

MARITIME INDUSTRY CHALLENGES OF BULGARIA

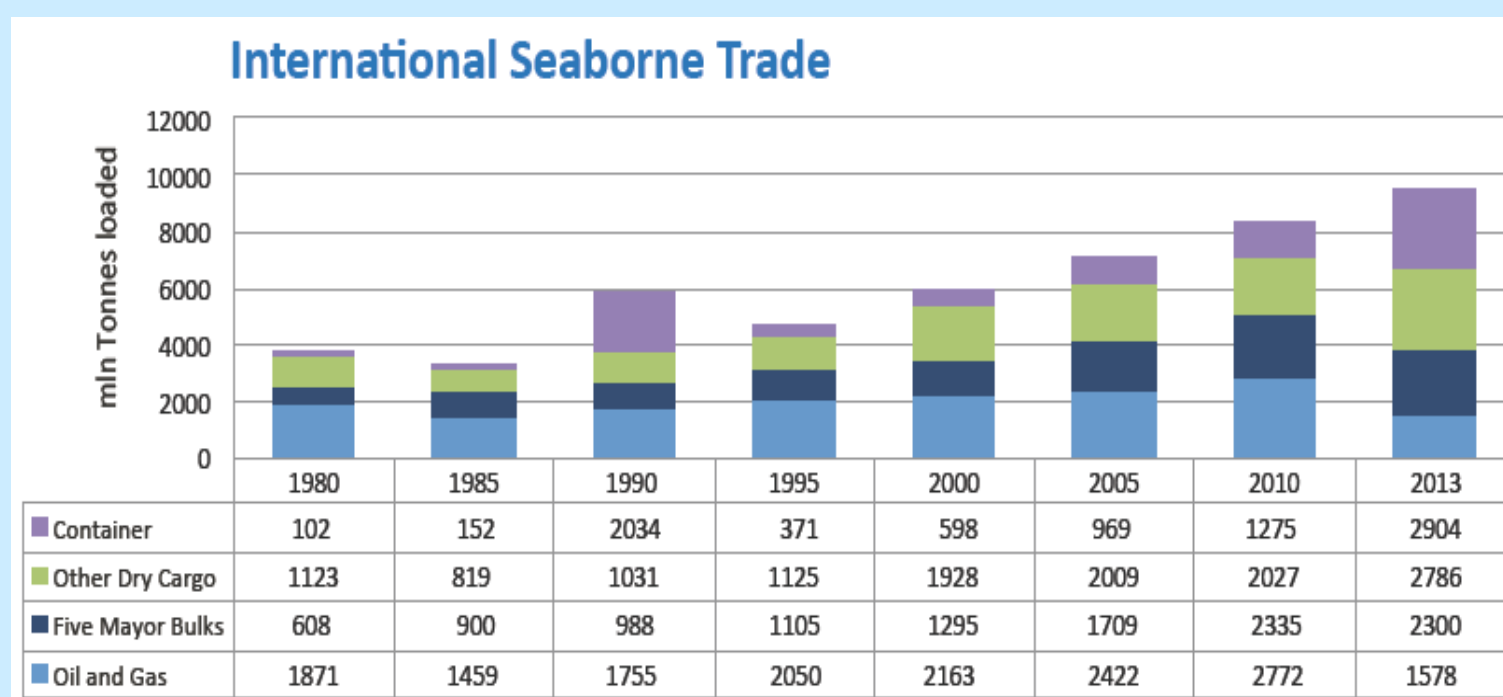


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