

**CTUR**  
Cruise Traffic and Urban Regeneration of  
city port heritage  
URBACT Thematic Network

**BASELINE STUDY**

Lead Expert  
Rachel Rodrigues Malta

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# INTRODUCTION

# 1. Port cities : cities on the move

For over two decades, European port cities have held an important place in urban current affairs.

## 1.1 Cities in crisis

The first headlines are both depressing and alarming. Developers and decision-makers need to find answers to the abandoning of large areas by port and industries, which are the most visible spatial impact of a crisis affecting all the components of cities. In the 1980s the drastic evolution of maritime transport (gigantic ships and containerization), the demands of spatial re-organization and both human and technical restructuring of ports, dismantling of large industrial units of production (steel industry, petrochemical industry, shipyards, etc)... all strongly shook the socio-economic basis of port cities with an accumulation of negative indicators : demographic decline, unemployment, accentuation of the phenomenon of social exclusion, accelerated deterioration of old urban tissues. The figures in the table below show the extent of this crisis.

Years 1980-90 : urban crisis with common characteristics

Port city	Loss of inhabitants	Loss of jobs	Negative spatial dynamics (1980-90)
		Unemployment	
Marseilles	- 100 000 (1975-90)	- 40 000 jobs (1962-90)	Port neighbourhoods & city centre in decline Derelict port areas
		20% (1990)	
Hambourg	- 225 000 (1965-90)	-	Port neighbourhoods in decline Derelict port areas
		14% (1987)	
Liverpool	- 400 000	- 33% jobs in industrial & port sectors (1971-85)	Port neighbourhoods & city centre in decline Derelict port areas (960 ha)
		27% (1990)	
Barcelona	- 50 000 (1960-90)	-	Port neighbourhoods & city centre in decline Derelict port area
		20% (1986)	
Genoa	- 120 000 (1960-90)	- 50 000 (1960-90)	Port neighbourhoods & city centre in decline Derelict port-industrial areas (+/- 200 ha)
		-	
Rotterdam	- 172 000 (city centre)	-	Port neighbourhoods & city centre in decline Derelict port areas
		20% (1987)	

INAMA (1992) and other sources

## 1.2 Cities undergoing change

Halfway into the 1990s, the spectacular growth of maritime exchanges - with over 25 000 billion tons of merchandise travelling by sea and ocean annually - is favourable to ports, which all show a rise in activity. Container traffic figures confirm this: between 1995 and 2005 this traffic went from 145 million T.E.U. (twenty equivalent unit) to 275 million with an average growth estimated at 8.9% per year.

With this new situation, port cities must invest in a double competition: one that the ports have to engage in order to secure and control maritime traffic, and one that drives the cities to reinforce their position on the European territory. Whilst it is in fact shown that economic renewal of cities doesn't always follow the mechanic progression of traffic (A. Lemarchand, 2006), the news of port cities isn't any less festive, with the media coverage in Europe of a series of inaugurations of new waterfront developments, replacing quaysides and docks abandoned by modern port functions. Barcelona, Genoa, Liverpool, Hamburg or Lisbon are all examples which confirm a *waterfront revitalization phenomenon* as the cornerstone of an ambitious regeneration project for the city as a whole. The challenge is first to make port-cities productive and no longer simple transit areas. In this way, the city-port interface becomes a real experimental support for the elaboration of strategies that are able to respond to socio-economic changes imposed by globalization. The challenge is also to solve the tensions between port functions and urban functions, to respond to inhabitants' aspiration in terms of quality of life, housing and of provision of facilities and public spaces. In any case, the city-port interface, which was, yesterday, presented as a sterile and opaque boundary, now constitutes an « active fringe » around which there is a will to renew the form, the image and dynamics of the city.

## 2. Cruise activity: a challenge for the renewal of the port city

### 2.1 Cruise Traffic and Urban Regeneration (CTUR): genealogy of the topic

The topic « Cruise traffic and urban regeneration », initially proposed by the city of Naples, is in the continuity of work carried out from 2005 to 2007 in the framework of the URBACT SUDEST working group, which focused on the study of the specificities of sustainable development of port cities.

During this programme, the partners identified a tendency of the port cities to propose the city-port interface as a place where new metropolitan approaches are structured and where, in a way, « the future of the port city » is organized:

- new specialized port terminals and large logistic zones are being created in the cities' outskirts;
- the more central sequences of city-port interface are subjected to urban interventions on a large scale which aim, among their priorities, to favour a diversity of functions: functional diversity vs requalified city neighbourhoods; functional diversity vs superior service sector and logistic functions ; functional diversity vs tourism, leisure activity and free time. In most situations, the intention is to develop or reinforce the diversity between port functions and urban functions.

In many waterfront development projects, cruise activity is put forward as a strong element of the will of port cities to develop/reinforce the urban tourism industry. Cruise tourism has now become a new market for the ports. In the past 10 years, this market has literally exploded with over 10 million people who embark each year on large ships; the rate is estimated at 8% a year until 2010 (Seatrade, 2006). Let's note that this phenomenon does not only concern the southern ports nor the ones disconnected from merchandise flows. It also concerns the northern ports and all the big trading ports.

In Europe, the topic of cruise activity as a new economic and marketing stake for port cities and a support for urban regeneration, attracts much attention:

- Firstly, as we will see in the section on the « state of the art », many comparative studies devoted to port city dynamics in Europe, underline the importance of it. As for the information disseminated by associations specialising in cruise tourism at international and European level, it demonstrates the size of cruise activity development and the importance of its economic effects.
- Another indicator of the importance of the topic could be the number of European port cities having applied to the CTUR Network with more than 30 applications (partners included).

CTUR : partners and other potential partner applications

CTUR partners	Other applications to participate to CTUR
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Alicante (Spain) Dublin (Ireland) Helsinki (Finland) Leixões port authority (Portugal) Matosinhos (Portugal) Naples (Italy - Lead partner) Rhodes (Greece) Rostock (Germany) Trieste (Italy) Valencia (Spain) Varna (Bulgaria)	Barcelona University (Spain) Bremen (Germany) Brighton and Hove (UK) Corfu (Greece) Crotone (Italy) Istanbul (Turkey) La Valletta (Malta) Larnaka (Cyprus) Le Havre (France) Liverpool (UK) Malaga (Spain) Messina (Italy) Narbonne (France) Patras (Greece) Portimao (Portugal) Southampton (UK) Stettin (Poland) Stockholm (Sweden) Syracuse (Italy) Thessaloniki (Greece) Volos (Greece)

## 2.2 Cruises as a generator of urban tourism and an opportunity for the recovery of urban and port building heritage: CTUR themes of investigation and experimentation.

Cruise tourism is a function which necessarily involves the city and the port as much in the definition of spatial organization for operational modalities as for the elaboration of a development strategy. Thus, to be included in the circuits, it is necessary to offer guarantees of port reliability, but also of a « global quality » of the stay.

1 – Its development assumes prior local political intervention. It is then a **question of governance**, between the « urban and territorial » public institutions, the port authorities, the local economic actors and civil society. As a matter of fact, developing cruise activity assumes a strong engagement from the public sphere and the private local one in the **construction of the port city image** and in the development of the territorial and urban infrastructures and facilities: international airport, the extent and quality of the hotel industry and the quality of transport connections from the city to the hinterland. Cruise tourism is also favourable to the emergence of **cooperation between port cities**. As a matter of fact the activity also depends on its inclusion in a « route », a network of cities having convergent interests.

2 – Cruise tourism has close links with **urban tourism**: the flow of persons it generates is conditioned by the quality of the city's cultural offer. In the past years, many city ports, whatever their rank in the urban hierarchy, have concentrated on the **creation of cultural facilities of national or even international importance**. The Guggenheim museum at Bilbao is the best example of this well marked tendency.

**The urban-port heritage** intervenes here as a favourable component in the affirmation of the identity of the places and the offer of a new experience for visitors. For some cities (Naples, Barcelona, Amsterdam, etc.), the presence of an exceptional « historic » urban heritage allows them to establish their tourist reputation. But other cities find it more difficult to bring out artistic and cultural interest in their built environment. For the latter cities, the solution is to give value to the industrial and port heritage, which have a strong identity and social value, and are always seen as a curious and exotic place by visitors, and which need to be

transferred into a cultural or leisure field. Nonetheless, there is the question of reuse of these large structures and the capacity of medium-sized cities to absorb them. The **commercial function** in its most innovative aspects can help to reinforce the preservation and the enhancement of the largest historic port structures. The warehouses and the docksides can be opportunities to revitalize and diversify commercial facilities in the heart of the cities. By associating medium and up market specialist shops with an environment empowered by a strong identity (built heritage and docks), these achievements are offered today as a new kind of urban focal point.

3 – **As for employment**, the cruise market, and the urban tourism it generates, requires specific and qualified professional competences:

- in the training of cruise personnel (on board and land-based);
- in urban services (hotel industry, catering industry, business industry, etc.) ;
- in the transport sector on a local, regional, national and international level ;
- in the servicing of ships (supplies, etc.);
- in the activities of naval industry and other industry (purchases by cruise lines).

This assumes the setting up of **specific professional training** open to the local population so as to maximize the **social effects** in the city.

## 3. Elements of method

### 3.1 Methodology

The baseline study was carried out from:

- Analysis of the existing general bibliography on port cities and cruise traffic;
- Visits of internet sites specializing in European sea ports and European associations promoting cruise traffic;
- Visit of the web site of the International Association of Cities and Ports (Le Havre - France), specialized in the knowledge and promotion of port cities;
- Studies and documents on the topic provided by the CTUR partners (local studies; studies carried out in the framework of European or interregional networks);
- City visits to see the areas concerned and to talk with the partner (city and/or port authority) and with local stakeholders in order to get a better understanding of the local situation, needs and challenges. During these visits interesting local studies were made available in order to better define certain issues or identify questions;
- Exchange with partners within the first workshops.

The body of knowledge on the topic of cruise traffic in Europe appears to be very varied and not analysed in depth. This situation is most certainly linked to the recent development of the cruise industry in Europe (+/- 10 years) and the lack of planning for its spectacular development by economic stakeholders, cities and ports.

### 3.2 Main sources of references

- *Literature on port-city relationships and waterfront redevelopment*



We will first point out the voluminous literature on city-port relationship in Europe: general or thematic approaches, monographs, studies and institutional and technical documents, case studies, etc.

Amongst these references, particular attention was given to studies carried out in the context of EU networks:

- “Plan the city with port” project, INTERREG III C - Hanse Passage Programme;
- “NEW EPOC” project (Renewing economic prosperity for port cities), INTERREG III C;
- “Waterfront development” project, INTERREG IIC;
- “SUDEST” project (Sustainable development of sea towns), URBACT I.

Although none of these European projects were specifically devoted to the study of cruise activity and its impacts, some good practices were nonetheless identified regarding development of terminals and passenger stations, enhancement of port heritage, and in a general manner, management and enhancement of the city-port interface.

▪ *Reports and documents of European bodies or associations on port policies:*

These documents discuss and define the elements necessary for the set up of an integrated port and maritime policy. The setting up of this policy must involve the consultation of civil society and all of the interested parties, as well as the analysis of global impacts.

- Report “On a European ports policy”, Committee on Transport and Tourism, European Parliament (2008) and other documents.
- Report “Port policy consultation 2006-2007”, Energy and transport DG, European Commission (2007) and other documents.
- Report on “A port policy for all seasons”, Contribution of European sea ports organisation (ESPO) to the European Commission’s consultation on a future EU policy on seaports (May 2007) and other documents.

▪ *Reports and documents of local and national bodies:*

These documents (thematic studies, master-plans and strategic plans, etc.) throw light on particular situations. Their value is also in their contribution to methodology, the issues that are identified and the recommendations that are formulated. Taking these documents into account (when they exist) will be essential in the application phase of CTUR. As a matter of fact, they constitute a basis to attempt the establishment of comparison between different methods of approach.

▪ *Documents and studies produced by tourism organisations and cruise promoting associations:*

The value of these documents is variable:

- Many are informative and the approaches are mainly quantitative (with possible bias since dealing with a port or/and port city assumes its membership of the association).
- Others offer methodological guidance to interpret data and portray a summary of cruise activity in Europe.

We would like to point out that the study “*Contribution of cruise tourism to economies of Europe*” published in 2007 by the European Cruise Council (made by G.P. Wild et al.) is an essential document concerning the development and the economic impacts of the cruise industry in Europe.

## Chapter 1

# CRUISE TRAFFIC AND URBAN REGENERATION IN EUROPE: STATE OF THE ART

This chapter presents an overview of the development of cruise activity in Europe, its specificities, its demands, its organisation and impacts on the cities and regions (socio-economical, politico-managerial, cultural, town-planning, environmental). As the cruise topic is closely linked to the topic of urban tourism – the topic addressed by CTUR- we choose to focus more specifically this state of art on the city, port and cruise relationships so as to underline its originality and importance.

