

# SWOT Analysis for the Intervention Area



## FINAL REPORT

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# 1 Introduction

The study aims to analyze the internal and external factors that may affect Nautical Tourism development in the Intervention Areas. Such analysis may provide a comprehensive review of the development potentials in the regions of Italy, Albania and Montenegro, in the context of nautical and touristic development.

## 2 Implementation Environment

### 2.1 The Interreg IPA CBC Italy-Albania-Montenegro Programme

The Interreg IPA CBC Italy-Albania-Montenegro Programme, co-funded by the European Union through the Instrument for Pre-Accession (IPA II), has a total budget of 92.707.558,00 euro (including 15% national co-financing). The Programme is managed by Puglia Region, which participates together with another Italian Region, Molise; Albania and Montenegro participate with the entire territory. The objective is to promote economic growth and to intensify cooperation in the low Adriatic area, by implementing joint actions between national and regional institutional and non-profit actors and by fostering smart, inclusive and sustainable development.

The overall Programme budget is EUR 92.707.555, with a Union Support of EUR 78.801.422. The financial allocation to the chosen thematic objectives reflects the estimated financial size of actions foreseen in each priority axis, the coherence with the funding priorities as in the EC Country Position Paper and in the EC Indicative Strategy Papers, the strategic choices of the Programme stakeholders, as well as the inputs provided by relevant partners within consultations. Additionally, not less than 50% of total amount of the financial resources shall be reserved for thematic calls and strategic projects.

The Program Priority Axis are:

- **PRIORITY AXIS 1. Strengthening the cross-border cooperation and competitiveness of SMEs.**
- **PRIORITY AXIS 2. Smart management of natural and cultural heritage for the exploitation of cross border sustainable tourism and territorial attractiveness.**
- **PRIORITY AXIS 3. Environment protection, risk management and low carbon strategy**
- **PRIORITY AXIS 4. Increasing cross border accessibility, promoting sustainable transport service and facilities and improving public infrastructures.**
- **PRIORITY AXIS 5. Technical Assistance.**



Municipality of  
Molfetta



Municipality of  
Termoli



## 2.2 The REGLPORTS Project

Nautical Tourism (NT) is a dynamically expanded form of tourism, consisting an industry of high added value with strong clientele growth tendencies in the Adriatic Sea. In general, NT is seasonal, however, if combined properly with other mild tourism activities it may be prolonged with profound positive impact to local economies. Despite its high potential, NT is not sufficiently developed in the intervention area and its connection with the assets of the hinterland is insufficient.

Hence, the overall objective of the REGLPORTS Project is to develop a common model for the smart and sustainable NT management through integrated development plans. More specifically, the Project aims to provide a holistic approach by (a) connecting the coastal areas with the rich inland's assets, (b) emerging and promoting the interconnected areas (Area Brand, Thematic Routes), and (c) upgrading tourism supporting services and products.

REGLPORTS foresees to facilitate the sustainable NT management, considering as a top priority the environmental sustainability. The anticipated impact will substantially benefit stakeholders in the intervention area, including local communities, national and/or regional organizations and tourism related businesses. Brief reference to the Project content, objectives, partnership and results.

The Partners participating in the Project are:

- **National Coastline Agency (LP) - AL**
- **Municipality of Molfetta – IT**
- **Union of the Provinces of Puglia - IT**
- **Ministry of Tourism and Environment of Albania – AL**
- **Agency for the management of the town harbor Herceg Novi Ltd. – ME**

The Associated Partners of the Project are:

- **Municipality of Vlora – AL**
- **Region of Molise – IT**
- **Municipality of Herceg Novi –ME**
- **Tourism Agency of Manfredonia – IT**



## 2.3 The REGLPORTS Environmental Impact Assessment

The environmental sustainability of the foreseen data and development propositions, is a prerequisite for the overall viability and success. Therefore, the given data and analysis, as well as any suggested actions, measures and strategies, are provided in the context of securing that environmental conditions will not be jeopardized by the changes imposed in the Intervention Area.

Particularly, the capacities of ports and tourism destinations were carefully considered throughout the research, as well as the natural resources (marine water, coastal, soil, inland water) and habitats. In this frame, the process of the collected information and the conclusions deriving from the analysis, will be elaborated for parts of the Intervention Area, encompassing all the potential aspects that might affect natural, cultural and anthropogenic environment.

### 3 Methodological Framework

SWOT is an acronym for Strengths, Weaknesses, Opportunities and Threats. By definition, Strengths (S) and Weaknesses (W) are considered to be internal factors over which you have some measure of control. Also, by definition, Opportunities (O) and Threats (T) are external factors over which you have essentially no control.

An overview of the four factors (Strengths, Weaknesses, Opportunities and Threats):

1. **Strengths:** Strengths are the qualities that enable to accomplish a mission. They can be either tangible or intangible, mostly related to expertise, traits and qualities. When referring to nautical tourism, such strengths may be related to the capabilities of current nautical bodies, skills of personnel, financial resources, products and services, natural and cultural assets of the areas, port infrastructure, etc.
2. **Weaknesses:** Weaknesses are the qualities that prevent achieving the full development potential. These weaknesses deteriorate influences on success and growth. Such factors may be insufficient research and development facilities, touristic services that do not meet high standards, narrow product range, poor decision-making, etc. However, weaknesses are controllable, and they must be minimized and eliminated.
3. **Opportunities:** Opportunities are presented by the environment within which nautical tourism operates. These arise from conditions in the environment, such as the state of the market, competition, innovation, natural and cultural heritage, etc. It should be noted that it is important to grasp opportunities whenever they arise.
4. **Threats:** Threats arise when conditions in external environment jeopardize reliability and profitability. They compound the vulnerability when they relate to the weaknesses. Threats are uncontrollable. When a threat comes, the stability and survival can be at stake. Examples of threats could be unrest among employees, ever changing technology, increasing competition leading to excess capacity, price wars and reducing industry profits, etc.

The above-mentioned issues can also be stated in terms of planning/strategy formation and strategy implementation on different administrative levels. Regional SWOT analysis concentrates on the region in question, not on the organization undertaking the SWOT, as was originally intended in the management sphere.

Problems regarding the necessary balance between internal and external factors may rise also in regional planning as well as unforeseen issues relating to external factors. It has been argued in public planning debates that “any process of choice will become a process of planning (or strategic choice) if the selection of the current actions is made only after a formulation and comparison of possible solutions over a wider



field of decisions relating to certain anticipated as well as current situations”. The uncertainties in the process may also require making implementation and strategic planning a more inter-woven process, where planning and implementation are considered as part of the same interactive process on communicative planning.

The context question in the strategy formulation stage is sometimes seen as secondary to the contextual nature of strategy implementation. This means that one should formulate strategies objectively, but the degree to which their implementation can be objective is dependent on the person or organization implementing the strategy.

## 4 Theoretical Framework

### 4.1 Presentation & Database of the Intervention Areas

#### 4.1.1 Region of Puglia

The region of Puglia, also called Apulia, is located in the southeastern Italy and extends from the Fortore River in the northwest to Cape Santa Maria di Leuca at the tip of the Salentine Peninsula (the “heel” of Italy). It comprises the provinces of Bari, Barletta-Andria-Trani, Brindisi, Foggia, Lecce, and Taranto. The northern third of the region is centred on the Puglia Tableland, which is flanked on the north by the limestone massif of Gargano Promontory (the “spur” of the peninsula) and on the west by the Neapolitan Apennines. The central third is occupied by the low Murge plateau, which slopes gradually to the narrow coastal plains of the Adriatic Sea in the east. The Salentine Peninsula consists of the lowlands of Lecce, Taranto, and Brindisi and low plateaus east of Taranto and south of Lecce.



Figure 1 Puglia Region

Puglia is one of the less crowded regions in Italy, with 4 million residents in its surface area of 7,469 square miles. The region is composed of five provinces (Bari, Brindisi, Foggia, Lecce, and Taranto), where a good number of interesting landmarks are readily available such as cathedrals, archeological museums, historic ruins of the Greek and Roman eras, fishing villages, medieval towns, Europe's largest forests, and fresh beaches along the Mediterranean coast.

Specifically, the region is rich in cultural assets, such as the two UNESCO heritage sites “Trulli of Alberobello” and “Castel del Monde”, rock churches and Romanesque cathedrals, as well as many festivals and cultural events. Apulia is also rich in traditions and handicrafts such as the famous terracotta whistles of Rutigliano, the laces of Gargano, the ceramic products of Grottaglie and the products made in Salento with the soft stone of Lecce, with wrought iron and papier-mâché. Moreover, the region offers a high quality enogastronomy and a diversified cuisine offering different dishes in relation to the different seasons.

