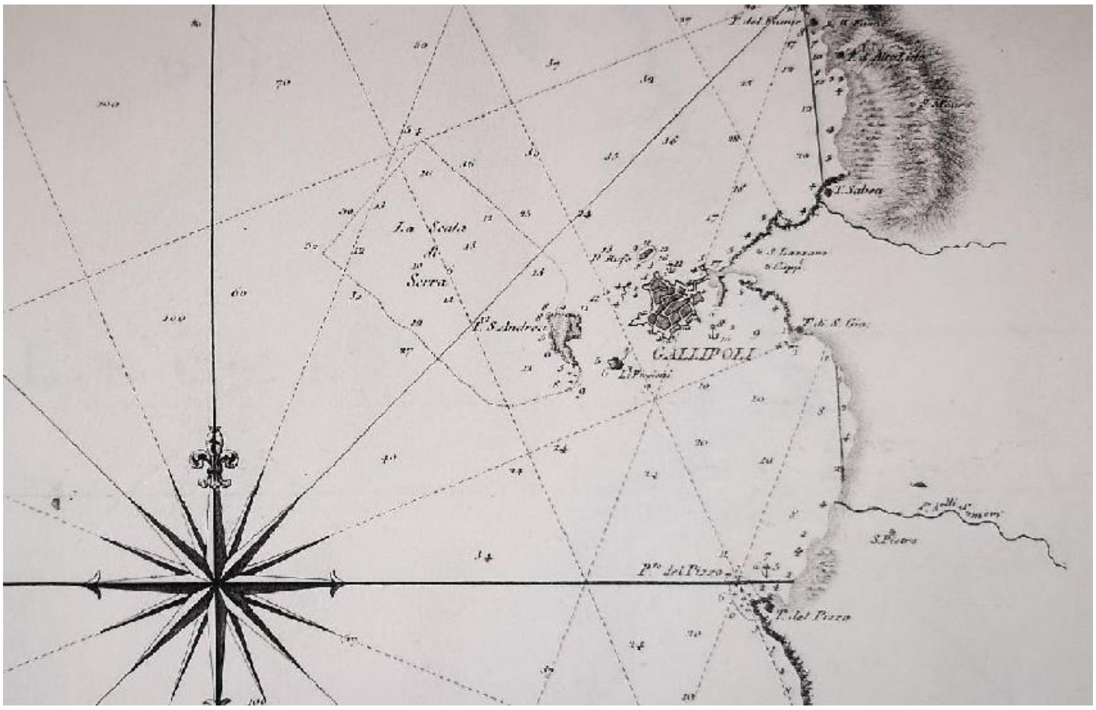

TOURISM DEVELOPMENT PLAN

STUDY SITES OF THE SOUTH APULIAN INTERVENTION AREA BASED ON THE REGLPORTS APPROACH

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SOMMARIO

1. Introduction

Puglia is the most maritime of the Italian peninsular regions, and not only for the exceptional extension of its coasts, which overlook two seas. With its major centers located mainly along the coast and most of the rest within 25 kilometers of the coastal strip, Puglia is a structurally maritime region, not only in the geographic sense of the term, but also in the economic and social one.

The relationship of confidence of the Apulians with the sea is expressed in their daily life, in the language, in the cuisine, in the expressions of art, placing itself at the center of the collective imagination and assuming the value of an anthropological figure.

If we frame Puglia in a broader context, on a smaller scale, the frequent definition of "pier in the Mediterranean" is anything but a metaphor. The narrow arm of the Adriatic Sea and then the Ionian Sea, rather than separating, unites Puglia like a bridge to the facing Balkans, with which it has shared events, economic interests, flows of men and cultures since the earliest times. From the sea came fortunes and misfortunes, and Puglia historically owes to the sea what today would be defined as a role of geopolitical relevance, which is confirmed in the present times by a defensive, commercial, logistic-infrastructural point of view.

But those 860 km of coastline are today, above all, the most important asset of the Apulian tourist offer, both in terms of attractiveness and in terms of access to the territory and connection to the turistic systems of the macro-region, representing one of the major points of strength of the Apulian economy in the perspective dictated by the Blue Economy.

For these reasons, after a long and economic crisis and the new pandemic crisis, the future of the region can only start from the sea, perhaps changing the perspective and looking at this region from the sea.

2. The regional tourist scenario

Puglia, among the Italian regions, and in particular among those of the south, was probably the most effective in pursuing and implementing an advanced tourism marketing strategy, starting from the identification of a shared vision and the construction of an own. clearly recognizable, brand, having as its aim a significant position in the vast and articulated panorama of the national and Mediterranean tourist offer and a positive repositioning in the international market.

The key to this success is to focus on the quality of life of the residents, not as an asset to be achieved and preserved by tourism, but as an acquired and recognized value that has to be shared with the tourist.

Tourism is not a phenomenon that overlaps with the Apulian life, but it is part of his daily life and the tourist is not a foreign subject, he is immediately part of a cohesive and responsible community, sharing his style and quality of life: this represents the authenticity of the experience. And this happen by overcoming the traditional limit of seasonality imposed by the worn message of the sun and the sea, already with the claim of the Strategic Plan for tourism in implementation: Puglia 365.

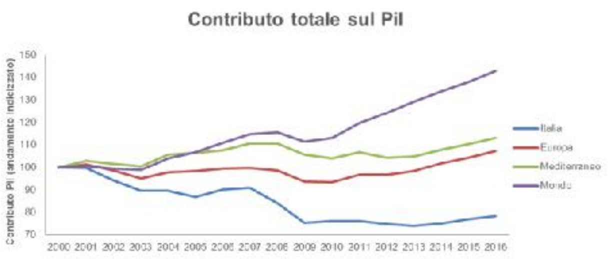
To achieve this results, a participatory process has been adopted which involved the social and economic stakeholders of the territories, in which were deployed all the assets of the many "Apulia", the extraordinary heritage of cultural and archaeological heritage, but also the equally exceptional religious and spiritual heritage, the landscape, the social dimension of the hinterland, the rural development, the slow mobility and integration with agri-food excellence.

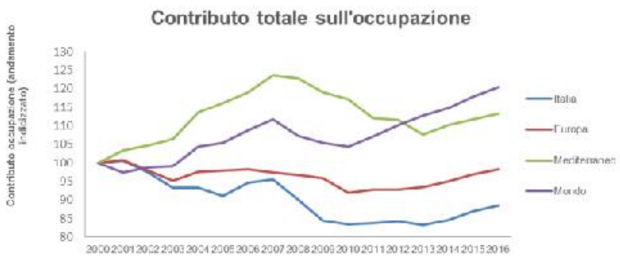
In Puglia we reasonably speak of tourism of the cultural landscape because this region has adopted a statutory and identity document which is the foundation of the Regional Territorial Landscape Plan (PPTR), which is the matrix for every planning and programming action, always starting from the invariant of its widespread historical, cultural and environmental heritage and in strict coherence with it.

The correct shared combination of these resources allows the creation of diversified and innovative tourist products and itineraries, to seasonally adjust and attract more national and foreign incoming, taking care of the proximity tourism that has taken on a decisive role with the pandemic situation.

2.1 Economic and qualitative indicators

2.1.1 The economic impact of tourism in the world





Fonte: *WTTC (World Travel and Tourism Council).*

2.1.2 The economic impact of tourism in Puglia

Economic indicators

The centrality of the tourism sector in the regional economy can now be summarized in three data:

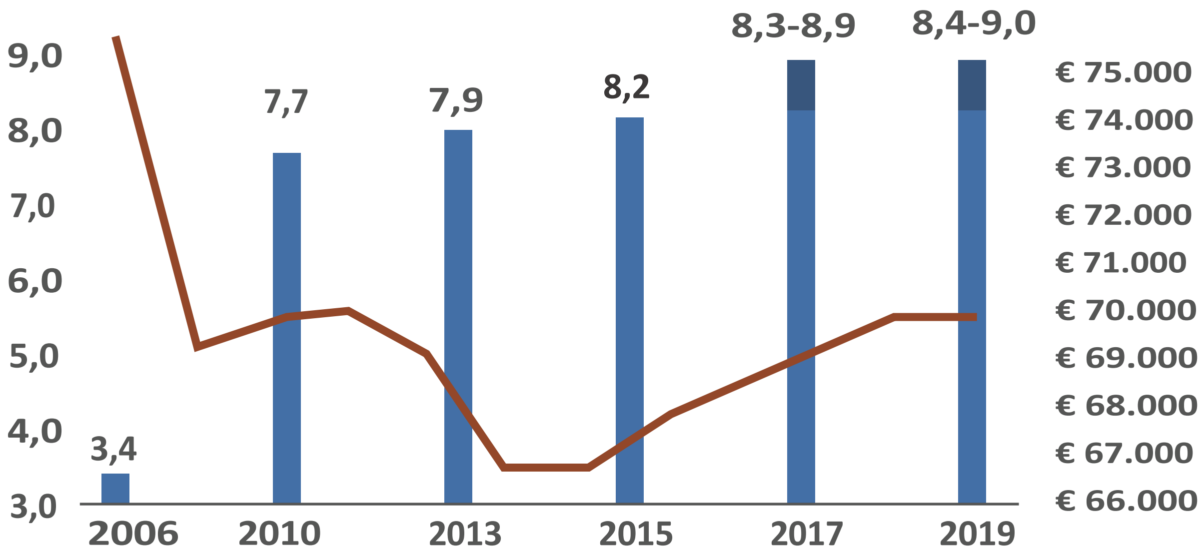
- Tourism in Puglia has an impact of 6.5 billion on final consumption (12.3% of total consumption).

- 9 billion in terms of added value (13.6% of the total).

- 135,000 employees (15.4% of the total) directly and indirectly involved in the tourism chain made up of 52,000 companies (38% of the total)

According to Bank of Italy, international tourist spending in Puglia increased by + 3% from January to September 2019.

The incidence of the tourism GDP

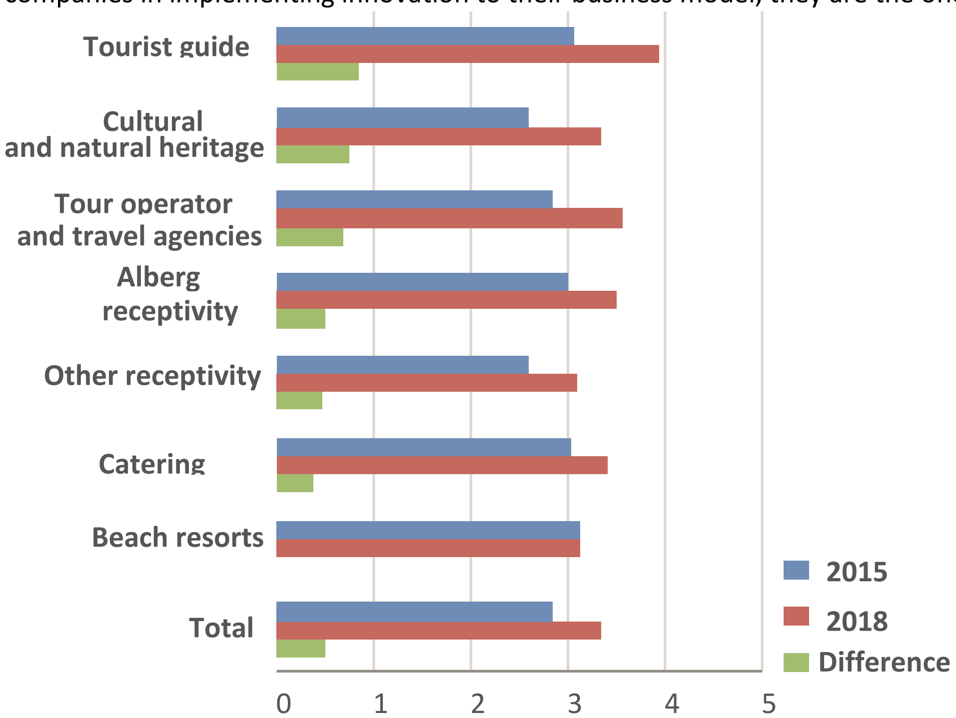


Source: Ca 'Foscari, The economic impact of tourism in Puglia
IPRES elaborations and estimates on ISTAT data, Pugliapromozione Regional Tourist Agency

Incidence of tourism on the GDP of the Puglia Region (left axis)
GDP at linked market prices-values (millions of euros). Reference year 2010. (right axis)

Il fatturato delle imprese

The companies declare that they have recorded positive economic performances in the 2015-18 period. The three sectors with the best results in company turnover are tourist guides, companies dealing with cultural heritage and naturalistic areas, tour operators and travel agencies. These are also the most attentive companies in implementing innovation to their business model, they are the ones that get the best results.



Fonte: Ca' Foscari, L'impatto economico del turismo in Puglia

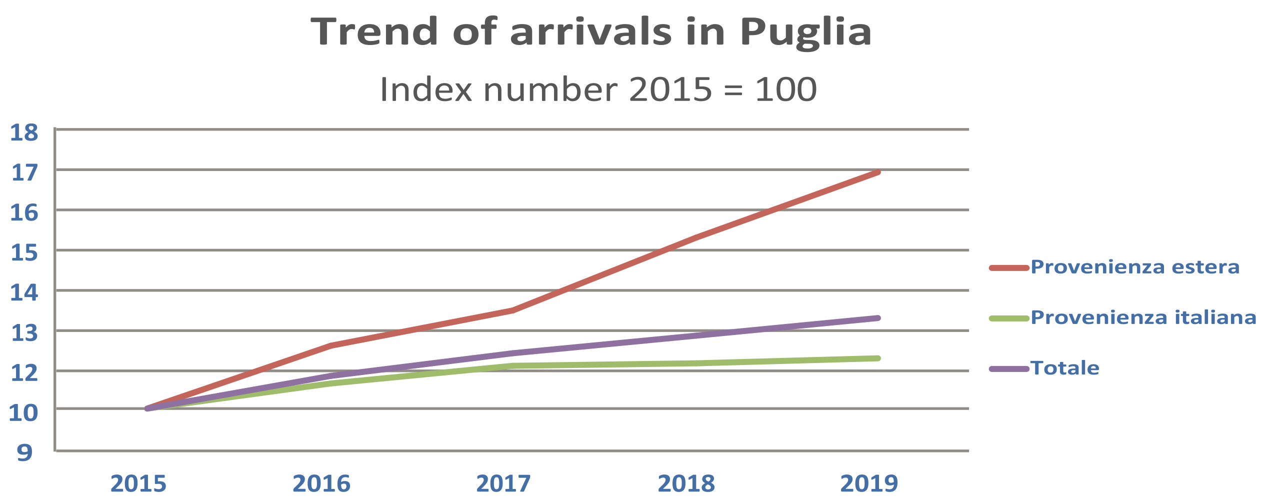
The tourist tax

The municipalities that apply the tax in 2019 are 33, 12.7% of the total (258):

Lecce (13): Lecce, Gallipoli, Ugento, Salve, Otranto, Melendugno, Porto Cesareo, Nardò, Castrignano del Capo, Santa Cesarea Terme, Patù, Giurdignano and Minervino di Lecce.
Foggia (8): Lesina, Manfredonia, San Giovanni Rotondo, Vieste, Peschici, Mattinata, Rodi Garganico and Vico del Gargano.
Bari (4): Alberobello, Castellana Grotte, Monopoli and Polignano.
Taranto (3): Castellaneta, Ginosa and Martina Franca.
Brindisi (4): Brindisi, Carovigno, Fasano and Ostuni.
BAT (1): Margherita of Savoy

The overall revenues have been estimated at around 14 million euros. The municipality that enjoys the highest average income is Vieste with 1.5 million euros, followed by three municipalities in Salento, namely Otranto with 1.2 million euros, Lecce with 1.1 million euros and Ugento with 1.1 million. EUR.

2.1.3 Flows, territorial distribution, positioning



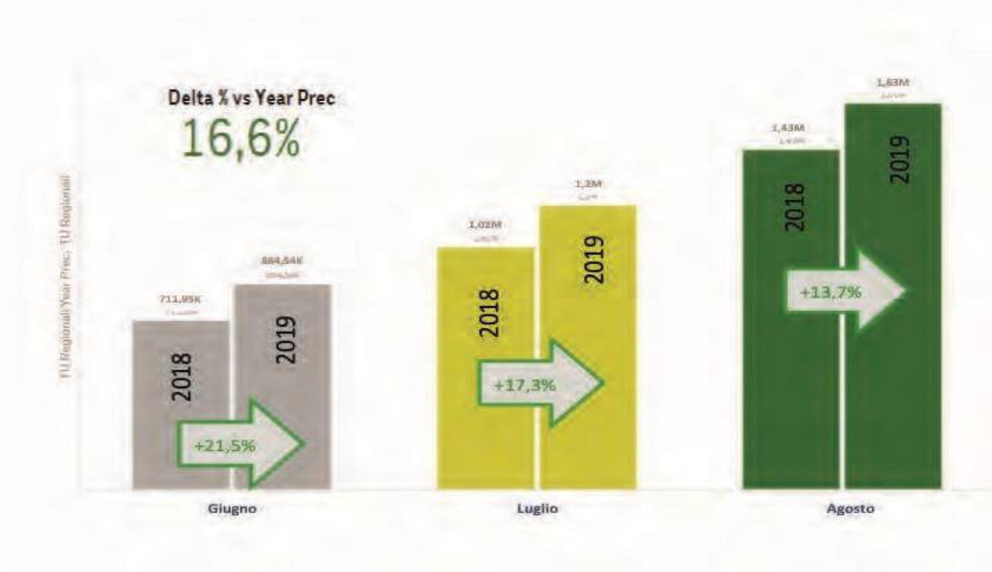
*Source: * Regional Tourist Observatory. The ISTAT 2019 data, provisional and partial, were collected on approximately 90% of the beds in the region and respect the statistical significance. These are the data communicated directly by 85% of the referents of the approximately 7,900 accommodation facilities in the region through SPOT (Puglia System for the Tourist Observatory). The values reported in this document, referring to February 1, 2020, may be subject to changes at the end of the completion of the missing entries.*

4.2 million arrivals (+ 4% compared to 2018)
15.5 million visitors (+ 2%)
1.2 million arrivals from abroad (+ 11.5%)
3.8 million international overnight stays (+ 8%)
3 million domestic arrivals (+ 1%)
11 million Italian overnight stays (+ 0.1%)
3.7 nights of average stay

From 2015 to 2019, international incoming grew by + 60% (overnight stays + 44%) and complex arrivals (Italian + foreign) by + 23%. Total overnight stays increased by + 15%.

Total tourists in Puglia according to the Big data TIM - Summer 2019

Observing the overall trend that compares the data collected, through the analysis of telephone cells, in summer 2019 compared to 2018 there was an increase of + 16.6% in the tourist presence throughout the region.
In detail, the monthly increase highlights a growing phenomenon in all months.
The month that recorded the most significant increase was June, with + 21.5%, followed by July with + 17.3% and by August, which shows the highest concentration of tourist presence and a more contained increase than in previous months. but very positive (+ 13.7%).