## 1. The importance of the cruise activity in Europe: facts and figures<sup>1</sup>

Cruise activity is currently one of the most dynamic tourist activities as is attested by the simultaneous growth of offer and demand. In the world, about 14 million cruise passengers have navigated and about 30 ships are on order.

### 1.1 Demand for cruises in Europe

- Almost 3.3 million European residents booked cruises in 2005.
- Europeans represented 23% of all cruise passengers worldwide in 2005, compared to 17% in 1995.
- More than 2.8 million passengers embarked on their cruises from a European Port. Approximately 2.5 million (90%) were European nationals.
- The vast majority visited ports in the Mediterranean, Baltic and European regions and generated 13.1 million passenger visits during 2005.

### 1.2 A supply on the increase

The construction of increasingly large and more luxurious ships confirm the shipowners' optimism:

- At the end of 2006, there were 35 cruise vessels on order for worldwide trading with a capacity for 90 500 passengers;
- Of these, 36 000 berths (40%) are primarily for the European source market and many of the others will visit Europe.

Capacity of the international fleet: current state and previsions

	2000	2005	2010
Ships	245	253	274
Berths	241 000	332 000	440 000

Source ODIT (2007)

A major evolution concerns the large scale of new ships. The next one , the Genesis ship of the Royal Caribbean Cruise Line (due for delivery in 2009), will count among the « sea giants » with a capacity of 5 400 passengers and 2 600 crew members, meaning 8 000 persons.

This increase in fleet capacity has a strong impact on European shipyards. In fact, the main shipyards that dominate the global market of steamship construction are European: Fincantieri (Italy), Meyer Werft (Germany) and Aker Finyards and Akeryards (Finland). As an indicator, let's remember that the last cruise

<sup>1</sup> The figures result from the following studies:

- *La croisière maritime*, Observatoire, Développement et Ingénierie Touristiques (ODIT-France), 2007;
- *Contribution of cruise tourism to economies of Europe*, European cruise council (ECC), 2007.

ship - 2500 passengers and 987 crew members – ordered by the MSC Company from the Fincantieri shipyard cost some \$ 420 million.

### 1.3 Cruise activity: a dynamic source of economic activity

The “cruise industry”<sup>2</sup> in Europe is a dynamic source of economic activity providing economic benefits to virtually all industries and countries throughout Europe. It generated, in total, € 8.3 billion (2005) in direct expenditure throughout Europe by cruise lines and their passengers:

- Passengers: € 1.6 billion in purchases during their city port visits (from accommodation to retail purchases).
- During 2005, the cruise industry spent about € 3.1 billion on cruise construction and maintenance. This is expected to rise to € 4.4 billion in 2009.
- Included in the € 8.3 billion is €754 million earned by the European employees of the cruise industry.

In term of employment, in 2005, the cruise industry generated about 187 300 jobs throughout Europe:

Number of jobs generated by the cruise the cruise industry in Europe

Direct jobs (2005)	Indirect jobs (2005)	Induced jobs (2005)
33 700 European residents are employed by cruise line operating in Europe (crew members ; administrative staff)	69 000 indirect jobs are generated through the purchase of goods and services by companies that supply and support the cruise industry's direct suppliers	28 200 induced jobs result from the spending by employees directly and indirectly
22 600 European residents are employed by the shipbuilding industry		
33800 plus were generated in industries which supplied a variety of goods and services		
90 100	69 000	28 200
187 300 jobs throughout Europe (2005)		

Source: E.C.C., P. Wild, 2007

## 2. Challenges of cruise activity for European port cities

### 2.1 Northern and Southern Europe: two cruise markets in strong progression

According to the ODIT study (2007), the European market represents a strong development potential:

- It's a market that has not yet reached the stage of « maturity »;
- Many Europeans haven't experienced this type of tourism;
- Port areas offer many development possibilities;
- The supply of destinations with a strong cultural content is strong and diversified.

European cruise market (2006)

Country	Market share
France	7%
Germany	20%
Greece	3%
Italy	16%
Spain	12%

<sup>2</sup> « The European cruise industry is defined as those cruise-related activities that take place in Europe including cruise itineraries that visit European ports and destinations and also directly impacts businesses and individuals located in Europe. It is broadly defined to include cruise lines and their employees; the direct suppliers to the cruise lines, such as wholesale distributors, stevedoring firms, and financial business service providers, such as insurers and consultants, shipyards and cruise passengers ». P. Wild, ECC, (2007).

UK	33%
Others	9 %

Source ODIT (2007)

#### Leading E.U. Cruise ports (2005)

Port	Port call	Total cruise passengers
Mediterranean		
Barcelona	645	1.229
Civitavecchia	669	983
Palma Majorca	486	878
Naples	694	830
Venice	128	815
Savona	114	596
Northern Europe		
Southampton	11	701
Copenhagen	147	387
St Petersburg	288	300
Tallinn	292	292
Helsinki	222	240
Lisbon	195	239
Stockholm	198	228

Source ECC (2007)

The cruise market in Europe is distributed between the Mediterranean area and the North-European area, with variable dynamics:

1. The cruise market in the Mediterranean is particularly dynamic. Despite the seasonal constraints, it competes with the Caribbean market, which is the most active one (47% of the global market)<sup>3</sup> :

- 61 companies and 126 ships cruise on the Mediterranean Sea (2005);
- In 2005, it registered about 1.9 million passengers.

The Mediterranean offers real development capacities thanks to its strong cultural potential and the great number of possible destinations. Nonetheless, this area suffers from frequent inappropriateness of port facilities for the reception of mega cruise ships (of over 3 000 passengers) which are more and more numerous in this area.

2. The Northern European area is very seasonal but benefits from excellent port facilities and the most important European markets (Germany and the United Kingdom):

- 42 companies (2004) and 87 ships cruise in Northern European waters.
- In 2005, it supplied a potential of 619 000 passengers (E.C.C. 2007).

## 2.2 City and port: deciding and governing together

- The need for cooperation between city and port

Developing cruise activity involves a multitude of stakeholders: the port; the city; territorial institutions (Regions, Provinces, etc.), public specialized institutions (tourism, transport, etc.), economic actors, and local civil society in some cases.

This choice is firstly based on a will and capacity coming from the municipality and the port authority to collaborate/cooperate in order to define a strategy (choice of set up; operative modalities) and share a common vision of the future of city port.

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<sup>3</sup> Source Miami Seatrade 2006

The study of « Comparison of city ports in Europe » (2005) underlines the difficulty of being able to reach and formalize this prior understanding. This difficulty is often due to the administration system of large European ports, which we can group into 3 categories<sup>4</sup>:

- Ports under State administration: in France, Italy, Spain, Cyprus, Ireland, Lithuania, Malta, Portugal and Slovenia.
- Ports under municipal administration: in Belgium, Holland, Germany (city and State), Sweden, Denmark, Finland, Latvia (State and city) and Poland (State and city).
- Ports considered « private » or « partially privatised »: in United Kingdom and Greece (State and private).

The port status partially explains the capacity of certain cities to react rapidly to the formation of vast port and industrial derelict areas, by elaborating strategies to redevelop their waterfronts. As a matter of fact, it is not a coincidence (the studies prove it!) if the most precocious and most advanced waterfront developments are found in « municipal ports » (Rotterdam, Antwerp, Copenhagen, Hamburg, etc.). It seems the cursor position between a market approach and a quality of life approach may be defined more easily and collectively.

In other situations, the consensus of a future shared between the port and the city always seems to be the longest and hardest to achieve. In this way, the collaboration between city and port is always identified and encouraged: by the partners of European networks (PCP and NEW EPOC - INTERREG IIIC, SUDEST - URBACT I and contributions from ESPO), new national port policies (Spain, Italy, and today, France) or European policy (especially during the Commission consultation for the definition of a European port policy).

If reaching consensus between cities and port is sometimes difficult, today the European scene offers a certain number of good practices:

- In Le Havre (France) a monitoring committee was created at the initiative of the municipality, associating port authority and all the public institutional actors, private economic actors (via the Chamber of trade and industry), representatives of neighbourhood associations, and a group of public and private experts.
- In Bilbao (Spain) the public company 'Ria 2000' in charge of urban regeneration gathers public institutional actors on an equal basis. Decisions are made unanimously and it functions on the principle of « good governance » between partners. Civil society and the private actors are grouped in the public-private association Metropoli 30 that constitutes a source of proposals for promoting the city. It is also guaranteed that the "Strategic plan for the revitalization of the metropolitan area" is respected.
- In Genoa (Italy) the city and port work together in the public company Porto Antico, which is in charge of the redevelopment of the old port, and in the Port Authority Planning Agency, which is in charge of the elaboration of the urban-port masterplan.
- In Spain the new port laws (of 1992 and 1997) encourage understanding between city and port. While they authorize port authorities to identify a service zone to accommodate recreational and urban facilities, the law ensures that this zone is developed as a result of collaboration between city and port. The project Port Vell in Barcelona has served as a reference for many Spanish city ports.

- Coming together to promote cruise business in the port city and on the international market

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<sup>4</sup> These categories must of course be refined according to the management systems (public, public-private or private), to financial autonomy (autonomy, partial autonomy) or to the sometimes specific status of the port within the country.

As seen previously, cruise tourism constitutes a fully-fledged “industry” (E.C.C., 2007). This activity must therefore be managed in a coordinated manner and promoted by joint actions between different players in the cruise business. These actions take place “upstream of the port of call” aiming to attract new customers (cruise companies; cruisers) but also “during the call” to satisfy the customers and cruisers.

The formula used to establish co-operation and define actions is most often the one of “Cruise Club” able to group the port authority, the chamber of trade and industry, the municipality, maritime companies, public tourism agencies, tourism companies, and transportation companies (public transports, taxis), and retail associations, etc.

The actions of these organisations consist of:

- giving information to professionals, cruise passengers, crew members and the local population;
- promoting the destination by participating in international fairs specializing in cruises, navigation and tourism (the Seatrade salon in Miami cannot be ignored);
- favouring the coordination of passenger formalities (customs; police), transportation (railway/air/road), in assuring activities during the calls (such as local markets on the docks), and in establishing a “Quality Charter”;
- orienting local decisions concerning port and urban planning and concerning city-port planning projects compatible with the expectations of the cruise sector.

Here again, the European scene offers many good practices:

- In Marseille (France): the Club de la Croisière Marseille-Provence (1996) is run by the chamber of trade and industry, the municipality and the port authority. It brings together all the public institutions concerned and the whole professional community. It is a real promotion tool aimed at the cruise operators with, in 2007, the MSC Crociere, Costa Crociere and Louis Cruise groups successfully confirming 450 port calls and a traffic of a million passengers in the port city by 2010. Moreover, this Club tries to orientate (with more or less success) the programme of the “Euromediterranée” urban-port project (320 ha) for the creation of urban facilities for cruise tourism.

- In Copenhagen (Denmark) the Cruise Copenhagen Network (1992) was established as a partnership between the Port authority, the City council and 45 professional suppliers, in order to strengthen and develop Copenhagen as a successful home port for cruises in Scandinavia and the Baltic. The gamble seems to have succeeded since Copenhagen, within a few years, has positioned itself as the first « home port » of the Baltic (about 400 000 passengers). This success has also been maintained with cooperation at another level chosen by the Ports of Copenhagen and Malmö (Sweden): to play the inter-port cooperation card. These two ports have built on their complementarity and have merged into one legal entity, the Copenhagen-Malmö Port (CMP). This rapprochement has allowed this new entity to reach positions of leadership in Europe in many sectors, especially cruise and ro-ro traffic.

At this stage of the analysis, it is appropriate to introduce the terms « Home port » and « Port of call », fundamental terms that define the status of the city port in the cruise sector.

- The status of « **Home port** » is avidly sought after by city ports since it designates those few ports where passengers embark/disembark on the ship to begin or finish their tourist trip. The economic benefits are therefore very important, expressed in urban tourism (night/s passed in the city before embarkation and after disembarkation), in services provided to the members of the crew and in ship supplies. This status is, in any case, closely linked to the presence of a high level airport, with international lines or even direct intercontinental lines. In Europe, where the high-speed train sometimes competes with the airplane, the presence of such a line also constitutes an alternative or another advantage like in Amsterdam (with 122 105

cruise passengers in 2005) or Barcelona (with 1.2 million cruise passengers in 2005). On average, the expenditure per cruise passenger in a « Home port » is estimated at €100 per person (ECC, 2007).