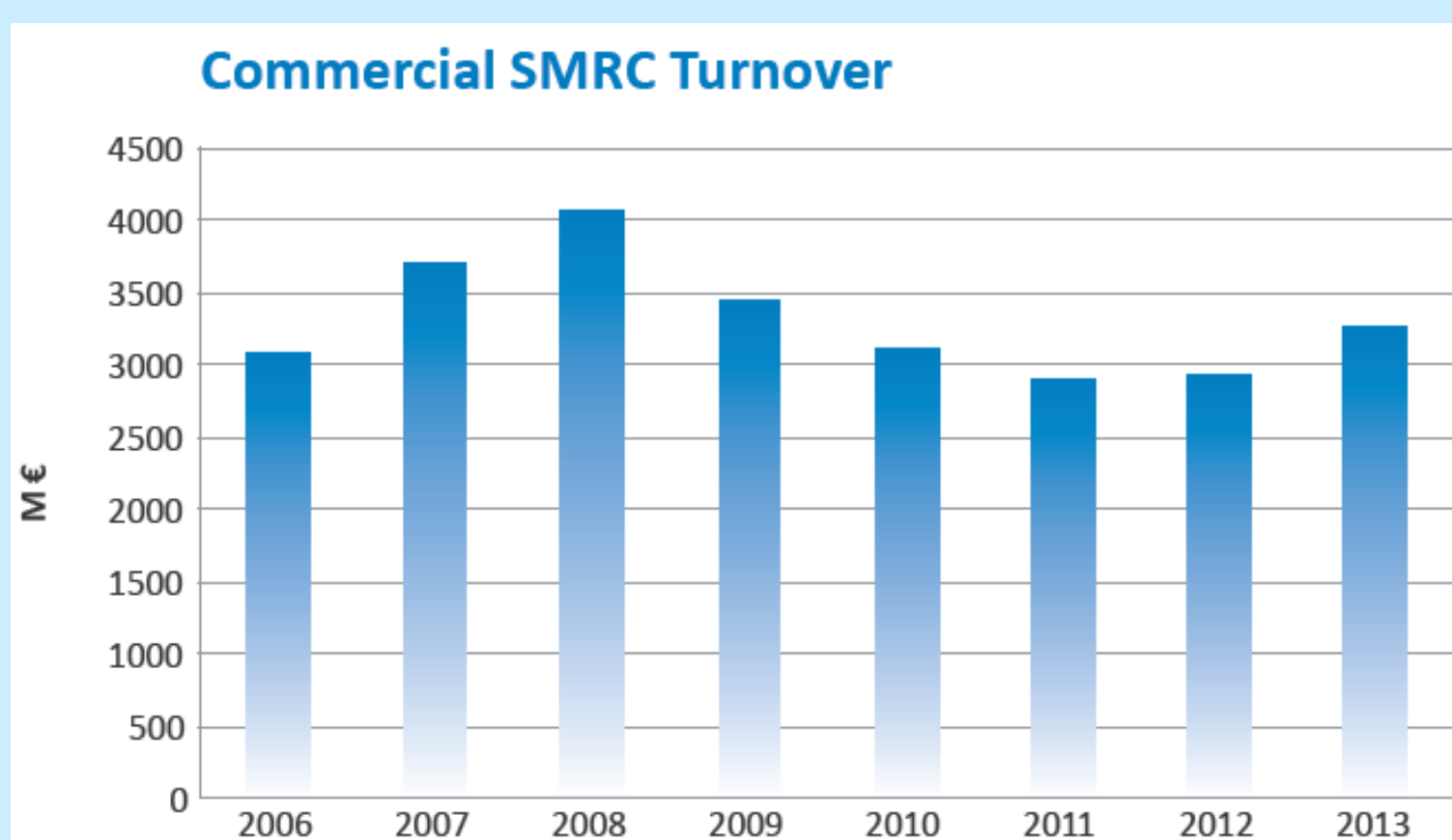
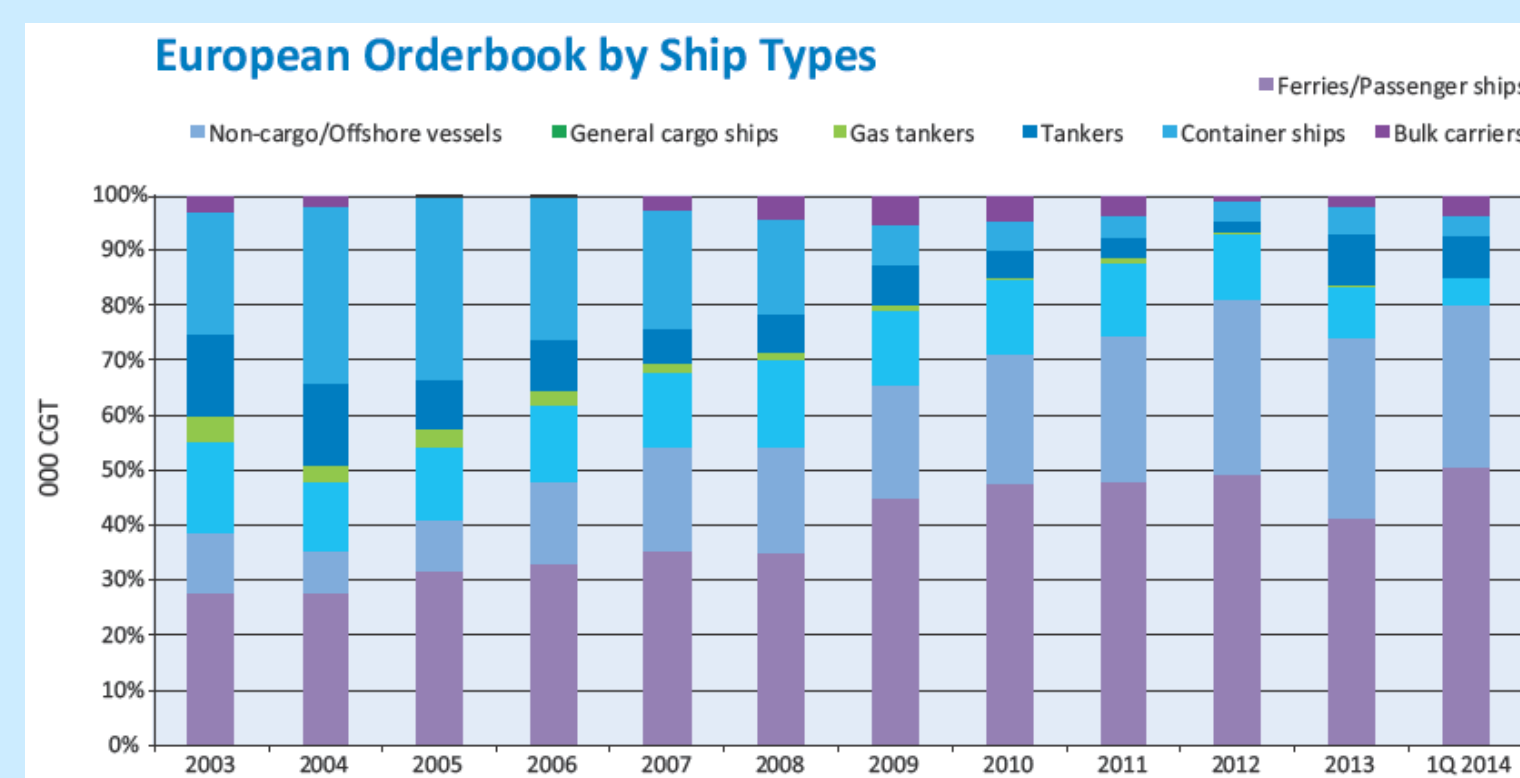
International Shipping and Shipbuilding