The potentials of the area as a unique cultural destination, are also reflected on the nautical development in the recent years. In particular, Apulia has played an important role in the Mediterranean in various historical periods, representing a bridge between East and West and the gateway to the Balkans. Since ancient times, ships loaded with oil and wine, marble and precious goods coming from the East left and landed from the ports of Apulia. And from Puglia also the armies of the Crusaders left in the direction of the Holy Land for the reconquest of the Holy Sepulchre which had fallen into the hands of the Muslims. After the medieval period, when the coasts and the cities on the sea were easy prey to pirate and Saracen raids, the function of important port of call for the port cities of Puglia was constantly increasing.

Nonetheless, nowadays, the use of its splendid natural and historical heritage for pleasure boating is very modest. The current offer of port services is lacking both from a quantitative and qualitative point of view. According to the data provided by the Italian Ministry of Transport 2017, the number of nautical tourism facilities in Apulia is low compared to the national average. In fact, the total number of berths is 14,068, representing 8.87% of the national total, while the ratio of berths per km of coast is 16.3 berths per km compared to a national average of 21.3 berths per km of coast. Despite the relatively low numbers, it can still be said that nautical tourism is one of the fastest growing sectors both at international and national level and is an opportunity to be seized for the socio-economic growth of Apulia.

As for the nautical infrastructure, The Apulian coast, 865 km long, has a port system with 3 main ports (Bari, Brindisi, Taranto) 6 smaller ports (Manfredonia (FG), Barletta (Ba), Molfetta (Ba), Monopoli (Ba), Otranto (Le), Gallipoli (Le) and several smaller marinas and pleasure ports.

In recent years Puglia has experienced significant growth as a tourist destination. A study carried out for the PUGLIAPROMOZIONE Regional Tourism Agency on "Tourism in Puglia 2019/2020" shows that arrivals in Puglia in 2019 increased by 4% compared to 2018, of which 11.5% came from outside of Italy. Although growing in terms of internationalization, the percentage of foreign presences has a wide margin for improvement. In fact, in its strategic plan Puglia one of the objectives is to reduce the gap with the other tourist destinations through actions that support the Hospitality, Infrastructure and Services sector.

Taking into consideration the aforementioned brief overview of the Region of Puglia, it can be said that both opportunities and weaknesses can be identified in the context of nautical touristic development. Those elements will be analyzed further in the SWOT analysis of the area.

#### 4.1.2 Region of Molise

Molise, with a land area of only 4,438 km<sup>2</sup>, is the second smallest region in Italy after Valle d'Aosta, characterized by a predominantly mountainous and hilly profile (55.3% and 44.7% of the surface respectively), with a short coastline extending for 35 km. The territory is however distinguished by a high diversity from the geological-environmental point of view (with at least 6 structural tectonic units that make up the Molise Apennines) which is obviously reflected in its physiographic and landscape features. This conformation particularly affects the high conditions of seismic risk, coastal erosion, and the water dispersion and landslides.

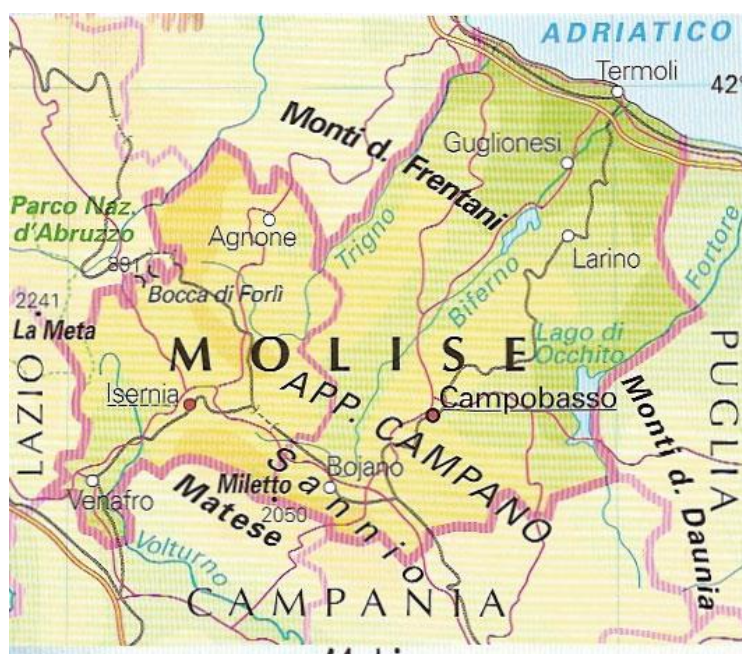


Figure 2 Molise Region



According to the most recent ISTAT data (2018), the population, Molise counts 308,493 inhabitants. The demographic decline is evident considering the evolution of residents between 2012 and 2018. In fact, the number has decreased from 313,145 inhabitants in 2012 to 308,493 in 2018.

From ISTAT data it is possible to evince a GDP trend between 2014 and 2019, a swinging trend and an overall weak growth, a trend in line with the low recovery rates of the national economy. According to the consolidated data provided by the Bank of Italy, in 2018 the Molise economy showed a slight improvement after the contraction of the previous year. Some positive signals for the region come from foreign trade which, although influenced by economic components, have shown signs of dynamism in the last period.

As far as the tourism sector is concerned (according to the information provided by the provincial authorities), there has been a decrease as in the first seven months of the 2019 arrivals and presences of tourists in the region have decreased. These data are, however, affected by the information gaps historically present in the tourism survey system, as highlighted, moreover, in the Regional Strategic Plan for the Development of Tourism, recently adopted by the Regional Council.

The Region has a main port in the city of Termoli. It is a passenger, fishing and tourist port. The marina is called Marina di San Pietro Built under the ramparts of the historic center is open to the public since September 2009 and represents the ideal base to reach the main yachting destinations of the southern Adriatic center. Tremiti Islands, Gargano Promontory, Lastovo, Vis are the closest and most convenient destinations to reach through an ancient route that takes boats from Termoli to Dubrovnik passing through the most beautiful islands of the Adriatic.

Just a few kilometers from the mouth of the river Trigno, there is the touristic port La Marina Sveva which offers moorings, all equipped with water and electricity connections, are distributed on floating docks equipped with finger and can accommodate boats up to 30 m. in length. Near the port there is the well-equipped resorts of Marina di Montenero, San Salvo Marina and Vasto Marina which boast spacious beaches and numerous bathing establishments; in the immediate vicinity there are also hotels with SPA, bars, restaurants, self-service, pizzerias and trendy clubs,

#### 4.1.3 Albania

Albania, officially known as the Republic of Albania, is a country in Southeast Europe on the Adriatic and Ionian Sea within the Mediterranean Sea. The country provides free primary and secondary education. In the economic aspect. The service sector dominates the country's economy, followed by the agricultural and industrial sectors. The villages of Xarrë and Mount Dajt were found to contain the first traces of human

presence in the country. Albania is almost midway between Equator and the North Pole, and covers a surface of 28.748 km<sup>2</sup>. The overall length of the borderline of the Republic of Albania is 1094 km; out of which 657-km is land-border, 316-km sea- border, 48-km river-border and 73 km lake-border.

Albania is a new tourist destination. Till now it is experiencing a significant growth in the tourism sector, from both demand and supply side. While in the first 20 years after the decline of the socialist regime, tourism has been developed only empirically only with private investments, mainly towards outgoing tourism and domestic tourism, in the recent years, there is a lot more focus on strategies to develop tourism demand and proper tourism destinations in Albania. Sea and Sun tourism has been the main type developed in the past, while tourism operators are now offering different packages and exploiting different opportunities of the country. Thanks to the impressive natural environment and a variety of attractions, Albania offers opportunities for many different types of tourism including cultural and natural tours, hiking, biking, rafting and many other activities in the field of rural tourism, sports and adventure tourism, natural tourism, coastal tourism, etc.

The Economic development potentials in the coastal area in Albania are closely linked to its multiple resources related to tourism development. This diversity of resources allows a tourism development along the entire coastline, the diversification of the tourist product as well as the attraction of tourists throughout the year. Coastal tourism is primary among the most mentioned potentials as it offers even more development opportunities due to the high demand. This sector largely affects the economic benefits and sources of income for the population of the coastal area. NT is one of the types of tourism which is designed and planned to give a boost to economic development on the Albanian coast, in the context of maritime economy, together with the above-mentioned types of cultural and natural tourism, as well as alternative tourism as a whole.



#### 4.1.4 Montenegro

The Montenegrin tourism and travel sector contributed to around 22 %<sup>1</sup> of national GDP and is one of the country's main development priorities. Montenegrin coastal waters and the Montenegrin coast are primarily used for beach tourism, the most developed tourism branch in Montenegro. There are about 75 long, sandy beaches and numerous bathing areas.

With regard to maritime transport, it must be noted that several international ports are in operation (ports of Bar, Kotor, Zelenika and Risan – the latter three being located in the Bay of Boka, which implies intense use of space in the relatively small area of the Boka Bay (see Figure 3). The port of Kotor is exclusively used as a passenger terminal for liners and cruisers and accounts for 100% of cruising vessels turnover and 84% of nautical tourism turnover in Montenegro<sup>2</sup>.

