Pan-European dialogue between cruise operators, ports and coastal tourism stakeholders

Session 4: A new impetus for regional cooperation in cruise tourism

CRUISE EAST MED forum

United by the Sea

Maritime Institute of Eastern Mediterranean

Zacharias Siokouros

Tel.: (+357) 250 255 31

Fax: (+357) 250 255 15

Mob.: (+357) 996 625 00

E-mail: zacharias.siokouros@marinem.org

Web: www.marinem.org

Lloyd's List Awards Global | 2014 | Winner Innovation Award

The Maritime Institute of Eastern Mediterranean – Who we are?

- The Maritime Institute of Eastern Mediterranean - Mar.In.E.M.- is a non-profit Organization, based in Cyprus, established with the aim to promote Research, Technology and Innovation, as well as Education and Training within and for the Maritime Industry.

- Mar.In.E.M. acts at the same time as a Think-tank on Maritime Policy but also as an Incubator of Business Opportunities on Marine and Maritime issues, encouraging and facilitating Dialogue, Networking and Cooperation within the Eastern Mediterranean region.

Participation in European Research Programs, including:

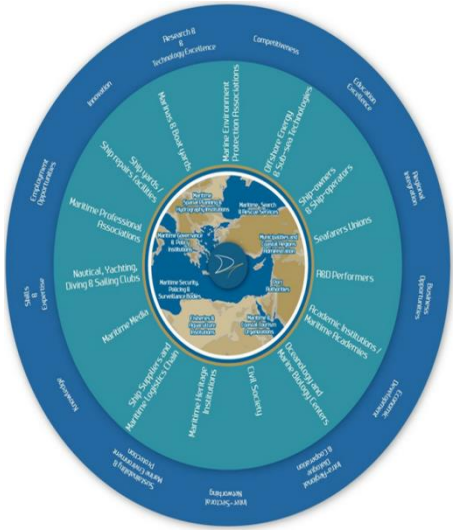
- "People Localization for safe ship evacuation during emergency" - LYNCEUS Project - EU FP7
- "Mediterranean Network for Custom Procedures and Simplification of Clearance in Ports" - MEDNET Project - EU MED Programme
- "Maritime Clusters supporting Research & Innovation to enhance Blue Economy Entrepreneurship", CoRINThos Project - EU MED Programme

A Maritime Cluster for Eastern Mediterranean

The strategic aim of the Maritime Institute of Eastern Mediterranean since its inception has been the creation of a "Maritime Cluster in the Eastern Mediterranean" - as an essential aspect of a **European Maritime Strategy for the Eastern Mediterranean** - encompassing the whole range of sea-related economic activities, which would foster synergies between the various regional stakeholders ▪ currently scattered and in some cases isolated within their National boundaries ▪ and will boost the development of a Common Maritime Economy which will benefit all the people of the Region.

A Maritime Cluster for Eastern Mediterranean

- **The Cluster will constitute a powerful engine of economic growth and a driver of innovation, providing a fertile business environment for companies, particularly small and medium-sized enterprises (SMEs), which will facilitate cooperation with research and academic institutions, the public sector, the civic society, suppliers, customers and competitors of the wider region and will allow synergistic actions based on their own competitive advantages.**
- **Contributing each one on its own field of expertise and complementing each other with resources, technology, people, know-how, facilities, infrastructure, fleets, will secure the "critical mass" for the operation of an effective, competitive and integrated Regional Cluster with multifold benefits for the whole region.**



The Cruise East Med Forum

Cruising into the Cradle of Civilization

Why a Cruise East Med Forum?

