNAMICS, **Goal:** Understanding and forecasting the Mediterranean Sea dynamics ; **Action:** Perform scenarios of environmental change to provide insights into the impacts of alternative future socioeconomic development pathways, policy options and blue growth exploitation on biodiversity and nature’s benefits
2. PROMOTING SUSTAINABLE TOURISM IN THE MEDITERRANEAN; **Goal:** Linking tourism and environment; **Action 1:** Define and assess environmental value, risk mitigation and conflicts of use by involving scientist, companies, regulators, and coastal communities; **Action 2:** Develop strategies and practices to improve the wellbeing of coastal communities and their economy, and ensure the preservation of their culture/identity; **Goal:** Developing smart technologies and dedicated services; **Action 1:** Develop smart technologies and dedicated services for sustainable tourism; tackle environmental protection and human wellbeing.

INTRODUCTION

The main output of BlueBoatsMed is a Results Matrix which suggests promising innovations to address sustainability challenges posed by the cruise and recreational boating sectors in the Mediterranean. Such innovations, identified through the participative process set up by the project, need to be enshrined into an integrated long-term strategic planning process for the two sectors.

The necessary assumption for a meaningful transition is the convergence of main stakeholders towards an ideal “landing point”, an agreed vision of the two sectors for the Mediterranean region to be pursued through concrete goals and objectives. Such a vision will describe the collectively desirable situation and concrete meaning of “sustainability” for cruising and recreational boating/yachting in the long-term. The results achieved, and the process set up, by BlueBoatsMed can serve as one of the stepping-stones for an inclusive process heading up to a common strategy, vision, and action plan for the two sectors in the Mediterranean region.

OBJECTIVES OF THE REPORT

This report will scope further regional activities that may assist the transition towards sustainable and inclusive cruise and recreational boating in the Mediterranean. In particular, it is being proposed to launch a participative process, in the wake of the BlueBoatsMed experience and fully capitalizing on the project’s results, to formulate “Guidelines for the sustainability of cruise and recreational boating in the Mediterranean region” (hereinafter Guidelines). The Following sections will provide further insights into the Guidelines project.

OBJECTIVES OF THE GUIDELINES

The Guidelines aim to provide a means to guide strategic planning and decision making towards attaining what Mediterranean stakeholders consider a desirable situation of cruising and recreational boating/yachting. In order to pursue this shared vision, measurable goals and objectives will be established, and evidence-based innovative approaches, methods, tools, practices, etc. proposed as a way to address sustainability challenges.

The Guidelines will acknowledge the social and economic relevance of the two sectors, including ports and marinas. They will focus on harnessing the opportunities for development that they offer while proposing ways to mitigate the adverse impacts on marine and coastal ecosystems, associated biodiversity, climate and air quality, and local communities.

TENTATIVE STRUCTURE OF THE GUIDELINES

Introduction

- Guidelines scope
- Mediterranean vision for sustainable cruising and recreational boating/yachting
- Goals and objectives

Stakeholders, trends and challenges

- Figures and facts
- Main stakeholders
- Sector trends
- Main governance, environmental, economic and social challenges

Roadmap to Sustainability

Cruise sector, including ports

- Sustainability goals and objectives
- Actions to be implemented (short/medium/ long term scenarios)
- Milestones
- Monitoring systems and sustainability indicators

Recreational boating, including marinas

- Sustainability goals and objectives
- Actions to be implemented (short/medium/long term scenarios)
- Milestones
- Monitoring systems and sustainability indicators

Examples and Lessons Learnt

- Case studies - examples of innovative solutions for sustainability challenges in the two sectors

Conclusions

PARTICIPATIVE PROCESS FOR DRAFTING THE GUIDELINES

The elaboration of the Guidelines will involve a wide range of Mediterranean stakeholders with complementary responsibilities. To this end, the exchange mechanisms with BlueBoatsMed partners will be revived, consolidated, and enriched. Scientific studies and lessons learnt from projects and initiatives will be integrated into the Guidelines whenever relevant. As to the latter, it is worth highlighting that operational links have been already built on three Interreg Med Communities: Blue Growth, Sustainable Tourism and Mediterranean Biodiversity Protection.

The extensive knowledge, expertise and experience existing in the Mediterranean region will be tapped on. This will increase Guidelines credibility and authority while, on the other hand, offering visibility to the complex of recommendations, methods,

approaches, tools and good practices developed within projects, programmes and initiatives.