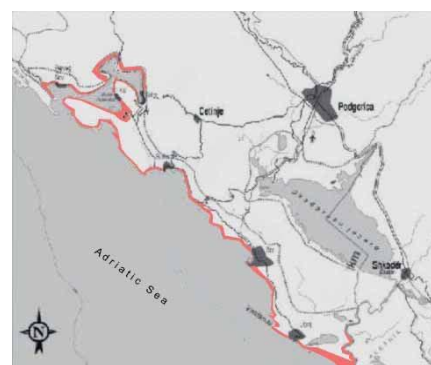


Figure 3 Public Maritime Domain - Montenegro

Nautical tourism is considered to be the development area for the future. Currently, demand is higher than supply, which implies the need for more docks and small ports. These docks and ports are also needed for coastal passenger and tourist transport.

Taking into consideration the aforementioned brief overview of the Region of Puglia and Molise, it can be said that both opportunities and weaknesses can be identified in the context of nautical touristic development. Those elements will be analyzed further in the SWOT analysis of the area.

<sup>1</sup> World data Atlas

<sup>2</sup> National Report on Current Policy, Procedures, Legal Basis and Practice of Marine Spatial Planning in Montenegro: European Commission study

## 5 SWOT Analysis

### 5.1 SWOT: Region of Puglia

#### 5.1.1 Strengths

##### ➤ General

##### i. *Types of tourism that can be accommodated*

The region of Puglia is gifted with sights that can accommodate practical any form of traditional or alternative tourism. More specifically, it is a largely coastal area, thus being able to accommodate seaside vacation. At the same time, the area is brimming with sites of historical, cultural and religious interest. Finally, as is the case with the largest part of Italy, the Apulian region is an exceptional Eno-gastronomic destination offering a range of unique products.

##### ii. *Two international airports*

Apulia can be accessed via a total of four airports. The major and most popular though are the two international ones, i.e., Bari Palese airport in the city of Bari, which is the main of the region, and Brindisi Casale airport in Brindisi, which serves the whole area of Salento.

##### iii. *Specific sectors of the economy record positive employment trends in spite of the crisis*

Despite the recent economic crisis, the region shows a rise in employment percentages in the sectors of tourism, the energy and the agribusiness. However, it is worth mentioning that such indexes will be soon prone to revision due to the Covid-19 outbreak.

##### iv. *An excellent tourism website ([www.viaggiareinapulia.it](http://www.viaggiareinapulia.it))*

The official tourism web-site of the region (curated by Regione Puglia - Regional department for tourism and culture) does an excellent job in welcoming visitors and promoting the sector by providing information on what to see, where to go, how to travel etc.

##### v. *Favorable climate characteristics*

The region is characterized by a very stable climate without significant fluctuations. In general, the climate and weather are typically Mediterranean, with short mild winters and hot dry summers. Puglia is one of the driest and hottest areas in Italy with an average temperature of 17 °C.

**vi. Important natural environment and quality local resources**

The region is characterized by a rich and varied environment ranging from a beautiful coastal area to lush forests and mountainous areas. The protected areas in the region extend in total to 245,154 hectares, of which 75.8% represented by national parks (the Gargano national park and the Alta Murgia national park) and 8.3% consists of natural areas and marine nature reserves.

**vii. Historic town centers and attractions with great cultural, religious, architectural quality**

The region of Puglia has a long history dating back more than 3,000 years. Facing the Mediterranean Sea yet still being connected to the mainland, Puglia throughout the years has absorbed cultures, arts and traditions coming from far away, as well as developing its own genuine uniqueness. Such a long history is still vibrantly reflected in the area with sites dating back to the Paleolithic Age.

**viii. Commitment to further improve regional planning and coordination**

The region of Puglia in collaboration with its municipalities, sustains a continuous effort to support and enhance various sectors of the regional economy through planning and coordination. Through enhancement and support mechanisms such as *Micro-prestito*, *Capo VI Turismo* and *START* the region aims to support the economy and especially urban sustainable development and the tourism and culture of the area.

**ix. Access to EU funding sources**

The region has a strong track of access to EU funding sources either through national programmes (National Operational Programme on Culture, National Operational Programme on Education) or through cross-border, transnational and interregional co-operation programmes (ESPON, INTERACT, REGLPORTS).

**x. Excellent road network**

The region is reached in large part from the Italian Autostrada, a road network of high velocity and is generally served by an excellent road network, thus facilitating transport and movement.

**xi. Traditional hospitality of local population**

The local population is known for maintaining a strong bond with the roots and culture of the area while at the same time being incredibly open to visitors and tourists. Moreover, the region offers a variety of options of more rustic and traditional places that transport visitors in the past.

**xii. Quality seaside tourism**

Puglia has always been a staple for seaside tourism with unique swimming spots throughout the region such as the Maldives of Salento, the Lama Monachile and Grotta della Poesia only to name a few.

**xiii. Significant awareness and recognition of the “Puglia” brand in Italy**

The region is held in high regard especially among Italian citizen, especially for its local produce such as the wine, olive oil and pasta.

**xiv. A strong focus on tourism development**

Italy in general and the region of Puglia show a strong focus and incline towards the development of the tourism sector, an effort highlighted from:

- Presence on the Italian territory of the number of schools and universities training young tourism experts,
- Level of tourism professionals and experts due to the aforementioned number of schools and universities training young tourism experts,
- Growing awareness of tourism potential locally and appreciation of environmental sustainability.

➤ **Nautical Sector**

**i. Plethora of ports marinas**

Puglia practically being a coastal area in its entirety, offers a plethora of ports, marinas and mooring stations across its full length (approximately 60). Undoubtedly, the most important of these are the ports of Bari and Brindisi, two large multipurpose ports traditionally considered Europe's door to the Balkan Peninsula.

**ii. No of berths**

A berth is a designated location in a port or harbor used for mooring vessels when they are not at sea. Except from the ports and marinas the region gives place to a large number of berths along its coast. In 2017, only Gallipoli had more than 5.000 berths.

**iii. Length of coastal area**

The region is almost totally encircled by the sea, thus having an 860 km coastline of coastline of beaches and breathtaking cliffs.

#### **iv. Water quality**

The sea water quality surrounding the region is generally excellent with the only exception being the area around Bari which (probably because of the port) shows traces of contamination without it however being on levels that cause concern.

### **5.1.2 Weaknesses**

#### **➤ General**

##### **i. Economic development**

Puglia presents a significantly less powerful economy compared to the national and European economy in terms of economic development. GDP per capita was on average €18,700 in 2017, one of the lowest in the country and corresponding to 65% of the national GDP per capita (€29,200) and 62% of the GDP per capita for the EU average (€30,000), (Eurostat, 2019).

##### **ii. Unemployment rates**

Clearly correlated to the previous point are the unemployment rates of the region. More specifically, the region in the 2<sup>nd</sup> quarter of 2020, has a 12.4% unemployment rate, being the fourth highest in the country which has an average rate of 7.9%.

##### **iii. Strategic plans**

Strategic plans do not reflect specific needs to address lack of jobs for local populations.

##### **iv. Tourism Seasonal fluctuation**

Tourism in the region, especially in regards to international visitors is very seasonal and clearly “summer heavy” as Puglia is considered mostly a seaside tourism destination.

##### **v. Great Environmental pressures in the area of Taranto and Brindisi.**

The biggest European steel industry, ILVA spa, in Taranto, that counts 20.000 and more employed is going to be in bankruptcy, the people are still dying for cancer due to diossine pollution, and the all government actions are failing. Similar issues can be encountered in the Brindisi area due to the presence of an old coal plant.

##### **vi. Rate of high school dropouts**

In the Region of Puglia, the rate of high school dropouts is 23.9% (source: Ministry of Education). Almost one third of the people of young people between 18-24 Puglia has completed only the middle school (27.6%).

##### **vii. Bureaucratic procedures**

The administrative and organizational procedures are still long and arduous, both according to Entrepreneurs opinions and according to citizens’ responses.

##### **viii. The ecotourism offer is still limited and poorly structured**

Even though the area has great potential to sustain a thriving ecotourist economy, the offer is still limited, with the majority of the marketing and dissemination efforts focusing on traditional seaside tourism.

**ix. Promotion/marketing system**

Continuing from the previous point, the promotional and marketing structures are clearly focused on traditional tourism, leaving little space for the rest of the potential of the area.

**x. Poor product enhancement**

Puglia, a region viewed very favorably for its local products, shows an insufficient tourism promotion of typical products.