Objectives of the Forum

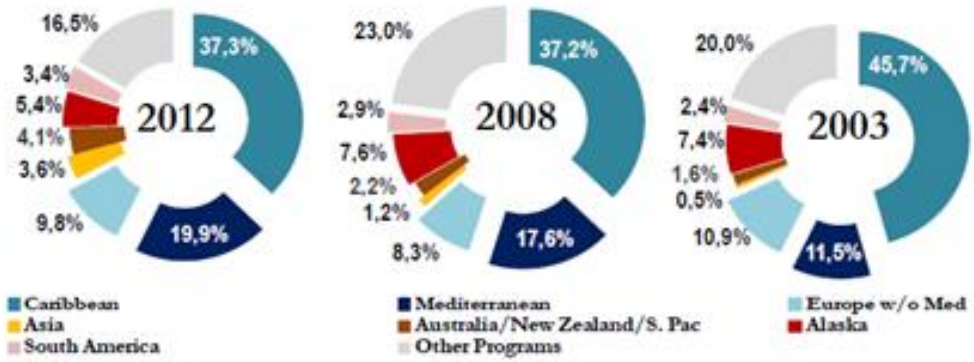
- The "Cruise East Med Forum" will promote cruising in the Eastern Mediterranean region, enhance cooperation amongst cruise companies, operators and all relevant authorities, organizations, SMEs and relevant research institutes, facilitate the exchange of information and create a network of all these entities and potential travellers.

Why a Cruise East Med Forum?

The Current State of the Cruise Industry as per CLIA:

The highest market share (37%) still remains to the Caribbean area, but it is followed by the Mediterranean, for the first time near to the 20%. These results had been achieved thanks to a constant availability of cruise beds in the whole Mediterranean area.

Figure 2: Deployed capacity shares 2012-2008-2003

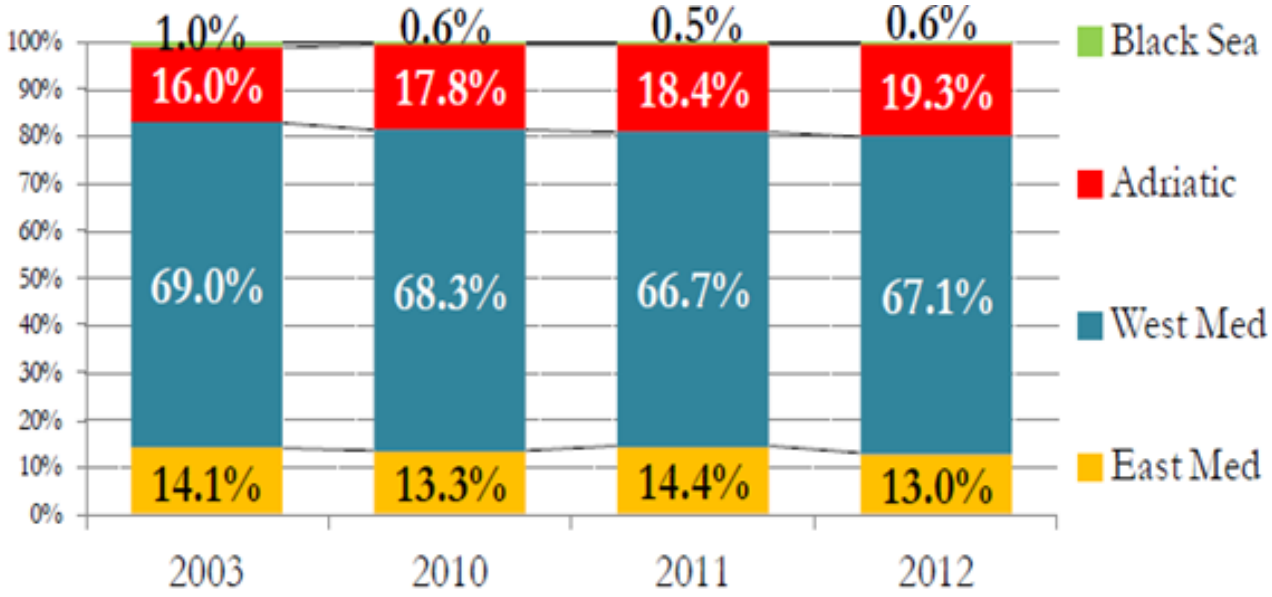


Source: Risposte Turismo elaborations based on CLIA data (2013).

Why a Cruise East Med Forum?