Internationalization

Internationalization rate % arrivals by origin (2015-2019)

In 2019, the internationalization rate reached 28% for arrivals and 25% for presences / overnight stays.
Compared to 2015, the internationalization rate of incoming has grown by 7 percentage points.
I dati di aeroporti di Puglia nel 2029

*Source: Regional Tourist Observatory. Processing on ISTAT / SPOT data. **

Puglia airports data 2019

Bari

International flights: 2.4 million passengers (+ 17% compared to 2018) Domestic flights: 3 million (+ 4.5%)

Brindisi

International flights: 717 thousand passengers (+ 18%)

Domestic flights: 1.9 million (+ 6%)

Topo 10 destinations from Bari:

London Stansted, Budapest, Paris Beauvais, London Gatwick Munich, Bucharest Otopeni, Amsterdam, Wien, Krakow, Chaleroi

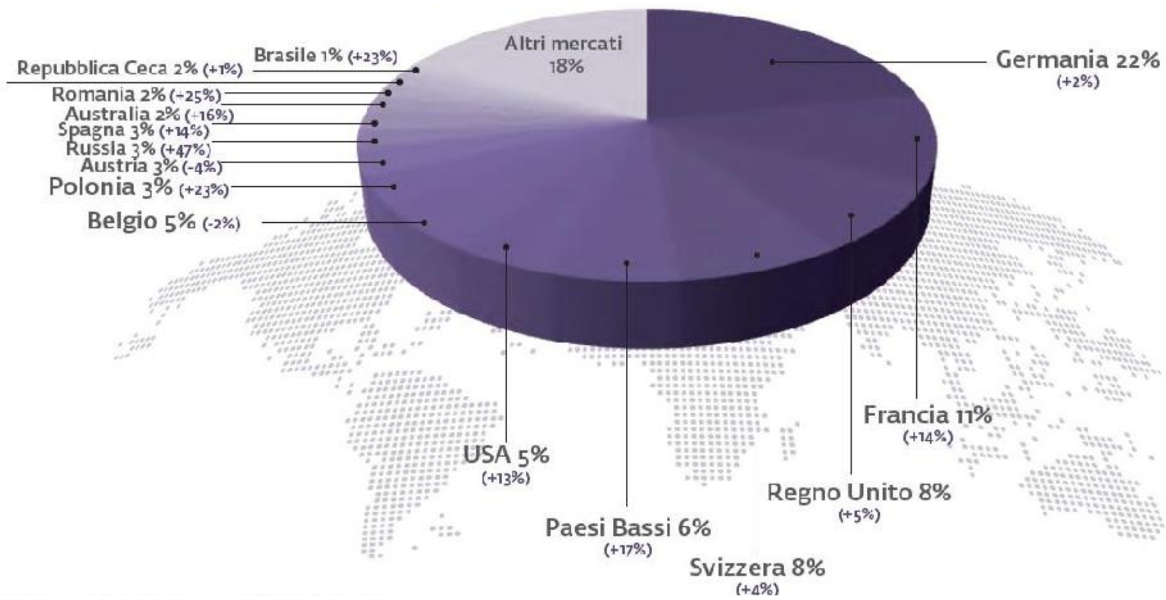
Top 10 destinations from Brindisi:

Geneve, Bordeaux, London Stansted, Zurich Basel, Chaleroi, Frankfurt, Berlin Tegel, Eindhoven, Stuttgart, Beauvais

International tourism. 1

Top 15 foreign markets in Puglia

% Share of overnight stays by market on the total in 2019



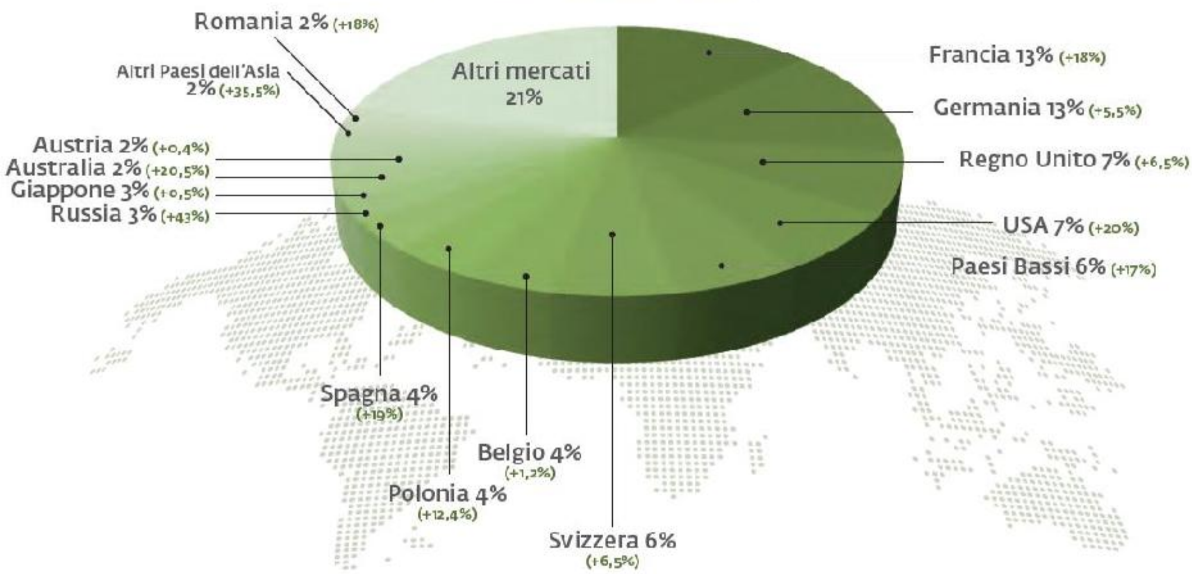
*Source: Regional Tourist Observatory. Processing on ISTAT / SPOT data. **

International tourism. 2

Top 15 foreign markets in Puglia

% Of arrivals per market on the total in 2019

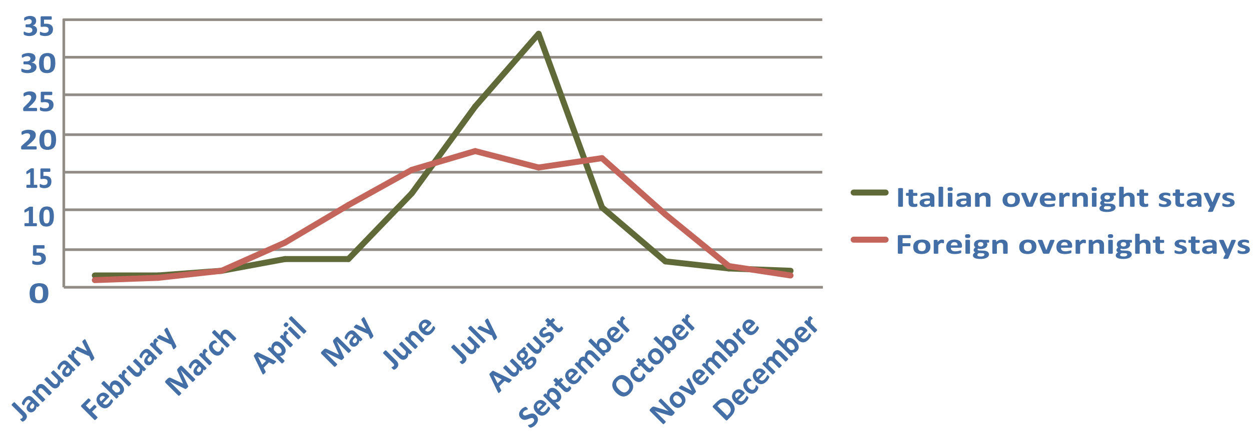
(% Change from 2018 to 2019)



*Source: Regional Tourist Observatory. Processing on ISTAT / SPOT data. **

The monthly trend

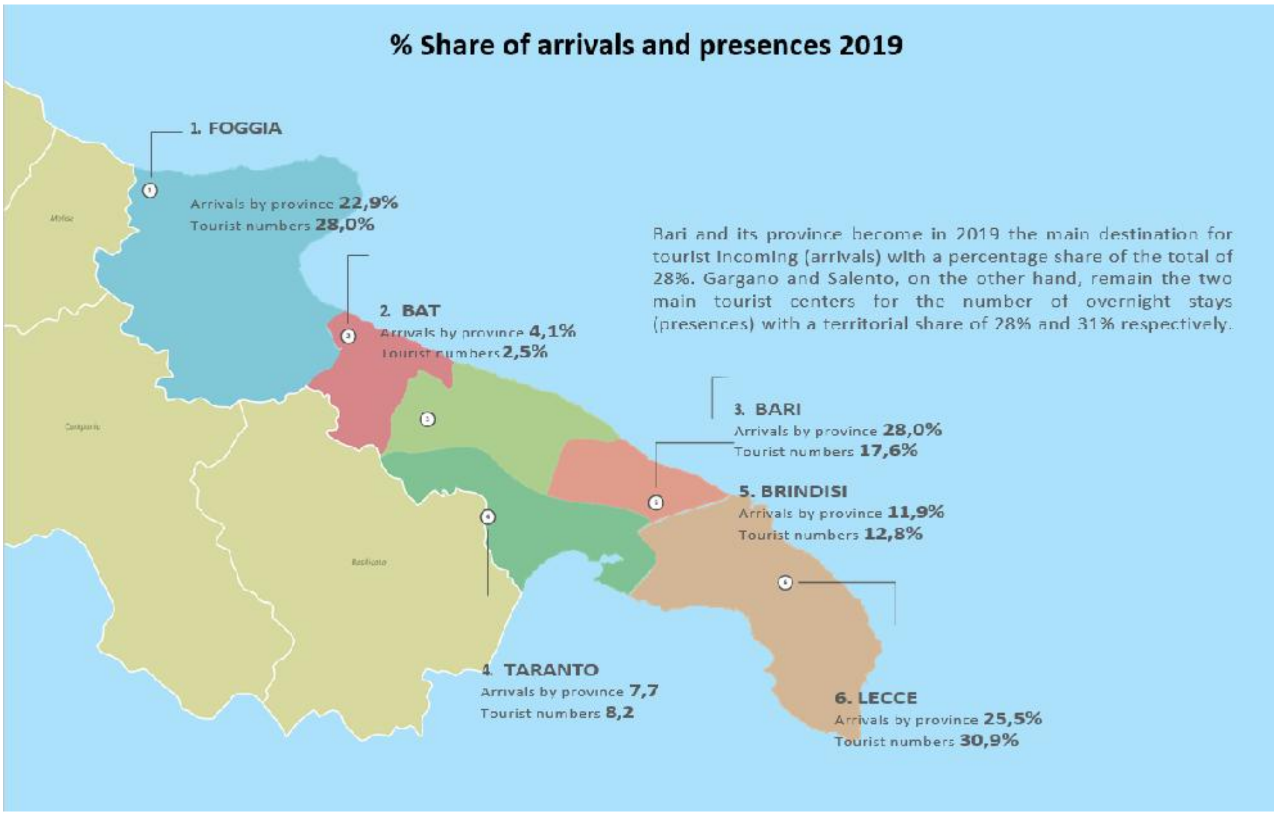
Monthly% of overnight stays in Puglia (Italy and abroad 2019)



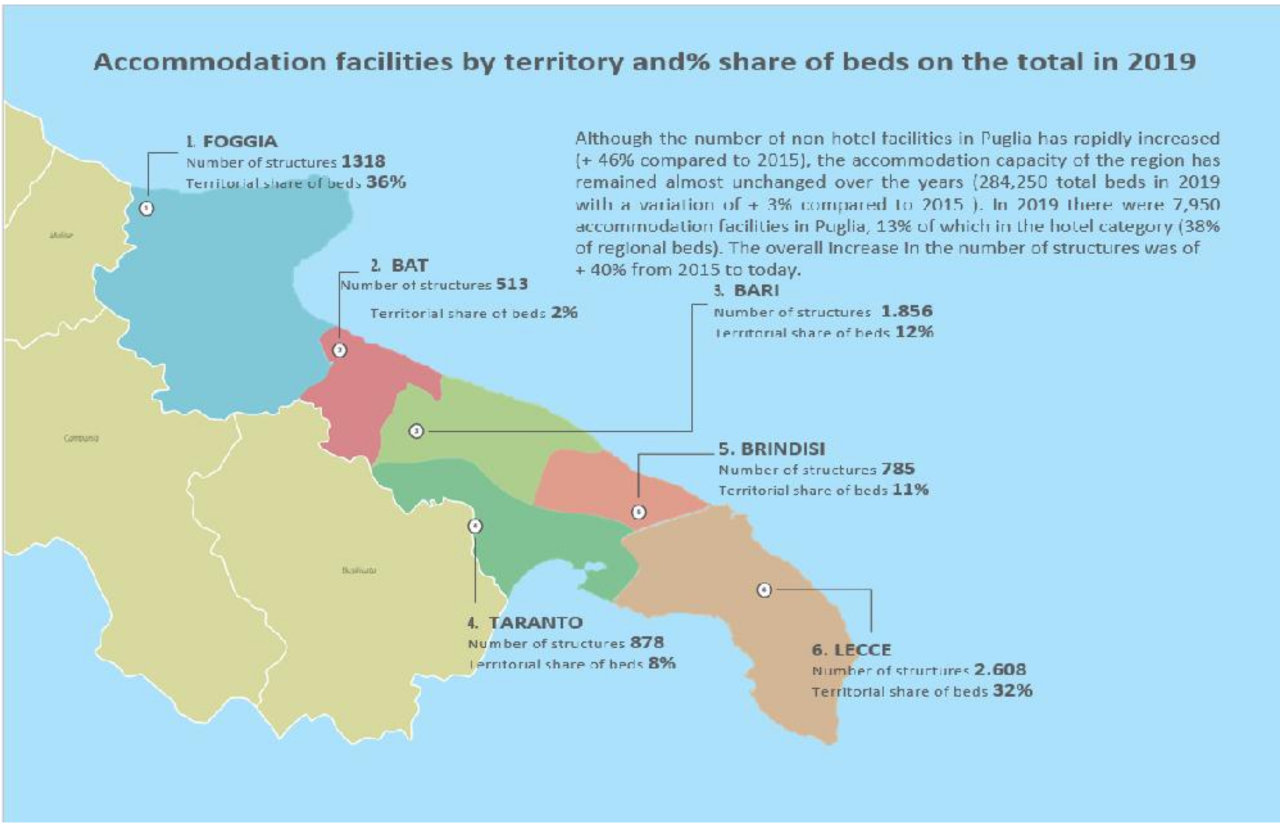
Foreigners choose Puglia for their stay especially in the months of July (18% of the annual total) and September (17%) showing a tendentially even-distributed trend in the months from May to October.

August (60,000 more arrivals, + 8% on 2018), October (+ 30,000, + 11%), April (+ 20,000, + 7%) and May (+ 18,000, + 5%) were the months with the most high.

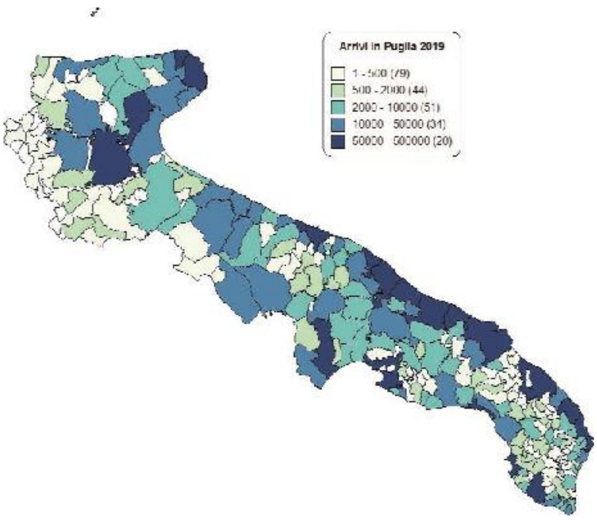
The territorial trend



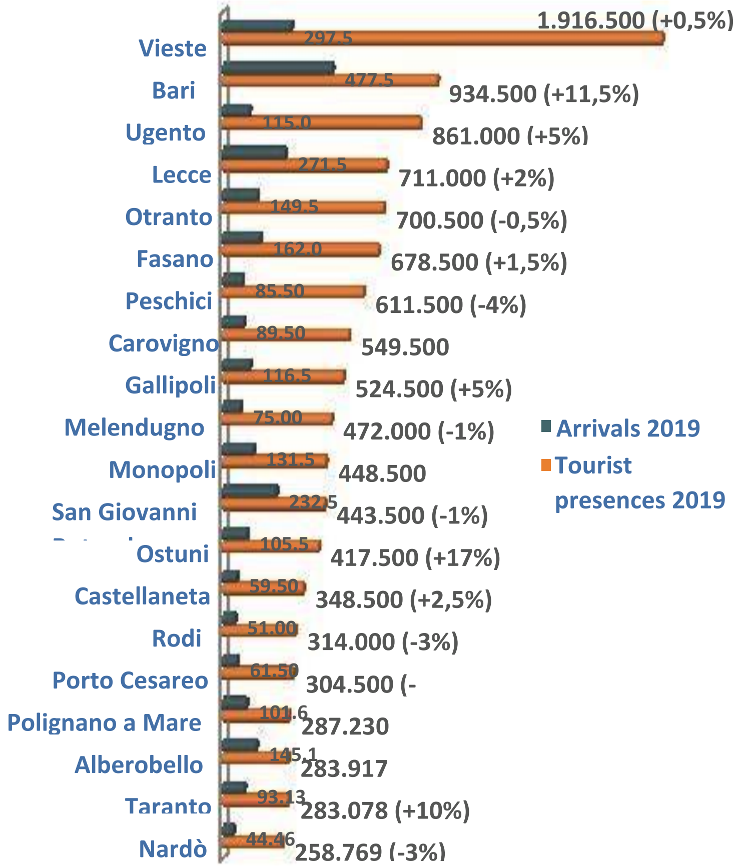
The accommodation offer



The municipal trend



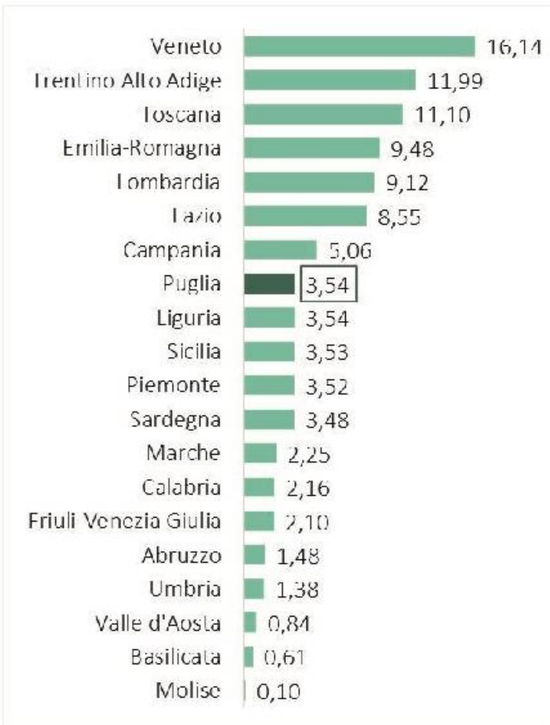
67% of incoming is concentrated in twenty municipalities in Puglia but tourist flows are also beginning to spread to minor inland destinations: Martina Franca Locorotondo, Castellana Grotte, the Dauni villages, etc.



The benchmark with the Italian regions

% Share of presences on the national total in 2018

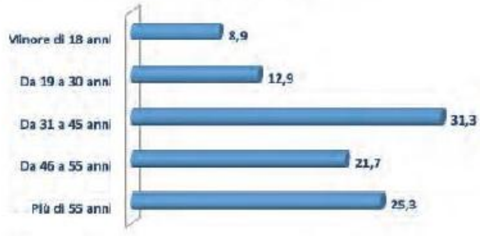
According to the latest Istat regional data (2018), Puglia was ranked eighth in terms of overall number of presences with a share of 3.54% of the national total. It passed Sardinia, Sicily, Liguria, Friuli-Venezia Giulia and Marche



2.1.4 Offer and motivational factors: appeal, opinion, customer satisfaction

Data collection in regional info points

Age of the tourists



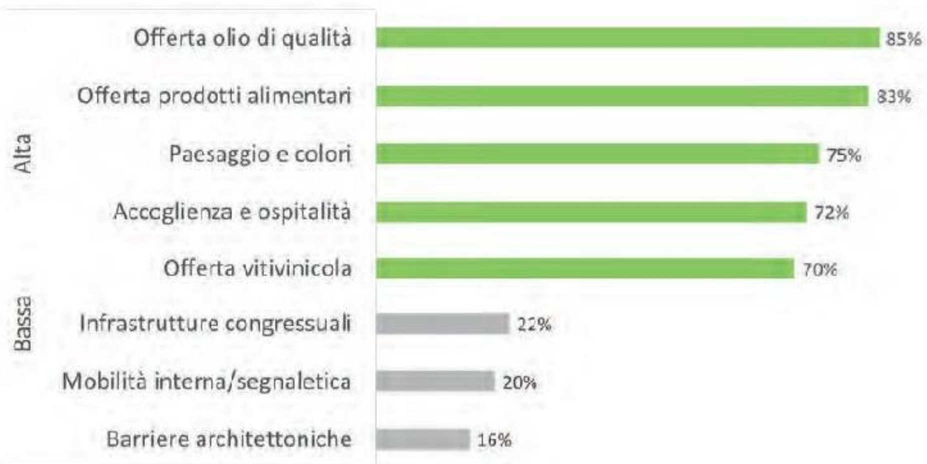
Booking channels

Source: The data derives from the approximately 20 thousand questionnaires administered to tourists / visitors in 2019_2020 who went to the Infopoints of the regional network

The relationship with the territory

% Share of the satisfaction of the regional offer compared to the expectations of the tourist / visitor, the opinion of tour operators

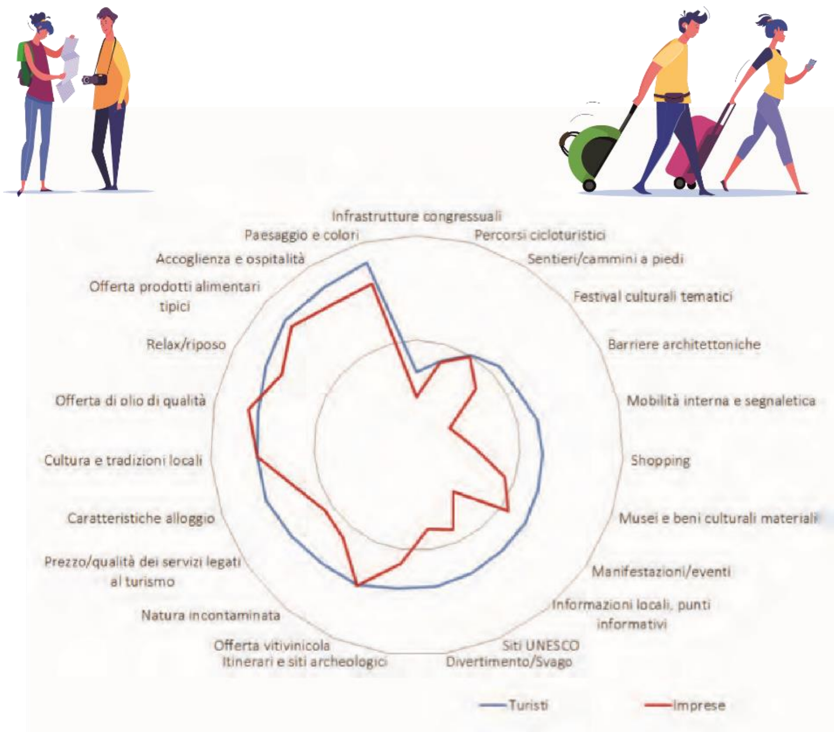
In your opinion, what is the capacity of the territory to satisfy the expectations and needs of tourists for the following areas? (Operators are asked to report the opinions of tourists known in the exercise of the activities)



Fonte: Ca' Foscari

The knowledge of tourists

The territory's ability to meet the needs of tourists. Perceptions in comparison.