**5.1.3 Opportunities**

**i. Increasing tourist destinations by means of its quality products and services**

After the empowering and showcasing of the ports and connecting them more with the surrounding points of interest, the next logical step is the building upon this idea and principle to produce and promote quality products and services of these areas. In general, Puglia is responsible for a large portion of Italy's olive oil and wine.

**ii. Empowering new forms of tourism (sports, congress, wellness, diving tourism + mixing these forms with nautical tourism)**

The refocus to Nautical Tourism may be the catalyst for the neighboring areas to build on their already existing facilities and possibilities and /or give prominence to new untapped ones. The geomorphology of the region of Puglia can support new forms of tourism, such as sports, congress, seminars, wellness, diving tourism, especially mixing these forms with Nautical Tourism.

**iii. Improve new mobility experiences (railways, ports, slow mobility, cycling) and the hospitality system**

As with every progress, new infrastructure will be needed. Especially improvement of the existing mobility experiences or creating new ones. From the side of the local responsible authorities, they will need to focus on the changes and the new needs that Nautical Tourism will bring. Therefore, they may need to improve port infrastructure, promote cycling, improve the current railways and other transport to POIs and inland target areas.

**iv. Enhance the region, relaunching routes and itineraries with particular attention to local products and complementary sports activities;**



The implementation of the Project will open new possibilities for the region, the port, the nearby areas and the local enterprises. The local authorities responsible should be prepared to make thorough and long-lasting plans to enhance the region, protect it too, possibly rebrand it where needed, relaunching routes and itineraries with certain focus to the new needs created with the new arrivals and connected them with local products and possible complementary sports.

**v. *Strengthening the enhancement and promotion of Apulia's cultural heritage;***

Apulia is one of the southernmost regions of Italy, overlooking the cerulean Adriatic Sea and it still represents a bridge to Greece and the Levant. In fact, Apulia's culture shaped itself differently from the other regions of Italy because of the different ethnicities visiting its ports and the area along the centuries. As such, Apulia is an entity characterized by an incredible diversity both from an environmental and from an artistic and cultural point of view. These cultural diversifications and traits, such as local dialects that have various influences including the Albanian language in Brindisi and Lecce, the Illyrian dialects in Capitanata, and Greek dialects in Salento, local cuisine inspired by these ethnicities, the plethora of UNESCO World Heritage Sites, i.e. Trulli, the mysterious building of Castel del Monte, etc. give Puglia lots of opportunities to strengthen and refocus the promotion of Apulia's cultural heritage.

**vi. *Improve the competitiveness of the Apulian traditional seaside industry by strengthening facilities and services and promoting "coastal tourism";***

Compared to Sicily and Sardinia, Apulia is a considerably young tourist region, with a coastal heritage yet to be discovered and utilized. Apulia looks out over the Mediterranean Sea, meeting the Adriatic Sea on the east side and the Ionian Sea on the west side. With its 800 km of coastline, varied coasts and alternate tropical landscapes, long beaches, fascinating caves and impressive cliffs it is the region with the largest potential for coastal development.

**vii. *Enhance ICT providing support to tourists and local operators;***

The very same Project will provide smart ICT tools for the Ports. Afterwards the spike in the arrivals of tourists will create the need and the opportunity to create relevant ICT tools providing support to tourists and local operators and augmenting their satisfaction;

**viii. *Improve, extend and re-designing the existing marinas and ports or building new ones;***

The possible increase in tourist arrivals will create the need for improvement, extending and re-designing the existing marinas and ports, building new ones and also improve the current infrastructure. These changes will give a boost at the areas in question and will also attract more visitors.

**ix. *Boatbuilding development: the know-how, tradition and acquisition of new technologies make the local boat builders competitive in the national and international markets.***

Boatbuilders still often rely on slow manual lay-up. This involves using molds into which continuous fiber mats are inserted layer by layer before being baked and cured. Of course, the know-how, traditional production and the openness to new technologies make the local boat builders competitive in the national and international markets. An example of exquisite taste and possibility is the recent built of a MAMBO (motor additive manufacturing boat) by Italian tech startup Moi Composites using 3-D printing. This fact shows the possibilities for the development of boatbuilding in the area and the hope that younger people will be attracted to this sector.

**x. *Creating a development strategy of the nautical tourism: development programs directed towards modern and ecological marinas; revitalization of small ports; creating jobs on the islands and preventing the brain drain***

As stated, before the Project and the promotion of Nautical Tourism in the area will cause the opportunities but also the need to improve and build on already existing infrastructure to better accommodate the incoming visitors. As such, possible improvements would be modern and ecological marinas, revitalization of small ports, modernizing current port infrastructure and facilities and altogether creating job positions and preventing the brain drain. Therefore, the local authorities tasked with policy and decision making will have to take a responsible and deep look in implementing these changed by making a durable development strategy directed towards modern and ecological marinas, the revitalization of small ports, creating jobs on the islands and preventing brain drain.

**xi. *Enhance the image of the Region: development of brands (destinations, food, eco-tourism);***

In a highly competitive market for a tourist destination, it is necessary to create a recognized brand. Often it is necessary to develop a diversified strategy and image according to a target audience. Frequently, apart for some worldwide known regions, the perception of a region is usually quite different for a local than an international potential tourist. Most of the tourists usually don't have deep knowledge about distinguished internal cultural characteristics within a country. As such further developing the overall brand of Apulia but also the singly brands will enhance the image of the Region.

**xii. *Extend the Tourism season***

The rebranding of the area, the possibilities created by having a constant inflow of more visitors all year round seems to make perfect sense to extend the tourist season. This will cause potential benefits for governments, employment, tax revenues, tourism, progress, SME's, economy, etc.

***xiii. Exploit EU programming funds for the development of networks and public-private partnerships for the creation of quality tourism products***

The REGPORTS project, its objective and results, the aforementioned ICT tools and its networking aspect is paving the way for identifying and using other relevant EU programming funds and projects for further development opportunities. Some of them could be further networking experiences, public-private partnerships, the creation of quality tourism products, etc.

***xiv. Cooperation between the region and interested parties on planning and promoting the tourist destination of Puglia, artistic, cultural, nature and services***

It is essential to establish a close collaboration in regards to the planning and promotion of the value of Puglia as a tourist destination. This could be accomplished by strategizing towards the enhancement of artistic tourism, cultural marketing and development, nature promotion and the improvement of services.

***xv. Exploitation of emerging markets***

Emerging markets are economies that are moving towards becoming what are known as 'developed markets. Noticing the emerging aspect of the markets, we understand that those are sector of the local economy that will be affected positively from the increase in tourism and will grow larger in the future and thus will have more and more of an impact on business, trade and economics.

#### 5.1.4 Threats

***i. Environmental Threats lack of awareness, urbanization and overfishing = loss of habitats = loss of species; noise pollution, oil spills, black waters, alien species, forest fires***

The more popular a place gets the more tourists it attracts and that may lead to unwanted dangers such as the multiple impacts that mass tourism brings to the environment. Mass arrivals by visitors may lead to crowded ports, crowded points of interest, noise pollution, forest fires, lack of awareness, urbanization and overfishing, oil spills, etc.

***ii. Uncontrolled development of Nautical Tourism (NT): concessions, occupation of the sea and the coastline.***

The main aspect of this project is to enhance the Natural Tourism of the area but as with every progress there should be some level of control because there is the possibility that uncontrolled development may lead to crowded ports, more need of facilities around the port to satisfy the new demands that may also affect the occupation of the sea and the coastline.

**iii. High real-estate price**

Visitors cause land, food, water, housing and infrastructure prices to increase at a rate closely correlated with the decline in tourism operators' margins. As such that may cause the increase of the real-estate prices making them hostile to locals but friendlier to wealthier “investors”, hence transforming in a negative manner the traditional local appeal of the area.

**iv. Poor coordination between stakeholders and administrative authorities**

The potential lack of communication between administrative authorities and interested parties in the region could prove to generate problems in the long run. Thus, the administrative authorities should always strive to create strategies and incentives tailor made to tackle the problems and support the needs of the area.

**v. Risk of identity loss**

As mentioned just above the over crowdedness and over tourism, if not handled responsibly and within reason they may cause severe tampering with the cultural and architectural identity of the area and in some cases affecting even the production of local traditional products. It is something common that has been observed in areas that decided to invest more in tourism sacrificing certain traditional products.

**vi. High competition with other EU countries with strong tourism tradition (Spain, Greece, Croatia, Mediterranean North Africa countries)**

The objectives and goals of the REGLPORTS Project are so inspiring for the whole realization of the possibilities of the area. Of course, that doesn't come without the knowledge that there are nearby popular destinations such as Spain, Greece, Croatia, etc. and accordingly the local authorities should take that in consideration and emphasize the identity of the area that separates it from other neighboring destinations.