The following results are expected to be achieved:

- A participatory process engaging interested stakeholders is set up and consolidated with clear mechanisms of exchange.
- Long-term sustainability standards for cruise and recreational boating are agreed upon by the Mediterranean community engaged in the two sectors. Such standards will reflect how the Mediterranean community would like the cruising and recreational boating sectors to be in 2050.
- In order to pursue the agreed sustainability standards, goals and objectives are set up and concrete measures in the short, medium and long term are proposed. The identification of milestones and indicators to be monitored will ensure the follow-up to the desired outcome, indicating when measures are achieving progress towards the defined goals and when measures need to be adjusted. Milestones and indicators are to be seen within the context of an adaptive policy framework.
- A collection of concrete examples for promoting the sustainability of the two sectors, along with an analysis of the conditions needed for their replication, will be included in the Guidelines.

FOOD FOR THOUGHT – ISSUES TO BE CONSIDERED

Among other inputs, the Guidelines will build on the discussion, and following reflections, held in the framework of BlueBoatsMed and, more recently, in the “Call for Contributions” meeting organized by Plan Bleu (23 November 2020). The below is a preliminary and non-exhaustive list of issues coming out of these two activities that will be considered when drafting the Guidelines.

Issues raised by BlueBoatsMed:

- Work towards a shared long-term Mediterranean vision. What cruising and recreational boating sectors we aim at over the next 30 years?
- Establish explicit links between the Guidelines and global/regional frameworks (e.g. Agenda 2030, EU Green Deal, Barcelona Convention, etc.) and conservation/planning instruments (e.g. EU Nature directives, MSP directive, ICZM Protocol, MSFD, IMO regulations, etc.)
- Engage sectors’ industry for developing credible guidelines able to spot emerging business opportunities inherent to the sustainability transition process.

- Prioritize challenges to be addressed within the four challenges already identified: i) Safeguarding ecosystems and biodiversity; ii) Ensuring acceptable air quality and limiting air pollution; iii) Protecting local socio-economic systems from sectors' adverse impacts and ensuring that benefits are shared equitably; iv) Promoting business models inspired by circular economy principles.
- Include the innovations identified in the case studies section as examples to replicate.

Issues raised by the virtual “Call for Contributions” organized by Plan Bleu

- Should the Guidelines address both sectors? Most stakeholders would like to have separate Guidelines since they deal with different challenges and need different approaches.
- Assess critically advantages/disadvantages of using liquid natural gas technology (LNG) for reduction of CO₂ emissions in cruises. When it comes to decarbonization, consider also ferries.
- Reduce the size of cruise vessels as sustainability option along with scaling up micro-cruising for small-scale aquatic experiences within the same value chain.
- Harmonize national regulations, mitigate current market distortions (e.g. fossil marine fuels are tax free) and attribute more decision-making power to municipalities as main recipients of cruise externalities.
- Address the cumulative effects of cruises by linking sector development and operation with population health and well-being in the framework of innovative value chain business models.
- Frame the Guidelines into a larger North-South approach to coastal and maritime tourism.
- Address the complex of environmental pressures on biodiversity and ecosystems (e.g. respect marine protected areas conservation objectives, waste, pollution, underwater noise, collisions risks, mooring, anchoring areas, invasive species, impact on migratory areas for marine species, etc.).
- Build synergies with upcoming initiatives (e.g. expert group managed by EC-DG MOVE on ports as key for sustainable blue economy).
- Pay attention to charter yachting and boat tourism as growing sub-sectors impacting marine environment, especially marine protected areas.
- Build on successful examples of sustainable marinas instrumental to the development of the territory

CONCLUSIONS AND NEXT STEPS

The idea of elaborating Guidelines for the sustainability of cruise and recreational boating in the Mediterranean has encountered interest, and several stakeholders have already expressed their will to collaborate in the drafting or provide their inputs and comments to the different drafts that will be prepared. BlueBoatsMed results have been fully taken up by the Guidelines project team and participants and provide a useful basis from which to start the Guidelines project, which is supported by the UNEP/MAP - Barcelona Convention - Mediterranean Trust Fund (MTF), as well as by the French Environment and Energy Management Agency (ADEME). The structure of the Guidelines as well as the list of the main topics to be addressed will be ready in January 2021 as a result of the work run by the drafting “working group”, coordinated by Plan Bleu, which is currently being established.

Next steps will be: i) preparation of a short concept note based on the exchanges held so far in order to explain in detail the rationale behind and final aim of the Guidelines; ii) preparation of an Index reflecting as much as possible the priorities, concerns and interest of sectors’ stakeholders; iii) establishment of a drafting “working group” with a set of mechanisms able to ensure that interested stakeholders, including the industry sector, may actively contribute to the Guidelines.



This project has received funding from the *European Union's Horizon 2020 research and innovation programme* under grant agreement No 727453





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