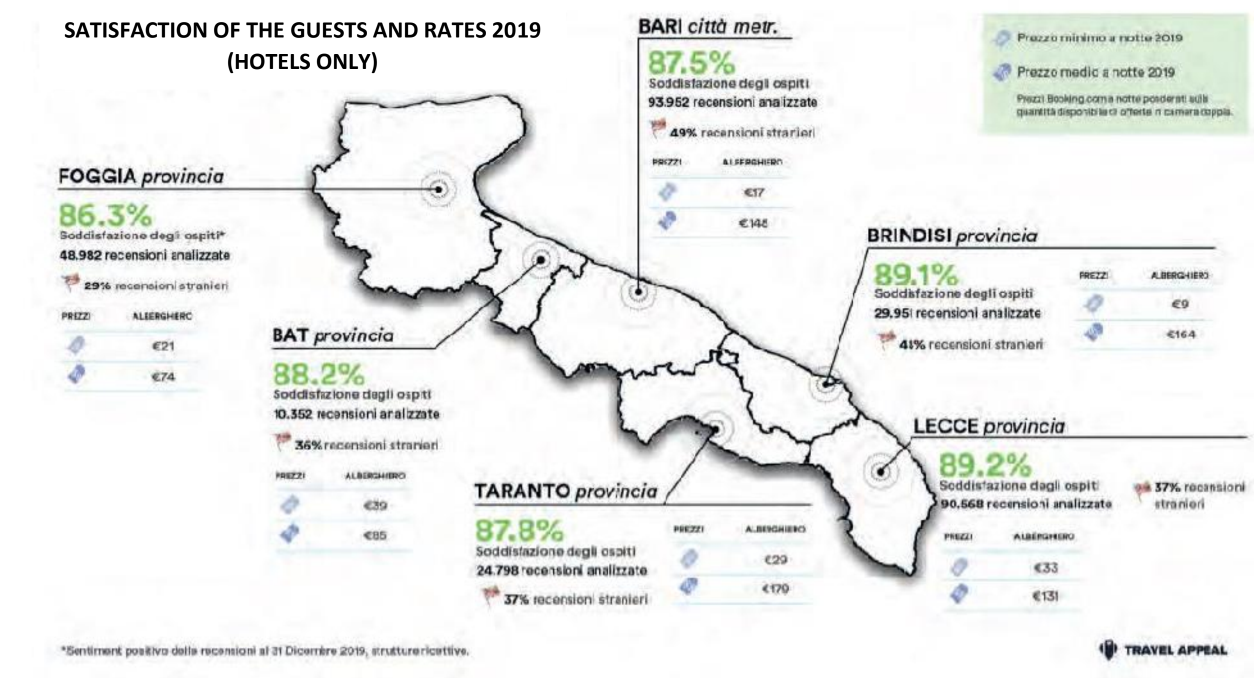
Fonte: Ca' Foscari

The companies demonstrate a fair knowledge of the tourists who visit Puglia. Many of the characteristics investigated have similar evaluations by businesses and tourists, but there is a tendency on the part of operators to underestimate the regional tourism system.

The factors with the highest evaluation by tourists (landscape and colors, welcome and hospitality, offer of typical food products) are also generally recognized by businesses.

The information points, internal mobility and signage are considered to be much worse than the average opinion of tourists, albeit low.

Travel appeal: the sentiment



2.1.5 The new tourism

Food and wine in Puglia

Food and wine experiences offered by tour operators, food and wine experiences offered by traditional intermediaries. Italian regions proposed and number of operators. Absolute and percentage values *. December 2017.

REGIONE	NUMERO	%
Toscana	86	66%
Veneto	71	54%
PUGLIA	68	52%
Campania	65	50%
Lazio	63	48%
Sicilia	61	47%
Emilia Romagna	60	46%
Piemonte	57	44%
Liguria	50	38%
Lombardia	48	37%
Umbria	46	35%
Trentino Alto Adige	33	25%
Marche	29	22%
Sardegna	26	20%
Friuli Venezia Giulia	25	19%
Valle d'Aosta	22	17%
Calabria	22	17%
Abruzzo	21	16%
Basilicata	20	15%
Molise	11	8%

Note:

* percentage values calculated on the total of operators who have in their catalog at least one food and wine theme proposal (n. = 131)
The operators considered are both Italian and foreign

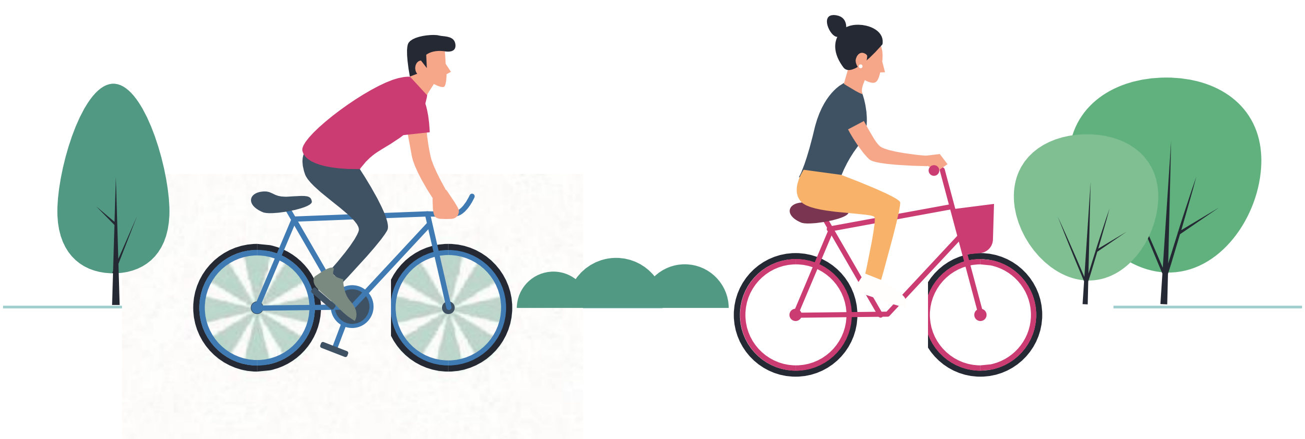
Source: our elaboration on a survey carried out on a panel of 236 operators (Tour Operators and Travel Agencies) who participated in the main trade fairs and workshops in 2017 (TTG, Good Workshop, BIT - Borsa Italiana del Turismo, BITEG - Borsa Italiana del Turismo Enogastronomico)

Summary framework

The Bike Economy and cycle tourism in Puglia

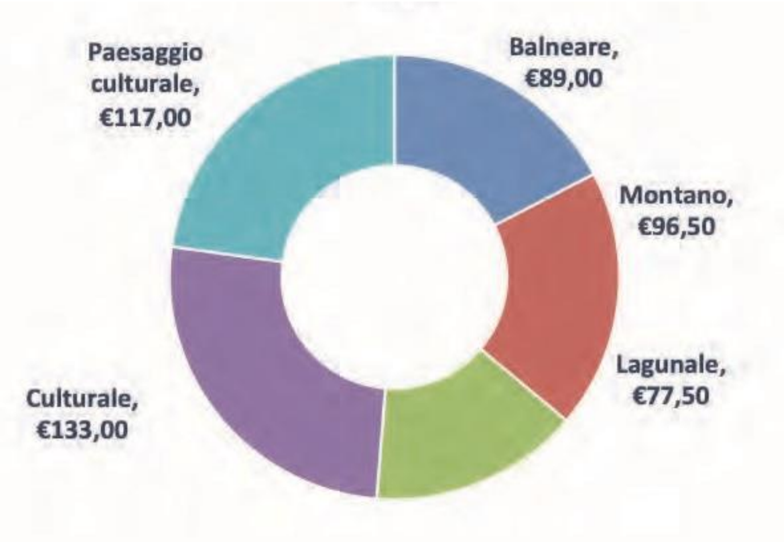
• Economic phenomenon of great importance: 500 billion in the EU alone (see European Cyclist Federation)
• Italy is the 17th European country for bicycle use
• 60% of Italians declare that they do not use the bicycle
• High economic impact on the local economy: for every euro spent, 32% impacts in the local area
• European citizens make 2.3 billion daily tourist excursions and 20.4 million overnight trips every year
• A bicycle tourist spends an average of 80 euros per day
• The potential induced for Italy has been estimated at approximately 3.2 billion euros (See Istat)
• High growth rates of the sector in Puglia
• Significant consistency, both in terms of the number of overnight stays developed and the added value generated in the area
• Increasing number of local tour operators that are born and national / international tour operators that sell Puglia bikes
• Increasing number of “Puglia” packages sold
• Increasing variety of the proposed itineraries
• Exponentially growing turnover of local companies that sell "Puglia"
• Increasing number of Apulian hotels that close allotment contracts with tour operators specializing in cycle tourism.

The Puglia Region in its PRT has dedicated great attention and resources to tourist cycling, in particular with the CY.RO.N.MED project. (Cycle Route Network of the Mediterranean - Mediterranean cycle network), financed with Interreg IIIB ArchiMed 2000-2006 funds, with which the regional sections of the national cycle routes of the Bicitalia network and those of the trans-European EuroVelo, which cross the regional territory. Specifically: a) Adriatic Cycle Route (Trieste - Santa Maria di Leuca) - Itinerary no. 6 BicItalia; b) Ciclovia dei Borboni (Bari-Naples) - Itinerary no. 10 BicItalia; c) Cycle path of the Apennines (Colle di Cadibona - Reggio Calabria) - Itinerary 11 of BicItalia with variants: Gargano and Apulian aqueduct cycle path); d) Ciclovia dei tre Mari (Otranto-Sapri) - Itinerary 14 BicItalia; e) Pilgrims Cycle Route (London-Rome-Brindisi) - Itinerary no. 5 EuroVelo (3 Bicitalia). A further important initiative was that carried out by AQP with the construction of the Aqueduct Cycle Route, one of the most evocative in Italy.



Cultural tourism

Average spend by type of trips presence



Cultural and art tourism represents a significant share of the Italian tourist demand which was the main travel motivation, exceeding half of the arrivals. Therefore, cultural tourism destinations (51.7% of the total) have exceeded, in terms of arrivals, the seaside data (21%), both because they lend themselves more to a short break holiday, and because visitors are more uniformly distributed throughout the year. The expenses for the cultural holiday are growing in 2017, each cultural tourist has spent an average of € 133.00 per day, while an average seaside tourist has spent € 89.00.

Top of mind of cultural tourism in Apulia

Top of mind attractors

2.2 Tourism trends

2.2.1 Global trends

The number of people traveling has grown enormously in the last few decades, as we can see from the analysis of the UNWTO and Wttc data. Tourism has progressively transformed itself from an elitist phenomenon into a form of widespread and mass action (70s / 80s), involving ever wider and more differentiated sections of the world population. The quantitative increase in the tourist movement was accompanied by the expansion of the variety and variability of consumption behavior. The multiplication of low-cost routes, the self-care and the search for physical and psychological well-being, the wide penetration of smartphones (mobile first) which has amplified the possibility of accessing content (always connected), and the growing importance of web and social networks in guiding choices, are some of the great changes that are revolutionizing the way travel is experienced. Among the other megatrends of world tourism on which it will be appropriate to start a reflection in terms of promotion and development strategy, it is worth mentioning:

1) The increase in short breaks on the short-medium range: tourist flows are growing, but the periods of use are decreasing. A trend that is now generalized: people travel more than in the past, but they do it for shorter periods.

2) The multiplication of motivations to purchase and the diversification of consumption behaviors: an increasingly heterogeneous parterre of actors, both for countries of 3 Unicredit4tourism in collaboration with the Italian Touring Club: Report on tourism 2016. 15 origin and for social categories (elderly people, single women, millennials, medical tourism, etc.) is addressing the tourist offer in an increasingly less homogeneous and increasingly fragmented way.

3) The polarization of spending with trading-down and trading-up effects: in the future the demand for low-cost flights and travels will increase, but at the same time will increase also the demand for high-level accommodation. The number of rich people is increasing in the world, for example it is estimated that the number of Chinese millionaires will rise from 1.2 million to more than 2 million by 2019. For the new rich people in the world, travelling has become the new status symbol.

4) The growing desire for authenticity and uniqueness of the tourist experience: the holiday is no longer conceived and lived as a simple period of rest and relaxation, but as an experience of life and personal enrichment: tourism is increasingly experiential. 5) Greater attention to the environmental component and eco-sustainability of the travel: from this new sensitivity also arises the enhancement of non-traditional tourist destinations (rural tourism, green tourism in parks and nature reserves).

6) The key word for tourism development in the coming years will be "sustainability", for the World Tourism Organization this is a development that minimizes the environmental impact. According to the study "Walk on the wild side: estimating the global number magnitude of visits to protected areas", published by the team of researchers at Plos Biology, annual visits to protected areas of the planet have been quantified at 8 billion; the 80% of these visits relate to North America and Europe. It is estimated that these visits generate approximately $ 600 billion in direct spending and $ 250 billion in consumer surplus each year. The turnover of nature tourism in 2012 in Italy was calculated at € 11.3 billion.

7) Agritourism, an ever-expanding trend: almost 11 million visitors in Italy, of which 57% foreigners, and a growth rate of over 20% in the last five years. To explain the success of the agritourism - over 18,000 accommodations, with an increase in beds of 26% over the medium term - a series of factors must be considered: the desire to get in touch with the rural world, as opposed to the now dominant urban one; the presence of “strong” attractors (from the landscape to the artisan traditions and to the typical agri-food production); a “local” management, which makes the stay less standardized.

8) Bike tourism and adventure tourism are on the rise: according to the findings of the ENIT in 2015, cycle tourism generates an economic impact of 44 billion in Europe, with 2 million trips and 20 million overnight stays. In Italy it has a potential value of 3.2 billion and is growing at a steady pace. An estimate from the Fiab (Italian Federation of Bicycle Friends) calculates that a person who rides a bike for a day and stays overnight

is worth 80 euros.

9) The search for new destinations: within the classic destinations (for example, the sea and the mountains), unspoiled and unregulated places are sought. Increased interest in thematic trips and special stays.

10) The new tourist demand from the emerging middle class of the RDEs (Rapidly Developing Economies), that is the rapidly growing economies: China, India, Eastern and Central Europe.

11) Climate change: the overheating of the planet, following the increasing concentration of greenhouse gases in the atmosphere, is also a decisive factor for the travel and vacation sector because it influences the context conditions that can favor or slow down tourism: the drought , increasingly hot summers, mild and dry winters and the recurrence of exceptional phenomena.

12) International terrorism, no longer an isolated and sporadic phenomenon, limited to a "dangerous" area of the world but something extended to all the areas of the globe. If global tourism has not been affected immediately, something will likely change in the medium term: tourism could, for example, further accentuate its short-medium range character. In fact, already today, over 80% of international arrivals are intra-regional, then they concern movements in the same geographical area;

13) The crisis of the BRICs, which are experiencing a general setback with evident consequences also for tourism. In fact, in just a few years, some destinations have established themselves among the main generating countries of outgoing tourism, such as China, which has assumed the world leadership with 165 billion dollars of tourism spending abroad, Russia which is in fifth place with 50 billion, while Brazil is in tenth position (26 billion). India, on the other hand, is still a non-significant reality (25th place with almost 15 billion). The current scenario may change in the light of economic growth forecasts: the World Economic Outlook of the International Monetary Fund of January 2016 highlights the slowdown in China (the projections for 2016 are around + 6%, positive but far from those of previous years), while the forecasts are negative for Russia and Brazil (-1% and -3.5% respectively). The tourist consequences are not lacking: the still provisional UNWTO figures on spending abroad in 2015 already see a 30% drop for Russia and Brazil;

14) The Sharing Economy, which has asserted itself strongly in recent years, has found an excellent field of application in tourism: from Airbnb to Blablacar and others. The sharing economy is born in a difficult economic and employment context and it has been able to give new solutions to travelers, taking advantage of technological evolution.

15) The European population is aging and requires an increasingly targeted, evolved and innovative offer: European senior tourism will strongly increase. Eurostat estimates that in 2060 about 30% of EU residents will be over 65 (to date this segment covers only 18% of the total). Over 65s people love organized trips, culture and good food, they prefer safety, they are ready to leave even in low season and their stay lasts longer on average. Senior tourists are now more dynamic people and enjoy superior financial resources compared to previous generations.

2.2.2 Regional trends

The trends of 2020 according to Booking.com

The revenge of the lesser known destinations

• Travel to lesser known destinations will increase in 2020, helping to reduce mass tourism and protect the environment.

• 54% of travelers worldwide want to do their part to reduce overtourism (56% for the 18-25 age group).

• 51% would choose a lesser known destination but similar to the more well-known ones, if this had a lower environmental impact.

• 60% of travelers worldwide want to use a service (app / website) that recommends destinations where increased tourism could have a positive impact on the local community.

Technology take me away

• In 2020, travelers have entrusted the key aspects of their travel decision-making to technology even more resolutely. Technology will give “smart” advice and will allow you to find a myriad of new experiences.

• 59% of respondents want to use the surprise effect of technology to find completely new ones.

• 46% will use an app to find and book an activity in real time while on the go. 44% will use an app to plan in advance the activities to do once at their destination.

Slow tourism to the rescue

In 2020 FOMO (Fear Of Missing Out, i.e. the fear of missing something important or being cut off) and being always in a hurry will give way to slow travel. The very way of traveling will change:

• 48% of travelers intend to spend more time traveling, in order to reduce their environmental impact

• 61% will take a longer trip to enjoy the journey even more, starting from the landscape.

• 62% want to go on a trip where the means of transport used makes the experience truly unique. 56% of people don't mind taking longer to get to their destination, just to use a less common means of transport.

Pet Friendly Tourism

2020 will mark a turning point in the field of holidays designed especially for pets, since when it comes to choosing the destination of a trip, where to stay and what to do, the needs of pets will come before those of the owners.

The rush to book

In the new year, food will play a fundamental role in the choices of travelers in deciding which destination to visit, and there will be a real rush to book for the best restaurants. In fact, many will choose the destination for their trip based on the possibility of being able or not to book a table to savor a much desired gastronomic experience.

2.3 The 2015-2025 regional strategy

Tourism, with its approximately 10% incidence on regional GDP, is a key sector of the Apulian economy. The 2014/2020 programming allocated approximately sixty million euros to Apulian tourism, adopting an integrated governance capable of enhancing the opportunities and advantages of sectoral intersections and creating products / services aimed at enriching, diversifying and qualifying the tourist and cultural offer of the territorial areas. It has flanked and integrated within the Europe 2020 program the "Smart Puglia 2020" strategy, "Puglia Digital Agenda 2020" which traces the path of innovation and development that has to be followed to strengthen the regional digital system, to outline the prospective vision of current phase of regional planning, that proposes an ever closer integration of "transversal" policies for innovation, competitiveness, internationalization, with the "vertical" policies of the environment, transport, welfare and health, cultural heritage.

1) In the first place, through the research, a clear and incontrovertible fact emerged: “deseasonalization equals internationalization” (that is lengthening the classic Apulian tourist season). Therefore, the Apulian strategy must have this aim because the data show that Italian tourists are still concentrated in the months of July-August, while foreign tourists are those who naturally destagionalise our market.

2) This first observation is also followed by another one linked to the target of foreign tourists and their origin, and it emerged that the European market remains by far the most productive for our operators. The target of the so-called “gray panthers” stands out in this: people over 55/60 who live in countries that have a good welfare system, who have already visited Italy and who are preparing for group holidays in Puglia attracted by wellness and food-nature combination.

Key element of the strategy is linked to brand identity and more generally to the prospect of marketing and promotion of Puglia in the near future. Starting from the assumption that 65% of visitors choose their destination independently of traditional intermediaries (tour operators, travel agencies), it is clear that a "generalist" promotion must be pursued while trying to be consistent with the targets to be reached, the places reached from direct flights: a promotion therefore consistent with these areas.

4) A further important strategic element has been that one related to the relationship between product and promotion. The shared orientation appears to be to go towards "product clubs" to be structured through homogeneous clusters (for example art and culture, active tourism, etc.) within which an adequate number of product clubs of regional rank has to be defined. These specific products (for example bike tourism) will require ad hoc promotion with specialized fairs and defined promo-marketing.

5) Between product, promotion and strategy, also emerged the need to define Puglia through its territories without forgetting its specificities, connected to the brand. Salento, for example, in Italy is equal to the Puglia brand, sometimes overlapping it.

6) The theme of promo-marketing is a fundamental and strategic element. The strategy of Puglia aims at producing an advancement of the functions of the portal to favor promo-marketing without necessarily reaching “direct” sales. The orientation is to tie mature product clubs to an online promo-marketing system.

7) Still on the subject of the online, digital is decisive for a tourism enhancement strategy, which emerges as decisive in the light of the new category of prosumers (tourist consumers who become producers of information and "involuntary" promotion). In this sense, engagement appears to be a strategy to be pursued even in the long term.

8) A strategy that looks to the future cannot ignore the theme of innovation and technological innovation in the strict sense. This area will have to work a lot on the topic of big data and on consumer profiling. Furthermore, the need for tourist apps and cards that provide the traveler with information and suggestions both in the cultural and public transport fields emerges as transversal.

9) In a shared vision, the strategy that looks to 2025 cannot ignore the air connections that have been decisive in recent years to increase tourism in Puglia starting from the "putting on the map" that low cost flights (confirmed until 2019) have represented, and that will reasonably continue following the pandemic crisis. In this context has emerged the need to coordinate promotion and destinations reached by direct flights, while trying to overturn the logic: not only to promote where the Puglia Airports have direct connections, but to ask AdP to directly connect the target markets that emerged from the research and from the demand of the operators.

10) Still in the infrastructural field, the dimension linked to the bike tourism, the slow mobility and the new emergence of "paths" as a tourist product has emerged as strategic. European, national and regional investments are planned on this: Puglia is also the leading region in two projects of "paths" and aims to encourage urban policies towards a progressive pedestrianization of historic centers. Furthermore, it appears necessary to enhance the internal railways as experiential information points.