Source: Sea Europe. Supplying, Building & Maintaining the Future. 2014 Edition.



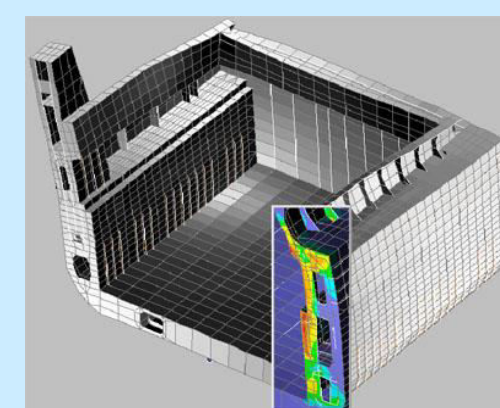
2013 has seen an increase in the international seaborne trade in comparison to 2012. Trade growth has a positive impact on the absorption of excess shipping capacity, freight rates and ultimately the maritime technology industry.

The European order book by ship type shows the progressive specialisation of European shipbuilders in passenger, offshore and other non-cargo carriers.

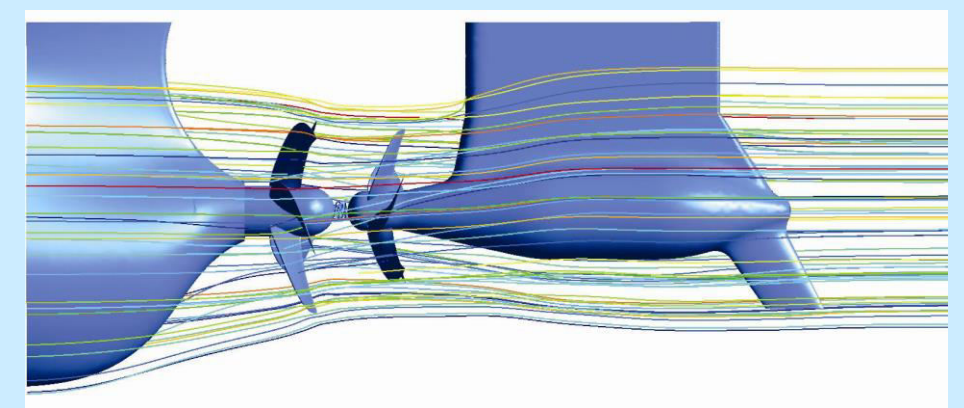


The turnover of the European ship maintenance, repair and conversion sector for 2013 was around €3bn back to the 2006 level and has increased year on year since 2011.