- The status of « **Port of call** » describes the stopover ports on the tourist circuit. The economic effects are few, estimated at €53 per person (ECC, 2007), without real impact on the dynamics of the hotel facilities. Of course, the benefits cannot be neglected and the city ports are in strong competition in order to become stopovers for big circuits. Nonetheless, when the ships offer a multitude of activities in a luxurious setting and when tour-operators offer stopovers as an « all inclusive package », to compete, local actors must be creative and offer original alternatives. Besides, it is necessary to underline that many « home ports » are also « ports of call » which are much appreciated by cruise companies and passengers (Barcelona, Venice, Copenhagen, and Stockholm).

## 2.3 Planning, developing and valuing the potential in the framework of a city-port synergy

- Specific urban-port development plans for an integration of areas and functions

Dialogue between city port, functional diversity, reuse and re-value of derelict port area, sustainable development, are key words in intervention on the city-port interface. Reconciling port needs and urban needs is not obvious, nor always possible, and compromises are then necessary. European networks (such as the PCP, SUDEST and NEW EPOC projects) which have concentrated on contemporary issues of port cities, equally identify the importance of the elaboration of an urban-port development master plan.

Today, in Europe, and more particularly in Italy, Spain and France where ports come under the competence of the State, the legislator encourages or imposes the elaboration of such a planning document in terms of a partnership between the city and port. In the context of an integrated approach it is then about evaluating the compatibility between functions, favouring their diversity when it is possible, and improving the city-port accessibility and urban mobility.

In the matter of an urban-port development plan, Genoa (Italy) constitutes a perfect case study and offers good practices both in governance and in methodology:

- Firstly the municipality and port authority elaborated their planning document at the end of the 1990s in a simultaneous and agreed way.

- For the elaboration of the urban-port development plan imposed by the ports law in 1994, on the initiative of the port, a Port planning agency was created bringing together the port authority, municipality, internationally renowned experts (Mr. Smets, R. Koolhaas, B. Secchi and M. Solà-Moralès) and a multidisciplinary group of academics. This approach has allowed the entire port territory to be reviewed, by identifying tension or conflict points and offering solutions acceptable to residents (with a nautical-recreation park as a buffer zone), to reserve the entire original port for recreational activities and « soft » port functions (cruises, ferries, yachting), and to rethink the entire mobility and transportation in the metropolitan area. It is a fact that this approach has strongly contributed to a global regeneration of the port city as much in container and cruise traffic as in a better quality of life.

In Northern Europe, Stockholm is an example of strategic urban planning (Stockholm, Visions 2030) where the development of all three ports is totally integrated. The port sector of Värtan, in terms of a new mix between urban and port functions is designed as a pole that participates actively in bringing the city up to the level of capital of Scandinavia ... even better... of « world-class city ».

In their most exemplary form, new urban-port development plans aim, in terms of an integrated approach, to evaluate the compatibility between functions, to favour –when it is possible- a mix, and to improve city-port accessibility and urban transportation.



*Redefine city-port interface by identifying the incompatibilities, the inter-dependencies, the nature of land dynamics, possible environmental improvements.*

The negative impacts of the cruise industry on the city (real or perceived) are relatively less than those generated by goods traffic. This « soft » port function allows a new use for the quayside, docks and land areas which have become unsuitable for goods traffic; it also allows physical links to be created between the city and port. We will recall here that in Spain, where cruise activity is beating all records (over 5 million cruise passengers in 2007, meaning an increase of 23.5% compared to 2006), over € 230 million are programmed to be spent for the 2008-11 period, of which an important part concerns the environmental aspect.

*Encourage a mix of urban and port functions*

While the first waterfront redevelopments offered a radical suppression of port functions (London Docklands are the best example), the current tendency consists in associating « soft » port functions with specific urban functions: service functions, cultural and leisure functions and commercial functions. In the « municipal port » situation, where the port influence appears as less constraining, and where city-port governance is closer, the residential function is also strongly developed in dockland areas.

For the past few years, the cruise industry has constituted a function supported by mixed development programmes, considered to be compatible with urban life and providing good support for ambitious urban development. Besides, by associating cruise activity and urban functions, the objective is to compensate for problems such as the cruise industry being seasonal and especially the non-usage of equipment during winter months.

We can distinguish many categories of functional mix:

- *Horizontal mix*, an association of urban and port equipment in the same sector. In Barcelona or Amsterdam the cruise terminal is accompanied by diversified urban facilities in the same sector. In Copenhagen, the Langelinie cruise terminal is associated more specifically with high standing housing and office facilities. In Hamburg, the cruise centre is a component of the Hafen City project.



Copenhagen : Langelinie pier, port of call for cruise ships.  
Photo CMP.

- *Vertical mix*, a stacking up of urban and port functions in a same structure according to the model of *Marble Terraces in Genoa* which, in the 19th century, overlooked the business port. **Marseille** is an illustration of a horizontal diversity situation (small cruise and ferries are included in a cultural and leisure

facility) and vertical mix (the upper levels of a passenger terminal are reserved for a large shopping centre and a vast terrace with view of the port).

It is important to underline that the cruise industry function is subject to strong security constraints: passenger security at embarkation/disembarkation, national security, and dock security during ship manoeuvres. Combining cruise and urban functions is therefore extremely constraining and calls for innovative answers.

#### *Improve transport infrastructures and the quality of urban mobility*

The cruise industry generates a flow of people. The question of transportation is essential in terms of accessibility and in terms of quality.

- In terms of accessibility, it's about linking the cruise terminal and the city to its hinterland. As already underlined, the « home port » status is closely linked to the presence of an international airport and/or a high speed train line. Between the airport, the railway station and the port it's about developing a direct and « comfortable » transportation link. That said, the Marseille situation is exemplary since the rail network allows the TGV train line to access the cruise terminal.

- In terms of city-port liaison, it's about improving the quality of liaisons between passenger terminals and the city centre, especially when the terminal is located in a far away port zone (Marseille), sometimes in a very industrial setting (Bremerhaven).

So, developing cruise activity assumes a redefinition of urban and metropolitan transport. The elaboration of a new transportation scheme aiming to improve urban and port mobility both quantitatively and qualitatively constitutes an essential precondition (see the recommendations from SUDEST and the PCP).

## 2.4 Port facilities endowed with potential urban usage

The cruise industry is a « glamorous » activity par excellence. Nonetheless, beyond the magic of the ships at dock, the cruise industry imposes the provision of port facilities on a large scale to be able to host ever increasingly large ships.

In some cases, the cruise terminal arises from old transatlantic and/or colonial passenger functions. When the nautical characteristics of basins and docks allow it, old maritime stations may be reconverted for reception functions, as in Genoa. Nonetheless, the size of the ships and the importance of passenger flows (number and frequency) most often lead to a new terminal.

Identified as a strong component of waterfront redevelopment, the architectural quality of the building and the integration of urban functions are actively sought-after. This point can be illustrated by the cruise terminal in Amsterdam: an uncluttered architecture that is inserted in a multifunctional system.



Cruise terminal in Amsterdam  
Photo Port of Amsterdam

The new Stockholm cruise terminal is also an example: it's a flexible structure that, out of season, will act as an exhibition hall and will be able to welcome 2000 visitors.



In many cases, like the Bilbao Guggenheim museum, the redevelopment of the urban-port sector is made more dynamic by the creation of urban facilities on a regional, national or even international scale. Most often, it's about cities upgrading the design of a building to the level of a real international architectural event. Let's specify that this issue of architectural audacity is just as good for a cultural facility as for a business facility. Thus, in Genoa the cruise station is closely linked to the conception of a vast shopping and leisure centre in the heart of the old port.



In Marseille, in the ambitious programming of cultural facilities on the docks, the shopping centre « The port terraces » takes on a very important function: the structure overlooking the docks creates an interesting linkage between city and port. The terrace will include restaurants and will be open to city dwellers and provides a relaxation area with an unobstructed view of the port and the sea, a view that has long been hidden from citizens due to the warehouses and freeway viaduct.



## 2.5 Bringing the city port up to a tourist destination level

### ▪ Reinforce the port image

The recent recommendations for the start of an *Action plan for an integrated coastal policy* or even the results of consultation for European port politics (2006-07) encourage equally the promotion of port visibility and coastal spaces.

The image of the port and its perception by citizens can be improved by a new attitude of ports towards the city but also and especially by the programming of specific actions in partnership: promoting the value of the maritime and port heritage, the organisation of festive and cultural events, the creation of « open port » days for residents, the organisation of port visits, and the endowment of facilities for tourism and leisure activities. These recommendations agree with the recent research of E. Van Hoodydonk (2007, 2008) who demonstrates how ports are endowed with « immaterial soft values » and « material soft values » which often remain unexploited. The first arise from imagination and history: myth, legend, source of artistic inspiration and pride for residents. The second concern the port's historic heritage, the strength of the "landscape" of an active port and its potential to welcome new tourist and leisure activities. In some cities, the port image is so powerful that it is raised to the level of an « icon » like in Hamburg, Rotterdam or Barcelona. The notion of « soft value » opens new perspectives for the development of the port with the city. The port of Antwerp appears as particularly innovative with the commissioning of a study to evaluate its « iconic » potential.

Certain actions to promote the image of the port and the city-port are identifiable today:

- Leading a prior reflection on the « iconic » potential of the port as was realized by the **Antwerp** port;
- Organizing a big public event in the port to affirm the port and maritime identity of the city. In **Hamburg**, in 2008 a « Cruise Days festival » was organized with spectacular parades of cruise liners (Queen Mary 2, MS Deutschland, MS Columbus, etc.) which attracted over 1 million visitors. Besides, as we can sometimes observe, the port can be transformed into an artistic setting in order to welcome concerts and movie projections.
- Revealing the potential port landscape. In certain cases, the strength of the port landscape is exploited by lighting of the docks, buildings and equipment. The port of **Saint-Nazaire** is such an example, followed more or less successfully by other European ports. We can recall here the case of **Hamburg** where the artistic project « Blue port » consisted in a sumptuous lighting of the port in the setting of the « Cruise Days festival ».
- Offering the active port as a "show". The ship movements, the 'ballet' of the transfer of merchandise or the boarding of passengers are scenes of ordinary port life which appeal to city-dwellers. Many ports like **Rotterdam** or **Antwerp** bring city dwellers to the heart of the city port by organizing tourist visits which are very much appreciated by the public. It can also be about making the port « visible » by working on the transparency of the port gate or by creating real balconies overlooking the port. We have mentioned the example of « Port Terraces » in Marseille. We can also retain the example of **Copenhagen** with a



promenade organised on an old surrounding port wall, or the example of Genoa where the possibility of transforming the current freeway viaduct into an urban coastal route for citizens is being studied.

▪ *The port heritage as identity and tourist resource*

Among the actions aiming to reinforce the port image, those relative to the value of port heritage inside the port and the associated urban spaces deserve particular attention. As a matter of fact, the port and industrial heritage is always endowed with a strong sense of identity. Therefore, in the cities most touched by the disappearance of recent traditional activities, maintaining and valuing strong symbols of the port and industry (cranes, silos, warehouses, smokestacks, etc...) constitute a strong challenge, even taking on the value of a social component of economic regeneration programs.

If the retention of the most remarkable « heritage pieces » is considered, it is nonetheless necessary to underline the diversity of the port heritage inventory and the difficulty of reconverting it into urban facilities.

Nevertheless, many city ports have shown themselves to be very inventive in conserving and valuing specific structures:

- In **Saint-Nazaire** (France), the huge and indestructible submarine base (480 000 cubic metres of concrete, 300 m. long, 130 m. wide, 18 m. high) was transformed into a multipurpose «facility » with a terrace overlooking the port. This equipment particularly houses «The Atlantic stopover»: in a reconstituted setting of a dream ship, the visitors embarked in the olden days cruise world.
- In **Marseille** and **Amsterdam**, old silos are transformed respectively into a concert hall and for residential use.



In Europe, the attitudes toward port heritage vary. We can therefore compare the Genoa waterfront, where the majority of port buildings were conserved, to the Barcelona waterfront where only one big warehouse was retained. But, in any case, the port and industry heritage always appears as an opportunity to develop new cultural recreational commercial activities, either by association with a modern structure, or by development of a urban function in «a heritage setting ».

It is a fact that developing the cruise activity means that the city must position itself as a privileged « tourist destination ». But all cities are not endowed with exceptional architectural and urban heritage. They are sometimes also in competition with hinterland cities, as we observe in Livorno where cruise passengers disembark to visit Florence and Pisa. Also, as we observe in Marseille or Liverpool, the port heritage may serve as new « territorial flagships » to catch the visitors' interest and to guide them in the discovery of an original « life-style » in terms of leisure, cultural events and shopping. This said, the case of Antwerp is remarkable if we consider how « the great modern port city » has also become « a trendy city with a refined life-style ».