11) The strategy also involves overcoming the weaknesses that have emerged in particular in the field of the widespread hospitality. The shared perception is that Puglia is today a cool destination that has eroded market slices to competitive regions in the 80s and 90s such as Tuscany, Sardinia and Sicily; it has established itself with respect to North Africa (also for reasons of international contingency); it has a very dynamic private system and excellent promotion, but lags behind in the area of territorial policies dedicated to hospitality. For this reason it will be necessary to network the new local INFO POINTS, to promote a digital market place, as well as to provide the sector with trained workers who speaks foreign languages.

12) Besides the ability to communicate in foreign languages, training emerges as a strategic theme in all sectors. To be divided into four macro-areas: the world of university training, professional training, e-learning

and training with regional leadership, and the business world. A particular focus is training in the cultural field,in the food and wine heritage and typical Apulian specialties.

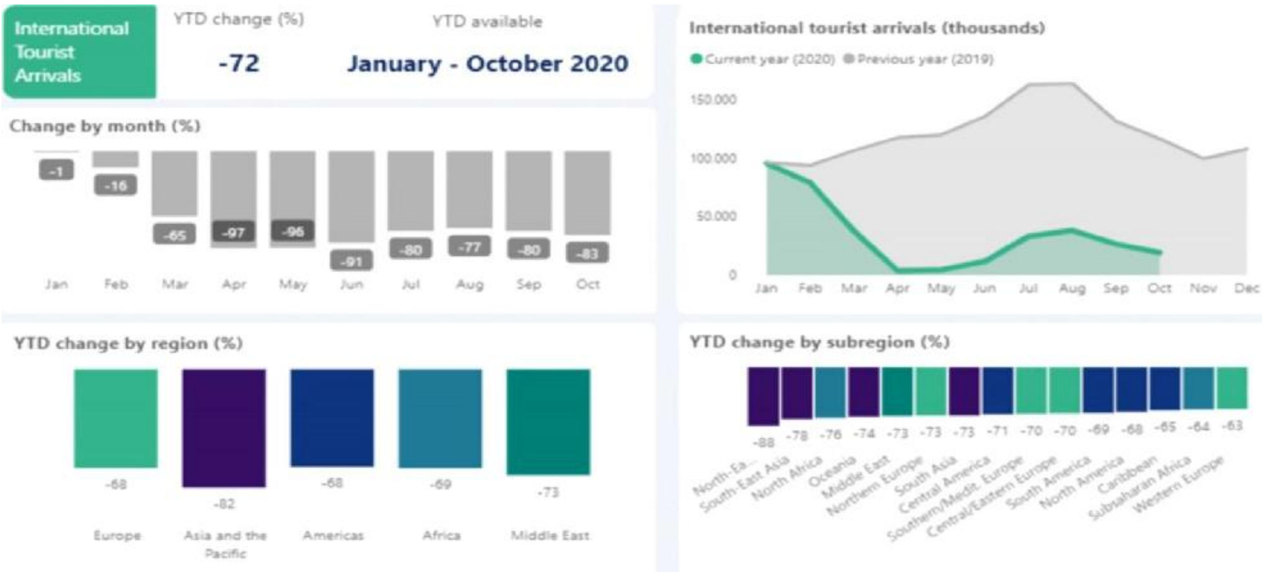
2.3.1 Focus about new tourism

Enhancing the beauty of our landscape means promoting all over the world itineraries of naturalistic-international significance, marine reserves (Tremiti and Torre Guaceto, to name a few), regional protected areas, nature reserves and related activities connected (cycling, trekking, birdwatching, diving, etc.).
For a tourism development based on the union of culture and territory, a subdivision into by-products will be necessary: archaeological heritage; historical-artistic heritage: creative industry and arts; “small heritage" or rural heritage, villages, small municipalities; immaterial, such as craftsmanship, rites and traditions, local knowledge; heritage of UNESCO sites with a synergistic design with Matera; cultural itineraries of Puglia Basilicata along the Lecce - Taranto - Matera axis, passing through Altamura and Gravina; religious; fortified sites; circuit of geosites and natural parks; Puglia Bridge over the Mediterranean; streets and paths of Puglia; knowledge and flavors (with food and wine tourism); events and club culture.
It will be necessary to create networks and alliances, thanks to a public-private planning and management model. Once the clusters have been defined, also the products will have to be defined, on which to create any product clubs, declined in relation to the various user targets: families, children, the disabled, seniors, young people, students, lgtb, petfriendly, foreign markets, various needs.
This system will allow the recognition of the offer, through product standards. It will be essential to create thematic tourist itineraries and destinations based on themes that will allow connections between territories.

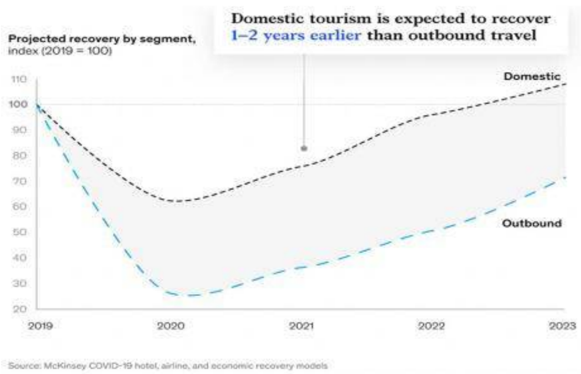
In particular, the "sea product" should not be understood as mere seaside tourism, but according to a theming and an evolution that responds to what international demand requires (heliotherapy, sports, recreational and cultural activities, etc.), but also “sea tourism”, that is product of enhancement of knowledge and flavors linked to the sea. The sea must become a cultural element, representing a "gate" for the enhancement and knowledge of the territory, including inland. Nautical tourism can be linked to ancient routes of Magna Graecia reused by travelers on the "Grand Tour", encouraging the "slow" fruition system of the territory.

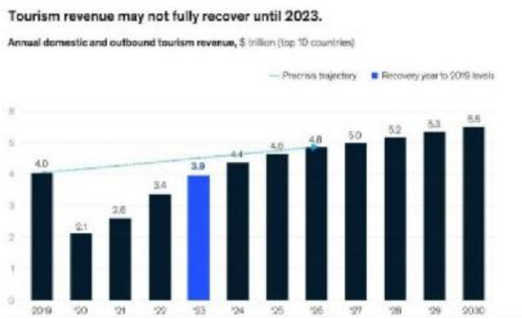
2.3.2 Focus abuot tourism at the time of Covid

At the beginning of 2020, the tourist perspective were excellent. The UNWTO World Tourism Barometer reports that in 2019 international tourist arrivals globally were 1.5 billion or 54 million more than in 2018 (+ 4%). It also estimated that in 2030, international tourist arrivals would amount to 1.9 billion, continuing the steady growth that the tourism industry was experiencing. For 2020, the UNWTO estimated further growth between 3 and 4%. The explosion of Covid-19, starting from January 2020, and its international spread in the following months, has radically altered and changed both the flows and the concept of international tourism. Considering the fact that travel restrictions around the world have changed existing tourism perspective from 2020 and likely until 2023, UNWTO estimates that international tourist arrivals globally shrank by 72% in the period from January-October 2020 compared to the same period of the previous year. And given the second wave, the losses will likely increase again in the following period.



The consequences of this can be seen in an increase in domestic tourism in 2020, mainly by road, and a tendency to book last minute travels, with a very reduced booking window. International tourism has experienced a drastic downsizing this year, due to limitations, fear of travel, and severely reduced air connectivity. All this has caused a radical change in the behavior of the demand in deciding where and how to spend holidays, but also the way of doing tourism in the destination. However, the new phase of vaccination immunization and the structural resilience of an ever rapidly changing sector outline a scenario in the short-medium term that through the phases of stagnation-oscillation-assimilation-recovery will provide a substantial recovery of the volumes prior to the phenomenon, but with a substantial change in the relationship between in-home tourism and travel to foreign destinations.





Fonte: McKingsey COVID-19 hotel, airline, and economic recovey models

2.4 SWOT analysis

	(S - strengths) The cards to play	(S - strengths) The cards to play
Products and attractors	Availability of a broad and differentiated product portfolio. Ability to address a wide range of targets, through the offer of personalized tourist experiences and specialized.	Absence of an attractor with World Wide Awareness, even in the presence of attractors that have the potential.
	Availability of attractors spread throughout the region (both in major tourist destinations and in areas with low or low flow).	
	Landscape not densely populated and strongly identifying (olive trees, dry stone walls, Mediterranean scrub).	Limited efficiency of purification systems (water supply, distribution and management systems that are not fully efficient). Presence of abandoned quarry sites, now illegal landfills. Risk of desertification. Air quality jeopardized by the presence of pollutants: PM10, ozone and nitrogen dioxide. Low percentage of separate waste collection. Limited efficiency of the integrated waste cycle.
	Strong appeal of sea / culture / food and wine / nature / traditions / events / products.	
	Wealth and variety of cultural, natural and archaeological heritage: three UNESCO sites, historic centers and 13 historic villages Orange Flag, Baroque, Romanesque, Federiciano, the Marta and the Grifoni of Ascoli Satriano	
	Strong appeal of the sea product, with over 800 km of coastline, two seas and a variety of landscapes / types of offer.	Coastal erosion phenomena.
	Great quality and strong appeal of the food and wine product.	
	The climate and the location. Geographical location that places the region as a privileged crossroads towards the Balkan area, Europe, the Mediterranean and the Adriatic-Ionian macro-region.	
	Price competitiveness despite competition from the Balkan regions.	Low usability of cultural heritage, and natural parks. Presence of architectural barriers that limit access to and use of tourist goods and services.
	Lifestyle: perfect mix between tradition and innovation. From the surveys of recent years it emerges that the Apulian archetype is linked to the values of welcome, hospitality, authenticity, but also dynamism and creativity.	Degradation of some stretches of the coast, some historic centers with great potential and inland areas. Poor care of free beaches.
	Increase in national and international routes at the Bari and Brindisi airports.	Insufficient enhancement of typical products that still little integrate with the tourist offer.
	Offer of events, especially musical (Notte della Taranta, Petruzzelli, Valle d'Itria Festival, other festivals).	
	Popular rites and traditions, festivals, Holy Week, combined with quality products in agriculture, craftsmanship and manufacturing.	Poor enhancement of cultural attractors (programming of exhibitions and events, storytelling activities).
Accessibility of the destination	Presence of excellence in the management of some cultural and natural attractions (eg: castles, museums, parks, ecomuseums)	
	Availability of "all season" products: rural, cultural, naturalistic, food and wine tourism, wedding, business, MICE.	Poor maintenance and revitalization of some parks.
	Good concentration of Parks and Nature Reserves: 2 National Parks (Gargano and Alta Murgia), 11 Regional Parks, 3 Marine Protected Areas, 17 State Reserves, 7 Regional Reserves.	
	Modern and quality airport system connected with the main European hubs (Rome, Milan, Frankfurt, London, Paris, Istanbul, etc.).	Territories with widespread high illegality (mafias, illegal activities, petty crime)

	Sistema ricettivo diffuso sul territorio regionale. Caratteristiche medio-piccole del sistema ricettivo con forte valorizzazione delle tipicità architettoniche (agriturismi, masserie, trulli).	Limitato (sotto il profilo numerico) orientamento al mercato degli operatori turistici.
	Creazione di nuovi sistemi di raccolta e diffusione di dati, statistiche e studi sul settore turistico.	Forte presenza del sommerso e del turismo nelle seconde case.
	Crescente specializzazione su segmenti di nicchia (lusso, matrimoni, golf, biketourism, ecc.).	Scarsa attenzione ai processi di salvaguardia ambientale da parte degli autoctoni.
	Rete capillare e rinnovata nel design e nei servizi della Rete di Accoglienza Turistica (circa 80 comuni).	Parcellizzazione delle competenze di governo del territorio in chiave turistica e basso sviluppo di sistemi integrati di offerta. Limitata presenza sul web delle imprese turistiche. Ridotta propensione alla cooperazione tra operatori dello stesso settore e fra operatori di settori diversi (agricoltura, servizi, trasporti, ristorazione, ospitalità).
		Insufficienza del sistema di trasporto pubblico locale: pluralità di soggetti gestori e mancata integrazione, livelli di inefficienza, difficoltà a reperire le informazioni, scarsa raggiungibilità di alcune destinazioni (aree interne, estremo nord ed estremo sud della regione).
	Migliorata governance della promozione turistica.	Insufficienza del sistema di trasporto privato locale: taxi, compagnie di bus, noleggi auto.
		Elevata presenza della fascia media di offerta ricettiva e assenza di sistemi di qualificazione moderni (familyhotels, guesthouse, boutique hotel, design hotel, ecc).
	Generale apertura delle comunità locali a prospettive di sviluppo turistiche, purché basate su principio di sostenibilità.	Sottostima del potenziale dello slow tourism nel generare reddito e occupazione.
	Buon livello di professionalità media degli operatori.	Scarsa conoscenza delle lingue straniere fra gli operatori e la popolazione. Mancanza di poli di eccellenza per la formazione dei manager del turismo. Ridotta propensione all'aggiornamento professionale e manageriale. Scarso utilizzo di strumenti di marketing e branding.
	Presenza di sistemi di offerta fortemente innovativi e differenziati (es: masserie didattiche, alberghi diffusi).	Scarsa integrazione e collaborazione tra le filiere culturali e turistiche
	Presenza su alcuni territori di positive esperienze di governance del patrimonio culturale ed ambientale (SAC).	Difetto generalizzato dei servizi turistici erogati dagli Enti Locali (informazione e accoglienza turistica, trasporto pubblico, taxi, segnaletica, parcheggi, etc).
	Prima regione italiana ad aver adottato la "carta dei beni culturali".	Scarsa disponibilità degli operatori turistici a collaborare e fare rete.
	Nascita di nuove start up turistiche su servizi specialistici veicolo di innovazione dei servizi e di nuova occupazione.	Mancanza della copertura a Banda Larga e del WI-Fi pubblico.
Tourist market	La Puglia rappresenta una nuova destinazione turistica da esplorare per numerosi turisti provenienti da mercati esteri.	Basso grado di internazionalizzazione e forte dipendenza dal mercato tedesco.
	L'incremento della notorietà del brand Puglia sui mercati "classici" europei (Germania, Francia, Regno Unito, Svizzera, Austria, Paesi Bassi).	Scarsa notorietà del brand sui mercati extra europei.
	Crescente attenzione dei media internazionali e nazionali di settore alla destinazione turistica Puglia.	Crisi territoriali che incidono negativamente sull'immagine (ad esempio Xilella, Ilva).
	Rinomanza di alcuni sotto-brand: Gargano, Salento, Valle d'Itria.	Limitati investimenti da parte di grandi operatori internazionali e grandi catene.
	L'aumento della rinomanza cinematografica e televisiva.	Immagine negativa del mezzogiorno d'Italia, fortemente legata a stereotipi non positivi.
	Grande crescita dei flussi (arrivi e presenze) di turismo internazionale: +8% il tasso medio di sviluppo annuo degli arrivi stranieri dal 2007.	L'identificazione della regione avviene attraverso pochi simboli stereotipati: i trulli, gli ulivi, il mare.
	Intenso incremento di attività esperienziali destinate agli opinion leader del turismo (media, blogger, T.O. e Agenzia di viaggi) attraverso educational tour ed altre attività specifiche per implementare la conoscenza del territorio e dei suoi luoghi più remoti.	Passaparola e gestione della reputazione: i feedback negativi dei visitatori vengono amplificati a livello mondiale dal web 2.0.
		Forte dipendenza dal turismo domestico e stagionale.

(O - Opportunities) A sea of opportunities	(O - Opportunities) A sea of opportunities
New financial envelope for programming 2014 - 2020 with more than 4 indirectly managed Structural Funds (provided by the EU to the Regions: ERDF, ESF, EAFRD, EMFF) and many others directly managed (provided directly by the European Community to citizens and businesses : Horizon 2020, LIFE, COSME, CREATIVE EUROPE, etc.).	Anthropogenic pressure (urbanization, unsustainable tourism, fires) exerted on "unprotected" agroforestry ecosystems. Desertification and climate change. Use of toxic chemicals and pollution of the soil.
Follow up of Matera Capital of Culture 2019.	:ontraction of domestic demand (of Italian tourists in Puglia) in particular in the business travel segment. Consumption crisis and reallocation of expenditure items. Fluctuation and unpredictability of the tourism market.
Centrality of Bari as a hub for transport and reception of tourist flows. Regional funding already available provided through	International smear campaigns linked to immigration control in the Mediterranean.
	el of companies (tax burden, management and labor costs, pricing policies). Bureaucracy.
Title II, which aims to encourage the development of the economic activities of tourism-hotel SMEs by facilitating access to credit.	Increased global competitiveness and the number of destinations
	ng destinations (the Balkans) and cheaper on prices.
Funding and regional start-ups for young tourism businesses and national contributions.	Polarization of tourism consumption with trading-up and trading-down effects (towards luxury or low cost tourism) as a consequence of a renewed increase in global social inequalities.
	tays and seasonality of flows: decongest the attraction process towards the low season months through the promotion of alternative products to the sea.
Well-rooted image of the Italian brand.	Limited degree of response from operators to demand-induced changes.
Gradual development of an international slow and eco-sustainable mobility system (bicycle and electric public transport).	Poor coordination between public and private entities, with the risk of delays in the construction of integrated networks. Persistence of the phenomena of irregular underground economy, speculation and double economy (increase in prices
Evolution of tourism consumption towards a greater demand for quality and typical products.	for tourists, especially foreigners).
Growing focus on the creation of bottom-up and integrated development strategies.	Possibility of increasing internal social hardship linked to the low level of employment. New migratory waves of the Apulian population, in particular young people in the 25-35 range, to foreign countries and devaluation of human capital.

3. Nautical tourism in Puglia

3.1 The state of the nautical tourism in Italy

The number of the recreational vessels

Table A offers summary data, by Region and Geographical distribution, relating to the number of pleasure craft registered in the Registers of the peripheral Maritime Offices and in those of the Civil Motorization (U.M.C.), together with indicators on the infrastructural endowment.

Table A - Nautical pleasure craft registered in the Registers of the Peripheral Maritime Offices and the Offices of the Civil Motorization (U.M.C.) as of 31/12/2019 and berths recorded as of 30/09/2019 - Data and indicators by Region and Geographical distribution

Region/ Geographical breakdown	Units registered at U.M.C.	Units registered at Maritime Offices	Total units registered at Maritime Offices and U.M.C.	% of units registered on the national total	Berths (**)	% of berths on the national total	Units registered for every 100 berths (crowding index)	Km of shoreline	Berths per km of coastline
Piemonte e Valle d'Aosta	3.757	-	3.757	3,9	-	-	-	-	-
Lombardia	6.810	-	6.810	7,1	-	-	-	-	-
Trentino Alto Adige(*)	64	-	64	0,1	-	-	-	-	-
Veneto	2.005	4.442	6.447	6,7	5.852	3,6	110,2	140	41,8
Friuli Venezia Giulia	12	3.881	3.893	4,1	17.530	10,8	22,2	94	186,5
Liguria	75	18.221	18.296	19,1	24.462	15,1	74,8	389	62,9
Emilia Romagna	565	3.946	4.511	4,7	5.405	3,3	83,5	122	44,3
Italia Settentrionale	**13.288**	**30.490**	**43.778**	**45,8**	**53.249**	**32,8**	**82,2**	**745**	**71,5**
Toscana	825	9.090	9.915	10,4	18.092	11,1	54,8	561	32,2
Umbria	237	-	237	0,2	-	-	-	-	-
Marche	158	2.880	3.038	3,2	5.312	3,3	57,2	188	28,3
Lazio	1.477	8.761	10.238	10,7	8.567	5,3	119,5	363	23,6
Italia Centrale	**2.697**	**20.731**	**23.428**	**24,5**	**31.971**	**19,7**	**73,3**	**1.112**	**28,8**
Abruzzo	251	602	853	0,9	2.699	1,7	31,6	138	19,6
Molise	0	62	62	0,1	587	0,4	10,6	36	16,3
Campania	6.093	8.923	15.016	15,7	15.998	9,8	93,9	522	30,6
Puglia e Basilicata Ionica	273	2.775	3.048	3,2	13.656	8,4	22,3	1.015	13,5
Calabria e Basilicata Tirrenica	609	1.052	1.661	1,7	5.490	3,4	30,3	796	6,9
Sardegna	363	2.599	2.962	3,1	20.028	12,3	14,8	1.851	10,8
Sicilia	18	4.785	4.803	5,0	18.777	11,6	25,6	1.473	12,7
Italia Meridionale e Insulare	**7.607**	**20.798**	**28.405**	**29,7**	**77.235**	**39,0**	**36,8**	**5.831**	**13,2**
Italia	**23.592**	**72.019**	**95.611**	**100,0**	**162.455**	**100,0**	**58,9**	**7.688**	**21,1**

(*) Autonomous Provinces of Trento and Bolzano.
(**) For 2019 the data relating to the infrastructures for the Nautical Pleasure are updated to 30 September.
Source: Ministry of Infrastructure and Transport, Port Authorities, Port Authorities, U.M.C.

Table A highlights, among other things:

- a general average of 58.9 pleasure craft registered in the registers for every 100 berths offered (the numerous small boats that do not have to register[1] are not included in the calculation of this statistic - See Ministerial Decree 29/07 / 08, n. 146) and 21.1 berths per kilometer of coastline;

1) To assess the significance of the indicators, it is necessary to consider that:

- the boats surveyed are the largest, those that generally need shelter along the coast throughout the year;
- the small units, not registered, can be pulled ashore and allocated in any garaging;
- the place left free by a boat or pleasure boat can be occupied by more than a small unit;
- the number of berths must be greater than the nautical park, in consideration of the need to accommodate pleasure craft from other countries in order to enhance and increase the offer of tourist facilities in the area.