Research and Innovation Activities in Bulgaria

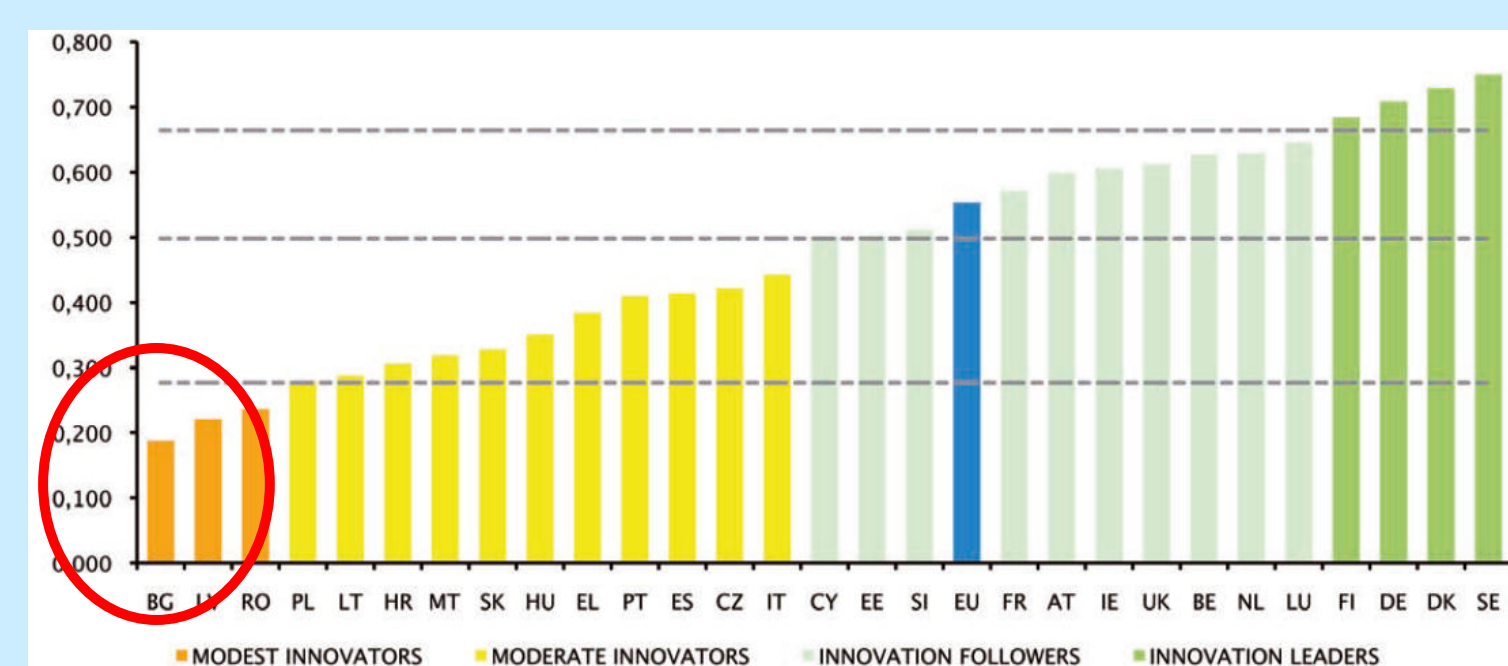


Research Infrastructure:
□ Technical University of Varna
□ Naval Academy
□ BSHC - BAS
□ Institute of Oceanology - BAS



