

Blue Economy Challenge for Albania

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ABSTRACT

This paper studies the situation of the blue economy in the Albanian part of the Adriatic Sea. As a country with a considerably long coastal line, it bears a lot of potential for the development of this sector, which includes tourism, fishery, maritime transport, and trade, as well as other related activities. The study focuses on tourism because it is one of the main contributors to the state budget, and to the fishery, due to its impact on tourism, gastronomy, exports, and the ecosystem. Data on these sectors during the last decade will be presented, with a special emphasis on the impact that Covid-19 pandemic had on tourism and fishery, how it shaped even afterward the way people make tourism, as well as their view on health and free time, due to its enormous economic and psychosocial impact. Another turning point in the performance of our blue economy is the actual armed conflict in Ukraine. Russian and Ukrainian tourists have increased impressively during the last years in Albania, and this aggravated situation has already begun to show its negative impact on our blue economy. The importance of this study lies in keeping up with the steps undertaken by our government towards this crucial sector of the economy, in terms of legislation, and real support with the right strategical politics undertaken and foreseen for the near future. It delivers recommendations to enhance these strategies to overcome the actual boundaries and develop further necessary reforms in favor of a sustainable blue economy.

1. Introduction

The purpose of this paper is to describe the reality of the economic activity related to tourism, fishery, transport, trade, and other related activities in the Albanian part of the Adriatic Sea. The blue economy is gaining more and more importance in the world economy, in terms of health or recreational tourism, employment, environmental impact, etc. (PHAROS4MPAs, 2019). The Albanian government has apprehended the importance of this part of the economy in all its forms (Ciro & Toska, 2018). In Italy, Saipern and Alboran has been signed even a Memorandum of Understanding for the development of a hydrogen project in Albania (European Commission, 2021). As a vital force in nature, waters are used in different industries, and this leaves not only good but also negative effects on the seas, lakes, and

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rivers. It is important to control these activities in order to minimize their negative sides and to make them in a sustainable way (World Bank, 2020), as well as to enhance the regulatory aspects to incentive a blue economy in a land with a 316 km long coastal line (Instat, 2018) like ours. At the same time, it is also important to raise the awareness of people, businesses, and all the stakeholders interested and affected by these activities, in order to give the sector the deserved attention. The awareness of these issues is increased especially after some hits the Albanian blue Economy took after the earthquake of 21 September 2019 of a 5.6 richter scale, and the bigger one on 26 November 2019 of a 6.4 richter scale, which caused great damages (Leka, 2020) and lost in lives, homes, and businesses. After this humanitarian and economic tragedy followed the Corona Virus wave which reached Albania with the first case of Covid-19 on March 8, 2020 (UN Albania, 2020). In the present day, there is also the invasion of Russia in Ukraine which affects tourism in Eastern Europe (DeutscheWelle, 2022). The issues addressed here will be on the Albanian potential for developing the blue economy, the problems related to them, and whether they are backed up by supportive legislation. The following sections will include the recent state of the literature, reports, and statistical data related to the blue economy in Albania, its potential, related issues, and recommendations. These sections will include an analysis of the legislative part and a description of some general statistical data on the blue economy, tourism, and related sectors. Recommendations will be given on how to foster a sustainable blue economy that will profit the whole Albanian society and economy.

2. Literature Review

2.1. Legislation

One of the main aspects when dealing with this kind of economic activity is the legislative aspect, which regulates the necessary framework under which all the activities will be undertaken. The Albanian legislation about waters covers ecological aspects such as the framework directive 2000/60 (Framework Water Directive) transposed into Albanian legislation with Decision of Council of Ministers no. 246, date 30.04.2014, which aims the good ecological status of waters for 2015. Another crucial directive is Framework Directive 2008/56/EC About the Maritime Strategy, planned to be adopted into the Albanian legislation in 2016. Giving the necessary framework for actions in ecological maritime politics, it aims among other things to inhibit maritime degradation, contamination, and negative impacts on the biodiversity and human health (VSM Report, 2021). All these parts of the legislation are connected to the Blue Economy, since they impact tourism, fishery, etc. Other directives regulate the ecological standards regarding water politics, transposed into Albanian legislation, such as Directive 2008/105/EC, Directive 2006/7/EC, etc. Another important legislative act is Law no. 43/2020 “On the Activities on Maritime Tourism” which regulates the conditions and criteria to be met for maritime tourism, navigable vehicles for tourism and recreational purposes, and the necessary infrastructure for the exercise of these activities.