- more numerous mooring points for pleasure craft in Southern Italy, where, however, the infrastructural equipment for pleasure boats shows significant differences compared to the North of the country. In particular, in 30/09/2019 the coasts of the Northern Regions offer nautical pleasure boating 71.5 berths per kilometer of coastline, compared to the corresponding averages of 28.8 and 13.2 berths calculated respectively for the coasts of Central Italy and Southern Italy. The maximum, in the North, is observed in correspondence with Friuli Venezia Giulia (186.5). In the South, on the other hand, the minimum of this ratio is found in "Calabria and Basilicata Tirrenica" (6.9);
- high regional crowding rates (number of units registered per 100 berths) in Lazio, Veneto and Campania, with a maximum (equal to 119.5) for the Lazio coast;
- Liguria, Tuscany, Lazio and Campania are the Regions with the highest number of registered vessels, with a maximum value, in Liguria, of 18,296 units;
- how, with the exception of Lazio, the Italian coastal regions have a greater number of berths than the boats registered with the Peripheral Maritime Offices and how, in particular, Puglia, Calabria, Sicily and Sardinia, whose coasts absorb approximately two thirds of the total length of the Italian coasts, offer a number of mooring points considerably higher than that of pleasure craft actually in the Region; these data also highlight an infrastructural structure, especially in the South, intended to meet the high demand for berths for pleasure craft coming, in the summer months, from other Regions or from abroad.

The following Table B, which illustrates the composition of the recreational fleet registered in the Peripheral Maritime Offices only, by vessel length class, also highlights:
- how 39.2% of the boats registered belong to the "up to 10 meters" class, 60.5% to the central length class ("from 10.01 to 24 meters") and only 0.3% to the higher class of length ("over 24 meters");
- a significantly higher number of berths, again compared to the registered boats, as regards pleasure craft with a length of less than 10 meters and more than 24 meters; in this regard, it is recalled that the mooring points for small boats can also be used to satisfy part of the mooring demand of the many thousands of pleasure craft without registration obligation;
- a fairly satisfactory situation with regard to the overall existing infrastructural endowment, with a mooring offer such as to satisfy the mooring demands even from a considerable number of foreign vessels.

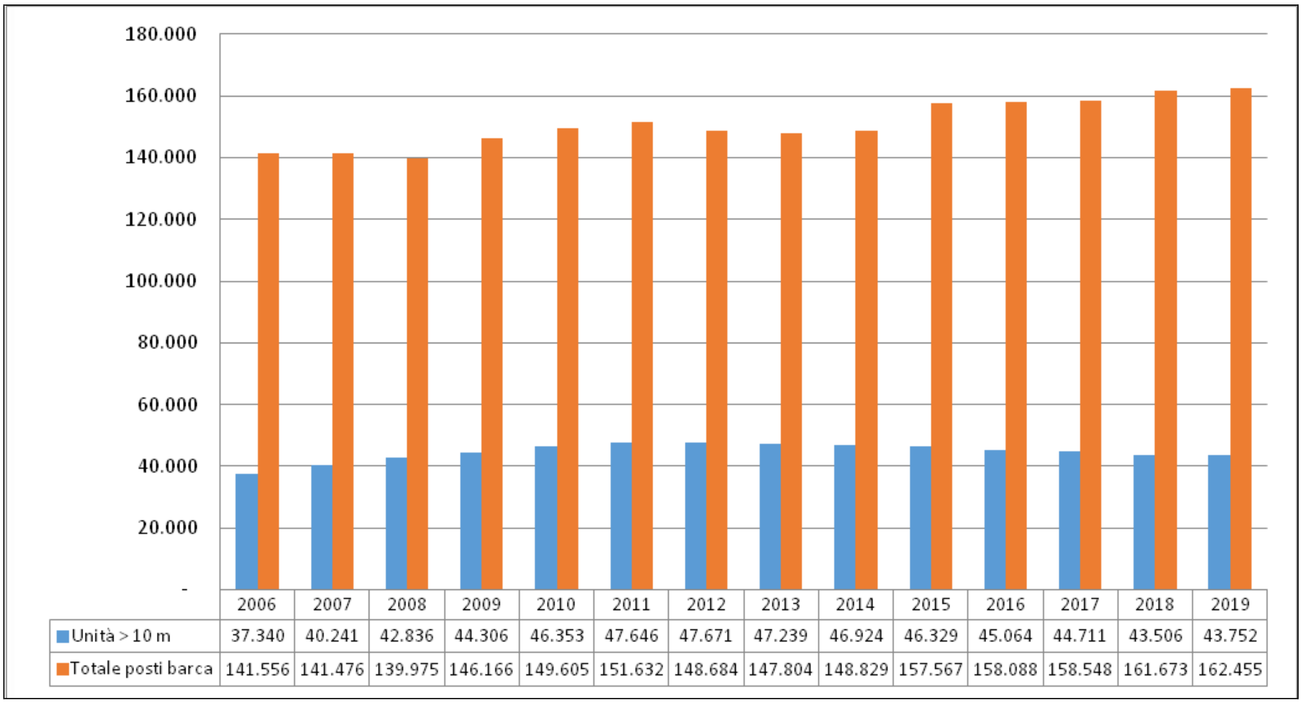
Table B - Nautical pleasure - Indicators on berths and length classes of vessels registered in the Peripheral Maritime Offices

Classi di lunghezza del natante	**Unità iscritte al 31/12/2019**	**% di unità iscritte sul totale nazionale**	**Posti barca al 30/09/2019**	**% di posti barca sul totale nazionale**	**Unità iscritte per ogni 100 posti barca (indice di affollamento)**
Fino a 10 metri o non specificata Da	28.267	39,2	107.780	66,4	26,2
10,01 a 24 metri	43.563	60,5	50.729	31,2	85,9
Oltre 24 metri	189	0,3	3.946	2,4	4,8
Totale	**72.019**	**100,0**	**162.455**	**100,0**	**44,3**

Fonte: Ministero delle Infrastrutture e dei Trasporti, Capitanerie di Porto.

The following Graph A summarizes the relative evolution in the period 2006-2019:
a) to pleasure craft and vessels subject to registration in the Peripheral Maritime Offices and U.M.C.registers, longer than 10 meters;
b) to the berths located along the Italian coasts.
The observation of the two data series shows, both for the registered pleasure boats and for the berths, a cyclical trend that tends to increase in the period considered, with an increase in the units and berths respectively of 17.1% and 14 , 8%.

Graphic A - Number of pleasure craft over 10 meters long registered in the Peripheral Maritime Offices and number of berths in Italy - Years 2006-2019



Note: data as at 31 December, with the exception of berths for the years 2018 and 2019, referring instead to 30 September.
Source: Ministry of Infrastructure and Transport, Port Authorities.

Table C - Nautical licenses issued for the first time, renewed and replaced by the Peripheral Maritime Offices and by the U.M.C. by Region - Year 2019

Regione	Numero di patenti nautiche rilasciate per la prima volta		Numero di patenti nautiche rinnovate e sostituite		Totale	
	Uffici Marittimi Periferici	U.M.C.	Uffici Marittimi Periferici	U.M.C.	Uffici Marittimi Periferici	U.M.C.
Piemonte e Valle d'Aosta	-	350	-	397	-	747
Lombardia	-	1.120	-	2.789	-	3.909
Trentino Alto Adige(*)	-	163	-	72	-	235
Veneto	872	0	1.091	0	1.963	0
Friuli Venezia Giulia	544	0	1.472	0	2.016	0
Liguria	2.329	12	6.189	47	8.518	59
Emilia Romagna	1.202	113	1.768	1.566	2.970	1.679
Toscana	1.010	246	2.490	935	3.500	1.181
Umbria	-	89	-	153	-	242
Marche	323	0	805	20	1.128	20
Lazio	1.382	725	4.745	1.242	6.127	1.967
Abruzzo	194	31	344	44	538	75
Molise	48	16	7	1	55	17
Campania	1.110	109	2.780	3.055	3.890	3.164
Puglia	508	194	1.112	742	1.620	936
Basilicata	-	34	-	55	-	89
Calabria	327	25	693	138	1.020	163
Sicilia	1.271	24	3.095	0	4.366	24
Sardegna	805	0	1.388	218	2.193	218
Totale	**11.925**	**3.251**	**27.979**	**11.474**	**39.904**	**14.725**

(*) Province Autonome di Trento e Bolzano.
Source: Ministry of Infrastructure and Transport, Port Authority, U.M.C.

Consistency of pleasure craft

The most recent statistical data indicate some national and comparative dynamics of a relevant importancebetween regions. In particular:
- the total number of units registered as at 31/12/2019 is lower (by only 40 units) than that recorded as at 31/12/2018;
- the sailing units are concentrated in the 10-18 meter length classes: 15,379, equal to 82.5% of the total sailing units;
- 73.9% of the total registered units are motorized, of which the 49.2% are under 10 meters in length (these units fall within the category of boats).
- at 31 December 2019 the Maritime Compartment with the highest number of registered units is that of Genoa (10,837 units), followed by Rome (7,445 units), Naples (7,198 units) and Livorno (4,114 units).

Recreational unitsregistered in the Peripheral Maritime Offices by length classes and by region Situation as of 31/12/2019

N.	REGIONE	Vela (con o senza motore ausiliario)					A motore					Navi (> 24 m)	Totale
		Fino a 10,00 metri	Da 10,01 a 12,00 m	Da 12,01 a 18,00 m	Da 18,01 a 24 m	Totale	Fino a10,00 metri	Da 10,01 a 12,00 m	Da 12,01 a 18,00 m	Da 18,01 a 24 m	Totale		
1	Liguria	587	2.125	1.848	899	5.459	5.146	3.342	3.664	570	12.722	40	18.221
2	Toscana	248	1.080	973	71	2.372	2.719	1.686	1.827	406	6.638	80	9.090
3	Lazio	348	932	772	26	2.078	3.170	1.546	1.582	349	6.647	36	8.761
4	Campania	78	308	327	27	740	4.354	2.065	1.611	141	8.171	12	8.923
5	Calabria	12	62	119	1	194	647	121	76	13	857	1	1.052
6	Puglia	68	176	151	7	402	1.787	353	222	11	2.373	-	2.775
7	Molise	2	3	4	-	9	21	15	13	4	53	-	62
8	Abruzzo	22	75	67	6	170	274	99	50	8	431	1	602
9	Marche	87	306	201	13	607	958	559	664	89	2.270	3	2.880
10	Emilia Romagna	120	954	715	23	1.812	855	653	546	75	2.129	5	3.946
11	Veneto	181	793	548	18	1.540	1.375	774	680	67	2.896	6	4.442
12	Friuli Venezia Giulia	153	981	641	26	1.801	802	547	632	98	2.079	1	3.881
13	Sardegna	89	327	276	13	705	958	471	411	52	1.892	2	2.599
14	Sicilia	113	300	315	18	746	3.093	508	355	81	4.037	2	4.785
Totale		**2.108**	**8.422**	**6.957**	**1.148**	**18.635**	**26.15**	**12.73**	**12.33**	**1.964**	**53.195**	**189**	**72.019**

						9	9	3				

Structures dedicated to pleasure boating and berths

The following statistical tables, relating to the data on the berths present along the Italian coasts, have been elaborated on the basis of the data provided by the Port Authorities and the Port System Authorities.
In particular, the berths have been identified on the basis of the following types of structures derived from the D.P.R. 2 December 1997, no. 509, which in art. 2 provides the following definitions:
- Tourist port - Complex of removable and immovable structures built with works on land and sea for the purpose of serving solely or primarily the recreational boating and the nautical yachtsman, also through the provision of complementary services;
- Tourist landing - Multifunctional port having the function referred to in Article 4, paragraph 3, of Law No. 84 of January 28, 1994, intended to serve recreational boating and yachting, including through the provision of complementary services;
- Mooring points - State-owned maritime areas and stretches of water equipped with structures that do not involve difficult-to-remove systems, intended for mooring, hauling, launching and storage of small boats and pleasure craft.

Among the most important services present in ports, landings or mooring points, the following are reported, subject to statistical surveys:
- Docking
- Water
- Light
- Fuel
- Supervision
- Tourist information
- Toilets
- Parking area
- Hauling
- Waste

In addition to these services, further characteristics illustrated concern the number of licenses of the companies that manage berths for length classes. In this regard, in some Port Authorities no distinctions of berths by length classes were made and, therefore, for many seaside resorts the total number of berths was generically assigned to the smallest length class (<10 meters). Consequently, the reading of the overall data must be carried out taking this attribution into account.
Tables 4.7A and 4.7B illustrate the distribution of berths by length classes and by type of structure, with percentage compositions calculated both on the totals per row (berths by type of structure) and by column (berths by length classes).
Table 4.8 reports the 2006-2019 time series relating to the number of berths available by Region. The total on the entire national territory over the years of the interval considered shows a fluctuating trend until 2013 (decrease from 2006 to 2008, recovery from 2009 to 2011 and new decrease in the two-year period 2012-2013) but a systematic increase in recent years, from 2014 to 2019.

Number of berths by regions, type of berthsand length classes as of 09/30/2019

Capitanerie di Porto	Tipologia di struttura			Classi di lunghezza in metri			Posti barca totali
	Porto turistico	Approdo turistico	Punto di ormeggio	fino a 10,00 metri o non specificati	da 10,01 a 24 m	oltre 24 m	
Imperia	2.412	2.010	64	2.736	1.551	199	**4.486**
Savona	3.544	437	531	3.018	1.444	50	**4.512**
Genova	2.922	2.596	2.204	4.622	2.193	907	**7.722**
La Spezia	1.373	1.338	5.031	5.897	1.702	143	**7.742**
Marina di Carrara	65	-	1.151	1.064	152	-	**1.216**
Viareggio	-	642	872	973	451	90	**1.514**
Livorno	5.487	2.755	6.581	10.354	4.303	166	**14.823**
Portoferraio	133	406	-	304	98	137	**539**
Civitavecchia	285	194	350	745	75	9	**829**
Roma	961	2.324	715	2.244	1.634	122	**4.000**
Gaeta	568	2.146	1.024	2.838	882	18	**3.738**
Napoli	2.592	2.440	1.944	4.281	2.533	162	**6.976**
Torre del Greco	350	-	-	300	50	-	**350**
Castellammare di Stabia	288	1.005	1.104	1.775	605	17	**2.397**
Salerno	1.974	1.711	2.590	3.915	2.112	248	**6.275**
Vibo Valentia Marina	1.966	566	-	1.749	725	58	**2.532**
Gioia Tauro	-	-	229	196	33	-	**229**
Reggio Calabria	449	230	125	620	167	17	**804**
Corigliano Calabro	270	405	32	539	158	10	**707**
Crotone	640	150	428	964	253	1	**1.218**
Taranto	450	440	621	949	542	20	**1.511**
Gallipoli	1.335	861	2.730	4.341	545	40	**4.926**
Brindisi	-	978	630	1.198	393	17	**1.608**
Bari	999	-	761	1.431	327	2	**1.760**
Molfetta	141	-	149	272	18	-	**290**
Barletta	-	505	830	1.126	204	5	**1.335**
Manfredonia	1.010	451	765	1.292	898	36	**2.226**
Termoli	434	153	-	344	238	5	**587**
Ortona	402	742	-	1.000	144	-	**1.144**
Pescara	1.140	415	-	1.029	507	19	**1.555**
San Benedetto del Tronto	1.271	-	-	711	531	29	**1.271**
Ancona	2.717	200	54	1.975	995	1	**2.971**
Pesaro	555	-	515	686	338	46	**1.070**
Rimini	740	1.304	491	1.240	1.219	76	**2.535**
Ravenna	1.453	502	915	1.139	1.714	17	**2.870**
Chioggia	480	-	-	450	30	-	**480**
Venezia	2.012	2.890	470	1.880	3.432	60	**5.372**
Monfalcone	6.162	1.013	2.254	4.909	4.247	273	**9.429**
Trieste	1.569	3.481	3.051	6.578	1.489	34	**8.101**
Cagliari	3.452	1.867	689	3.522	2.312	174	**6.008**
Olbia	4.179	569	658	3.349	1.749	308	**5.406**
La Maddalena	2.218	223	1.249	2.020	1.611	59	**3.690**
Porto Torres	3.735	710	86	3.815	703	13	**4.531**
Oristano	366	-	27	341	50	2	**393**
Messina	-	380	35	310	95	10	**415**
Catania	-	889	840	1.357	365	7	**1.729**
Augusta	-	973	171	943	179	22	**1.144**
Siracusa	61	1.377	-	1.255	162	21	**1.438**
Pozzallo	923	120	80	570	517	36	**1.123**
Gela	163	-	-	126	36	1	**163**
Porto Empedocle	808	455	281	1.315	198	31	**1.544**
Mazara del Vallo	120	290	-	330	79	1	**410**
Trapani	391	989	2.854	2.994	1.200	40	**4.234**
Palermo	869	383	2.819	2.433	1.614	24	**4.071**
Milazzo	1.549	290	667	1.416	927	163	**2.506**
Totale	**67.983**	**44.805**	**49.667**	**107.780**	**50.729**	**3.946**	**162.455**

Fonte: Ministero delle Infrastrutture e dei Trasporti, Capitanerie di Porto, Autorità di Sistema Portuale.

Number of berths by regions, type of berthsand length classes as of 09/30/2019

Region	Type of structure			Length classes			Total berths
	Porto turistico	Approdo turistico	Punto di ormeggio	fino a 10,00 metri o non specificati	da 10,01 a 24 m	oltre 24 m	
Liguria	10.251	6.381	7.830	16.273	6.890	1.299	**24.462**
Toscana	5.685	3.803	8.604	12.695	5.004	393	**18.092**
Lazio	1.814	4.664	2.089	5.827	2.591	149	**8.567**
Campania	5.204	5.156	5.638	10.271	5.300	427	**15.998**
Calabria	3.325	1.351	814	4.068	1.336	86	**5.490**
Puglia	3.935	3.235	6.486	10.609	2.927	120	**13.656**
Molise	434	153	-	344	238	5	**587**
Abruzzo	1.542	1.157	-	2.029	651	19	**2.699**
Marche	4.543	200	569	3.372	1.864	76	**5.312**
Emilia-Romagna	2.193	1.806	1.406	2.379	2.933	93	**5.405**
Veneto	2.492	2.890	470	2.330	3.462	60	**5.852**
Friuli Venezia Giulia	7.731	4.494	5.305	11.487	5.736	307	**17.530**
Sardegna	13.950	3.369	2.709	13.047	6.425	556	**20.028**
Sicilia	4.884	6.146	7.747	13.049	5.372	356	**18.777**
Totale	**67.983**	**44.805**	**49.667**	**107.780**	**50.729**	**3.946**	**162.455**

Fonte: Ministero delle Infrastrutture e dei Trasporti, Capitanerie di Porto, Autorità di Sistema Portuale.

Number of berths per service endowment by region as of 30/09/2019

Region	Berths equipped with:										Totale posti barca
	Berth	Water	Luce	Fuel	Vigilanza	Tourist info	Toilets	Parking	Hauling	Waste	
Liguria	23.577	23.570	21.641	12.410	13.329	13.885	21.810	13.826	15.760	20.049	**24.462**
Toscana	17.016	16.337	15.489	9.414	12.648	9.002	12.608	10.056	13.118	15.102	**18.092**
Lazio	8.567	8.058	7.543	4.940	6.396	2.880	6.780	6.846	6.655	5.376	**8.567**
Campania	15.844	14.966	14.450	5.850	14.184	8.623	10.361	9.346	9.922	13.924	**15.998**
Calabria	5.039	5.204	4.986	2.762	4.277	3.650	4.350	3.728	3.464	3.983	**5.490**
Puglia	13.640	12.339	11.731	4.296	11.999	6.506	10.643	9.018	7.189	11.420	**13.656**
Molise	587	587	587	354	504	430	554	434	504	587	**587**
Abruzzo	2.308	2.699	2.699	1.986	2.308	1.957	2.076	2.061	2.090	2.481	**2.699**
Marche	5.312	5.089	5.089	4.689	4.327	4.113	4.811	5.070	4.611	4.181	**5.312**
Emilia-Romagna	5.405	5.405	5.182	2.344	4.562	2.761	4.712	4.020	3.912	4.658	**5.405**
Veneto	5.852	5.724	5.582	4.478	5.689	5.202	5.682	5.336	5.578	5.724	**5.852**
Friuli-V. Giulia	17.084	15.589	15.106	5.460	7.440	8.935	12.240	13.197	10.693	10.718	**17.530**
Sardegna	19.829	19.353	18.575	11.245	15.493	13.742	16.377	15.470	15.325	18.909	**20.028**
Sicilia	18.647	16.858	16.312	5.968	14.996	7.711	11.821	7.794	10.462	12.531	**18.777**
Totale	**158.707**	**151.778**	**144.972**	**76.196**	**118.152**	**89.397**	**124.825**	**106.202**	**109.283**	**129.643**	**162.455**

3.2 Analysis of the regional system of tourist ports in Puglia

Description

Nautical tourism is a rapidly growing sector both internationally and nationally and is an opportunity to be seized for the socio-economic growth of Italy and the Puglia region.
Already in the second half of the 2000s, a series of plan studies have been completed and consequent program agreements and measures have traced a path for the implementation of these potentials.
In 2005, the Framework Program Agreement on Local Development (II supplementary act) between the Ministry of Economy and Finance, the Ministry of Productive Activities and the Puglia Region entrusted to Sviluppo Italia (now the National Agency for the attraction of investments and business development - INVITALIA), the drafting of the "Feasibility study of the regional tourism port system", as the implementing body of the "National Tourist Port Network Program - First three-year plan for the regions of Southern Italy" pursuant to the Resolution CIPE 83/2003.
Over the last decade, the increasing demands of sustainability of economic development and protection of fundamental resources have dictated the Union and national directives, and have seen Puglia at the forefront of the national scenario for the adoption of the instruments of regulation and planning of the territory , the main ones being the Territorial Landscape Plan (PPTR) and the Regional Coastal Plan (PRC). The PRC in particular aims to "guarantee the correct balance between the safeguarding of the environmental and landscape aspects of the Apulian coast, the free use and the development of recreational tourist activities".
This new regulatory framework and a more careful sensitivity of the local communities, the technical structure and the decision-makers themselves have called into question the criteria initially adopted and generally lengthened the implementation process of the projects, adapting at the same time to the dynamics of the sector and of the territorial and macro-regional tourism market, that is rapidly changing, especially in the last decade.