THEMATIC AREAS OF WATERBORNE PLATFORM

Sustainable Waterborne Transport - Increasing the energy efficiency of ships and vessels - Minimising the environmental impact of ships and vessels - Assuring security of supply - Building safer ships and vessels - Increasing competitiveness - Recruiting and retaining a skilled workforce - Developing advanced waterborne infrastructure including e-maritime solutions	Support for the harvesting of offshore resources - Renewable energies: wind, wave and tidal energy - Fossil fuels and raw materials - Fisheries and aquaculture	Minimising impact on the oceans. Developing a better understanding of the oceans - Improving products and services for marine monitoring - Increasing direct collaboration with the marine sciences
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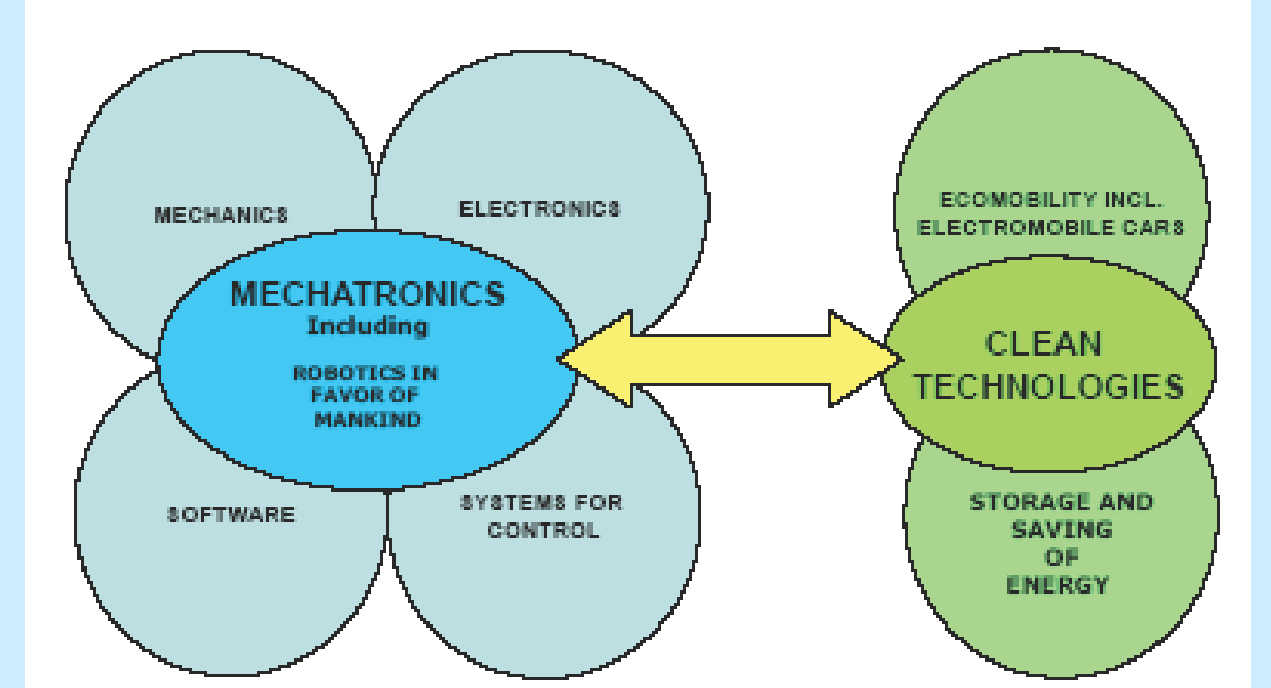


Lowest Innovation Performance according to **Innovation Union Scoreboard, 2014**

Smart thematic areas according to "Innovation Strategy for smart specialization the Republic of Bulgaria"

version 22.12.2014

There is no word "maritime" or "marine"!



BLUE GROWTH Strategy for Bulgaria

PROJECT - Contract Number, MARE/2012/07
Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea
REF. NO 2, REPORT 1 - ANNEX 2.3, Country Fiche BULGARIA, JANUARY 2014