Other related acts of a major importance for our seas and our tourism involve water resource management, protected areas, fishing, maritime safety, and maritime pollution, which are regulated by various laws in order to ensure a sustainable tourism industry, as part also of the EU integration policy.

Due to the fact that Maritime Transport is strongly connected to international relations to other countries, they needed to be regulated by a legislative act which required more than just a simple majority in the parliament, therefore it was codified in the Maritime Code in 2004 (Law No. 9251, date 08.07.2004 on the Maritime Code of the Republic of Albania, as

amended). It fulfills the EU requests for a fixed legislation needing 3/5 in Parliament to be amended (Kadrimi & Gjeta, 2019). Other transportation sectors such as the Road Transport have faced many changes, which makes it more difficult to adopt a code for it (a law was introduced for it instead), contrary to the Maritime Transport which as part of the process of Stabilization and Association in the EU should be harmonized with priority.

These and more legislative acts about maritime waters which rule the whole sector, together with the fiscal and supporting legislation on contractual relationships, financing, etc., show that the blue economy has a good point from where to develop further its potential here in Albania. The Ministry of Tourism is in charge of implementing this strategy, including the creation of the legal framework for the objective regarding the Support for Destination Management (Gerxhani, 2021). The Smart Adria Blue Growth Project, organized by the Union of the Chambers of Commerce and Industry and the Albanian Ministry of Europe and Foreign Affairs, is another example of the efforts of the Albanian government to implement development strategies concerning the blue economy (Interreg, IPA CBC, 2021).

2.2. Tourism

Tourism is one of the sectors bringing most of the income in the state budget, as well as in the business and family budget in the country, and with the highest employment potential sector (93,000 directly employed and over 291,000 total employed for 2017) (Ministria e Turizmit dhe Mjedisit, 2019). Coastal tourism is the most important one in Albania (Husar et al., 2020) and beaches, the sea, and the sun occupy the main weight in the tourist offer, therefore tourism deserves increased attention in the framework of developing the blue economy in Albania (Ministria e Turizmit dhe Mjedisit, 2019). According to the National Strategy for the Sustainable Tourism Development 2019-2023, it is predicted that for the next 10 years this sector will have a considerable increase of around 8.8 % only in 2-3 years, accounting for up to 9.3 % of the GDP.

But as many other sectors during the Covid-19 Pandemic have faced difficulties, also tourism has been hit, where tourism contribution to GDP for 2019 was 18 %, which shrank to 10.4 % in 2020 (IMF, 2021). Even though statistically traveling and tourism have increased by 68.2 % during the first half of 2020, the income deriving from this sector is lower than in 2019, respectively 854,000,000 Euro for 2019 and 408,000,000 Euro for 2020 (Ministria e Turizmit dhe Mjedisit, 2021). According to this statistic, the closing caused during the Pandemic was reflected also in the decrease of investments in hotel constructions and other accommodation structures, which fell in value (000 ALL) from 11,068,368 in 2019 to 383,362 and 35,758 in 2021, further on in the decrease of construction permits from 39 in 2019, 9 in 2020 and 11 in 2021, and also a respective decrease in the approved construction area for this kind of business. This all is reflected in the hotel stays which faced a tremendous decrease too. In 2021 there were registered an increased number of accommodation structures.

Another hit in this industry came and is predicted to become worse for this summer season and maybe the others to come, due to the war in Ukraine. After a tourist boom of tourists from Ukraine from 2016 until 2019, following a halving in 2020, this number quintupled in 2021 going to 110,205 according to the Institute of Statistics. According to the Director of the Tour Operators Association, there are many suspended flights and hotel reservations from Ukraine and Russia, which will have a direct impact on our tourism, given that Ukrainian tourists occupy about over 20 % of the Albanian tourism market (Euronews, 2022).