Characteristics of supply and internal demand

The total number of moorings that are actually available in the region as of 9/2019 is 13,656, divided according to location, and consequent services, ashore in:

- tourist ports 3,323
- tourist landings 3,234
- mooring points 6,486

The subdivision of the moorings according to the size is as follows:

- <10 m / n.d. 10,609
- 10-24 m 2,907
- > 24 m 120

The number of vessels registered at the Peripheral Maritime Offices amounts to 12,031 units, divided as follows:

- boats (<10 m) 10,609
- boats (10-24 m) 1,336
- ships (> 24 m) 24

From the above numbers it would be deduced an excess of available moorings compared to internal demand, and therefore available for the reception of extra-regional vessels. In reality, some fundamentals must be made about the real relationship between shipping and moorings and therefore on the reception capacity of the Apulian yachting port system:

1. the mooring points, which constitute the major part of global nautical receptivity, are actually often anchorages in the harbor (eg Porto Cesareo), of uncertain regulatory regularity, without services and not usable outside the favorable season, therefore completely non-standard for the pleasure craft of transit and not computable for the purpose;
2. the category of nautical capacity includes the moorings of private associations which statutorily host their members and a limited number of external guests upon invitation or approval of the association, and are therefore essentially private moorings unavailable to tourism proper;
3. on the demand side, the data of the ships completely lack small and very small unregistered units as they are not legally required, which UCINA estimates at 85% of the total and which, despite being in turn often put back in the so-called dry ports in private spaces of individual owners, however they occupy the berths in the season of greatest demand;
4. to the total calculation of the real overall "nautical pressure", but not to the statistically formalized one, the boats registered outside the region that use the Apulian harbor as a permanent shelter, contribute significantly;
5. a dynamics that are not well investigated is that of the units registered in the Apulian nautical registers but moored permanently, for various and interesting reasons, on the other side of the Otranto channel, mainly at the good ports of the Ionian Islands and marginally in Croatia, Montenegro and Albania, growing in recent years but tending to progressively decrease due to the leveling of tariffs with European standards and the difficulties in moving due to the pandemic emergency.

Characteristics of the tourist port demand, development potential of ports and landings

Currently the Apulian ports satisfy the tourist demand:

• mainly permanent: the number of berths intended for transit is approximately 540, equal to approximately 5% of the total berths available).
• proximity and residents: about half of the demand from boats in transit has a regional origin, in fact 50% of the concessionaires indicate the regional area as the "predominant origin of the boats in transit".

The analysis of the context shows that the Apulian destination can be characterized according to a modality attributable to the great nautical itineraries as regards the Adriatic belt and to the nautical of medium and short routes for the Ionian belt.

The occupancy rate of the berths in the three summer months, as already mentioned, is close to 100%. Therefore, it is of fundamental importance to strengthen the offer both from a qualitative and quantitative point of view of the Apulian ports, and to put in place adequate interventions to create a virtuous synergy between the various ports and landings.

Already from the feasibility phase, sector planning has identified a "Network of Apulian tourist ports", organized in Areas in which Pivot Ports (of great appeal and size, well equipped with a wealth of services and functions) are identified, which attract the pleasure craft in transit, especially in the Adriatic, and to connect the sea to the territory by also enhancing the offer of the Apulian Tourist Itineraries (cultural, religious, food and wine).

All this must be done without neglecting the local and regional pleasure demand.

The Areas and the Pivot Ports of the Puglia Region tourist port network - First level ports and second level ports

The data collected relating to the infrastructural characteristics of the ports, together with a more detailed assessment of the tourist character of each individual locality, led to the identification of the candidate locations to represent the first level system of tourist ports and of those candidates to constitute the second level system.

The Areas:
The Apulian coast has been divided into seven areas (Garganico, Nord-Bari, Bari, Brindisi, Salentino-Adriatico, Salentino-Ionico, Tarantino) with reference to the following criteria:
• Nautical vocation (major international, regional or sub-regional nautical itineraries);
• An already consolidated image in the nautical tourism field;
• Geographical dimension as homogeneous as possible and such as to guarantee an adequately uniform distribution of pivot, first and second level ports;
• Possibility of agglomerating a critical mass of ports, suitably differentiated (between first and second level ports, with reference to the type of port demand - local or external);
• Reference as unambiguous as possible to local authorities and state bodies with expertise in the yachting sector (Coast Guard, Harbor Master's Office).

A Port Pivot has been identified for each area, chosen on the basis of the following criteria:
• Potential of the locality in infrastructural terms (current and potential).
• Potential of the locality in terms of tourism (integrated tourist resource).
• Consideration of the individual realities and territorial specificities;
• Geographic location within the scope.

Area n. 1 - Garganico:
• Porto Pivot: Manfredonia
• First level ports: Vieste, Margherita di Savoia, Mattinata

Area n. 2 - North Bari:
• Porto Pivot: Bisceglie
• First level ports: Trani, Barletta, Molfetta

Area n. 3 - Bari:
• Porto Pivot: Bari
• First level ports: Monopoli, Mola di Bari

Area n. 4 - Brindisi:

• Porto Pivot: Brindisi
• First level ports: Ostuni

Area n. 5 - Salentino Adriatico:
• Porto Pivot: Otranto
• First level ports: Castrignano, Otranto, Castro, Santa Cesarea Terme, S. Foca

Area n. 6 - Ionian Salento:
• Porto Pivot: Gallipoli
• First level ports: Porto Cesareo, Nardò

Area n. 7 - Tarantino:
• Porto Pivot: Taranto
• First level ports: Maruggio

Current offer and prospective estimate in the identified areas

13 years after the original drafting of the Framework Program Agreement (APQ), the areas show a general delay in implementation and a varied situation of plans and planning, not without critical issues mainly due to:
• inconsistency and problematic integration of the projects - largely conceived in the 2000s - with the forecasts, constraints and new standards of quality and sustainability established by the mentioned regional strategic planning;
• poor reliability and transparency of the entrepreneurial team involved in some public-private partnerships;
• absence of an organic and strategic vision of the sector as a system
• lack of public governance

Nevertheless, it can be seen that in areas 1, 2, 4 and 5 there are mature plans and projects that are proposed for the start of works in the short term; among other things, these provide for actions to strengthen the Pivot Ports and some of the first level identified in the study.
On the other hand, in Sections 3, 6 and 7 they report a clear delay. This criticality is especially important for the ports of Gallipoli and Taranto.
It was positive to note that there are four significant upgrading interventions, two of which have started (Rodi Garganico and Polignano a Mare) and two are in the start-up phase (Manfredonia new tourist port and Lecce San Cataldo) with Project Financing involving consortia between public and private bodies, which testify a capacity of synergy between the business world and the public action.
These initiatives confirm that in Puglia the trend in demand for tourist ports is growing and that it is also able to attract private financial investments.

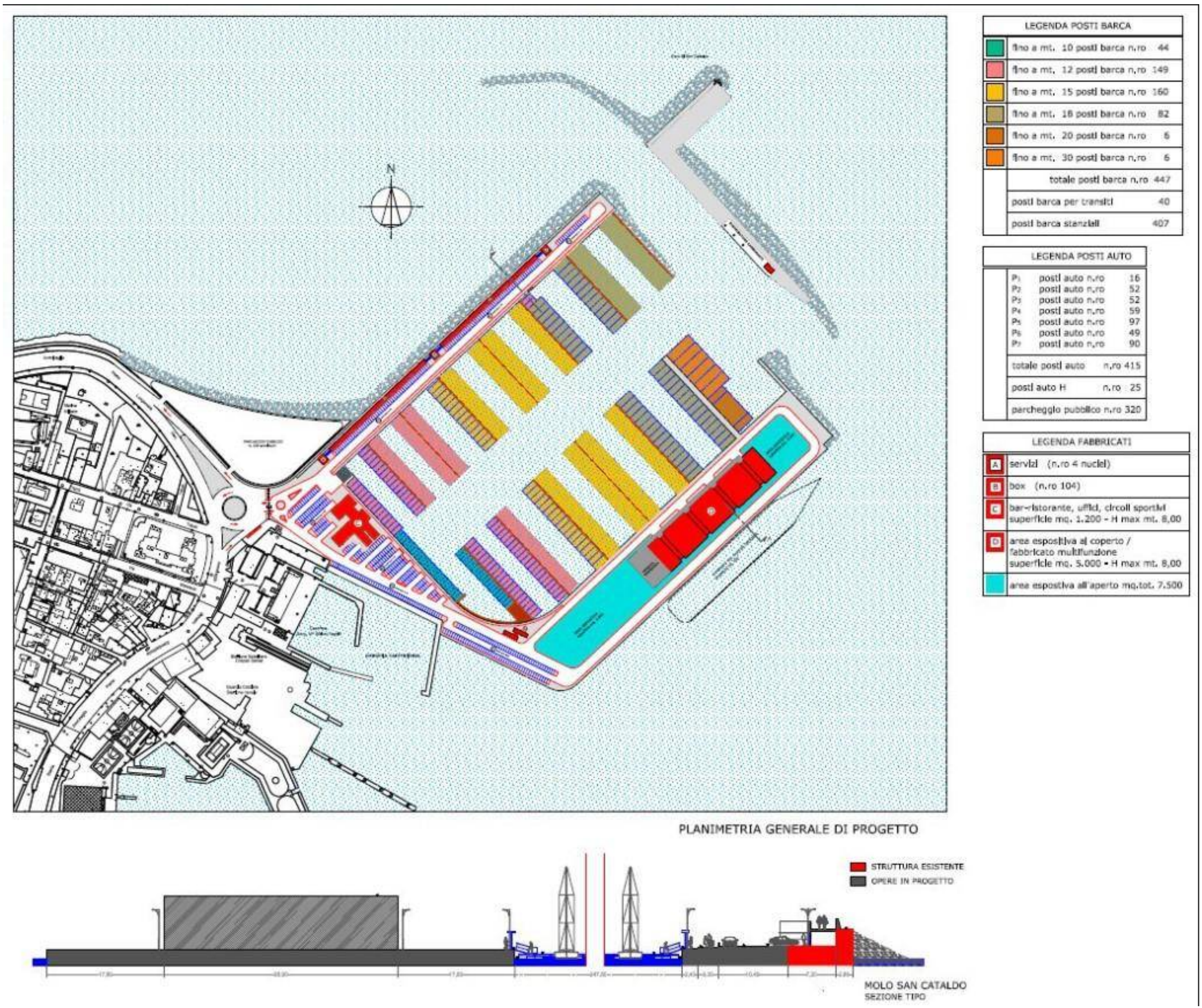
The strengthening of the berths

The strengthening of the berths must take place, first of all, by rationalizing the use of existing port basins, maximizing the protected bodies of water (sometimes not used or used in a non-functional way) and creating, where possible, dry ports that allow freeing up a significant number of berths in existing protected basins.
All this must take place in synergy with other existing or planned port production activities.
Subsequently, taking into account the existing superordinate plans, such as the Regional Coastal Plan, etc., and compatibly with the dynamics of the coasts and the environmental sensitivity of the area, it is possible to resort to the construction of new ports.

Taking into account that the construction of new berths is not usually fast, it is appropriate to draw up a reference framework for a long period of time, 10 years (2008 - 2017), to then evaluate the actions to be implemented consistently over a medium period of time, 5 years (2008 - 2012).
To assess the evolution of the development of the demand, a rate of 5% can be assumed in the period 2008 - 2012, a rate that is compatible if the interventions to improve the quality of the existing ports are immediately undertaken. With this hypothesis, approximately 14,000 berths would be needed in 2012.
For the period from 2013 to 2017, as a precaution, a lower growth rate of 2.5% per year can be assumed, equal to the natural one considered; so in 2017 the number of berths required would be approximately 15,800.

Study case

As regards some hypothesized initiatives, the one that will see the construction in the New Port of Bari of a tourist port for large cruise boats (up to 25 m and over) is particularly important. The project involves the redevelopment of the San Cataldo pier with the creation of the tourist port for the development of the city-port relationship: the Port Authority of the southern Adriatic Sea makes use of the partnership of "Cassa Depositi e Prestiti" (Cdp).
In particular, "Cassa Depositi e Prestiti" will support the Authority by providing technical-administrative consultancy for the design, implementation and development of the public-private partnership relating to the infrastructures of various strategic areas in the ports of Bari and Brindisi. In addition, Cdp will evaluate any requests for funding from the Authority, providing the necessary support to facilitate the improvement of the process.
In this way, our city will also fully fit into that range of tourist offer that aims at a different target, with services dedicated to the landing of yachts and the reception of guests on board.
Other locations eligible for similar initiatives on the Adriatic coast can be Brindisi, Barletta, Monopoli and on the Ionian coast Gallipoli and Taranto, all locations that have moorings with deep waters.



Quality of services offered and environmental quality

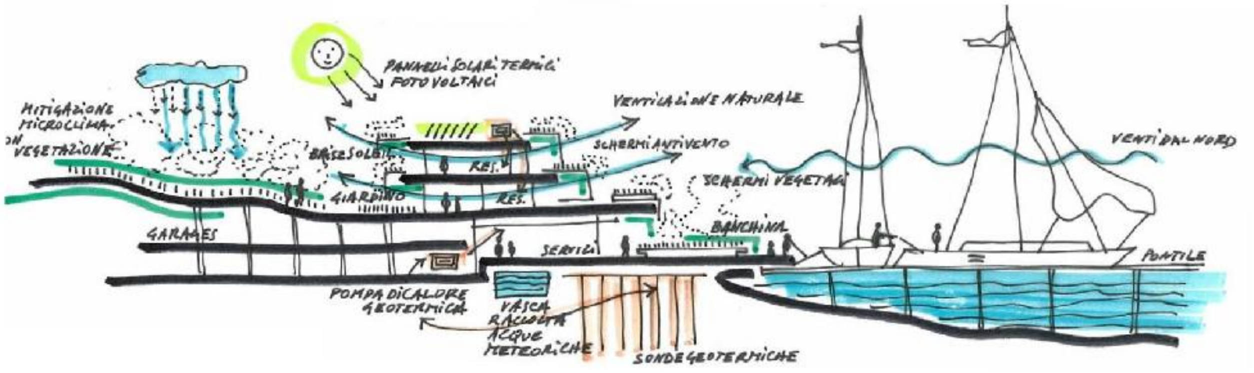
The current offer of port services is also extremely lacking from a qualitative point of view, both compared to other Italian regions that are more competitive in the sector, and in comparison with that of the regions on the other side of the Adriatic with which the Apulian ports must naturally compete to attract boaters in transit on long nautical itineraries.

Strategies for strengthening the network ports

Improvement of the services and environmental quality of the ports, bringing the Pivot and first level ones to a predetermined and sufficiently high supply in terms of offer and the second ones to at least an adequate and satisfactory common level.

For Pivot ports it is proposed to introduce an environmental management system (EMS), as is now the case in many Italian tourist ports, with a procedure that can be the scheme proposed by the international standard UNI EN ISO 14001 or that proposed by EMAS European Regulation.

Environmental sustainability - bioclimatic strategies



The regional planning in place and the resources committed

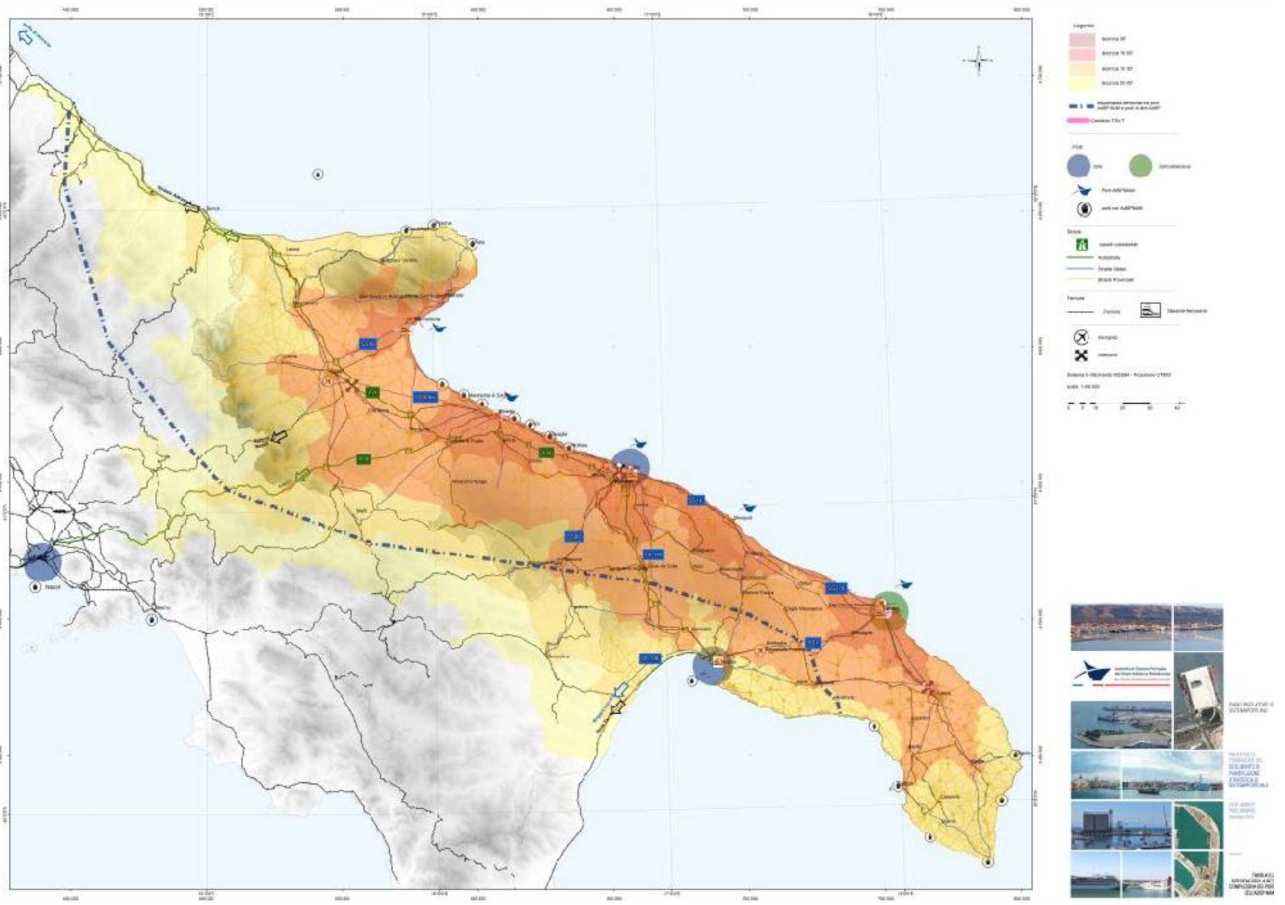
The regional mapping, regarding Salento, includes three pivot ports (large, well-equipped works, with maximum functions and excellence) in Gallipoli, Otranto and Santa Maria di Leuca and various landings (less impressive ports) in Casalabate, San Cataldo, Castro, Tricase Porto, Salve, Ugento, Santa Caterina and Porto Cesareo. The programming was remodeled in 2019 by the regional council which provided more important interventions in Leuca. There are 18,184,710 euros of total resources provided for by the Framework Program Agreement (APQ) "Implementation of interventions in support of local development". In particular, 6.5 million were allocated to Lecce for the port of San Cataldo, 3 million to Melendugno for the landing of San Foca, 465,277.80 euros to Castro, 8,219,432.20 euros to Castrignano del Capo for Leuca.
Three axes of intervention:
1) Redevelopment of the 3 pivot ports of Gallipoli, Otranto and Santa Maria di Leuca into tourist attraction hubs through ferries, hydrofoils and seaplanes, to connect Croatia, Montenegro, Albania, Greece on the one hand and Sicily and Sardinia on the other;
2) Strengthen the agreements with cruise companies to integrate Gallipoli, Otranto and Santa Maria di Leuca in the routes and landings of cruises and mini-cruises in the Mediterranean;
3) Strengthening the landings of Casalabate, San Cataldo, Castro, Tricase Porto, Salve, Ugento, Santa Caterina and Porto Cesareo through the enlargement and redefinition of floating piers for pleasure boating and luxury tourism.

