



The Blue Growth Mapping Study Albania

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Blue Economy Sectors, Challenges, and Priorities in Albania

Albania aspires to deliver EU-level living standards to its citizens. The Blue Economy can become a driver of this ambition. Well-established marine-based economic sectors such as fisheries and tourism can help Albania achieve its national development goals.

Priorities in coastal and nautical tourism and fisheries and aquaculture could be designed in such a way to meet ecologically and operationally meaningful objectives, and address societal needs, without jeopardizing the options for future generations to benefit from the full range of coastal and marine goods and services.

1. Fisheries, aquaculture and seafood

Fish and seafood industry is a relatively small part of the national economy with important growing potential. The fisheries and aquaculture industries provide full-time employment for 4,215 people. The overall economic contribution of fish and seafood is more than double the value of its primary production. According to the study's conservative estimates, its overall contribution was 100 million Euro in 2017 representing 0.9 percent of Albania's GDP.

Average seafood consumption is expected to grow as standards of living and GDP per capita are projected to rise. Currently, the official average seafood consumption is 5.3 kg per capita.

Driven by per capita income growth the fish food market growth potential is much greater in the domestic market (rising from 90 million to 140 million Euro in 2030) than in the export market (rising from 55 million to 65 million Euro in 2030).

Albania's impressive seafood export performance is a result of the country's dynamic fish processing and trading industry, which uses the country's competitive advantage. This includes proximity to EU markets, labor costs, commercial/cultural links to neighboring markets, access to imported raw materials.

2. Coastal and Nautical Tourism

Albania's pristine nature and rich cultural traditions will continue to contribute enormously to the value of coastal and marine tourism. They present a distinct opportunity to brand the Albanian coast as an authentic, diverse, and clean destination.

Currently, the coastal tourism industry in Albania depends largely on beach tourism. While beach tourism and other coastal activities have seen positive developments in recent years, areas such as marine tourism, boating, yachting industry, diving, recreational fisheries and other watersports still have good potential to grow. In 2015, 1,177 small and large yachts visited Albanian coastal waters. In 2019, Saranda, one of the main destinations, recorded 1,650 boat visits.

**All data are from: World Bank. 2020. Realizing the Blue Economy Potential in Albania*

Albania's current marine infrastructure has limited capacity and does not support the country's potential for nautical tourism. There are 354 berths in the country, not including day berths. This is only 0.5% of the total number of berths in the Adriatic Sea basin. It is estimated that there should be between 700 and 1,050 berths or at least a twofold increase from 350 to 700.

Total number of berths per km in the Adriatic Sea basin	Italy	Croatia	Montenegro	Albania
Number of berths	172,000	17,949	2,220	354 (431 including day berths)
Length of coastline in km	9,534	8,032	294	476
Berths per km of coastline	18.04	2.23	7.58	0.90

3. Marine Pollution and Plastics

Environmental concerns are a key part of the country's Blue Tourism Strategy. Support is needed to ensure the tourism sector produces less plastic waste. Incentives can be introduced to ensure resources are used efficiently and public policy and private sector innovations reduce the current levels of plastic waste.

Albania has a low recycling rate of plastic waste at nearly 5 percent of the total amount of generated waste (166,000kg in 2016)

The blue growth Mapping Study – Methodology

Stakeholder analysis is a process that enables us to identify how various parties are likely to be affected/included in blue growth economy. This phase relies on empirical assessment techniques to identify relevant stakeholder, and gather information about how these groups are likely to be affected. The stakeholder analysis process generates information about affected parties remains crucial to identification and successful engagement of stakeholders.

Step 1: Review of relevant literature and key documents in place, previous actions, national and local strategies, studies, etc..

Step 2: Stakeholders identification

Two stakeholder identification techniques will assist in making more complete identification of parties affected/to be affected by blue growth. The **first** technique is that of *identification of stakeholders through experts, business, universities and institutions consultations*, and **secondly** inducing *self-identification of groups of interest* through public communications and awareness activities.

Self-identification of groups of interest or stakeholders is induced through process communication and public Events. These public events will directly and in-directly reach groups of interest. Participation of stakeholders will be document and used as self identification.

The stakeholder inventory is being compiled **per each category, using a matrix format**, which classifies stakeholders per different category (type) and their stake.

Step 3. Impact Assessment and Stake of Groups of Interest

In this step of the analyses we aim to create a link between identified Blue Growth elements with expected impact and the stake of different groups of interest. Understanding the stake of each stakeholders *is crucial to the process of priorities stakeholders and design effective engagement strategies for the future.*

1. Authority and responsibility of the stakeholders
2. Expected impact on the stakeholder,
3. The expected contribution of the stakeholders in the process.
4. Knowledge and capacity of the stakeholders to engage.

II. Stakeholders Mapping and Engagement

Stakeholder mapping is a way of determining who among stakeholders is most/least influential on the process, who of the stakeholders is high/low impacted by the process.

- Stakeholder mapping is conducted in terms of power/influence vs interest/importance.

Expected impact combined with knowledge and capacity of stakeholders is used to judge the level of interest. Stakeholders are then classified in context setters, key players, subject/sector related stakeholders and background ones.

Thanks for your attention

Contacts

- Gledis Gjipali
- gledis.gjipali@em-al.org

In collaboration with