Internationally speaking the importance of the Blue Economy was recognized in the Rio +20 United Nations Conference on Sustainable Development. There was acknowledged the need for sustainable development in three dimensions: economic, social and environmental

aspects, where tourism can contribute to all of them through its linkages to the other sectors by creating jobs and trade opportunities (UNO, 2012). Another important factor in sustainable development are also oceans and seas for their contribution to economic growth. Coastal and marine resources are seen as very valuable in the process of the Blue Economy development by considering also environment protection and ecological imbalances (Lapa et al., 2021). Even the European Ministers for Maritime Affairs recognized in the Limassol Declaration of 2012 that seas and oceans are promoters of the European economy focusing inter alia in coastal tourism etc. In order to ensure a sustainable economic growth through maritime economy in Albania, it is crucial to connect tourism with blue economy as a sustainable model for economic and social growth (Lapa et al., 2021). It is crucial to give the right attention to the fragile coastal and marine ecosystems in order not to deter the Blue economy development for Albania (The World Bank, 2021). One of the necessary mechanisms of the marine spatial planning are also the empowerment and involvement of new generations in the blue and green tourism (Myftiu, 2019). According to the GEF Adriatic Project the main purpose is to foster an ecosystem based approach in order to develop a sustainable blue economy, where one of the main risks is the unstable tourism which is destroying the natural values as the main attraction for tourists (GEF Adriatic, 2020).

2.3. Fishery

Another sector of the blue economy is also fishery and seafood which has important growth potential, providing fulltime employment for 4,215 people, and an overall contribution of US\$ 111 million in 2017 representing 0.9 % of Albania's GDP, projected to grow by more than 40 % by 2030 (World Bank, 2020). During the Pandemic of Covid-19, maritime fishing and clams have faced a decrease going to 4.521 tons and 285 respectively, while aquaculture faced an increase from 5.229 to 8.799 (INSTAT, 2020). Another important phenomenon was the increase in the import of fish during the pandemic, even though restaurants faced major difficulties during that time, which can be explained by the change in lifestyle and adapting to the new situation by cooking healthy at home (Scan Intelligence Unit, 2021).

The literature review above tries to describe the actual situation of some important aspects of the Albanian blue economy and how the actual political, and socio-economic factors have influenced its progress during the last years, namely the Covid-19 pandemic and the ongoing Russian – Ukrainian armed conflict. There are also positive aspects related to the impact of the pandemic on the blue economy, which is the decrease of coastal pollution during 2020 in most of the coastal cities (INSTAT, 2020). Another positive trend shows that aquaculture, which came as an alternative to the limitations that fishing in the sea faced during the closure months, which is also in the focus of the government policies, also shown in its inclusion in the Interreg, IPA CBC project (Interreg Agenda, 2021). But the focus of this study will remain on the aspects mentioned above, to be taken into consideration in future detailed studies. All this gives enough evidence for the hypothesis, that the Albanian blue economy has faced a positive trend in terms of businesses and indirectly the government attention upon it over the last decade, and the pandemic of Covid-19 together with the ongoing critical situation in Ukraine has had a negative impact on its development.

2.4. Maritime Transport

Parallel to the other aforementioned blue economy sectors is of a crucial importance also maritime transport which is strongly connected to them, as a facilitator and a job maker, an income generator and a concern for the community and the environment. According to the

National Coastal Agency the main coastal areas in the Republic of Albania are Velipoja, Shengjin, Tale, the Bay of Lalz, Durres, Golem, Vlora, Drimades, Himara, Borsh, and Saranda. There are four ports in Albania, namely the Port of Durres (now bearing a Port Authority status), which is the biggest and most important one, only 35 km away from the capital city. Then comes the Port of Vlora, which serves for the processing of goods and passenger transport. In the northernmost Port of Albania is the Port of Shengjin, which serves also for the fishing boats. The smallest and southernmost port is the Port of Saranda, used for tourist purposes and passenger transport. Given the importance that maritime transport has on the transport of goods, which according to INSTAT data is much higher than other means of transport, railway, air and land, etc., it deserves the right attention in the economic and financial point of view, but also regarding the eco system. Being a member of the United Nations Convention on the Law of the Sea 1982, Albania has a National Contingency Plan in reaction of the obligations deriving from this Convention, to respond to accidental marine pollution. This plan organizes an effective response to oil spills and poisonous substances affecting the marine area, as well as facilitates the international cooperation in the Adriatic, Ionian and Mediterranean sea (Sinanaj, 2014).

3. Methodology and Limitations

Secondary data from official institutions like INSTAT, Ministry of Tourism and Environment, the World Bank, Scan Intelligence Unit, etc. Were gathered. The data of interest are on investment in the tourism sector, such as construction permits for accommodation and similar structures, the surface of construction, income, and net income from tourism throughout the last years, and hotel stays, as well as data on seafood. The timeframe of these data is from 2014, 2016, or 2017 to 2020 or 2021. They are presented in simple tables in order to simplify their understanding even by non-specialists.