3.3 Nautical tourism in the Puglia system

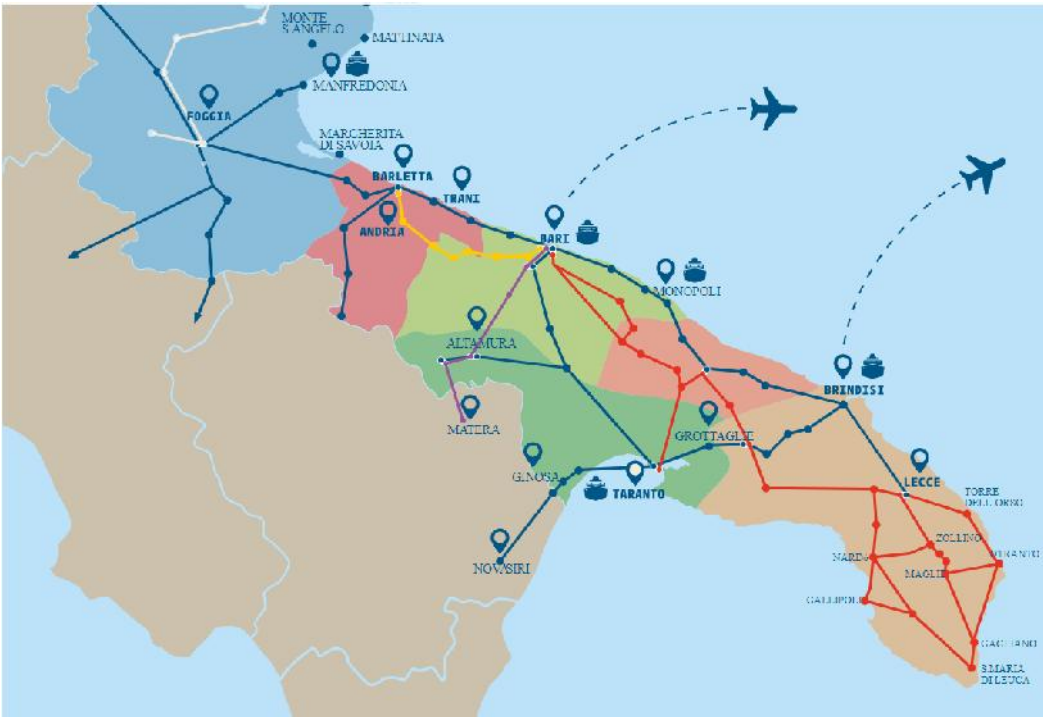
The connection with the transport system

The tourist system appears more and more like a complex network of subjects (public administrations, private operators, individual citizens) between which increasingly close and diverse relationships exist, whose solidity and efficiency can compromise the competitiveness of a territory.
Within this complex network of subjects and relationships, different levels can be identified, integrated with each other:
• physical networks, in particular the infrastructures linked to transport to and from the destination;
• technological networks, to support tourist use and local operators;
• relational networks, which involve all actors, public and private, of tourism development.
Boating is, due to the geographical characteristics and cultural contents of Puglia, the most appropriate approach and the privileged gateway to this region, but to be truly an integral part of the Puglia system it should fully fit in and at all levels of the networks that connect it externally and internally. Starting with that of transport.

Puglia has on its side, among its intrinsic geographical characteristics, a "form factor" that makes its ports close to the innermost parts of its territory, and its most hidden treasures within the reach of the coastal tourist with short and easy trips. even with sustainable means such as the bicycle.



Isocrone e linea di equidistanza del dell'Autorità Sistema Portuale Adriatico Meridionale

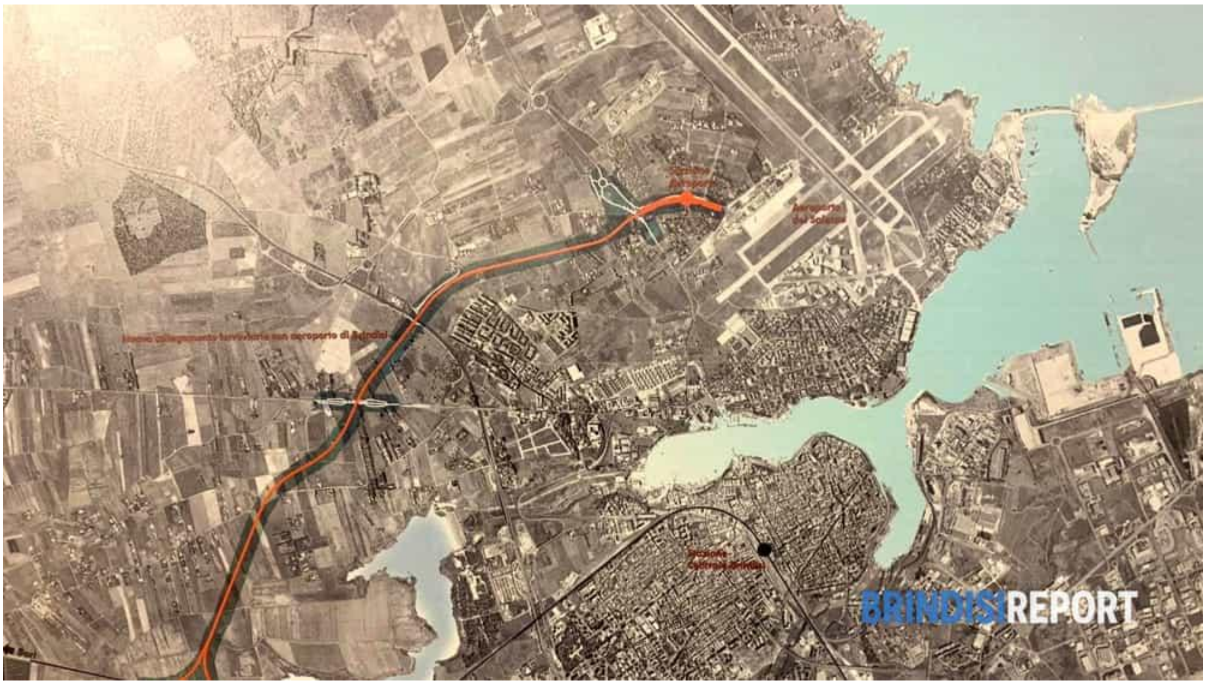


La rete del trasporto pubblico e gli hub in Puglia

Generally speaking, a strategy based on a regional intermodality plan is needed, capable of involving the main means of transport and airports (airports, railways, buses, ports and marinas, bicycle and car rental), according to the standards of the European tourism market, through more efficient road and rail links between airports and tourist resorts, connecting with the high-speed rail network.

But above all, as the most advanced design standards provide, it is necessary to equip tourist ports and marinas with connection hubs with the soft mobility network, with velostations and relative cycle paths, to connect them in an engaging way to the cities and territories that act as hinterlands, not just physical at the docking.

It is necessary to avoid tourist ports in an open way to the territory and really point of access for tourists, and not just berths for the resident, and then connect them, with public and private carriers efficiently sized in scope, to other hubs from rail to airport ones.



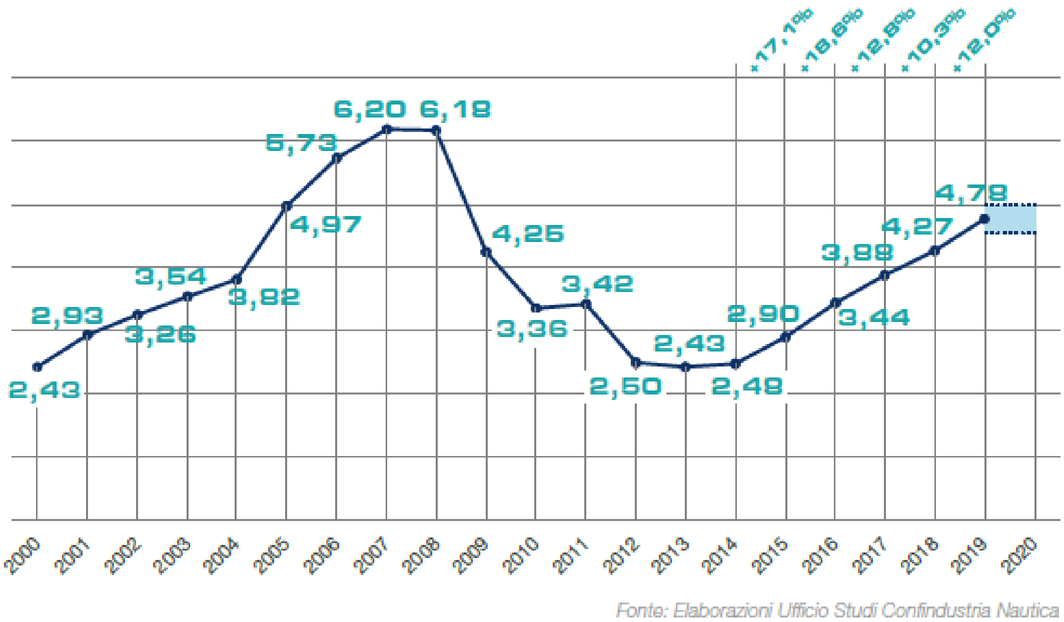
Il nuovo raccordo ferroviario con la stazione aeroportuale di Brindisi

Le connessioni tra gli hub della rete dei trasporti pugliese.

in the short term, concrete prospects concern the railway sector, and come from the important planning (about 700 million with construction sites to be closed by 2024) implemented by the Puglia Region with the technological and environmental adaptation of the vast and widespread network of local railway lines (FAL, FdG and FSE) and equally immediate and ambitious projects put in place by RFI itself in connection with the port and airport nodes of Bari, Brindisi and Taranto.

The sector supply chain

The shipbuilding industry is one of the true Italian excellences, which contributes not only to the national GDP but also and perhaps above all to the Italian Brand.



Industria italiana della nautica: andamento del fatturalo globale anni 2000-2020 (valori in mld di euro)

As already amply illustrated, Puglia is characterized by a strategic geographical position, representing a bridge between East and West and a gateway to the Balkans, and by a coast that winds for 865 km, with 3 main ports (Bari, Brindisi and Taranto) and 6 minor ones. These characteristics, combined with the beauty of the sea, the mild climate all year long, a dense presence of ports, marinas, docks and landings, a modern and dynamic industrial fabric, have made Puglia the ideal territory for the development of yatching.

The companies operating in the pleasure boating sector in Puglia, dedicated to the production and maintenance of boats, cover the entire production cycle: design, construction, production of individual components, assembly, outfitting and furnishings. High manual skills are compared and integrated with modern technologies, high specialization and high design capacity. A blend of innovation and tradition that involves the production system and the entire complex of services in the nautical sector: parking, maintenance and storage.

The Recreational Boating Production District is a tool to support the growth and innovation of the entire Apulian nautical sector by encouraging the creation of synergies between private and public stakeholders.
There are two strategic objectives of the District:
1. Business systems: to favor the birth of a new entrepreneurship that strengthens the existing realities and at the same time generates new activities also in the productive sectors connected to the nautical sector.
2. tourist ports System and nautical tourism: favor the integration and development of the nautical sectors related to tourism to enhance the offer and improve the quality of regional tourist services.

The District brings together 151 companies, 8 between research centers, universities and training structures, 18 between public bodies, employers' associations and trade unions.

The numbers of the sector: 245 companies, 1466 employees (Source CCIIA Bari year 2013, 3.3 million exports in 2013 (Source ICE Year 20l3).
The main specializations are the construction of cabin cruisers, semi-cabins and open boats, high quality pleasure boats and fishing boats, structural modifications on boats and pleasure boats, military and offshore, interior fittings, regatta sails, cruising and one design.
Born from a millenary tradition and devoted to innovation, today the Apulian yachting is a promoter of research and innovation. Traditional productions have evolved towards technologically advanced processes with the use of innovative materials, eco-sustainable components, which make it possible to create lighter and more resistant boats with less fuel consumption. A sector where skilled shipwrights coexist with cutting-edge companies that export all over the world.

3.4 Le specificità della Puglia meridionale

I Distretti turistici istituiti dalla regione Puglia sono: Gargano e Monti Dauni, Bari e la costa, La Puglia di Federico II, Valle d'Itria e Murgia dei trulli, Magna Grecia e Gravine, Salento.

Il presente documento è centrato su quest'ultimo ambito, culturalmente e storicamente coeso ed omogeneo, che comprende tradizionalmente la provincia di Lecce e la aree meridionali delle provincie di Brindisi e Taranto. Più un'isola che una penisola, ha forti tradizioni di marineria e di accoglienza, e assieme al Gargano guida turisticamente la regione sia come ricettività che come fatturato nel settore del turismo, della ristorazione e nella filiera economica collegata.

I porti ed approdi classificati sono 28, descritti nelle relative schede in allegato 1

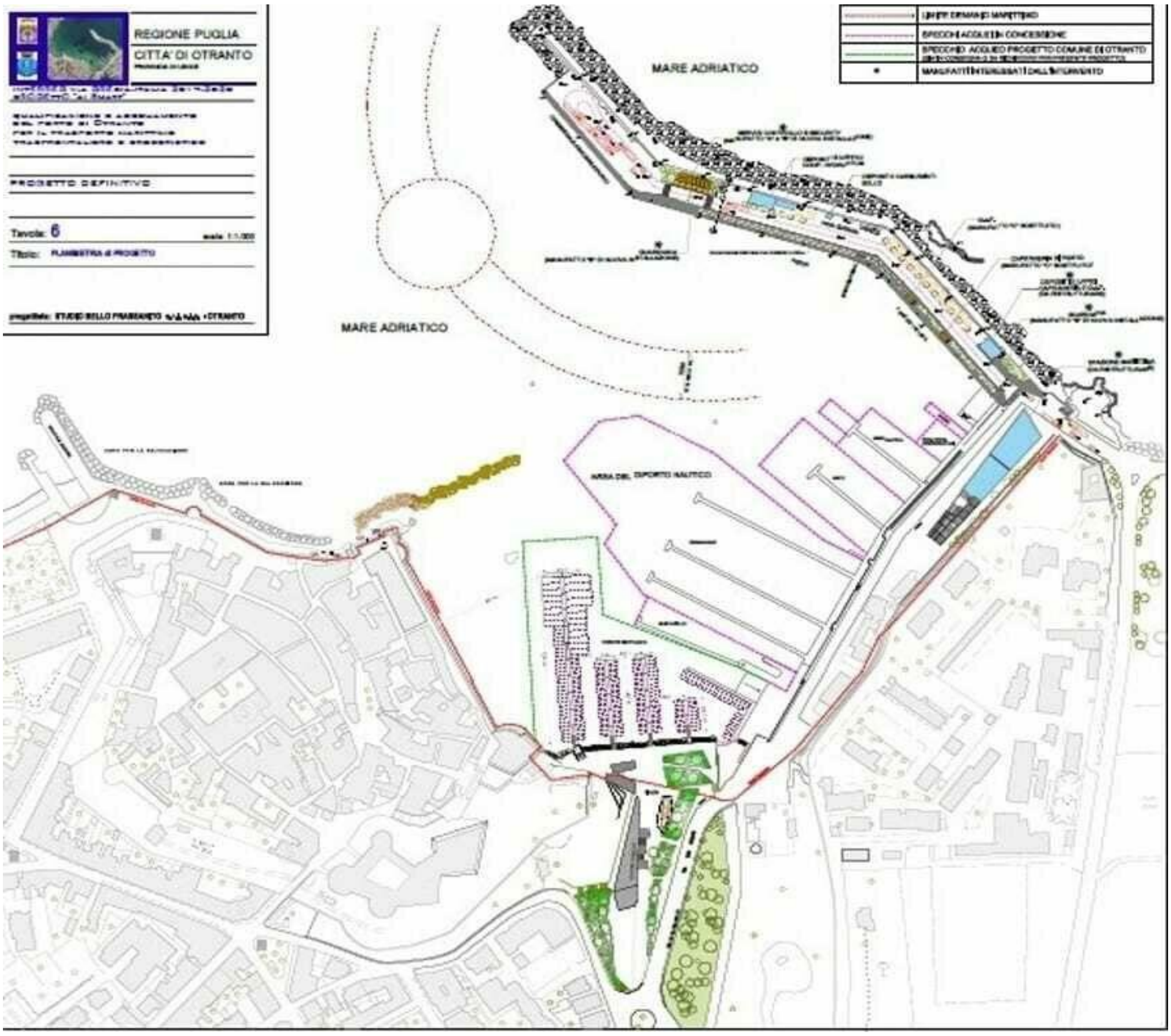
La seguente tabella ne riassume le specifiche salienti aggiornate all'anno 2019.

Comune	Numero di posti barca	Porto turistico	Approdo turistico	Punto di ormeggio	N° licenze (*)	Attracco	Acqua	Luce	Carburante	Vigilanza	Info turistiche	Servizi Igienici	Parcheg- gio	Alaggio	Rifiuti	Capitaneria di Porto
Maruggio TA	240	-	240	-	1	100	100	100	100	100	100	100	100	100	100	Taranto
Alessano LE	10	-	-	10	-	-	-	-	-	-	-	-	-	-	-	Gallipoli
Andrano LE	44	-	-	44	1	100	-	-	-	-	-	-	-	-	-	Gallipoli
Castrignano del Capo LE	680	680	-	-	1	100	100	100	100	100	100	100	100	100	100	Gallipoli
Castro LE	171	-	-	171	8	100	100	100	-	100	100	100	100	100	100	Gallipoli
Gallipoli LE	1.084	280	210	594	15	100	59	54	30	75	15	35	54	30	100	Gallipoli
Lecce	102	-	-	102	1	100	-	-	-	100	-	100	-	-	-	Gallipoli
Melendugno LE	466	150	144	172	5	100	100	100	15	100	32	63	72	63	48	Gallipoli
Morciano di Leuca LE	160	-	160	-	1	100	100	100	-	100	100	100	100	-	100	Gallipoli
Otranto LE	504	225	-	279	7	99	99	97	1	97	97	99	-	2	50	Gallipoli
Porto Cesareo LE	927	-	-	927	7	100	80	80	4	80	-	83	80	13	100	Gallipoli
Salve LE	106	-	106	-	-	100	100	100	-	-	-	-	-	-	100	Gallipoli
Santa Cesarea Terme LE	60	-	-	60	2	100	-	-	-	100	-	-	100	100	100	Gallipoli
Squinzano LE	10	-	-	10	1	100	100	100	-	100	-	100	100	100	-	Gallipoli
Tricase LE	241	-	241	-	4	100	91	91	-	92	-	77	71	77	-	Gallipoli
Ugento LE	361	-	-	361	4	100	75	75	-	100	-	25	-	-	100	Gallipoli
Brindisi	1.103	-	928	175	6	100	90	89	58	89	84	84	84	58	90	Brindisi
Fasano BR	215	-	50	165	1	100	56	-	-	58	-	-	23	42	100	Brindisi
Ostuni BR	290	-	-	290	-	100	87	87	-	87	11	49	76	89	100	Brindisi

A feature of all landings is that they are almost always central to the coastal tourist centers and therefore able to benefit from services and tourist attractions within reach of the quay, as well as nautical excursion services along the neighboring coast.
A dense network of pathways is spread over the territory, centering on the major coastal cities and traveling along the coast (CYRONMED circuit), increasingly safe and usable with the pedestrianization of the coast and innervating towards the hinterland as in the case of the "Salento di Mare" Cultural Environmental System. and Pietra2, where about 400 km of marked and slow-speed roads link Gallipoli by bicycle to the cultural heritage of 13 municipalities, served by stopping points and assistance to cyclists. Coastal are also all the natural parks of southern Puglia, where most of the 30 hiking trails of the Provincial Hiking Network develop, which take us into the heart of the unique nature of this land.
Even the longer-range connections to the most internal and authentic areas, the cities of art or the more distant coastal centers are guaranteed in the summer months by the car connections of the SalentoinBus program promoted by the Province of Lecce, which covers a time slot ranging from five in the morning until one in the morning, so that no appointment is missing from the rich program of music and festivals typical of this land.
Another strong point, in addition to the urban redevelopment works and the monumental and natural heritage, is the decisive growth of widespread accommodation, b & b and rural tourism, which gives authenticity to the experience and above all flexibility to the offer, being able to use even for very short periods and by booking your accommodation last minute according to the typical needs of the nautical yachtsman
Strong critical issues remain in the planning and management of port spaces, docks and stretches of water, disputed between fishing mariners and nautical associations which in fact privatize most of the useful fronts available, making the use of public moorings for pleasure boating in transit problematic.
Even the marinas and private moorings report a series of critical issues regarding the obsolescence of port structures, almost all conceived in the 1960s and 1980s, almost always lacking in technology and services, not just materials, which are really usable.
The number of berths available for transit are also modest and often fictitious, and the rates are not competitive or proportionate to the quality offered.
This has motivated in recent years a strong spill-over of local demand towards more advantageous destinations such as Greece, which in the meantime has strongly strengthened the nautical sector in terms of capacity, updating and quality of services, resulting in a highly attractive and competitive international demand despite the recent realignments in costs to the European sector market.

Study case

A strong signal has come just recently from Otranto, where after years of litigation between the municipal administration and the various bodies called to express themselves on the feasibility of the project (from the Puglia Region, to the Province of Lecce, Gallipoli Port Authority and Maritime District Office of Otranto, the State Property Agency, the Customs Agency, the Municipality and the Archaeological Superintendence of Fine Arts and Landscape), there is now the go-ahead for the qualification and adaptation project of the port area, which thanks to the Interreg programming on the Greece-Italy axis aims at a new redevelopment and also to settle the controversial question of floating docks for pleasure boats returned to full municipal usability after the judicial release also confirmed by the review court in June 2020. The overall project for the reorganization of the port system has already obtained a loan of 1.5 million euros from the Region in the Interreg-Ai Smart program, and provides the creation of control and reception services for sea passengers and the remodeling of floating docks destined for to pleasure boating, to define its compatibility with the monumental values present in the area.