## Chapter 2

### Partners' profiles ... the state of the art

The URBACT network CTUR brings together 9 port cities of different size, 2 port authorities and 1 region, which are involved in the development of the cruise activities at their own level of competences. In all the cases, the cruise activities have been identified as a engine to stimulate the local economic base, to improve the relationships between the port and the city, to redevelop some port/industrial derelict areas in association with the neighbourhoods, and to enhance the port and urban heritage in such a way as to strengthen the identity, the image and the quality of life of the port city.

## Alicante: the maritime Station a gateway to the historical city

The city	The port
<p><i>Location:</i> Spain - Region of Valencia  <i>Population:</i> 329 947 (city) 1.8 m (metropolis)  <i>Number of people in employment:</i> 778 000 (metropolis)  <i>Unemployment rate:</i> 5.9 %</p>	<p><i>Ranking:</i> international- regional  <i>Administrative statutes:</i> Port of state  <i>Total traffic:</i> 3.8 millions G.T. (2006)  <i>Container traffic (EVP):</i> 173 000 TEU (2006)  <i>Total passengers:</i> 362 000 pax (2006)  <i>Cruise passengers:</i> 55 000 pax - 60 calls (2006)  <i>Direct employment:</i> n.k.</p>

### 1 - Key features of the city and the port

#### *Demographic trends*

Alicante is in southeast Spain and it is the second most important city within the Valencia Community. Since the end of the 90s, Alicante has experienced a positive demographic trend due to the arrival of European, Hispano-Americans and musliman migrants. Nowadays, with 4.04 % of the Spanish population and 37.36 % of the Valencian Community population, Alicante has become the 5<sup>th</sup> most important city in Spain.

#### *Strategic importance*

The city of Alicante, located right on the heart of the Mediterranean coast, is one of the favourite Spanish destinations. It is strategically located and has excellent communications with the rest of Spain and Europe, thanks to the international airport and an extensive network of roads, dual carriageways and motorways, as well as railway links to the main Spanish cities. It is the capital of a rapidly developing commercial and industrial province, with conference venues, tourism and university.

#### *Business & employment sectors*

The main industries in Alicante province are, in the primary sector, intensive agriculture, specially in the fertile Vega Baja del Segura, Camp d'Elx (Elche's countryside) and vineyards in the inner part of the province (Monforte, Novelda, Pinós), also near the coast in the Marina Alta area. Fishing is important all along the coast, with important fishing harbours such as Santa Pola, Calp or Denia.

Industry has been historically important in the textile sector around Alcoy. Footwear still remains as the flagship industrial sector of the province, which occurs in Elche, Elda, Petrer and Villena, both intensive footwear and, especially, the textile business are at a low ebb due to harsh competition from fast growing economies in Asia. The traditionally important toy industry around the Ibi and Onil area is another one competing internationally with those same areas. A sector which has gained preeminence during the last 20 years is marble quarrying and processing, it takes place mostly in the Novelda and Pinós area.

Still, what the province is known for is its massive tourism sector. The generally mild and sunny weather of the Costa Blanca attracts hundreds of thousands of tourists from other European countries such as the UK, Germany, Belgium, Norway or France and also from other parts in Spain like Madrid. Thousands of families from other places own a second home in the Alicante province which they use for their vacation time.

#### *Place of the port in the local/regional economy*

The Port of Alicante has been always an industrial port, it was designed for merchant ships. It was a large but dirty port.

As with the city, the Port of Alicante, has grown a lot during the last 10 years. In 2003, cruise traffic in Alicante increase by 43.9% more than 2002, numerous meetings and approaches are being organised with the aim of supporting cruise tourism. Now, Alicante has a new Maritime Station with multiple possibilities

of meeting cruises, with gangways and fingers enabling simultaneous disembarkations or for very big cruises.

## 2 - Key features of the cruise activities and of the urban and port heritage

### *Evolution and position of the port city on the cruise market*

Alicante has realized that the cruise market could be another option to bring tourists to the city. A new Maritime Station was built 5 years ago. The Port of Alicante has experienced a good evolution during last ten years. For 2008, the cruise passengers forecast is 97 988 passengers. The Port of Alicante has improved its facilities to become not only a “port of call” and but also a “home port”.

### *Evolution and state of the urban tourism*

At the beginning of the 70's, Alicante was a sun and beach tourist destination for Spanish and European people. Today, it is still a sun and beach destination for those who are looking for sunny days. But the city centre and the new facilities for other kind of tourism, like golf courses, the restoring of the old town and the conference centre, have changed the visitors. The Municipality of Alicante has made a big effort to extol its heritage, lots of museums, squares, parks, official and private buildings, and the castle, have been refitted during the last fifteen years.

### *Urban and port heritage*

The Port of Alicante is located in the centre of the bay bearing the same name. It is the city's façade to the sea. Alicante's historical district is ten minutes walking from the Maritime Station, and it is the best place to visit, with narrow steep streets lined with white houses, pedestrian commercial centre, panoramic views from the castle of Santa Barbara and many other tourist sites.

The Municipality of Alicante is always working to improve the heritage of its city centre, full of buildings, churches, markets from different moments of its history that recall the different cultures and religions that have settled the city.

## 3 - Key problems, challenges and thematic focuses

### **Problems to resolve and challenges**

#### *Improving the connection between the cruise terminal and the historic quarter and promoting the cultural heritage of the city*

Ten years ago, the municipality started a revitalizing and restoring program of the historic quarter in the city centre, of which the main objective was to improve all the city heritage by restoring the monuments, museums, churches, the castle, pedestrian areas, etc. Now, it is necessary to connect the Maritime Station to the Old Quarter. They are only ten minutes walking distance from each other, but often the commercial offer is more appealing than the cultural one.

#### *Awaking the interest of the inhabitants to the cruise activities*

Although Alicante has a sea front, the citizens have never been connected with the port activities, most of them are not interested in cruises and their benefits.

#### *Harmonizing the time of the city and the time of the cruise call*

To be a cruise city means that the passengers arrive in the city at 08.00 am and depart at 06.00 pm and during that period of time commerce, museums and restaurants must be open. But in Alicante, from 02.00 pm to 05.00 pm shops are closed for lunch time so the visitors finally go to big commercial areas that are open all day.

#### *Separating cruise traffic and ferry traffic*

There was an organizational problem that has been solved with a ferry to Algeria. This ferry was berthed in the same area as the Maritime Station for cruises, and as it was a ferry for passengers and cars it was completely blocked every time at each departure, now the Port Authority has changed the ferry berth and this problem has been solved.

#### *Promoting the image of the city-port at the international level*



The Municipality of Alicante is very interested in promote the area. In October 2008 a big race “Volvo Ocean Race” departed from our city; this event had gave a great media repercussion for the city. The Municipality and the Valencia Community government did a lot of work to improve this area and the road connections in order to reactivate it as a commercial and leisure zone with a casino, hotels, restaurants and so on that will help our city to become a cruise home.

*Lack of an important international airport to become a “home port”*

The airport of Alicante has no direct flights to the European capitals so the cruise passengers more often choose Barcelona and Valencia as a home port.

**In addition, Alicante is going to focus on following issues :**

- Harmonization of the commercial time and the cruise time.
- Involvement of the local economic sphere and the citizens in the development of the cruise activities (research of a methodological approach).
- Promotion of the cultural heritage of the city by the creation of thematic trips and excursions for the cruise tourists.

#### 4 - Potential contributions and expectations of Alicante

##### **Potential contributions**

- Strong efforts in favour of a physical and functional port-city integration.
- Strong relationships between port, city and provincial institutions to promote the city-port as a cruise location at the international level.
- Organization of a great media event as an engine to the port-city integration.
- Development of thematic city routes: Seafront routes, Castle route, Historic quarter route, Shopping route and so on..

##### **Expectations**

- To reactivate and re-use the port area as a commercial and leisure zone.
- To become a cruise home port being furthermore an attractive destination for tourists.
- To attract the old town of Alicante to the cruise market as a new option for their excursions.
- To revalue the old town and the urban heritage.

# Dublin: cruise tourism linking between city, port and docklands

<b>The city</b> <i>Location</i> : Capital city of Ireland <i>Population (2006)</i> : 506 201 <i>Number of people in employment</i> : 2.1 m (national figure) <i>Unemployment rate</i> : 5.5% (national figure) <i>Income per capita</i> : € 46 801 (GDP) ; € 40 084 (GNP) (national figure)	<b>The port</b> <i>Ranking</i> : international - first port in Ireland <i>Administrative statutes</i> : State port managed by a Private limited Company. <i>Total traffic</i> : 31.1 m G.T. (2007) <i>Container traffic (EVP)</i> : 2.2 m. TEU (2007) <i>Total passengers</i> : 1.5 m pax (2007) <i>Cruise passengers</i> : 100 000 pax (2007) 80 calls (2008) <i>Direct employment</i> : 165 <i>Indirect and induced employment</i> : 3 500
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## 1 - Key features of the city and the port

### *Demographic trends*

Dublin is the capital city of Ireland. It is located on the east coast, at the mouth of the River Liffey. The area administered by Dublin City Council has a population of approximately 500 000. It is estimated that 40% of the population of Ireland live within 100km of the city.

Over the last ten years Ireland has experienced net immigration, with over 10% of the population having arrived from other countries. This percentage is higher in the Dublin region.

The Docklands area (520 ha) was, until recently, typical of other traditional port areas in transition. The area was lowly populated with traditional housing forms consistent with those provided for employees associated with port employment. Since the regeneration of the Docklands initiated in 1996, the area has been the focus of new residential and commercial development and a new community of 25 000 residents and 30 000 workers has been created.

### *Strategic importance*

Dublin has been at the centre of Ireland's phenomenal economic growth over the last 10-15 years. Living standards in the city have risen sharply . In 2008, Dublin was listed as the fifth richest city in the world. The economic boom years have led to a sharp increase in construction, which is now also a major employer. Redevelopment is taking place in large projects such as Dublin Docklands, transforming a run-down industrial area in a new world class city quarter. Dublin is one of the constituent cities in the Dublin-Belfast corridor, region which has a population of just under 3 million.

### *Business & employment sectors*

Banking and Finance, IT and Construction have become major employers in recent years, along with other services with a high concentration of the services industry locating in the newly regenerated docklands area.

### *Place of the port in the local/regional economy*

Located in the heart of Dublin City, at the hub of the national road and rail network, Dublin Port is a key strategic access point for Ireland and in particular the Dublin area. Dublin Port handles over two-thirds of containerised trade to and from Ireland and 50% of all Ireland's imports and exports, making it a significant facilitator of Ireland's economy. Dublin Port also handles over 1.3 million tourists through the ferry companies operating at the port and through the cruise vessels calling to the port. Dublin Port is the largest cruise port in Ireland. The port is at the mouth of the economy and is strategically essential to Ireland in social and economic terms. Ireland is highly dependent upon international trade for growth in G.D.P. Dublin Port has averaged 7% cumulative growth per annum over the last 10 years and has had a fivefold increase in throughput in 15 years reflecting the growth of the city and the economy.

## 2 - Key features of the cruise activities and of the urban and port heritage

### *Evolution and position of the port city on the cruise market*

Cruise tourism is a growing part of Dublin's tourist industry. Since 1994 Cruise ship calls have increased from 20 to 80 calls in 2008. Dublin Port is the principal port of call in Ireland. The principal cruises consist of repositioning cruises, Theme cruises, North West European Cruises and baby boomers, interested in education.

At present, cruise tourists are offered 20 touring options in the City including sightseeing, cultural tours, shopping and activities/sport. In general these tours are organized and managed by the cruise operators. Dublin port is a member of Cruise Ireland, a marketing co-operate, which was formed in 1994 to promote the island of Ireland as premier cruise destination. Cruise Ireland has 27 members including port authorities, ship agents, ground handling agents, transport companies, retail and visitor attraction providers and tourism associations and local authorities.

#### *Evolution and state of the urban tourism*

Tourism is one of Ireland's principal generators of economic activity and is a vital component of Dublin's economy. Visitors to Dublin have increased at an annual growth rate of 8% since 1999. In 2005, Dublin received a total of 3.9 million overseas visitors, injecting almost €1.3bn into the city economy and spending approximately 18 million nights in accommodation throughout the city.

Over the past decade a number of key tourism opportunities have been developed in the City. The establishment in 1991 of the Temple Bar Agency led to the regeneration of the Temple Bar area, a network of narrow, cobbled streets in the city centre, into a cultural quarter. The area is now an established tourist destination for culture and night time entertainment. The Guinness Hopstore is the biggest single tourist attraction in the city welcoming over 750,000 visitors in 2007. Aside from these relatively new attractions, Georgian Dublin and the City's literary tradition remain amongst the most attractive aspects of the City from a tourism point of view.