A comparison of Mediterranean cruise areas

MedCruise areas shares, passengers 2003/2010/2011/2012



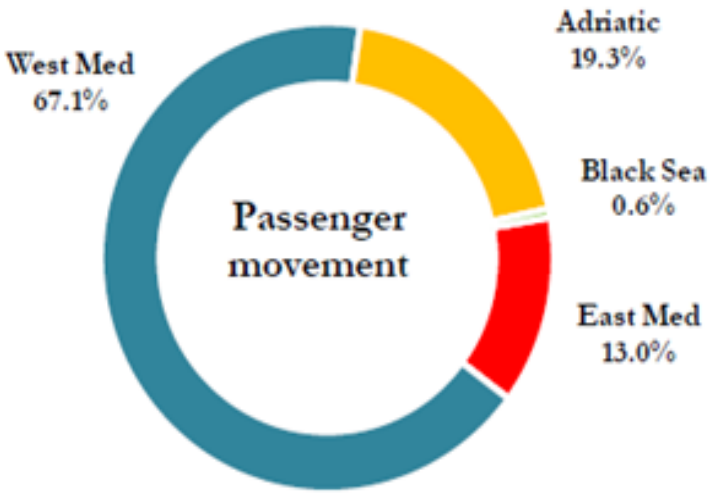
Note: the sum of 2003 is 100,1%due to rounded number.

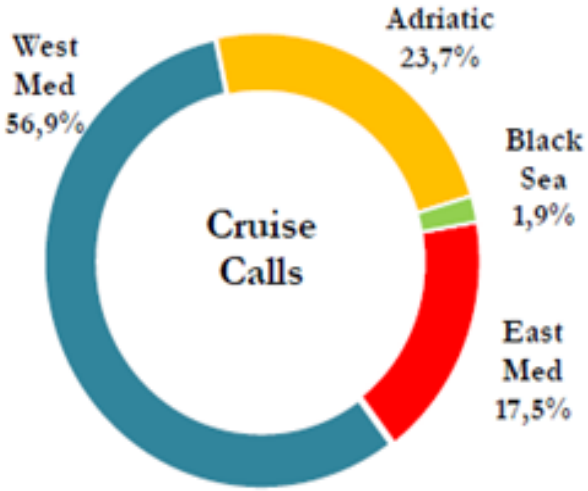
MEDCRUISE
THE ASSOCIATION OF MEDITERRANEAN CRUISE PORTS

Why a Cruise East Med Forum?

The Current State of the Cruise Industry in the Mediterranean as per MedCruise:

MedCruise areas shares, passenger movements and cruise calls, 2012



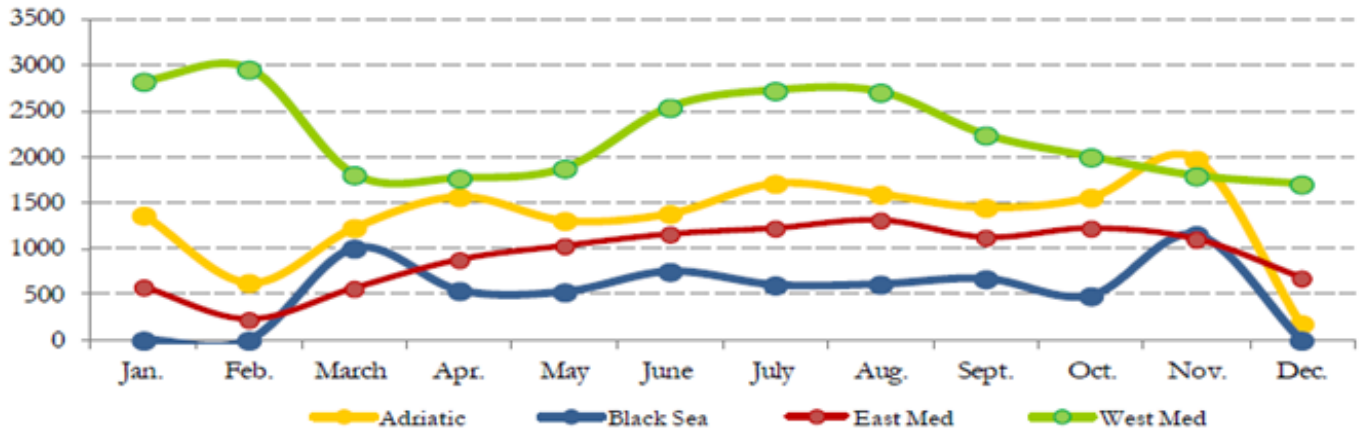


Why a Cruise East Med Forum?