**vii. Degradation of sea front due to increased development**

Increased development impacts the economy in a positive manner but strains the local environment and sources. In particular, coastal development reduces the ability of natural systems to respond to climate changes. Especially nowadays the challenges of the increasing climate changes weaken the ability of the ocean and coasts to provide critical ecosystem services such as food, oxygen generation, as well as to support nature-

based solutions to climate change adaptation. All these may lead to the degradation of sea front and a stab at the quality of life.

**viii. *Difficulty for Small and Medium Enterprises (SMEs) to access private finance***

In 2012-2016, Italian SMEs experienced a drop of 4.3% in employment, whereas value added increased by 5.1%. In the 2015-2016 period, SME employment rose by 1.1% and value added grew by 2.4%. However, the economy has still not recovered from the crisis. The regulatory framework for insolvency and related enforcement needs to be further improved as procedures remain lengthy and costly and are not supportive enough of restructuring. The administrative burden is still an issue despite the measures taken in the recent years. The on-going reforms in the area and the support to local SMEs should be continued and strengthened.

**ix. *Lack of conservation efforts by tourists or travelers damage the heritage***

Any development requires some interference with nature. Very often the infrastructure is built without any sustainable development plan or environment protection policies. Therefore, development comes at the cost of nature. Especially in mass tourism there also the visitors, tourists or travelers, that do not have environmental sensibilities. Puglia has to find the right authorities and efforts to conserve and protect their heritage.

## 5.2 SWOT: Region of Molise

### 5.2.1 Strengths

#### General

##### *i. Good quality of the life*

The good quality of life is characterized not only by food and wine or agri-food products, but also by a strong attachment to the values and the simplicity of the people that populate this area.

##### *ii. Good level of conservation of the tangible and intangible cultural heritage and, more generally, of the ancient villages*

It emerges as the extraordinary variety of the material and immaterial cultural heritage and the natural heritage constitutes, certainly, the main qualifying element of the reference area.

##### *iii. Traditional hospitality of local population*

The local population is known for maintaining a strong bond with the roots and culture of the area while at the same time being incredibly open to visitors and tourists. Moreover, the region offers a variety of options of more rustic and traditional places that transport visitors in the past.

##### *iv. Historic town centers and attractions with great cultural, religious, architectural quality*

Molise region has a long history and throughout the years has absorbed cultures, arts and traditions coming from far away, as well as developing its own genuine uniqueness. Such a long history is still vibrantly reflected in the area with sites dating back to the Paleolithic Age.

##### *v. Access to EU funding sources*

The region has a strong track of access to EU funding sources either through national programmes or through cross-border, transnational and interregional co-operation programmes (INTERACT, REGLPORTS, TOURISM4ALL).

##### *vi. A website also in English on the coast (<https://molisecoast.com/>)*

The website created thanks an Interreg Project (HERICOAST) is an excellent job in welcoming visitors and promoting heritage giving information on what to see in the three Municipality located on the coast, Termoli, Campomarino, Montenero di Bisaccia and Petacciato.

##### *vii. Favorable climate characteristics*



The coast is characterized by a very stable climate without significant fluctuations. In general, the climate and weather are typically Mediterranean, with short mild winters and hot dry summers.

#### **viii. Important natural environment and quality local resources**

The region is characterized by a rich and varied environment ranging from a beautiful coastal area to lush forests and mountainous areas. There are protected areas in the region represented by national parks and of natural areas (SIC).

#### **xi. Generational transition**

The accommodation system of Termoli is made up almost entirely by small and medium-sized family businesses. This phenomenon can be an advantage if we consider, for example, the greater familiarity of the new generations in the use of more sophisticated management techniques and tools, as well as the availability of a more qualified knowledge base (linguistic, informatic and relational).

#### **➤ Nautical Sector**

#### **v. Three ports marinas**

Molise offers three ports, marinas and mooring stations across its full length (approximately 36 km). Undoubtedly, the most important of these are the ports Termoli.

#### **vi. Water quality**

The sea water quality surrounding the region is generally excellent with the only exception being the area around Termoli which (probably because of the purifier), during the summer, period in which the population becomes double, shows traces of contamination without it however being on levels that cause concern.

### **5.2.2 Weaknesses**

#### **➤ General**

#### **I. Not competitive accommodation facilities system both in qualitative and quantitative terms**

In the conditions of development of modern economic relations, any product, regardless of the market, must be competitive. For the hospitality industry, the competitiveness of services is the degree of the ability to satisfy a set of needs and thereby its attractiveness to the buyer. The generally accepted factors that determine the competitiveness of hotel services are usually the price (the price-to-price ratio of the main competitors), the quality (the degree of conformity of the hotel to the level of its classification, the professionalism of the staff, the security of services, etc.), the organization of services, and the hotel marketing complex, marketing channels and their effectiveness). This factors in Molise Region are not competitive.

#### **II. Inadequate tourist information and reception system**

The tourist information and the receptive system is still not very developed compared to the standards of other destination.

### **III. *Insufficient organization of public transport***

For years, public resources for local transport have been insufficient and this weighs heavily on tourism, considering the service as insufficient.

### **IV. *High seasonality of tourist demand***

Tourism in the region, especially in regards to international visitors is very seasonal and clearly “summer heavy” as Molise coast is considered mostly a seaside tourism destination.

### **V. *Lack of analysis of the hotel and non-hotel accommodation sector***

there is no system to detect and to analyze hotel and non-hotel accommodation sector, with the exception of Termoli’s AAST, which however only has data on Termoli.

### **VI. *Lack of a coordinated image of the destination***

there are the relationships between local actors involved in tourism offer. In general, there is a weakness of a network that does not return a coordinated image of the destination. This circumstance, however, seems to be attributable also to an insufficient promotion of tourism in the area, which has never been proposed in a unified key and according to a shared project, resulting in excessive fragmentation of the initiatives. In fact, there are factors that preclude the valorization of tourism sector and its resources: it is still difficult to establish a specialization or differentiation strategy and, therefore, the result consists in an indistinct offer, often leaving to improvisation the system of tourism governance

### **VII. *Lack of specialized promotion/marketing strategies***

Continuing from the previous point, the promotional and marketing structures are clearly focused on traditional tourism, leaving little space for the rest of the potential of the area.

### **VIII. *Poor product enhancement***

Molise is a region viewed very favorably for its local products, shows an insufficient tourism promotion of typical products.

## **5.2.3 Opportunities**

### **I. *Investment plan and consequent increase of the routes served by the Pescara airport and investment plan for the modernization of railway network***

The position of the area offers interconnection with the whole regional system and, at the same time, the proximity to the Pescara airport, which has recently increased the number of routes served. Also in the case of rail transport, recently it is possible to reach Termoli station with high speed and it should be noted the investment plan for the modernization of the railway.

## ***II. Empowering new forms of tourism: wellness tourism; natural tourism; return tourism + mixing these forms with nautical tourism***

The refocus to Nautical Tourism may be the catalyst for the neighboring areas to build on their already existing facilities and possibilities and /or give prominence to new untapped ones. The geomorphology of the Molise region can support new forms of tourism, such as:

- Traveling for wellness: wellness trips are not just trips, but real experiences in search of new destinations where it is possible to regenerate the mind and body
- Sustainable travel: different forms including cycle-tourism, trekking, religious paths, etc
- Molisans in the world who preserve or want to rediscover their origins.

## ***III. "Molise does not exist"***

From a negative it has now become a real positive factor of communication, has led many curious people to visit our Region.

## ***IV. Increasing tourist destinations by means of its quality products and services***

After the empowering and showcasing of the ports and connecting them more with the surrounding points of interest, the next logical step is the building upon this idea and principle to produce and promote quality products and services of these areas.

## ***V. Enhance the region, relaunching routes and itineraries with particular attention to local products and complementary sports activities;***

The implementation of the Project will open new possibilities for the region, the port, the nearby areas and the local enterprises. The local authorities responsible should be prepared to make thorough and long-lasting plans to enhance the region, protect it too, possibly rebrand it where needed, relaunching routes and itineraries with certain focus to the new needs created with the new arrivals and connected them with local products and possible complementary sports.

## ***VI. Enhance ICT providing support to tourists and local operators;***

The very same Project will provide smart ICT tools for the Ports. Afterwards the spike in the arrivals of tourists will create the need and the opportunity to create relevant ICT tools providing support to tourists and local operators and augmenting their satisfaction;

**VII. *Boatbuilding development: the know-how, tradition and acquisition of new technologies make the local boat builders competitive in the national and international markets.***

Boatbuilders still often rely on slow manual lay-up. This involves using molds into which continuous fiber mats are inserted layer by layer before being baked and cured. Of course, the know-how, traditional production and the openness to new technologies make the local boat builders competitive in the national and international markets.