Opportunities now present themselves for tourism development in the docklands area. The continued growth and regeneration of the area and new facilities being created presents the area as a new venue for tourism and links the port and docklands area with the City. The construction of the National Conference Centre, new theatres and public spaces as well as the renovation and reuse of traditional docklands buildings as venues and attractions can be capitalized on to create a new tourist quarter.

#### *Urban and port heritage*

The port and docklands area has a rich heritage, both natural and industrial. Dublin Bay includes a wild bird sanctuary and nature reserve and is designated as a special protection area. Industrial heritage is being renovated by the Docklands Development Authority and private sector investment and is being reused for shopping, entertainment etc. A number of important buildings of port heritage remain underutilized and present opportunities for further development of cruise tourism. In particular, the Poolbeg Planning Scheme includes objectives to redevelop the Pigeon House Hotel and associated buildings along with a cruise terminal to create a cultural tourism hub in the Poolbeg Area.

### **3 - Key problems, challenges and thematic focuses**

#### **Problems to resolve and challenges**

##### *Improving the connection between the port, the docklands and the city*

There has been an historical lack of investment in infrastructure which is now being addressed and the City has developed with the port to the extent that they now live cheek to cheek. One issue still outstanding is the lack of connectivity from the port and docklands area to the city centre. This has implications for cruise tourism in providing access to visitors to the city centre and also in connecting the new communities and employment centres in the docklands to the city.

##### *Developing the cruise industry in the Poolbeg area and creating a new city quarter and a employment zone*

Dublin is at the heart of the economy and has experienced high levels of inward investment due to the educated young population and only English speaking member of the Euro Zone. Labour costs are high and unemployment is currently at a low level. The potential to expand the city's cruise tourism industry exists in the proposed development of cruise facilities in the Poolbeg area. The proposed regeneration of the Poolbeg area also represents an opportunity to create a new employment zone.

##### *Improving the quality of life for the communities in the docklands area*

Lower levels of education in the local community, ageing population, lack of affordable housing and lack of community facilities remain as issues amongst the traditional communities in the docklands area.

### *Resolving problems of pollution and contaminated areas*

Pollution, poor air quality, contaminated areas, lack of open/green spaces, poor waste management and inefficient power/energy management remain as issues in certain areas of the docklands and, in particular, the Poolbeg area. The designated nature reserve and the environmental protection of habitats in Dublin Bay are issues which also warrant attention.

### *Enhancing the industrial and port heritage*

There are a number of archaeological monuments and historic buildings within the Peninsula. Consideration must be given to these monuments in future development and their potential for redevelopment and reuse

### *Transforming the Poolbeg peninsula in a new city quarter*

The overall objective is to create an urban waterside quarter that facilitates sustainable and consolidated growth of Dublin City and articulates a new relationship between the city and the Bay. The quarter will provide for commercial, residential, tourism, cultural and amenity uses, whilst balancing the essential industrial and infrastructural requirements of the area. The recreational and amenity potential will be enhanced through the landscape and environmental framework, which optimises the natural resources and ecology of the peninsula.

### **Futhermore Dublin is going to focus on the following issues:**

- Linking the port, the docklands and the city by a betterment of the accessibility and mobility.
- Creating a cultural and historical cruise tourism hub that supports existing port tourism structure.
- Transforming a port-industrial area in a new city quarter.

## **4 - Potential contributions and expectations of Dublin**

### **Potential contributions**

- Good governance in urban regeneration with presence of specific agencies (Docklands corporation; Temple Bar agency).
- Experience in large size urban-port regeneration project.
- Strong attention accorded to the economic, social and environmental aspects in the urban regeneration programme.
- Good examples of enhancement and conversion of the port heritage in urban facilities.

### **Expectations**

- Development of an agreed Local Area Plan for the future development of cruise tourism and associated infrastructure.
- Development of an agreed set of project proposals and identification of funding sources that will facilitate greater connectivity between the city and the port and docklands, regenerate historical buildings in the Poolbeg area, and provide a greater range of facilities (infrastructure and services) to support cruise tourism.
- Improved co-ordination and co-operation between the 3 organizations involved in the project.

## Helsinki: A home for all boats

### **The city**

*Location* : Finland

*Population (2007)* : 568 531 (city) 1.3 m. (metropolis)

*Rate of employment* : 75,3% (metropolitan area)

*Unemployment rate* : 5.2% (2008)

*Income per capita* : € 22 621

### **The port**

*Ranking* : international - first port in Finland

*Administrative statutes* : Municipal port managed by an Harbour Committee

*Total traffic* : 13.4 m G.T. (2007)

*Container traffic (EVP)* : 431 000 TEU (2007)

*Total passengers* : 8.5 m pax (2006)

*Cruise passengers* : 330 000 pax - 270 calls (2008)

*Direct employment* : 276

*Employment in the cruise sector* : 470 (direct - 2007); 700 (indirect and induced - 2007)

### 1 - Key features of the city and the port

#### *Demographic trends*

Helsinki is the capital of Finland on the southern coast of the country. Helsinki has about 500 000 inhabitants and the whole metropolitan area i.e. Helsinki and the neighbouring cities of Espoo, Vantaa and Kauniainen, about 1 200 000.

One of the main demographic trends is the continuous growing of the proportion of immigrants (today 8 %) and of the number of elderly people and single households.

#### *Strategic importance*

The capital status means that Helsinki is Finland's leading city of all transports, port activities, amount of tourists and has the largest number of universities and institutions giving higher education (over 10). Helsinki was one of the nine European Cities of Culture for the year 2000. In that year Helsinki celebrated its 450th anniversary too.

#### *Business & employment sectors*

The economic structure is very much service-orientated, covering 83 % of jobs (commerce, services, public services etc.), the percentage of production is 17. High level services are typical of Helsinki as well as high technology businesses.

#### *Place of the port in the local/regional economy*

The Port of Helsinki is Finland's main harbour, which has by far the best ship connections to destinations abroad. The Port of Helsinki is specialized in unitized cargo. The national importance of the port is illustrated by the value of transports: one third of Finland's entire trade is transported through the port of Helsinki, or, 40 per cent of Finland's seaborne foreign trade pass the Port of Helsinki. The hinterland of the port is the southern part of Finland, and when imported consumer goods and forest industry export are concerned the whole country. The Port of Helsinki also forwards unitized transit cargo to and from Russia. The port's bulk transports consist of oil products and coal for the region's energy supply.

## 2 - Key features of the cruise activities and of the urban and port heritage

#### *Evolution and position of the port city on the cruise market*

Since 2005, the cruise traffic registers an important increase with, in 2008, an estimate number of 330 000 passengers and 270 calls.

The cruise ships moor at the West Harbour or at the South Harbour, which is also Finland's largest passenger port. Some six million passengers pass through it annually.

There are regular scheduled sailings both to Stockholm and Tallinn twice a day throughout the year. In summertime there are also numerous connections with high speed vessels to Tallinn starting in April and stopping in the end of December. The West harbour serves Tallinn and Rostock traffic. There are up to 8 departures a day to these cities. Some three million passengers pass yearly through the West Terminal.

#### *Evolution and state of the urban tourism*

The Economic and Planning Centre of the City of Helsinki has produced a Strategy with a title "The City of Helsinki – a Good Partner for Businesses", in which one of the main growth sectors is Tourism. Within this part of the strategy a main stress is put on the development of seaside travel destinations and the promotion of Helsinki as a potential hub for cruise traffic (home port status).

Nowadays, the most visible trend in the tourism evolution concerns the change in the nationalities of the cruise tourists: as in earlier years the majority came from North America, the share of South and Middle Europeans is in a steady increase. Also the increase of special groups is a challenge to organize interesting shore excursions and special programmes for these groups (e.g. gay, family, sport and other interest groups).

#### *Urban and port heritage*

In Helsinki, there are already some good examples of enhancement and conversion in urban facilities of the port heritage: Hotel Grand Marina, which used to be a harbour building, Hotel Katajanokka, a previous jail, both in the area of a cruise ship pier.

When the cargo traffic moves to the new port of Vuosaari and the redevelopment of the areas begin, the National Board of Antiquities gives strict instructions which buildings have to be restored in a way to save the old heritage.

## 3 - Key problems, challenges and thematic focuses

### **Problems to resolve and challenges**

### *Creating a new harbour: Vuosaari, a efficient gateway for foreign trade*

The most visible change in the physical aspect concerns the development of the Vuosaari harbour, which is the biggest project the Port of Helsinki ever has carried out. The whole cargo and container traffic will be moved in November 2008 from the city centre to the new Vuosaari harbour east of the city centre. The areas left empty will be reconstructed for housing and tourism during the coming 20 years.

### *Combining housing and cruise activities*

The delocalization of the port activities in the Vuosaari harbor represents an opportunity to create a completely new concept of waterfront, which proposes to combine housing - both private and municipal one - maritime activities from small sailing boats up to Genesis class cruise ships.

The main target of the project is anyway to find a sustainable mix of housing and maritime life, keeping in mind all environmental requirements, the protection of existing heritage buildings and areas and to create a neighbourhood in which both a private person and thousands of cruise visitors feel comfortable.

The planning of the project is in a very first starting phase. After the approval of the first proposals by the different departments of the municipality a summary/proposal will be represented to the City Council. The whole project is based on sustainable development, and the environmental details are considered in every point of the process.

The objectives of the project are economic too. A completely new neighbourhood brings new business in the area, the tourism creates handcraft and other small enterprises and the old buildings can be use for cultural events and exhibitions.

### **In addition, Helsinki is going to focus on following issues :**

- Creating a mix between maritime and urban activities in a process of sustainable development.
- Adapting the employment in the cruise sector to the new nationalities of the passengers.
- Increasing the attractiveness of Helsinki as a vibrant and interesting destination.

## **4 - Potential contributions and expectations of Helsinki**

### **Potential contributions**

- Strong position in the Baltic cruise market.
- Experience in sustainable urban and port planning.
- Good examples of enhancement and conversion of the port heritage in urban facilities.
- Existing of a Strategic plan which identifies the cruise traffic as an important economic sector for the city.

### **Expectations**

The main expectation concerns exchange of knowledge and experience to create a well functioning neighbourhood by mixing housing and maritime activities in its full scale and in an innovative way. Another one concerns the better exploitation of the urban potentialities to propose thematic excursions adapted to the new groups of cruise passengers.



## City of Matosinhos & Port authority of Leixões : A new cruise terminal. Challenges and opportunities to the surrounding area and the Northern Portugal

### **The city**

*Location* : Portugal, in the metropolitan area of Porto  
*Population* : 169 104 (2006)  
*Number of people in employment* : 78 877 (2001)  
*Unemployment rate* : 8 % (2001)  
Income per capita: tbc

### **The port**

*Ranking* : international - second port of Portugal  
*Administrative statutes* : State port managed by a  
Private limited Co.  
*Total traffic* : 15 m. G.T. (2007)  
*Container traffic (EVP)* : 433 437 m. TEU (2007)  
*Total passengers* : 15 863 pax (2007)  
*Cruise passengers* : 15 863 pax (2007)  
*Direct employment* : 5 800  
*Indirect and induced employment* : 9 200

### 1 - Key features of the city and the port

#### *Demographic trends*

Situated on the Atlantic coastal strip, Matosinhos is the 8<sup>th</sup> most populated municipality in the country (third in the metropolitan area), concentrating 11% of the metropolitan population in 3,9% of the surface area of the metropolitan region. The municipality grew from 25 to 169 thousand inhabitants, from 1900 till 2006.

The port is surrounded by the cities of Leça da Palmeira, on the North, and Matosinhos on the South. Both cities belong to the municipality of Matosinhos, which is integrated within the Greater Oporto Metropolitan Area, the second biggest one in Portugal.

The city-port border area presents a population density (2 711 inhabitants per km<sup>2</sup>) greater than the municipal (Matosinhos) average (2 685 inhabitants per km<sup>2</sup>). When compared with the Matosinhos average, the age structure of the city-port area shows a relatively more concentrated distribution of frequency of people aged 65 and more years, than of the other age groups.

#### *Strategic importance*

The Port of Leixões comprises the largest seaport infrastructure in the North of Portugal and one of the most important in the country. Leixões has excellent road, rail and maritime access and is equipped with advanced information systems for vessel traffic control and management.



Representing 25% of the Portuguese foreign trade and handling 15 million tons of commodities per year, the Port of Leixões is a competitive and versatile multi-purpose port. Around 2 800 vessels a year come through Leixões, carrying all sorts of goods and even passengers from Cruise Liners.