A comparison of Mediterranean cruise areas

Trend of seasonality in the Mediterranean

Average passenger movements per MedCruise areas, 2012



Why a Cruise East Med Forum?

Top 10 MedCruise member ports, 2012 (pax, cruise calls var.on 2011)

Rank			MedCruise Member Port		Passengers				Cruise Calls	Variation % on 2011	
# 2012		# 2011	REGION	MEMBER	Home In	Home Out	Transits	Total		Total pax.	Cruise Calls
1	=	1	WEST MED	BARCELONA	716.454	721.929	970.251	2.408.634	**774**	-9%	-12%
2	=	2	WEST MED	CIVITAVECCHIA	462.947	457.665	1.472.958	2.393.570	**1.040**	-7%	4%
3	=	3	ADRIAT.	VENICE	722.299	721.801	331.844	1.775.944	**661**	-1%	1%
4	=	4	WEST MED	BALEARIC ISLANDS	233.448	232.937	875.125	1.341.510	**632**	-17%	3%
5	▲	6	WEST MED	NAPLES	70.461	89.758	1137.014	1.297.233	**527**	0%	0%
6	▼	5	EAST MED	PIRAEUS	167.552	161.616	868.879	1.198.047	**763**	-19%	-18%
7	▲	8	WEST MED	LIVORNO	35.145	35.380	967.324	1.037.849	**465**	6%	-6%
8	▼	7	ADRIAT	DUBROVNIK/KORCULA	12.316	12.316	956.816	981.448	**659**	-3%	-3%
9	▲	10	WEST MED	MARSEILLE	157.336	155.986	576.698	890.020	**354**	10%	-16%
10		new	WEST MED	GENOA	267.525	263.347	266.367	797.239	**213**	0%	-15%

Major identified challenges in the East Med

1. Authorities invest on infrastructures without the proper impact assessment and without considering the actual needs of the Cruise Operators so as to secure the expected returns on their invested capitals.
2. Disproportional amounts are spent for promotion without considering the actual needs of the Cruise Operators as well as those of the potential travellers.
3. Lack of appropriate awareness and skills - of the local stakeholders involved - in handling the specific sector.

Major identified challenges in the East Med

4. Absence of effective tools to provide updated information to cruise companies on port fees, possible sites of interest, events etc.
5. An unbalanced distribution of traffic is observed among neighboring destinations. This fact frequently leads to the creation of environmental issues and security problems.
6. Coordination across the countries of the Eastern Mediterranean Sea Basin does not exist, unlike in other regions such as in the Baltic or the Adriatic.

Major identified challenges in the East Med

7. Unstable political conditions affect the development of a destination and consequently the development of the whole region.
8. Seasonality.
9. The “enclave” tourist model that exists in most coastal regions of East Med is not suitable enough to promote the economic development of a destination.
10. The congestion observed in certain destinations results in negative perceptions and attitudes from the side of the local communities.

The “Cruise East Med Forum ” objectives:

- The development of a regional cruise cluster.
- The development of strategic tools for a joint promotion of the area.
- The enhancement of existing destinations and itineraries.
- The development of new destinations and itineraries.
- To address the seasonality.
- The provision of support to SMEs.
- The support to local economies and the promotion of local products.

Tools to be utilized:

- The creation of the "Cruise East Med Forum".
- The creation of Cruise East Med Portal www.cruiseeastmed.org
- The development of the "Cruise East Med" Package.
- The development of Training Guidelines for the stakeholders.
- The development of relevant material for public policy makers.

Target Groups

- Cruise companies;
- Cruise passengers;
- Policy makers;
- Operators & Port agents;
- Tour guides;
- Port authorities and regional tourist boards;
- Other relevant stakeholders including public

Lynceus - Innovation for Safer Cruises:

THANK YOU FOR YOUR ATTENTION!

Maritime Institute of Eastern Mediterranean

For more info:

Web: www.marinem.org

E-mail: admin@marinem.org

United by the Sea…