**VIII. *Creating a development strategy of the nautical tourism: development programs directed towards modern and ecological marinas; revitalization of small ports; creating jobs on the islands and preventing the brain drain***

As stated, before the Project and the promotion of Nautical Tourism in the area will cause the opportunities but also the need to improve and build on already existing infrastructure to better accommodate the incoming visitors. As such, possible improvements would be modern and ecological marinas, revitalization of small ports, modernizing current port infrastructure and facilities and altogether creating job positions and preventing the brain drain. Therefore, the local authorities tasked with policy and decision making will have to take a responsible and deep look in implementing these changed by making a durable development strategy directed towards modern and ecological marinas, the revitalization of small ports, creating jobs on the islands and preventing brain drain.

**IX. *Extend the Tourism season***

The rebranding of the area, the possibilities created by having a constant inflow of more visitors all year round seems to make perfect sense to extend the tourist season. This will cause potential benefits for governments, employment, tax revenues, tourism, progress, SME's, economy, etc.

**X. *Exploit EU programming funds for the development of networks and public-private partnerships for the creation of quality tourism products***

The REGLPORTS project, its objective and results, the aforementioned ICT tools and its networking aspect is paving the way for identifying and using other relevant EU programming funds and projects for further development opportunities. Some of them could be further networking experiences, public-private partnerships, the creation of quality tourism products, etc.

**XI. *Exploitation of emerging markets***

Emerging markets are economies that are moving towards becoming what are known as 'developed markets. Noticing the emerging aspect of the markets, we understand that those are sector of the local economy that

will be affected positively from the increase in tourism and will grow larger in the future and thus will have more and more of an impact on business, trade and economics.

#### 5.2.4 Threats

##### **I. Competition and competitive strengthening of other destinations**

Molise is the smallest region of Italy which, despite having rediscovered a strong development in the tourism sector in recent years, is still struggling to make itself known as a destination compared to other regions of Italy which are much more competitive

##### **II. Immigration and depopulation**

According to Istat data, there is a mortifying depopulation because the Molise Region has lost about 12,500 residents in just 6 years

##### **III. Legislative confusion and consequent difficulties in territorial and tourism governance**

The regional tourism law that dates back to 1978 and to date we still do not have a renewal of this law

##### **IV. Poor coordination between stakeholders and administrative authorities**

The potential lack of communication between administrative authorities and interested parties in the region could prove to generate problems in the long run. Thus, the administrative authorities should always strive to create strategies and incentives tailor made to tackle the problems and support the needs of the area.

##### **V. Risk of identity loss**

The over crowdedness and overtourism, if not handled responsibly and within reason they may cause severe tampering with the cultural and architectural identity of the area and in some cases affecting even the production of local traditional products. It is something common that has been observed in areas that decided to invest more in tourism sacrificing certain traditional products.

##### **VI. Difficulty for Small and Medium Enterprises (SMEs) to access private finance**

In 2012-2016, Italian SMEs experienced a drop of 4.3% in employment, whereas value added increased by 5.1%. In the 2015-2016period, SME employment rose by 1.1% and value added grew by 2.4%. However, the economy has still not recovered from the crisis. The regulatory framework for insolvency and related enforcement needs to be further improved as procedures remain lengthy and costly and are not supportive enough of restructuring. The administrative burden is still an issue despite the measures taken in the recent years. The on-going reforms in the area and the support to local SMEs should be continued and strengthened.

##### **VII. Lack of conservation efforts by tourists or travelers damage the heritage**

Any development requires some interference with nature. Very often the infrastructure is built without any sustainable development plan or environment protection policies. Therefore, development comes at the cost of nature. Especially in mass tourism there also the visitors, tourists or travelers, that do not have environmental sensibilities.



## 5.3 SWOT: Albania

The following SWOT analyses is part of the strategic planning process, since its components are needed to develop strategies and plans and also impact their implementation. The list of Strengths, Weaknesses, Opportunities and Threats should be frequently updated, according to the environmental analyses and all data gathered for a destination with the focus of Nautical Tourism. The action plan should be in line with the SWOT analyses. Actually, after taking in consideration the conditions of the country, the list includes the following:

### 5.3.1 Strengths

#### I. **Geographic positioning**

Albania's geographic location enables considerable maritime access, which is more advantageous and easier than mobility on the inland surface, through the ports of Durrës, Vlora, Saranda and Shengjin, while direct land access for Eastern European countries such as Montenegro, Kosovo, Macedonia and Greece are better. This is also a strategic economic advantage for the country as it greatly improves transportation costs on regional and international business relations.

#### II. **Natural environment – considered as an important attraction for NT**

Albania has a coastline of 450 km on the Adriatic Sea and Ionian Sea with a important number of beaches. In the hinterland the territory boasts a very rich flora, with a large number of beeches, oaks and rare Macedonian pines in the lowlands. The sides of the mountains up to 2000 m are covered with birches, pines and firs, while at higher altitudes a bare and desolate landscape takes over. It is estimated that forests occupy 36% of the country, with a greater concentration in the northern highlands and near the Greek border. These isolated forests are populated by bears, deer and wild boar. Albania has 15 national parks Divjaka forest park in Lushnja, Dajti in Tirana, Lura in Diber, Thethi in Shkodra, Llogara in Vlora, Drenovë in Korce, a Hotova in Përmet etc while A very interesting natural attracting factor in this part is Grunas waterfall. Its waters descend from a height of 30 meter.

#### III. **Other cultural and heritage assets that may be complementary to the NT supply and products**

Integrated development of nautical tourism also means linking ports with inland points of interest. Albania can offer a mix of archaeological testimonies together with those of cultural tourism linked with tradition such as traditional clothing, dances and folk songs, the iso-poliphony style of Albanian folk singing has been stated by UNESCO as an "intangible cultural heritage".

#### IV. **Territory appropriate for development of Ports and other marinas**

The Albanian coast offers a significant number of virgin bays stretching along the coastline for the creation of tourist ports / marinas.

### 5.3.2 Weaknesses

#### ***I. Problems related to environment and pollution in the port areas***

Current regulation on port reception facilities for ship-generated waste and cargo residue is aligned with EU regulations. The rules for preventing the discharge at sea of waste generated by ships are applicable to all kinds of ships entering ports of Albania and include mandatory fees on delivery of ship waste at the port reception facilities. These rules are to be further aligned with the amended/approved Directive (EU) 2019/883 aiming to address negative effects of waste from ships using EU ports by improving port reception facilities for waste from ships.

#### ***II. Lack of tourist and marine appropriate infrastructure***

In Albania, besides the beauty of nature, additional tourist infrastructure is almost non-existent. Amusement and recreation parks, conference and fairs centers, yacht harbors where sailing or underwater tourism can be launched, are hardly present at all. Generally, the infrastructure at tourist destinations are poor including the energy and water networks, the connection routes with destinations, parking spaces, etc. Currently, Albania's maritime infrastructure does not support the country's potential for nautical tourism. Specifically, regarding the nautical tourism, the current number of Albanian berth is only 0.5% of the total number of berths in the Adriatic.

#### ***III. Short tourism season***

Although Albania has a typical Mediterranean climate, which makes our country enjoy 250 days of sunshine, the tourist season in Albania is limited to July and August only. Although there is a demand for services for a long period of the year, supply is lacking as sporadic development to date has given tourism a highly seasonal character. For this industry to become one of the pillars of the Albanian economy, the seasonal effects of coastal tourism need to be mitigated through the development of other forms of tourism, increasing the number of visitors, overnight stays and consequently tourism revenue.

### 5.3.3 Opportunities

#### ***I. Development of coastal planning in national territory and also territorial plans in municipality level, (PPVs) that have taken in consideration the development of sustainable tourism and including NT.***

The Government of Albania has made progress in maintenance and infrastructure of port facilities in line with the Sector Strategy, priorities stipulated in the Government Programme, the National Transparent Plan, the National Strategy for Development and Integration and the Medium- Term Budget Plan. Maritime transport is primarily concerned with the transport of freight and passengers by sea. The sector is associated with many

other activities such as ship agency, chartering and brokering, maritime labour and education, multimodal and intermodal transport and related services.

**II. *More focus in financing in EU level in maritime economy and Maritime tourism, Nautical Tourism etc.***

It is priority for the Country to promote the opportunities that arise through the utilization of national and European funds on the development of the blue economy sector.

**III. *Raised investment of GoA in ports with aim of improving infrastructure for cruise and other components of NT***

The Albanian government strongly focuses on the development of new ports dedicated towards high quality cruises, yachts and charter trips following the necessary regulatory framework in order to facilitate the development of this segment. Generally, there is a lack of quality infrastructure as well as a lack of preservation of existing assets due to the weak institutional capacity of both the public and private sectors. The private sector should be encouraged to invest in marine infrastructure while the public sector should be encouraged to do so by creating a framework for Albania's marina industry that will steer encourage private uptake and avoid potential mistakes.