Almost all cargo handling operations are under concession to private companies. The concessionaires own the most up to date equipment. The Port Authority provides pilotage, towage and mooring services and is equipped with the most up-dated means and equipment.

Benefiting from a strategic location with a hinterland rich in industry and commerce, the Port of Leixões has a privileged position in the context of the European port system. It operates 365 days a year with high productivity levels and with reduced vessels turnaround time at the quays. The bar entrance is always open to navigation, without sea tide restrictions.

The Port of Leixões also has a hinterland tourism with high-interest and distinctive attractions, from an excellent range of high quality and large capacity hotels, and located close to an international airport. Given that the cruise segment has grown at a high rate over the last decade in the world, and the Port of Leixões has high potential for the development of this activity, the Port of Leixões has undertaken an important investment, the Creation of the New Cruise Terminal, which will develop and promote the tourism of the North Region and the city of Matosinhos and improve the port/city relationship.

#### *Business & employment sectors*

Trade predominates in the economical basis of Matosinhos, which represents 38% of employment. The manufacturing industry is the second highest employment activity with a weight of 17%. The group of activities, trade, transformation industry, real estate and transport and communications, represents 80% of employment in Matosinhos.

According to the census in 2001 the resident employment reached 78 877 people, of which 1.1% was in the primary sector, 31.7% in the secondary sector and 67.2% in the tertiary sector. This is clear evidence of a strong tertiary economy when compared with the average for GAMP (Greater Oporto Metropolitan Area)<sup>5</sup> and with the national average, territories where the tertiary represents 58% and 59.9% respectively of total employment.

The privileged location of the city, the richness of both sea and land, the presence of the Port of Leixões and the initiative, creativity and enterprising capacity of its people, are factors that determine the attractiveness of Matosinhos for the setting up of certain industries, such as the canning industry, which experienced a golden era, and which left evidence of its presence on the urban landscape. The Leça refinery is another example of the inscription of the port and its industries in the urban landscape.

#### *Place of the port in the local/regional economy*

Since its inauguration (1892), the Port of Leixões has left its mark on the development of the municipality of Matosinhos. A multitude of interactions have been, and in fact still are, reflected in local land, economy and society. The intensity of the relationship between port and city areas has given rise to decisive moments, which have greatly contributed to the economic and social development that both areas have experienced throughout their common history.

The Port of Leixões is a port characterized by an excellent feeder transport network and right conditions for the development of short sea shipping, providing challenges and growth opportunities in the competitive environment.

The Port of Leixões is responsible for 5.6% GDP of Portugal and 13,3% of the GDP of the North Region. Concerning the employment, it represents 7.5% of the total employment of the country and 15.5% of the North Region.

## 2 - Key features of the cruise activities and of the urban and port heritage

#### *Evolution and position of the port city on the cruise market*

In the national context, the Port of Leixões remains the 3<sup>rd</sup> largest port in terms of Portugal's Cruise traffic and the 5<sup>th</sup> in terms of passenger numbers. The United Kingdom generated most cruise passengers which call at the port.

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<sup>5</sup> in Portuguese: Grande Área Metropolitana do Porto – GAMP: an area with 14 different municipalities, including Matosinhos

Its location on the Atlantic front is perfect to link up the circuits of the Mediterranean and of Northern Europe, and with the growing trend towards shorter duration circuits (4 and 5 days), it can become an ideal destination if connected to other national ports, as well as to foreign ports located on the Atlantic front.

#### *Evolution and state of the urban tourism*

The Portuguese North Region, as was recently shown by very positive indicators regarding revenue and an increase in the number of tourist nights, is one of the tourist destinations with the greatest domestic and international growth potential.

The modern international airport which links the NW Peninsula to main cities of Europe and America – Lisbon, Madrid, Barcelona, Paris, London, Frankfurt, Amsterdam, New York, Rio de Janeiro and so on - is an important component of the tourist dynamics.

#### *Urban and port heritage*

Porto – Northern Portugal is the birthplace of the Portuguese nationality. Porto is the city capital of the region with more than two thousand years of history and a hub of central activities for its two million people spread over nine towns in the metropolitan area. It is a city of business and work, the starting point of the Port Wine and Vinho Verde, a universal city greatly influenced by the different communities which have been settling there for centuries.

The historic centre of Porto is a World Heritage Site recognised by UNESCO. Porto is a “Living Museum” of alleys and stone-paved roadways, churches and monuments, the Douro river and its six crossing bridges, the market places and typically traditional shops, the city park and the romantic gardens, bars and restaurants, open-air spaces and traditional cafés, and so on.

Outside the port area and surrounding Leixões, Matosinhos is the city that welcomes all tourists. The urban heritage of Matosinhos concerns references from the XVIIIth century, streets whose commercial developments have turned it into an interesting urban centre; charming public gardens and sidewalks and the picturesque religious shrines. The historic heritage also concerns the neighbourhoods where the bourgeoisie built beach houses or where the fishing community lived, the impact of the port structures, the influence of maritime activities, and the design of streets and avenues where the industries gathered.

### 3 - Key problems, challenges and thematic focuses

#### **Problems to resolve and challenges**

##### *A cruise terminal to open up the port to the city*

In accordance with the Development plan of the port of Leixões, the port authority has undertaken a study for the Refurbishment of the South Pier and adjacent area which includes a new passenger terminal, a nautical recreation port and complementary urban zones.

One of the challenges of the project is to strengthen the role of the new seafront as a leisure and entertainment zone, including a wide-range of urban facilities of public utility and linking the port to the city. All this contributes towards enlarging the scope of influence of this project far beyond the city of Matosinhos, which, together with the planned programme can become a benchmark location in the metropolitan context.

##### *A cruise terminal to strengthen the position of the port of Leixões on the Atlantic area*

The port of Leixões cooperates with the Cruise Atlantic Europe Project. This project has been instigated by a set of ports along the Atlantic coastline: the ports of Lisbon, Leixões (which is leading the project), Coruña, Bilbao, Lorient/Belle-Île, Cork and Dover, in collaboration with several regional and local entities. The objective of the project is to contribute to the reinforcement of the position of the Atlantic Area in the European cruise tourism market, contributing to economic growth and employment and for the valorisation of the natural and cultural heritage of the Atlantic Area. The expected growth of the cruise tourism sector at the world and European levels opens a window of opportunity for the Atlantic Area to increase its competitiveness regarding the Mediterranean and the Baltic areas.

Given the ever-greater length of the cruise ships, the new cruise quay will allow the mooring of vessels up to 300 m length and 10 m draught.

##### *A cruise terminal as an opportunity to regenerate the derelict surrounding areas in Matosinhos*

The total project will allow an urban zone characterized by negative indicators (physical, socio-economic and environmental) to be revitalized.

In fact, the main problem of Matosinhos is the lack of attractive tourist places for the cruise passengers who ignore and “jump over” the city in favour of Porto and other places in the region. So, the challenge is to upgrade the attractiveness of the city through the revitalization of the commercial infrastructure and restaurants, and the creation of cultural facilities and urban services in the deprived areas. In a general way, the cruise terminal will participate in the strengthening of the quality of life of Matosinhos.

#### *A cruise terminal to stimulate the tourist sector in the Porto Region*

Another important challenge is to stimulate the employment growth related to the cultural and leisure activities linked to the sea. At the scale of Matosinhos, cruise tourism offers some perspectives of employment to the local population (growth of unemployment; low qualification; low level of education). At the scale of the metropolitan area and the region, the cruise terminal represents a new gateway to a prestigious hinterland where the historic city of Porto and the Alto Douro Wine Region have been distinguished as World Heritage by the UNESCO

#### 4 - Potential contributions and expectations of Matosinhos and the Port of Leixões

##### **Potential contributions**

- Good relationships between the city and the port authority, which are used to work together in territorial planning. The project associates the municipality and the port authority within a common vision of the sustainable development of the city and the northern region.
- Attractive layout of the new cruise terminal conceived as strong junction between the port and the city.
- Strong local potentialities for the development of the cruise activity.
- Outlines for the renewal of the commerce/restaurants streets are already drawn up.

##### **Expectations**

- Learning how to strengthen the port-city relationships through the building of a cruise terminal.
- Developing a network of relationships with the partners of CTUR in order to improve the cruise business and its interactions with the hinterland.
- Debating about better strategies to elaborate port projects with a strong urban integration and development potential.
- Encouraging the identification of Matosinhos as a tourist destination.

# Naples & Port Authority of Naples: The port in the heart of the city

The city	The port
<i>Location:</i> Capital of the Campania region	<i>Ranking:</i> regional and international
<i>Population:</i> 1 m.	<i>Administrative statutes:</i> State port managed by a public port authority
<i>Number of people in employment:</i> 288 190 (35.1%)	<i>Total traffic:</i> 21.5 m. G.T.
<i>Unemployment rate:</i> 17.8%	<i>Container traffic (TEU):</i> 461 000
<i>Income per capita:</i> € 16 000	<i>Total passengers:</i> 9 m. pax
	<i>Cruise passengers:</i> 1.2 m. pax
	<i>Direct employment:</i> 5 000
	<i>Indirect and induced employment:</i> 2 000

## 1 - Key features of the city and the port

### *Location and demographic trends*

Naples is the third largest city of Italy, and is also the most important in the south of Italy; it lies on the Mediterranean coast of the Italian peninsula, and is in an advantageous position in the Mediterranean basin. It's the capital city of the Campania Region and the province of Naples counts more than 3 million inhabitants on a surface of 1 171 km<sup>2</sup>. The population is characterized by the percentage of young people (under 15 years old), one of the highest rate in Europe. The territory is divided into 10 Municipalities with administrative autonomy and decentralized functions.

### *Strategic importance*

The city was founded by Greek colonists in 6<sup>th</sup> century BC. The Greek Roman road network remains preserved until today in the historical centre, and the stratification of the following ages during the subsequent centuries left monuments of great value. This is the reason for which the historical centre of Naples has been included in the UNESCO World Heritage List since 1995.

The port of Naples is one of the most important in Italy and in the Mediterranean basin, in terms of passenger traffic and it's going to become one of the most important in terms of cruise traffic too. The income produced by the tourism factor and by the cultural activities is a crucial element for the economic growth of the city.

Naples has one of the most ancient and prestigious Italian Universities: the "Federico II", whose foundation can be traced back to 1224. Currently it counts more than 100 000 students, and is structured in 3 poles and 13 faculties. Besides the Federico II, there are 4 more universities in Naples, with specific competences and specializations: "University of Naples – l'Orientale" (foreign languages and literatures); "Suor Orsola Benincasa" (educative sciences, communication sciences); "Parthenope University" (nautical sciences, motor sciences); "Second University of Naples" (medicine and pharmaceutical sciences).

### *Business & employment sectors*

During the second post-war period the steel and iron industry experienced strong growth, but the closing of many plants, and the general bad economic trend, generated a high unemployment rate, whose effects have been only in part replaced by the tourism incomes (tourism experienced a great growth since 1994, on the occasion of the G7) that contributed to the maintenance of the economic status quo of the city.

The high percentage of young people represents an important resource for the economy of the city that can, through opportune incentives, promote the creation of new activities linked to the key sectors of its development: tourism, environment and tertiary sector, etc.

#### *Place of the port in the local/regional economy*

The Port of Naples has a considerable importance among Mediterranean harbours, confirmed by the positive trend of commercial traffic registered over the most recent years. Its strategic location between Europe and Asia characterized it as a transit area of goods; furthermore, it shows a constant increase in cruiser and passenger traffic. The commercial area of the port of Naples has a good level of inter-modal connection. It is directly connected by highways and railroads to other central structures: the warehouses of Nola and Marcianise, the international airport at Capodichino, and Naples' Central Railway Station. The entrepreneurial power of the port system has been fully supported, in order to retrain and optimize every activity, by the fast and functional fulfilment of infrastructural public works and the achievement of new managerial policy. The port expands its infrastructures in the centre of the city and in the heart of an area rich in natural beauty and historical and archaeological remains.

## 2 - Key features of the cruise activities and of the urban and port heritage

#### *Evolution and position of the port city on the cruise market*

Passenger traffic is still a crucial point in the activity of Neapolitan Port, considering the fact that the amount of passenger traffic (including cruise passengers, gulf traffic and coastal navigation) reaches 9 millions which are the result of the involvement and care of the whole Neapolitan maritime system.

Cruise traffic reaches excellent scores: passengers in 2007 were 1 160 000 in comparison to 968 459 in 2006, increasing by 8.3%. In 2008 more than 1 500 000 passengers were expected. The increase is more clearly visible comparing the amount of cruise passengers who landed in Naples in 2001 (469 632 pax) with today data, an increase of 145 %.