Ranking order of the 7 largest maritime economic activities in Bulgaria

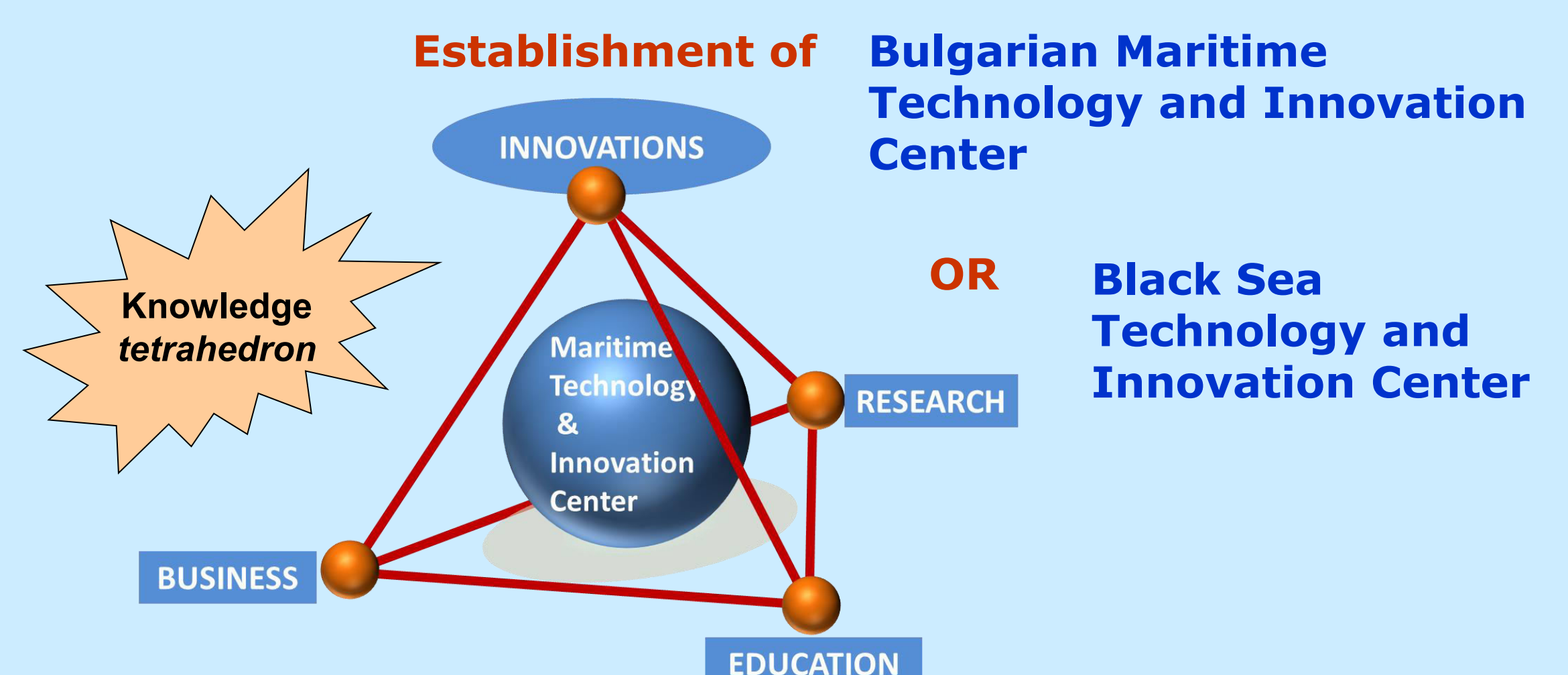
Rank	Marine and maritime activities	GVA (billion EUR)	Employment (*1000)	Score
1.	Coastal tourism	0,7694	109,519	62,45
2.	Fishing for human consumption	0,0653	14,660	7,98
3.	Short-sea shipping (incl. Ro-Ro)	0,0832	6,917	4,29
4.	Shipbuilding and ship repair	0,0647	5,983	3,64
5.	Water projects	0,0601	3,627	2,41
6.	Inland waterway transport	0,078	2,618	2,09
7.	Cruise tourism	0,002	2,500	1,27

Ranking order of the 7 marine and maritime activities with most future potential in Bulgaria

Rank	Marine and maritime activities	Score
1.	Offshore oil and gas	+++++
2.	Coastal tourism	++++
3.	Fishing for human consumption	++++
4.	Short sea shipping (incl. Ro-Ro)	++++
5.	Inland waterway transport	++++
6.	Water projects	++++
7.	Shipbuilding and ship repair	++++

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What can be done better ?



- To be a regional research complex performing specific "blue growth" in promising maritime activities for Bulgaria;
- Strengthening the links in the knowledge triangle and reach, a new quality in innovation;
- Coordinate efforts to conduct the relevant European and national policy in the maritime sector;
- Offer specific innovative services, technology transfer and practical solutions to businesses by involvement of experts;
- Offering new jobs requiring specific competences;
- To promote scientific cooperation by developing and working on national and European projects;
- Creating favorable conditions for researchers, ensuring free movement and development of intellectual potential;
- To collect and analyze data needed in the formation of strategies and policies related priority for Bulgaria and maritime activities in accordance with the platform WATERBORNE
- Coordination of efforts to establish a national technical platform **BUL- WTAERBORNE**
- BMTIC to become a **Center of Excellence** in the light of the new Operational Programmes - 2014-2020