**IV. *Legal initiatives for 0 tax for Sailing boats and other appropriate vehicles for NT***

**5.3.4 Threats**

**I. *Competition in the area, especially from countries with developed NT***

The neighbor countries like Greece, Turkey and Croatia are focused on the tourism market of "Sun and Beach" by doing this they have increased the competition in this market heavily. Albania has a unique opportunity to differentiate itself from its neighbours so it separates itself from heavily competitive market with declining potential and low profit margins. Furthermore, a tourism which focuses on independent tourists interested in local communities, natural resources and culture has shown to be from 5 to 10 times more profitable in terms of money spend from tourists compared to tourism based on "Sun and Beach". What makes Albania a unique attraction is the ability to have a big amount of attractions in a relatively unique aspect and geographically close to each other.

**II. *Lack of knowledge and information of tourists for incentives in Albania***

The tourist information and the receptive system is still not very developed compared to the standards of other destination. Moreover, many of the accommodation facilities, but also other service providers, such as

restaurants or tourist guides, operate in full informality by creating the ground for low quality services, affecting the safety of tourists and the image of the place.

### ***III. Centralization of decision making***

The centralization in governmental power structures often creates a barrier for the cooperation with the private sector

## 5.4 Montenegro

SWOT analysis of nautical tourism in Montenegro is a systematized complex overview of advantages, disadvantages, opportunities and threats from which it is possible to see the place of nautical tourism in Montenegro on the world market, its potentials, market development prospects and threats it faces. SWOT analysis consists of basic parameters: strengths, weaknesses, opportunities and threats.

One of the main advantages of nautical tourism in Montenegro is its natural beauty, favorable climate and ecologically preserved sea and submarine. These advantages stimulate the growth and development of nautical tourism, and make Montenegro an attractive destination for tourists-boaters.

Apart from the advantages in nautical tourism, there are also disadvantages. One of them is the offer of nautical tourism ports based only on berths, which does not have other additional facilities. In this way, the level of attraction of the marina for tourists worsens.

An additional contribution to the development of nautical tourism in Montenegro will provide such opportunities as: extension of the season, development of small shipbuilding and increasing the quality of the tourist offer. By noticing the opportunities, Montenegro can take its place on the world market of nautical tourism and become a competitive destination in this segment of tourism.

The biggest threats from the environment that could slow down the future development of nautical tourism in Montenegro are: rapid development of other destinations, construction of new berths in competing countries, redevelopment of the coast and possible political instability in the region.

## 6 Focus Areas & Target Groups

In THE FOLLOWING Section, a summary of the aforementioned analysis is provided, in order to produce important conclusions for the nautical and touristic development of both Regions.

### 6.1 Region of Puglia

Strengths	
<b>General</b>	<ul style="list-style-type: none"> <li>i. Types of tourism that can be accommodated</li> <li>ii. Two international airports</li> <li>iii. Specific sectors of the economy record positive employment trends in spite of the crisis</li> <li>iv. An excellent tourism website (<a href="http://www.viaggiareinapulia.it">www.viaggiareinapulia.it</a>)</li> <li>v. Favorable climate characteristics</li> <li>vi. Important natural environment and quality local resources</li> <li>vii. Historic town centers and attractions with great cultural, religious, architectural quality</li> <li>viii. Commitment to further improve regional planning and coordination</li> <li>ix. Access to EU funding sources</li> <li>x. Excellent road network</li> <li>xi. Traditional hospitality of local population</li> <li>xii. Quality seaside tourism</li> <li>xiii. Significant awareness and recognition of the “Puglia” brand in Italy</li> <li>xiv. A strong focus on tourism development</li> </ul>
<b>Nautical Sector</b>	<ul style="list-style-type: none"> <li>i. Plethora of ports marinas</li> <li>ii. No of berths</li> <li>iii. Length of coastal area</li> <li>iv. Water quality</li> </ul>



## Weaknesses

- i. Economic development
- ii. Unemployment rates
- iii. Strategic plans
- iv. Tourism Seasonal fluctuation
- v. Great Environmental pressures in the area of Taranto and Brindisi.
- vi. Rate of high school dropouts,
- vii. Bureaucratic procedures
- viii. The ecotourism offer is still limited and poorly structured
- ix. Promotion/marketing system
- x. Poor product enhancement

## Opportunities

- i. Increasing tourist destinations by means of its quality products and services
- ii. Empowering new forms of tourism (sports, congress, wellness, diving tourism + mixing these forms with nautical tourism)
- iii. Improve new mobility experiences (railways, ports, slow mobility, cycling) and the hospitality system
- iv. Enhance the region, relaunching routes and itineraries with particular attention to local products and complementary sports activities;
- v. Strengthening the enhancement and promotion of Apulia's cultural heritage;
- vi. Improve the competitiveness of the Apulian traditional seaside industry by strengthening facilities and services and promoting "coastal tourism";
- vii. Enhance ICT providing support to tourists and local operators;
- viii. Improve, extend and re-designing the existing marinas and ports or building new ones;
- ix. Boatbuilding development: the know-how, tradition and acquisition of new technologies make the local boat builders competitive in the national and international markets;
- x. Creating a development strategy of the nautical tourism;
- xi. Enhance the image of the Region: development of brands (destinations, food, eco-tourism);
- xii. Extend the Tourism season
- xiii. Exploit EU programming funds for the development of networks and public-private partnerships for the creation of quality tourism products
- xiv. Cooperation between the region and interested parties on planning and promoting the tourist destination of Puglia, artistic, cultural, nature and services
- xv. Incentives for participation to training activities specially ones dedicated to coastal and maritime tourism
- xvi. Exploitation of emerging markets

## Threats

- i. Environmental threats
- ii. Uncontrolled development of nautical tourism: concessions, occupation of the sea and the coastline.
- iii. High real-estate price
- iv. Poor coordination between stakeholders and administrative authorities
- v. Risk of identity loss
- vi. High competition with other EU countries with strong tourism tradition (Spain, Greece, Croazia, Mediterranean North Africa countries)
- vii. Degradation of sea front due to increased development
- viii. Difficulty for sme's to access private finance
- ix. Lack of conservation efforts by tourists or travellers damage the heritage

## 6.2 Region of Molise

Strengths	
<b>General</b>	<ul style="list-style-type: none"> <li>I. Good quality of the life</li> <li>II. Good level of conservation of the tangible and intangible cultural heritage and, more generally, of the ancient villages</li> <li>III. Traditional hospitality of local population</li> <li>IV. Historic town centers and attractions with great cultural, religious, architectural quality</li> <li>V. Access to EU funding sources</li> <li>VI. A website also in English on the coast (<a href="https://molisecoast.com/">https://molisecoast.com/</a>)</li> <li>VII. Variety of the offer (sea, hill, rural villages)</li> <li>VIII. Favorable climate characteristics</li> <li>IX. Important natural environment and quality local resources</li> <li>X. Generational transition</li> </ul>
<b>Nautical Sector</b>	<ul style="list-style-type: none"> <li>I. Three ports marinas</li> <li>II. Water quality</li> </ul>

Weaknesses
<ul style="list-style-type: none"> <li>I. Not competitive accommodation facilities system both in qualitative and quantitative terms</li> <li>II. Inadequate tourist information and reception system</li> <li>III. Insufficient organization of public transport</li> <li>IV. High seasonality of tourist demand</li> <li>V. Lack of analysis of the hotel and non-hotel accommodation sector</li> <li>VI. Lack of a coordinated image of the destination</li> <li>VII. Lack of specialized promotion/marketing strategies</li> <li>VIII. Limited presence of services related to leisure and tourism</li> <li>IX. Poor product enhancement</li> </ul>

## Opportunities

- I. Investment plan and consequent increase of the routes served by the Pescara airport and investment plan for the modernization of railway network
- II. Empowering new forms of tourism: wellness tourism; natural tourism; return tourism + mixing these forms with nautical tourism)
- III. "Molise does not exist"
- IV. Increasing tourist destinations by means of its quality products and services
- V. Enhance the region, relaunching routes and itineraries with particular attention to local products and complementary sports activities;
- VI. Enhance ICT providing support to tourists and local operators;
- VII. Boatbuilding development: the know-how, tradition and acquisition of new technologies make the local boat builders competitive in the national and international markets;
- VIII. Creating a development strategy of the nautical tourism
- IX. Extend the Tourism season
- X. Exploit EU programming funds for the development of networks and public-private partnerships for the creation of quality tourism products
- XI. Exploitation of emerging markets

## Threats

- I. Competition and competitive strengthening of other destinations
- II. Immigration and depopulation
- III. Legislative confusion and consequent difficulties in territorial and tourism governance
- IV. Poor coordination between stakeholders and administrative authorities
- V. Risk of identity loss
- VI. Difficulty for sme's to access private finance
- VII. Lack of conservation efforts by tourists or travellers damage the heritage

## 6.3 Albania

### Strengths

- I. Geographic positioning
- II. Natural environment – considered as an important attraction for NT
- III. Other cultural and heritage assets that may be complementary to the NT supply and product
- IV. Territory appropriate for development of Ports and other marinas