A comparison of the data before and after Covid-19 is made, in order to show the effect that the pandemic and globalism have on the blue economy, which even by the nature is connected to the economies of other countries.

The major limitation related to the methodology of this study is the lack of data for a longer timeframe, a minimum of ten years, which could allow a descriptive analysis and the use of regression analysis by taking into consideration the progress of the blue economy in Albania related also to other factors, such as Foreign Direct Investments, the portion of the state budget in this sector, the fiscal policy used as an incentive in this sector, and finally the impact that other forces acting globally such as the pandemic or wars in other countries. There are no official statistical data on the impact of the conflict between Russia and Ukraine, so they cannot be included in the tables below, even though many analysts and representatives of tourist agencies have pronounced themselves in this regard.

4. Analysis and Discussions

From the collected data the following are more relevant and significant to be shown for the analysis. Regarding tourism indicators, income and net income are the most relevant for the state in terms of the fiscal and financial aspects but also for the businesses and indirectly for employees. As can be seen in table 1 income and net income from tourism activity has shown an increasing trend from 2014 to 2019, with behalf during the pandemic year, 2020, namely 408,5 and 65.9 million Euro respectively. After the most difficult phase of the pandemic, in 2021 these figures increase to 687.2 and 288 respectively, which shows a direct connection between the closing due to Covid-19 and income from tourism. The upward trend until 2019 shows a positive trend regarding tourism and a negative impact of the pandemic on it in 2020.

Table 1.

Income from tourism

No.	Year	Income Mil/Euro	Net Income Mil/Euro
1	2014	545	-10
2	2015	592	118
3	2016	640	140
4	2017	723	156
5	2018	786	160
6	2019	854	157
7	2020	408.5	65.9
8	2021	687.2	288

Source: INSTAT, 2021

Another indicator connected to tourism is investment in terms of construction of new accommodation structures (table 2), its value, and respective surface, which as can be shown from INSTAT annual data, has seen an incredible increase from 2018 to 2019, respectively 1,428,758 (000) to 11,068,368 (000) ALL.

Right afterward during the pandemic, these figures show a drastic decrease of 383,362 (000) ALL. The same is also for the number of construction permits for these purposes and the approved construction permit surface, respectively from 39 and 310,962 m² in 2019 to 9 and 11,259 m² in 2020. Other than income, these figures show a lower increase in 2021, namely 11 construction permits, for an approximated value of 35,758 (000) ALL and a surface of 5,964 approved construction permits surface in 2021.

This shows a positive trend of investments in tourism until 2019 and a negative impact of the pandemic on the blue economy in Albania.

Table 2.

Investments in the tourism sector

1st half 2017-19	2017	2018	2019	2020	2021
No. Of construction permits for hotels and similar structures	17	32	39	9	11
Approximated in valued value (000 ALL)	998,862	1,428,758	11,068,368	383,362	35,758
Approved construction permit surface (m ²)	29,023	42,896	310,962	11,259	5,964

Source: INSTAT, 2021

Finally, hotel stays of inlanders and foreigners is another indicator that is analyzed to follow the progress of tourism, including coastal tourism as an important aspect of the blue economy, as mentioned above. As seen in table 3 it has shown a steady increase from 2014 to 2017, a bigger increase in 2018 from 9,872,300 in 2017 to 12,071,400 in 2018, and a slight decrease in 2019 in the year of the two big earthquakes that happened in the Adriatic see in that year. The biggest decrease happened in 2020 during the Covid-19 pandemic, from 11,305,000 hotel stays to only 1,786,450, approximately 6,3 times less. The year after shows a good increase in 9,016,680, even though not at the level of 2018 or 2019. All these figures above show a positive trend regarding the progress of the tourism business and the tourism climate in Albania and a negative impact of the pandemic in this field.

Table 3.

Hotel stays

No.	Year	Hotel stays
1	2014	7,285,000
2	2015	8,067,000
3	2016	8,323,000
4	2017	9,872,300
5	2018	12,071,400
6	2019	11,305,000
7	2020	1,786,450
8	2021	9,016,680

Source: INSTAT, 2021

Regarding the water categories, there are three main ones, namely fishing, aquaculture, and clams. Under fishing fall the maritime fishing, coastal fishing, lagoon fishing, and inland waters. Fishing shows an upward trend from 2016 to 2019, and a decrease in 2020 from 8.707 in 2019 to 7.808, proving again the hypothesis of the study. An increase despite the pandemic shows aquaculture from 5.229 in 2019 to 8.799, reinforcing the thesis above this category and its growing importance for the businesses and the government's attention.