The Port Authority has decided to establish a new management trust for the cruise terminal, Terminal Napoli S.p.a.; the Port Authority of Naples is now the first public company in Italy to start a new management project for cruise terminals. This model is now definitely the *Naples Model* for everyone in this division. This project, developed over a long time, through patient mediation, has made the leading world cruise companies get involved in this new team, such as Costa Crociere, MSC Crociere, and Royal Caribbean. Naples Terminal Trade, Marininvest, Intership and the Port Authority of Naples (saving a 5% quota to keep assuring control and regulation as by law) are also involved.

Gulf traffic has increased its performance by 10%, as a direct consequence of the growth of local and tourist transport, now being the second in the world for passenger numbers, right after Hong Kong Bay. The *other destinations* both sea highways (strictly meaning Palermo and Catania) and coastal navigation to Sardegna, Pontine islands, Eolie islands and Tunisia, must be also taken into account. The continued traffic growth to these destinations confirms the coastal navigation talent of the Port of Naples, now steadily considered a crucial access to sea highways and an important connection port for Mediterranean Sea lines.

#### *Evolution and state of the urban tourism*

The situation of the urban tourism in the city of Naples recently is going through a crisis brought about by many general factors that refer to the city and its image as usually perceived from outside.

In the last year, in addition to the crime that has always afflicted the city, the waste emergency heavily reduced the tourism flows in general, even if the urban tourism unexpectedly was not really influenced by this.

After a long period of crisis that the tourism sector experienced in the last decades of the previous century, and that got worse after the earthquake in 1980, the tourism industry started increasing in the city as a consequence of the general rehabilitation initiatives carried out by the municipality and further amplified by the media event of the G7 meeting that took place in Naples in 1994. Since that date, the number of the Italian and foreign tourists increased year after year, until it became stable after the events of 11<sup>th</sup> of

September 2001. It started decreasing in 2005 because of a general slowdown of the rehabilitation and maintenance actions, and a wide deterioration of the image of the city. The same trend can be seen referring to the accommodation structures that suffered a progressive, even if slow and non constant, increase until 2004 when the sector stabilized.

#### *Urban and port heritage*

The historical centre of Naples is included in the UNESCO World Heritage List. Its main feature is its closeness to the port, even if the port itself in the last years has become a barrier separating the city from the sea. Many interventions, aiming at the regeneration of the former industrial areas close to the seafront (west area – Bagnoli and east area - S. Giovanni) and at reusing the historical factory buildings, are in progress. The urban-port area is rich with historical structures that are /could be subject to interventions and reuse: “S.Vincenzo” quay (various proposals), “Immacolatella” quay (protocol of understanding with the Region to create the museum of the emigration), industrial area “ex Cirio” (various proposals), the “Casa del Portuale” (currently the seat of the offices of the port workers’ cooperative), the former “Juta” (converted into the subsidiary maritime station “Calata Porta di Massa”), and Mercato square (various proposals, but none of which is concrete).

The Maritime Station (currently under transformation) was built in 1934 to the design of the architect Cesare Bazzani (among the most productive in Fascist period). Seriously damaged by Second World War bombing, it was restored right after the War, through complicated recovery interventions of its loadbearing structures.

### 3 - Key problems, challenges and thematic focuses

#### **Problems to resolve and challenges**

##### *Receiving the cruise ships in the heart of the port city*

In Italy, despite the innovations that were introduced by the law of 84/94, a separation between city and port still exists. In 2004, the public holding Nausicaa was constituted by the port authority, the municipality, the Neapolitan province and Campania Region to give an impulse to and guide the waterfront transformation. At the end of an international competition, the award winning project introduced the concept of a “filtering line” that redefines the connection between the city and the port and transforms the confines into a major resource: re-organization of the mobility flow (pedestrian routes; port entrances), creation of services and port premises, multiuse spaces, underground parking. From the level of Via Marina, the ground will be raised so as to allow the development of a panoramic pedestrian route, which is open onto the port and the sea. In another section, the filtering line will be a commercial strip created as a linear building on three floors connected by a tunnel to the underground station of Piazza Municipio and to the Beverello Quay.

A critical/conservative restoration is planned for the San Vincenzo Quay and the redevelopment of the existing buildings for use for cultural services, commercial and free time activities. The route along the quay will end with a large public space for events. Public gardens behind the Royal Palace will be re-organized as an end to the filtering line.

##### *Improving the accessibility of the port area and strengthening the continuity between city and port*

The “Municipal transport plan” and the “100 metropolitan stations plan” aim to correct and to strengthen mobility within the metropolitan area. In this framework, *The “Municipio station” of Naples metro line 1* has become the occasion for the urban regeneration of the monumental area. It lies in the heart of the monumental area of the city, strictly connected both with the historical centre and with the passenger port area. *The modernisation of Municipio – S. Giovanni the tram line and the revamping of Marina street*, two projects in progress today, aim to transform Marina street, currently reduced to a continue series of disconnected and decaying parts along the port, into a boulevard for access to the city from the east. Finally, the “Marinella” park project aims to rehabilitate a really decaying area of the city, and to shape a



remarkable monumental pole (former barracks, fish market, “Maddalena” bridge). This monumental pole structured by a new urban park, will represent the eastern gate of the historical city.

#### *Re-using the historical heritage and organizing a media event to promote the image of the city*

The regeneration project of the *Goldsmith quarter* represents a remarkable initiative of promotion of the tourism, the culture, the art and the care of the historical artefacts of the historical centre of Naples. It aims to promote the Goldsmith quarter as the eastern gate to the historical centre of the city, through the creation of a tourism-themed cultural circuits and coordinated initiatives to promote artistic handicrafts.

Naples has been selected to host the *Forum of the Cultures 2013*; the forum was promoted by the initiative of the city of Barcelona, that collaborates with UNESCO since 1996 to create a new major event to put the city in the centre of a wide international network. The event, besides being an important opportunity from a cultural and social point of view, thanks to “Naples city open to the interethnic and intercultural exchange”, is also a great occasion for marketing the city that will implement important infrastructural and integrated urban regeneration interventions by 2013.

#### *Creating a “sea training pole”*

A protocol of understanding has been signed on April 2008 to implement a feasibility study, aimed at the creation of the “Sea Training Pole” of the Campania Region. The objectives of the project being studied are to develop a permanent Training Pole for professional workers in the maritime sector, in order to improve the labour market –, formed by the careers of the whole maritime sector, i.e. the personnel both on board and on land, following the interests of the young people in the Campania Region that are looking for a stable and secure job. The current situation of the job market in this sector includes the development and research of new professions, also thanks to the recent initiatives of the Campania Region aiming at improving the maritime link services, creating new maritime stations or improving the existing ones, widening the integration of the transport towards hinterland destinations, and developing the cruise tourism and the naval dockyard sector. 18 courses are planned (one of which is already finished) for on board chef, dockers and cruise liner crew, and within the end of 2008 there will be the training for the profession of service heads – head stewards for ferries, on board chef for ferries, tour escort for cruise liners, hostess and stewards for ferries, front desk operator (reception service for cruise liners. 177 persons will be trained in total.

#### *Redeveloping former industrial areas and strengthening the continuity between the city, the port and the coastline*

The main objective of the *regeneration project of the Coroglio-Bagnoli area*, a large former port-industrial zone located on the west side of the centre, is to create a unique and wide low density area, characterised by a high quality of the environment, and by the presence of many recreational possibilities, in which culture and the leisure can be integrated in the productive activities linked to the research.

At the east of the centre, the main purpose of the *regeneration project of San Giovanni a Teduccio*, is to re-connect this derelict neighbourhood with the sea; the project, carried out in the framework of the executive planning of the General Urban Plan, foresees integrating and completing the waterfront facilities (made up above all by the new tourist port of “Vigliena” and by the new university located in the former Cirio plants, two important initiatives already in progress) together with the recovery of the premises of the former “Corradini” factory. This initiative, besides the recovery of the relationship with the sea and increasing the users of the public transport, thanks to the inter-connection with the maritime transport, aims at stimulating the mobilisation of private resources in addition to public ones, with remarkable benefits for local development and the employment.

#### **Further the city of Naples and the Port authority of Naples are going to focus on the following issues:**

- Taking the cruise traffic to develop new attractive/ aggregative poles for cruise tourists and inhabitants on the waterfront in deprived areas..

- Conjugating the safety theme with the permeability of the port by the inhabitants and the tourists and toning down the physical obstacles.
- Rationalizing the organization of the port and improving the passenger port area.
- Encouraging a better utilization of the historical and monumental heritage of the city and of the abandoned former industrial areas of the port and of the city-port interface.
- Improving the governance of the projects of urban / port transformation for a real coordination between the different stakeholders involved in a shared management of the projects and of the objectives.

#### 4 - Potential contributions and expectations of Naples and the Port Authority of Naples

##### *Potential contributions*

- Presence of a new management trust of the cruise terminal considered as a “model” in Italy.
- Presence of a specific port-city public company which coordinates the transformation of the monumental waterfront area.
- An ambitious waterfront redevelopment project in progress.
- Experience in regeneration of deprived neighbourhoods and historical quarters.
- Port in a lead position on the Mediterranean cruise market

##### *Expectations*

- A better connection between port and city which will create a high quality tourist support for cruise passengers;
- Strengthening and rationalization of the logistic-port infrastructures, taking in account the multifunctional vocation of the port.
- A positive economic impact for commercial and handicraft industrial areas close to the port.
- Re-qualification of the building heritage close to the port area with a subsequent increase and enhancement of the hosting infrastructures.
- Strengthening sustainable mobility to decrease the high level of atmospheric and acoustic pollution.
- Approaching the cruise activity as an opportunity to redevelop the industrial derelict areas in urban park and recreational/cultural places and to upgrade the quality of life.

## Rhodes: Modern approach in a medieval port

The city	The port
<i>Location:</i> Capital of Rhodes Island	<i>Ranking:</i> international passenger port (ferries and cruise)
<i>Population:</i> 53 709 (2001).	<i>Administrative statutes:</i> Municipal port managed by a port authority
<i>Number of people in employment:</i> 24 935 (2001)	<i>Total traffic:</i> 1, 8 m. G.T. (2007)
<i>Unemployment rate:</i> 16%	<i>Container traffic (TEU):</i> no container traffic
<i>Income per capita:</i> > € 20 000 (national figure)	<i>Total passengers:</i> -
	<i>Cruise passengers:</i> -
	<i>Direct employment:</i> -
	<i>Indirect and induced employment:</i> -

### 1 - Key features of the city and the port

#### *Demographic trends*

The island is located in the South Eastern edge of the Aegean Sea and it is the 3<sup>rd</sup> largest island of the Aegean. Rhodes is the capital of the Prefecture of Dodecanese and the capital of Rhodes Island.



The population of the city is officially 53 709 (2001) but considered to be more than 65 000. During the last decades the population has significantly increased by 22.43%.

#### *Strategic importance*

Rhodes has an international port and an international airport, which, mainly in the summer time, has many arrivals from all over the world. The Medieval City of Rhodes is a world heritage monument of culture registered on the UNESCO List since 1988. It is located in the centre of the urban tissue of the city. Rhodes hosts two departments of the University of the Aegean, which are the “Teachers’ Department” and the “Mediterranean Studies Department”.

#### *Business & employment sectors*

Rhodes’ economy has been transformed during the last decades, especially since 1970, from an agricultural economy to a tourist economy. The result has been the increase of the population of the island and the significant increase of the local GDP, which is 41% above the average national GDP. Nowadays the tourist sector represents approximately 75% of the total economy sectors of the local market and the contribution of the tourist product in the local GDP is estimated to be 85%. The tourist development has created a stream of new economic sectors in connection to tourism, of which the sectors of services and construction have been particularly developed.

#### *Place of the port in the local/regional economy*

The port of Rhodes is considered to be an international Port with direct connections to European and Middle East Ports. The port operates 24 hours a day and is connected with the rest of the island by a national road and with the neighbouring islands by local ships. The port serves mainly passengers and cruise traffic and secondarily containers, cement, and fertiliser. Rhodes has daily connection to the Piraeus Port and connection to the main islands of the Prefecture of Dodecanese. It has also a connection 3 days a week to the capital of the region. The cruise traffic is mainly during the summer period (April to October) with more than 3 cruise ships per day.

## 2 - Key features of the cruise activities and of the urban and port heritage

#### *Evolution and position of the port city on the cruise market*

While Rhodes has been a very important tourist destination for decades, cruise tourism was not the major product. But nowadays cruise tourism is a sector which is registering a fast and strong development in Rhodes. These last years, the island of Rhodes has got its place in the cruise market and the goal is to achieve a good position in this market.