### Weaknesses

- I. Problems related to environment and pollution in the port areas
- II. Lack of tourist and marine appropriate infrastructure
- III. Short tourism season

### Opportunities

- I. Development of coastal planning in national territory and also territorial plans in municipality level, (PPVs) that have taken in consideration the development of sustainable tourism and including NT.
- II. More focus in financing in EU level in maritime economy and Maritime tourism, Nautical Tourism
- III. Raised investment of GoA in ports with aim of improving infrastructure for cruise and other components of NT
- IV. Legal initiatives for 0 tax for Sailing boats and other appropriate vehicles for NT

### Threats

- i. Competition in the area, especially from countries with developed NT
- ii. Lack of knowledge and information of tourists for incentives in Albania
- iii. Centralization of decision making

## 6.4 Montenegro

### STRENGTHS



- I. Natural beauty of the Adriatic coast;
- II. Rich cultural and historical heritage with world-renowned and protected locations;
- III. Maritime tradition;
- IV. Hospitality;
- V. Suitable climatic and maritime conditions;
- VI. Ecologically preserved underwater world;
- VII. Existing tourist infrastructure;
- VIII. Higher education in the field of tourism and maritime affairs;
- IX. Spatial possibilities for the construction of new nautical tourism ports;
- X. - Possibility of expanding existing ports.

## WEAKNESSES

- I. Insufficient capacity of nautical tourism marinas;
- II. Seasonal nature of nautical tourism port operations;
- III. Insufficient number of berths for mega yachts;
- IV. Lack of certain types of services;
- V. Low level of service quality;
- VI. Reconstruction of the coastal zone;
- VII. Insufficient development of traffic connections;
- VIII. Inadequate waste disposal and wastewater treatment;
- IX. Corruption activity;
- X. Offer based only on berth services, without additional content;
- XI. Untapped potential;
- XII. Insufficient number of quality staff.

## OPPORTUNITIES

- I. Increased demand for nautical tourism;
- II. Adoption of a strategy for the development of nautical tourism in Montenegro;
- III. Accession to the European Union;
- IV. Rich natural and cultural heritage;
- V. Increased demand for cruising tourism;
- VI. Easily accessible, close destinations;
- VII. Development of small shipbuilding;
- VIII. Extension of the season;
- IX. Montenegro is becoming a more popular tourist destination;
- X. Increasing the quality of the tourist offer;
- XI. Great potential for investments

## THREATS

- I. Political instability in the region;
- II. Reconstruction of the coast;
- III. Environmental pollution from ships;
- IV. Rapid development of other destinations;
- V. Inadequate privatization;
- VI. World security crises;
- VII. Uncontrolled development of nautical tourism;
- VIII. Inadequate legislation;
- IX. Occurrence of infectious diseases;
- X. Construction of new berths in competing countries;
- XI. Growth of competition in the Mediterranean countries;
- XII. Growth in the number of low-paying tourists.

## 7 Conclusions

### 7.1 Region of Puglia

Tourism has certainly produced satisfactory results in the Region in recent years, but these highlight the need for continued investment in the sector. This is required both in terms of financial resources, and also in terms of the Regional Governments commitment to define suitable development policies in view of significant potential which has yet to be realized. In a first general view, from what has been analyzed in this paper, it can be deduced that tourism has good prospects for further growth in both the short and medium-long term. At the basis of this deduction are the trends analyzed in previous studies of this REGLOPORTS project, which have

described a general growth of arrivals both domestic and international, also in this period influenced by the COVID pandemic.

## 7.2 Region of Molise

In the Region there are still potentials that are not adequately exploited, especially in terms of the competitive effort of the various segments: seaside and coastal, which, according to available estimates, absorbs 50% of the presence of the entire territory; nature and landscape (lakes, woods, environmental oases, parks); widespread rurality, history and culture (just think of the numerous examples of Romanesque art, the castles, the richness of the craft traditions of master organs, watchmakers and cabinet makers).

Further undoubted potential are represented by a favorable social climate, deriving from the absence of organized crime phenomena; a "quality of life" strongly linked to the values of tradition, nature and rurality that make the area particularly attractive for new entrepreneurial initiatives and a good propensity to invest in the local productive fabric.

Among the points of weakness emerges the difficulty of detecting data on tourist flows, which is extremely complex and articulated due to the phenomenon of the submerged tourism of a statistical type that refers to the presence at the structures not registered and, for this reason, not detected by official statistics; and of an economic type, which refers to the presence at official structures that are not reported voluntarily by the hotel owners. This phenomenon implies many difficulties in the definition of strategic guidelines and the related actions of enhancement and promotion of the territory.

## 7.3 Albania

It is important of the country to implement strategies for the tourism and nautical tourism development, which need to consider to attract also other segments that have more power of expenditure and that can be subject to destination loyalty strategies, while for the current segment that visit Albania, should be taken into account to develop word-of-mouth or buzz marketing strategies so tourists can be promoters of a positive image of this country.

Tourism continues to increase, thanks to the variety of tourism products present in territory and this is positive anyway, but the fact that this growth is not analyzed properly to understand the reasons behind, and that currently there are many weaknesses and threats led me to consider of a prior importance to establish and implement a strategy involving specially private operators in order to increase awareness of the importance in long term of this collaboration. The economic crisis all the world is facing today needs alternative and immediate solutions.

## 7.4 Montenegro

Montenegro possesses unique and excellent natural resources for nautical tourism development. On the other side, Montenegro as nautical tourism destination is not well developed and recognized. It is obvious that nautical tourism becomes more and more popular and day in day out there is greater number of people who are willing to experience such uniqueness. Unfortunately, their demands could not be met with current Montenegrin nautical tourism offer that can be defined as poor and low qualitative.

Montenegro should properly utilize its own nautical tourism resources and potentials, as well as opportunities regarding nautical tourism development. It is necessary to establish strong cooperation among governmental institutions, tourism and nautical specialists regarding nautical tourism development, but also strong financial support that can be provided through the public-private partnership.

## 8 Final Thoughts

In conclusion, taking into account what has been identified with the SWOT analysis, general evolution and characteristics of tourism as well as macro trends in tourism that make up the context of reference at a wide level, it will be tried to propose a "common" analysis for the two territories identifying the future prospects of tourism and a proposal of the appropriate strategic approaches to be pursued, by virtue of the elements characterizing the destination in question, for a competitive and sustainable development of tourism.

The analysis has identified that the territories enjoy various elements of attractiveness, which are strong points for the development of tourism, which can be emphasized and driven by as many opportunities given by the external environment. The tourist development in a competitive and sustainable key can also be hindered by some internal elements and other external threats to the destination, which, however, through careful preliminary analysis and constant monitoring can be partly resolved, or at least contained. This must be accompanied by a strategic planning of tourism in the territory that adopts a medium-long term vision through a systemic and collaborative approach of the actors involved, of which there are the premises.

The territories benefit from a rich historical, cultural, artistic and natural heritage not yet fully exploited. For example, a strategic line to be pursued for the development of tourism in this context, is represented by the integration of the nautical offer with the traditional cultural offer with material resources such as historical sites or museums and / or with other more active and experiential forms of enjoyment and that is an offer that enhances the resources present involving the whole territory with a systematic approach so as to transform the nautical tourism and not in a lever for territorial development, so the proposal to connect the areas of the coast with the rich hinterland of the resources mentioned above

It is important to enhance the areas that are most affected by seasonality and competition with other territories and therefore to relaunch these areas from a tourist point of view, promoting for example new forms of tourism based on the characteristics of the territory (sports tourism, green, food and wine), creating experiential products and trying to capture new targets of demand.

Therefore, it can be stated that the territory has good growth prospects from both traditional tourism and the nautical on, point of view, in the short and medium-long term, according to the principles of sustainability and competitiveness, considering the increasing number of actions and policies promoted by local and national governments in this sense. In a first synthesis, the strengthening of the strong points of the territory, such as the heterogeneity and abundance of attractions, and the effort to capture the opportunities given by external elements and phenomena, such as the growth of passenger traffic at the International Airport as regards the

region of Puglia, the modernization of nautical infrastructure and the use of technology, are identified as strategic lines to pursue for a competitive and sustainable development of tourism

For an effective medium-long term development it is also considered necessary to solve the weak points of the territory and limit or otherwise monitor the threats coming from outside, for example, through actions aimed at the seasonal adjustment of tourist flows, the prolongation of the average stay in the territory and promotion of awareness of the local community about the potential given by a sustainable and competitive tourism development.

It is considered strategic to implement throughout the territory a more and more experiential tourist offers, able to involve tourists on more dimensions and raise the quality of the visit itself, not forgetting the importance of strategic cooperation between operators at local level and the awareness of the same, as well as the population and institutions for an effective effort to pursue competitiveness and sustainability of tourism.



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