Table 4.

Catch from fishing by aquatic categories

	Description	2016	2017	2018	2019	2020
Nr.	Water categories					
I	Total fishing (1+2+3 +4)	7.884	8.289	8.629	8.707	7.808
1	Sea	4.646	4.609	5.537	5.499	4.521
2	Coast	952	1.074	315	342	365
3	Lagoon	598	599	350	94	7
4	Internal Waters	1.688	2.007	2.427	2.772	2.844
II	Aquaculture	3.200	4.000	5.138	5.229	8.799
III	Clams	1.450	430	1.108	1.075	285
	Total catch (I+II+III)	12.534	12.719	14.875	15.011	16.892

Source: INSTAT, 2020

According to INSTAT data the transport of freights by sea bears the greatest load in tonnes, which is nearly 7 times higher than the one through railway (the one through air is inconsiderable compared to the aforementioned). Table 5 shows the increases and decreases in the tonnage transported through the three main means of transporting goods:

Table 5.

Transport of freights

Description	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Volume of freight by railway	142	151	338	198	76	150	199	708	629	632
Volume of freight by sea	3,984	4,001	4,066	3,840	3,756	4,022	3,890	4,455	4,277	4,840
Volume of freight by air	2	2	2	2	2	2	2	2	2	2

Source: INSTAT, 2021

Whether regarding the number of sea passengers faced a major decrease during the pandemic in 2020, which went from 1,574,095 in 2019 to 379,084 and with 862,757 still not in the level of before the pandemic. This goes in line with the world wide impact of Covid-19 pandemic on human mobility due to restrictions on human movements and changes in consumption, which can be seen in the 70.2 % decrease of these numbers in the Exclusive Economis Zones with various other changes in other areas of the world (March, 2021). Table 6 shows the numbers for Albania during the last decade:

Table 6.

Transport of passengers

Descriptio n	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Number of railway passengers	448,000	329,130	186,620	189,708	88,690	65,980	75,881	59,787	17,948	24,018
Number of sea passengers	1,101,025	1,009,186	1,094,569	1,185,957	1,288,988	1,507,116	1,522,896	1,574,095	379,084	862,757
Number of air passengers	1,665,331	1,757,342	1,810,305	1,977,044	2,195,100	2,630,338	2,947,172	3,338,147	1,310,614	2,928,275

Source: INSTAT, 2021

5. Conclusion and Recommendations

The results above are all indicators that support the hypothesis of this study, even though they are not enough to make an overall econometrical assessment of the progress of the blue economy for at least 10 years in terms of business interest, and government involvement to develop this sector. This gap in the statistical data for such an important sector must serve as an indicator for the government and all the interested actors in investing and implementing the necessary strategies.

Some efforts to be taken in the development of the blue economy in Albania according to the World Bank study (World Bank, 2020) and others are the following:

- Further development of present Marine Spatial Planning, part of the MSP Pilot Project “MSP Pilot project, which goes hand in hand with Supreme and GEF Adriatic projects, supporting the EUSAIR Strategy (Myftiu, 2019).
- Support research and development for innovation in these sectors and the Blue Albania brand;
- Develop seafood growing and processing standards with high environmental and social standards to become competitive in the global market and facilitate accession to IPARD83 finance;
- Set environmental and social standards for aquaculture licenses, and stimulate businesses to invest in this sector according to the European Green Deal principles;
- Improve fisher’s marketing through an electronic platform;
- Enhance governments data gathering, and research, and increase the state budget for emergencies in order to draw conclusions from different political, environmental, and socio-economical factors which are out its influence, such as earthquakes, pandemics, wars in other countries, etc., and help businesses and other stakeholders to overcome the difficulties;
- Take actions to better address the marine plastic and fecal contamination of marine waters by developing a sustainable strategy for the blue economy, etc.

- Foster a sustainable maritime transport in order to back up the Albanian Blue Economy with the proper means as a big resource of income, and to protect our ecosystem from pollution and destruction.

This study, despite the limitations in the data mentioned above, will serve as an appeal to responsible state authorities, organizations, civil society, and researchers to invest more in statistics and studies in this field for the generations to come, to serve as a starting point for each policy and strategy to be implemented in the future in this field.

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