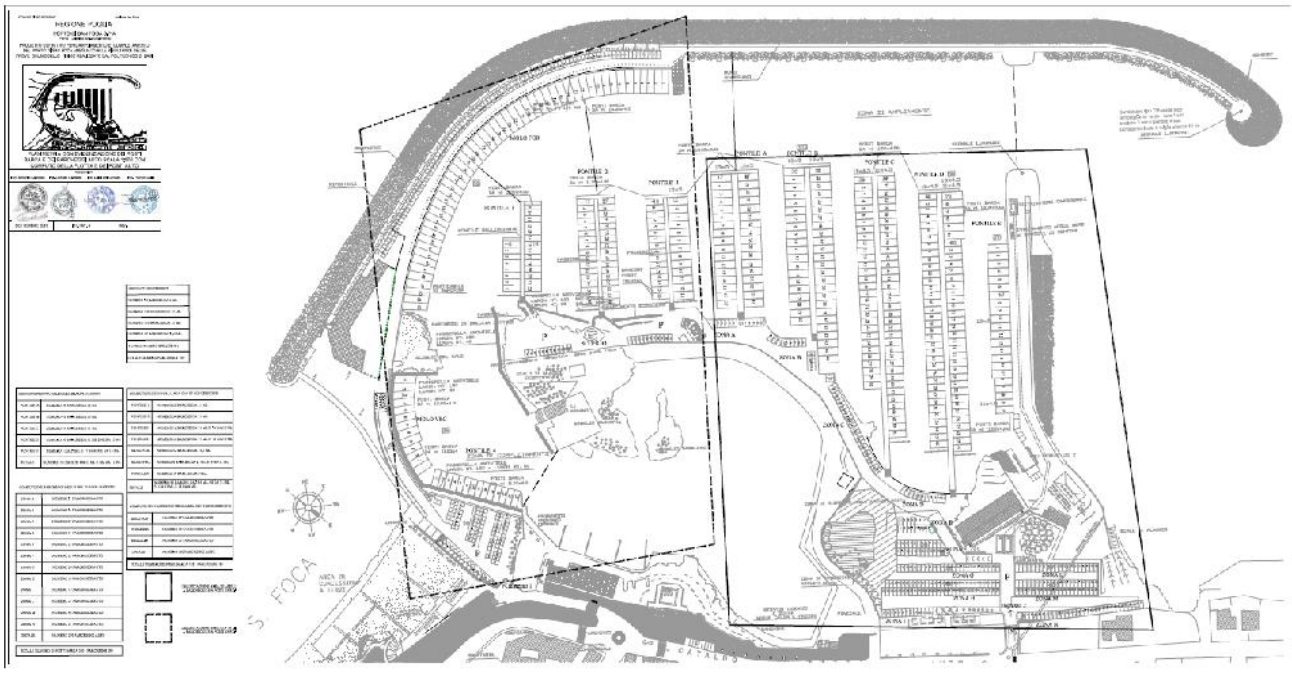


Also in Otranto, the new port has recently adopted a very rapid time schedule for carrying out the works. After years of standstill and uncertainties due to environmental criticalities and various improvements to the initial project, the Apulia Region has already committed itself to issuing the concession and, once the legal deadline has been granted, the works will be able to start and then be completed within 36 months from the start-up.

Il nuovo porto turistico di Otranto dagli elaborati di progetto

The ports of S. Foca di Melendugno and S. Maria di Leuca have undergone numerous vicissitudes in the last 15 years in the finalization of the expansion project, partly attributable to the legal ones of the private and majority part of the partnership, represented by the same subject. The implementation of the S. Foca project alone would lead to an increase by 230 berths the capacity of the Otranto area.

The first intervention involves an investment of several million euros which, in two years of work, would allow it to equip the coast between the neighboring ports of San Cataldo and Otranto with a port suitable for 431 boats: 14 of six meters; 192 by 11 meters; 173 by 13 meters; 52 by 15.5 linear meters. To understand the extent of the project, it should be considered that, currently, the San Foca marina can accommodate a maximum of 183 boats. The new project would triple its capacity, providing it with the potential to propose itself as Leuca as a hub of the Adriatic.
The project, in fact, envisages "expanding the existing port structures, improving their protection in the South East"; provides "better and more effective protection from waves from the South-East (around 110 ° North), compared to the Prgp forecast, necessary on the basis of what is highlighted by the marine meteo study carried out and the experience gained with the current structure which is definitely sensitive to such waves ". Yet. «The internal definition has been revised, with respect to the Prgp, with a reduction in some sales areas and an increase in others. This, even to the detriment of the total number of berths, which has actually decreased with the decrease in the water mirror, being instead a priority is specified in the project - to ensure those services necessary for both transiting and permanent boaters ".



In Leuca, the realization of the project drawn up by the Municipality of Castrignano to enlarge the marina is expected as soon as it becomes a real "marina" with 700 berths, including those for large boats. There are also ground services, sheds for the shelter of boats and repair shops, as well as a building intended to house offices. Due to the long dispute between the municipality and partner companies and between the latter and the other port operators in the fishing and tourism sectors, Community funding of approximately 2.5 million euros was lost. The total cost of the extension and modernization project amounts to approximately 10 million euros. The administration of Castrignano del Capo is finally ready to put an end to the long history of the functional technical variant of the Port Regulatory Plan for the port of Santa Maria di Leuca.

3.5 SWOT analysis

(S - strengths) The cards to play	(S - strengths) The cards to play
Refer to a mature and articulated tourism system To dispose of strong attractors well distributed on the territory and in alignment with the cultural level and expectations of the yachtsman	Absence of an attractor with World Wide Awareness, even in the presence of attractors that have the potential.
Rich natural environment, well protected, usable and identitalrio Strong appeal of sea / culture / food and wine / nature / traditions / events / products.	Overcrowding of ports and landings.
Extensive and dense network of connections in the internal territory	Limited efficiency of purification systems (water supply, distribution and management systems that are not fully efficient). Presence of abandoned quarry sites, now illegal landfills. Risk of desertification. Air quality jeopardized by the presence of pollutants: PM10, ozone and nitrogen dioxide. Low percentage of separate waste collection. Limited efficiency of the integrated waste cycle.
Strong appeal of the sea product, with over 800 km of coastline, two seas and a variety of landscapes / types of offer. Reduced isochrones towards all inland attractors	Coastal erosion phenomena.
The climate and the location. Geographical location that places the region as a privileged crossroads towards the Balkan area, Europe, the Mediterranean and the Adriatic-Ionian macro-region.	Lack of progress in port tourism planning
Price competitiveness despite competition from the Balkan regions.	Low usability of cultural heritage, and natural parks. Presence of architectural barriers that limit access to and use of tourist goods and services.
Lifestyle: perfect mix between tradition and innovation. From the surveys of recent years it emerges that the Apulian archetype is linked to the values of welcome, hospitality, authenticity, but also dynamism and creativity. Offer of events, especially musical (Notte della Taranta, Valle d'Itria Festival, other festivals). Popular rites and traditions, festivals, Holy Week, combined with quality products in agriculture, craftsmanship and manufacturing.	Degradation of some stretches of the coast, some historic centers with great potential and inland areas. Poor care of free beaches.

(O - Opportunità) Un mare di occasioni	(T) Gli allert sul futuro
18,184,710 euros of total resources provided for by the Framework Program Agreement (APQ) "Implementation of interventions in support of local development	Negative effects of climate change on coastal systems, with instability in the sea and weather conditions, an increase in adverse events, erosion of the coast lines and a decrease in the safety and usability of the current port system, more generally on the environmental quality of the territory and its environmental attractions
Connecting shipbuilding to the world of research and innovation	Effects on the nautical tourism market of the general economic crisis. Reduction, even in the medium and long term, of the tendency to travel due to the current pandemic and possible other global health emergencies
Regional funding already available provided through Title II, which aims to encourage the development of the economic activities of tourism-hotel SMEs by facilitating access to credit.	Lowering of the level of profitability of companies (tax burden, management and labor costs, pricing policies). Bureaucracy.
Possibility of advantageous partnerships with the tourism systems of emerging cross-border destinations, through the complementarization or integration of products (eg. Tourism on the roads)	Increased global competitiveness and the number of destinations Impetuous growth of competing destinations (the Balkans) and cheaper on prices.

	Gradual development of an international system of slow and eco-sustainable mobility (bicycle, footpath and electric public transport).	Polarization of tourism consumption with trading-up and trading-down effects (towards luxury or low cost tourism) as a consequence of a renewed increase in global social inequalities.
	Well-rooted image of the Italian brand.	Poor coordination between public and private entities, with the risk of delays in the construction of integrated networks. Persistence of the phenomena of irregular underground economy, speculation and double economy (increase in prices for tourists, especially foreigners).
	Evolution of tourism consumption towards a greater demand for innovative products	Reduction in the duration of stays and seasonality of flows:
	Growing focus on the creation of bottom-up and integrated development strategies.	Limited degree of response from operators to demand-induced changes.

3.6 The transnational cluster

Considering the only team involved in the present ReglPorts project, Montenegro and Albania see, net of the pandemic blockade, the tourist flows increase exponentially, no longer attracted only by consolidated tourist destinations along the coast, able today to attract Western European markets and no longer just Eastern Europeans by virtue of raising the standards of facilities and services, but also of the complete rearrangement of public spaces and services: the cases of Kotor, Budva, Ulcinije, Valona and Saranda. A policy more responsive to the requirements of the European Union and the undoubted wealth and attractiveness of the cultural and natural resources of those territories have by now consolidated demanding tourist flows in the top markets such as North American, North European, Australian and New Zealand, in search of new destinations and good standards of service and safety. This is how important destinations such as Gjirokastra, Berat, Shkodra, the splendid archaeological area of Butrint and the more inland Elbasan and Lake Ohrid, and parks and geosites such as the famous Blue Eye or the Osumi or Tara gorges have consolidated positions of absolute importance in the Mediterranean area, also intercepting the cruise flows of primary destinations such as Corfu and Dubrovnik towards the hinterland.

The port situation sees deep differences between the two countries. Much more advanced and on Croatian standards is the one of Montenegro, which boasts an excellent sector of chartering, shipbuilding and good quality facilities in Budva, Erceg Novi, Bar, and boasts an important cruise stop in Kotor and hosts one of the major tourist ports in Tivat of the Mediterranean, capable of mooring superyachts up to 250 m.

Il marina Porto Montenegro a Tivat

The situation in Albania is much less evolved, where until a few years ago the internal market simply did not exist, and this not only because of the poor nautical culture of a country traditionally suited to an agricultural and mountain economy, but also because of the moratorium on boats, adopted as part of the measures to prevent smuggling, which the Albanian government adopted in 2005 and remained in force until 2013. Today the yachting sector is among the priorities of Tirana's tourism development programs, and the development of maritime transport is part of the National Transport strategy and the 2016-2020 Action Plan through development investments in compliance with regulatory plans and with an orientation towards the market economy by 2020. It envisaged the rehabilitation of the infrastructures and superstructures of the four main ports and the tourist ports, and the development of tourist ports, including the construction of infrastructure and superstructures, in order to increase the number of tourism ships and tourists with an increase in related industries.
There are currently two concessions for marines in Albania. The only port for yachts is Marina di Oricum in the Gulf of Vlora, in concession to the Italian investors of the Giorgi Group, with about 625 berths, the related infrastructure and an hotel. The other port with concession, still in the project stage, is Porto Palermo, near Himarë, where there is a village with 12 bungalows and a tourist area with good potential for the development of boating.

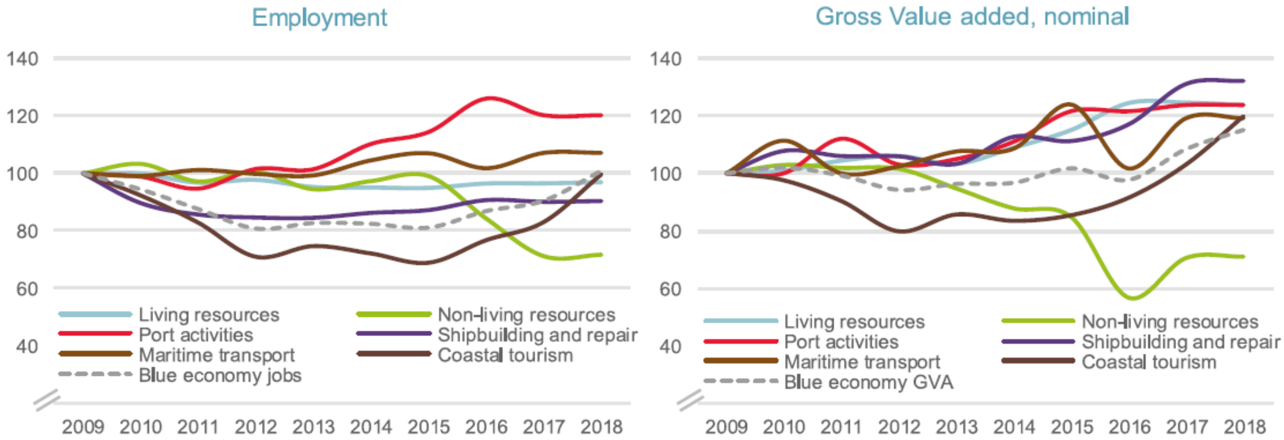
Finally, the port of Saranda is located about 160 km south of the port of Durres and is mainly dedicated to passenger traffic. The renovation of the port is being financed from the state budget and World Bank loans for tourist destinations.
Shipbuilding in Albania is not very developed: there are no large shipyards, except for Durrës-Gdansk Shipyard SA in Durres, which is specializes in the construction of cargo ships and fishing boats. 260 employees work on this site. The other shipyard is that of Pasha Liman, in the Gulf of Vlora, where military ships are built and where is also located the Albanian navy base. The yard was restored last

year in collaboration with the Dutch company Damen. Nevertheless, the nautical sector in Albania has good prospects for the immediate future. On the one hand, the varied Albanian coast offers good opportunities for the development of nautical tourism, on the other hand also the foreign producers of boats and nautical equipment see in Albania a good long-term potential, where they can produce, maintain and store boats from all over the Mediterranean, with very low operating costs, thanks to taxation and the cost of labor, among the most advantageous in Europe. In the immediate perspective, the grafting of the technological skills of the Apulian nautical supply chain in a rapidly evolving socio-economic context such as the Albanian one is undoubtedly one of the greatest, concrete and reciprocal opportunities for both sides of the Otranto Canal.

Nave da crociera in rada a Saranda

3.7 The challenge of the Blue Economy

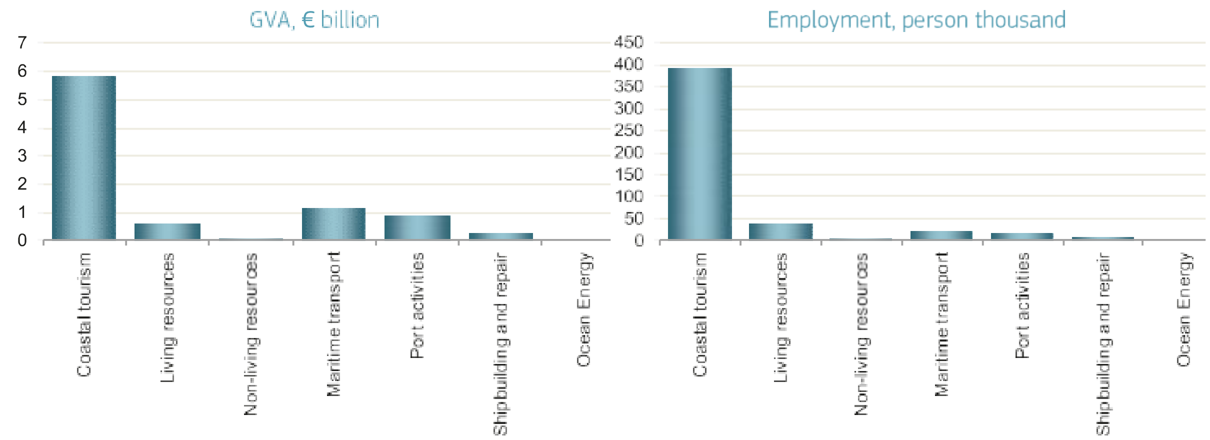
The blue economy is an innovative economic theory based on the marine and coastal environment which, on the model of the Green Economy and overcoming it, thanks to innovations in all sectors of the economy that use substances already present in nature, to make fewer investments, create more jobs and generate more revenue. For a correct reading, it is necessary to place the nautical tourism sector within the framework of the Blue Economy, which includes it both in terms of coastal tourism and port and shipbuilding activities, as well as obviously the impacts and value principles of environmental awareness and responsibility. .
The following economic data on a European and macro-regional scale photograph the sector and indicate its trends.



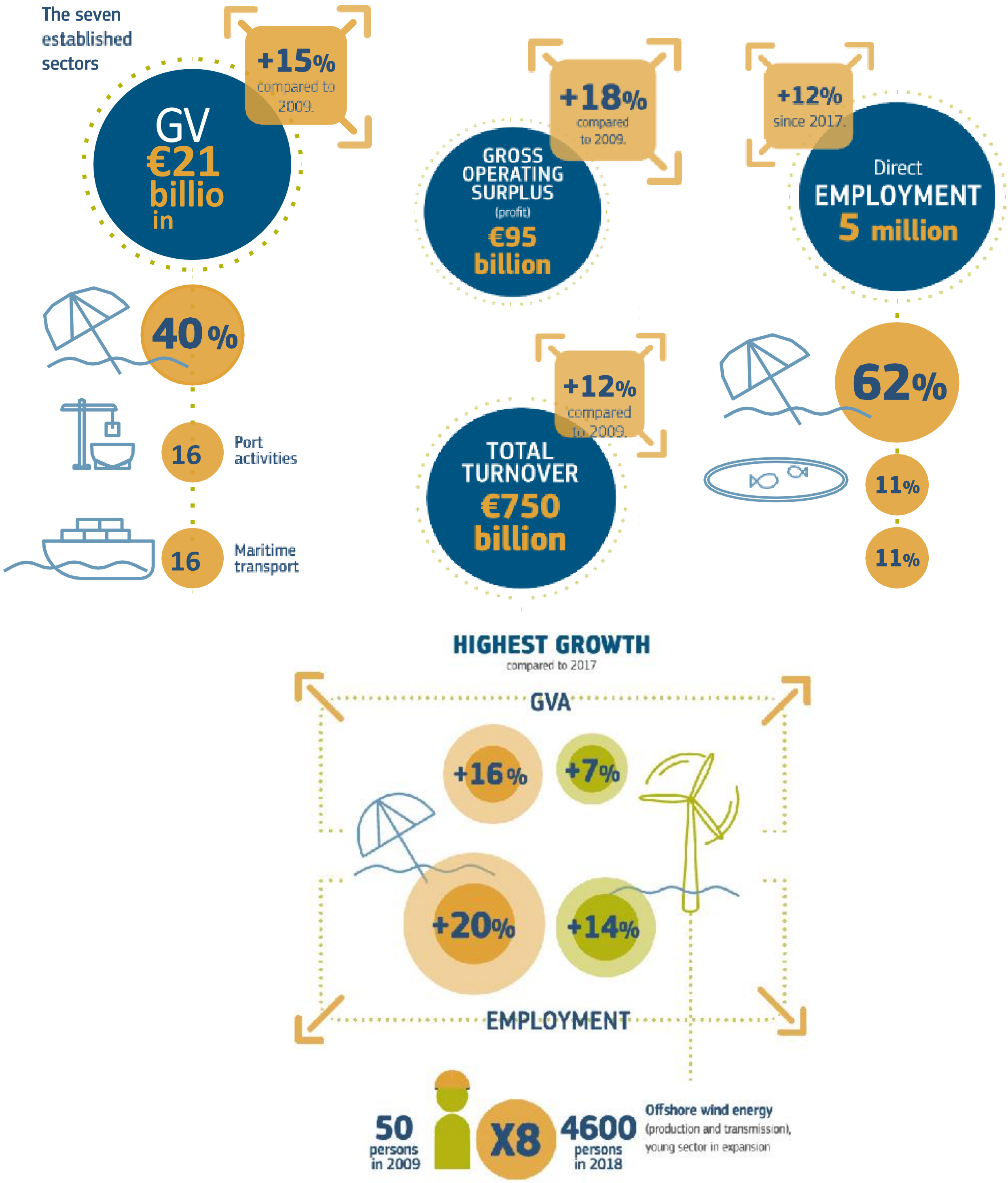
Source: Eurostat (SBS), DCF and Commission Services.

The development of the Blue Economy in Puglia requires greater redevelopment of tourist ports and support for shipbuilding as a driving force for pleasure tourism, for nautical charter, for the nautical industry, for the seafaring crafts and sports activities (sailing , rowing, sport fishing, scuba diving, etc.), which can significantly improve the visibility of our region and bring about a return of image and tourism of great interest. The bathing offer of the more than eight hundred kilometers of coastline requires increasingly qualified services appropriate to a foreign target, so the beaches and marine activities can remain operativel for several months, implementing the widespread economy of the territory and the seasonal adjustment that already start with the #Inpuglia365 process. Linking tourism, culture, environment, agriculture is essential to produce territorial marketing that can compete in international panorama.

The East Mediterranean sea basin Blue Economy by sector, 2017



Source: Eurostat (SBS), DCF and Commission Services.



The seven established sectors
+15% compared to 2009.
GV
€21
billio
in
40%
16
Port activities
16
Maritime transport
+18% compared to 2009.
GROSS OPERATING SURPLUS
(profit)
€95 billion
+12% compared to 2009.
TOTAL TURNOVER
€750 billion
+12% since 2017.
Direct EMPLOYMENT
5 million
62%
11%
11%
HIGHEST GROWTH
compared to 2017
GVA
+16%
+7%
+20%
+14%
EMPLOYMENT
50 persons in 2009
X8
4600 persons in 2018
Offshore wind energy
(production and transmission),
young sector in expansion

Sector	Size	Initial impact	Recovery path
Established sectors			
Marine living resources	Medium	Strong	Lagged
Marine non-living resources	Small	Medium	Prompt
Marine renewable energy	Nascent	Strong	Prompt
Port activities	Medium	Strong	Prompt
Shipbuilding and repair	Small	Medium	Lagged
Maritime transport	Medium	Strong	Prompt
Coastal tourism	Very large	Strong	Very lagged
Emerging sectors			
Blue bioeconomy	Small	Strong	Prompt
Ocean energy	Nascent	Small	Prompt
Desalination	Nascent	Small	Prompt
Maritime defence	Small	Small	Prompt
Cables	Nascent	Small	Prompt
Research and Education	Nascent	Small	Prompt
Marine observation	Nascent	Small	Prompt

Preliminary assessment of the impact of the Covid-19 economic chrisis on the Blue Economy