#### *Evolution and state of the urban tourism*

Since the 1960s, the island is a very popular international tourist destination which has been elected recently as the 1<sup>st</sup> among the European Destinations and 5<sup>th</sup> among the worldwide destinations by the registered users of the website “Trip advisor”. In 2008, the city offers a total of 140 hotels and 15 507 beds. The 2 and 3 stars categories are predominant. The tourism model that had been developed from the very beginning was the mass tourism model. During the 1990s, related to the international economic crisis, this kind of tourism has known some strong turbulence. Nowadays the tourist decision makers and the local authorities focus on alternative models of tourism such as convention tourism, cultural tourism and cruise tourism.

#### *Urban and port heritage*

The port is located alongside the medieval city of Rhodes and it can be considered as a part of the urban tissue. Its location is the original one, corresponding to the date of construction of the city in 407 BC. In the port, there are many monuments from different eras such as the Ancient Greek era, the medieval era, the Ottoman Period era, etc.

### 3 - Key problems, challenges and thematic focuses

#### **Problems to resolve and challenges**

##### *Need to extend the port infrastructure*

The port of Rhodes is the only commercial port on the island. The main problem is that the port hasn't been improved during the last decades and the services provided cannot be qualitative due to the lack of infrastructure. Recently the port was extended with the creation of 8 berths more but the land structures have not been built yet. The direct consequence of this deficiency in infrastructure concerns the lack of available spaces for business development in particular in the port tourism field, which needs new services. Another problem regards the bad control of the location of the different port functions, which leads to a certain inefficiency. In the same way, the port can provide the level of safety required by the international rules.

##### *Improving the link between port and city in progress*

Currently, the port extension is in progress. The project for the creation of the land structures is in the phase of final planning and it will be co-funded by the 4<sup>th</sup> European Union Framework. The delivery date is foreseen at the end of 2010.

An "Operational plan of the Municipality of Rhodes 2007-2012" has been elaborated by the city. A major project under active consideration concerns the improvement of the mobility from the port to the city. It will complete the present efforts to develop and improve the surrounding infrastructure, cultural and heritage sites together with open and green spaces. The Municipality has a set of objectives agreed and being implemented now to upgrade the general ambiance of the area.

##### *Improving the tourist services and offers*

While Rhodes has a strong experience in the tourism sector, some services must be improved and adapted to the cruise traffic. The "commercial guide" provided by the local agents focuses only on some shops and restaurants, neglecting the other potentials of the local market. In the same way, it is also necessary to improve the "city tours" offer and imagine new ones in order to exploit better all the tourist advantages of Rhodes.

#### **Further Rhodes is going to focus on following issues :**

- Improving the tourist potentialities of Rhodes and adapting offers and services to the cruise activity.
- Developing the port infrastructures in accordance with the city, taking in account the requirements of quality and security.
- Enhancing the port and urban heritage

### 4 - Potential contributions and expectations of Rhodes

##### *Potential contributions*

- A good experience in tourism activity
- A project of port and waterfront development in progress
- A general agreement between the local stakeholders to plan actions for a betterment of the quality of life in city.

##### *Expectations*

- The city of Rhodes expects to develop a Master Plan for the cruise tourism in the framework of the CTUR TN.
- The CTUR project will be a good opportunity to exchange best practices for the best integration of cruise tourism in the economic and social life of the city.



# Rostock: Awakening the sleeping beauty

## The city

*Location* : City in the state of Mecklenburg-West Pomerania

*Population* : 200 000 (city); 500 000 (metropolitan area)

*Number of people in employment* : 45 254 (city) 99 000 (metropolitan area)

*Unemployment rate* : 13,2%

*Income per capita* : 13 334 (GNP)

## The port

*Ranking* : international

*Administrative statutes* : Municipal port managed by a port authority (74,9% city; 25.1% state Mecklenburg-West Pomerania)

*Total traffic*: 26.5 m. G.T.

*Container traffic (EVP)* : no container traffic

*Total passengers* : 2, 5 m. pax

*Cruise passengers* : 115 000 pax

*Direct employment* : 3 800

*Indirect and induced employment* : 5 600

(10 000 and 15 000 including the maritime sectors)

## 1 - Key features of the city and the port

### *Location and demographic trends*

The North East German -Hanseatic City of Rostock is a medium sized harbour city, ideally located in the Berlin-Copenhagen-Hamburg triangle. With 200 000 inhabitants and a region of 300 000 residents, Rostock represents the absolute and only large city north of Berlin. Up to the end of the 20<sup>th</sup> century Rostock had to manage a demographic and economic collapse. These negative trends have stopped and nowadays Rostock is beginning to enjoy a period of stabilization and normalization. The maritime sector, including the cruise business, contributes to this trend.

The population of the Inner City has been partly changed by moderate gentrification; the Inner City community is reorganized into a high level of middle class households (single, flat-sharing) and relevant life style groups. The demographic situation is influenced by about 12 000 university students. The number of foreign immigrants is marginal. Rostock's Inner City offers business functions for a hinterland of about 500 000 inhabitants and - during the high tourism season - for up to 200 000 guests daily.

### *Strategic importance*

Because of its high urban qualities, Rostock is identified by the planners as a "RegioPole" (regional metropolis). The accessibility of Rostock is provided by 2 highways, developed railroad connections and an airport.

Rostock's roots come mainly from the Hanseatic League, dominated by the ideal location on the river with ice-free access to the Baltic Sea. Rostock is the turnstile for business relations to Scandinavia, the Baltic States, Russia, Western and Southern Europe. By tradition, it was the city of 7 towers, 7 churches and 7 bridges to the historical city centre.

Today, Rostock is likewise characterised by seven features : 1) Hanseatic City; 2) port city with a strong tradition in shipbuilding; 3) University City (the oldest university in Northern Europe); 4) focal point of the federal state (a supra-regional magnet); 5) business location (n°1 in northeast Germany); 6) traffic hub; 7) fairs and conferences centre (national and international events)

### *Business & employment sectors*

Nowadays, Rostock appears as a modern "green" harbour-city along the Baltic Sea. Its built infrastructure is nearly perfectly renovated and modernized.

Furthermore the economy registers a strong diversification with special developments in the fields of harbour business, tourism business, wind energy, plant industry, different and specific segments of metal processing and large vessel machine construction.

Rostock also benefits from some impulses coming from Biotec and life sciences, as well from the call centre market. The university (4700 working places) also has a growing number of students (about 12.000) and high level research projects. New excellent research institutes were developed to promote Rostock's intellectual driving force.

#### *Place of the port in the local/regional economy*

The harbour was and is one of the main economic functions of the city. It is also a backbone for the economic change and development at the local and regional scales. The maritime business offers a growing number of employment opportunities: AIDA cruise ships 3 200, Port of Rostock 5 500, DSR group 2 530, ship yards 1 400. In general, the expert's estimations amount to about 10 000 – 15 000 working places in the maritime business, harbour business included.

Rostock's port, the deepest German Baltic Sea port, provides ideal conditions: as a maritime industrial location with modern infrastructure, as a centre for commerce or for the service industry.

Rostock has different ports. The Inner City port is nowadays mainly used for leisure, sport, urban life and with a post industrial economic function (restaurants, shopping, offices, etc.). The fishing port, on the West side of the river Warnow still exists, but it has been changed into simple multiple business activities with some turn-over. The 2 shipyards in Rostock – Warnemünde and Rostock NW, use their own port basin and embankment. The former ferry embankment for the ferry connection from Rostock to Scandinavia closed and it has been moved to the main harbour in Rostock NE. This dock, ideally located in the fishing village of Warnemünde, is under private ownership. In the North of the Warnow river lagoon is located the navy port and in the South the main civil port.

## 2 - Key features of the cruise activities and of the urban and port heritage

### *Evolution and position of the port city on the cruise market*

Rostock enjoys growing importance as host for the cruise liner business and this fact is not only due to Rostock's harbour business. The competition between cruise liner destinations and cities is strong, and now Rostock plays a leading role in Germany, especially on the Baltic Sea market. Rostock could and can offer a wide range of urban qualities, a convincing and touching bouquet of arguments to live in Rostock or to visit Rostock. Nevertheless, up to now, Rostock's brand (in the cruise liner business) is dominated by the image of "Gateway to Berlin".

For the Cruise Liner business Rostock seems to be an ideal location, with for example the presence of the headquarters of AIDA. The growing cruise liner market takes advantage in Rostock of a wide acceptance and support in relation to the economy, policy, science and public administration.

In the industrial harbour in Rostock N-E, a Cruise ship port with a cruise ship welcome centre located in Rostock Warnemünde was developed especially with EU regional funds grants. With some exceptions, medium sized cruise ships also go into the fishery port.

The de-industrialized Inner City port offers potentials for small or medium sized cruise and tall ships. The Inner City and the Inner City port present great value for interesting visits for Cruise tourists arriving from Rostock Warnemünde.

### *Evolution and state of the urban tourism*

Today, the tourism industry is booming and is a main pillar of Rostock's region economy.

### *Urban and port heritage*

The old inner city, the old inner city port in the process of revitalization and its waterfront promenade present good tourist potentialities. Some port heritage (warehouse, port building, old shipyards, and cranes) has already been enhanced to recall the former function of this area. It underlines that the old riverfront is now totally open, without any restriction for public access. It represents a great potential to develop urban facilities and public spaces.

## 3 - Key problems, challenges and thematic focuses

## **Problems to resolve and challenges**

### *Promoting Rostock's inner city as a tourist destination*

Rostock and Rostock-Warnemünde present a competitive physical/spatial environment. The port infrastructure and facilities are perfectly adapted to the modern cruise ships traffic and the passenger terminal is well connected to Rostock's inner city (public transport and taxi) and to Berlin (train, bus, car). Rostock, and more particularly the city centre and the picturesque fishing village of Warnemünde, offer an high quality standard and an ideal mix of shopping, walking, pub and coffee house stops, museum visits, urban and port heritage, public parks, etc. Today, Rostock corresponds to an ideal destination for short-term tourism and cruise calls.

Thus, one of the main challenges is to strengthen the image of the city and develop a tourist strategy to enhance Rostock as a cruise tourist destination and not only as "a gateway to Berlin".

### *Strengthening the cruise industry sector*

The economic environment is opportune for developing the cruise industry in Rostock. The headquarters of AIDA Cruises is ideally located on the Inner City waterfront. This cruise company is the first German company in terms of sales and passengers. Today, its fleet includes four club cruisers: AIDAcara, AIDAvita, AIDAaura and AIDAblu. The Meyer shipyard in Germany has been commissioned to build four new AIDA ships for delivery in spring 2007, 2008, 2009 and 2010.

AIDA employs about 2 400 persons from 25 countries (400 land-based jobs and 2 000 onboard). The development of the company will generate about 3000 new working places on shore and on board.

Nevertheless, following a strategy of quality and growth, there is a permanent lack of highly qualified and motivated staff for on board and off shore jobs. Service mentality and foreign language use in the job is still not internalized enough due to the strong influence of the socialist times. While the cruise industry offers working places to the young population and while there are excellent training schools in Germany and Rostock region, this economic sector generates a job market with specific skills. In this way, a European cruise academy was founded in Rostock in co-operation with the University of Rostock

Another point, learning from the low interest of ferry operators in Inner City development, concerns the insufficient engagement of the local business society and other Inner City driving forces to get more attention of cruise liner passengers for an Inner city visit instead of a trip to Berlin. Their interest must be activated in the framework of the CTUR Local action plan.

### *Bringing the cruise traffic to the core of the city.*

The challenge is to develop a "unique cruise product" with a new offer of "bus ships" and mini cruise liners organized in the core of Rostock. Developing this project also means transforming the inner port into an attractive tourist place, planning integrated actions on the cultural, urban and port heritage components.

The first transformations of the inner waterfront have brought to light its potentialities and augured its tourist uses. But a problem to be resolved concerns the maintenance of the sea channel, supported by central state grants. Since some years, the waterway along the Warnow river has ceased hard economic functions and the depth cannot be ensured by the federal state. Developing a small and medium cruise market in the Warnow river needs to take this financial aspect into account.

### *Awaking the sleeping beauty*

In 2006, foreign experts evaluated Rostock as a "sleeping beauty". That means that some changes have to happen in the mentality of latent "looser" groups, a social feeling among the local population linked to the loss of mainly social competences or to the lack of integration in the social and cultural environment. Maybe two dictatorships and one total change of the society approach were too much for the population aged 60+. Flexibility, capacity and the willingness for change are not the strength of a large part of the local community. Provincial behaviour has a longer tradition and still wider value than hedonistic or bohemian lifestyle, which seems to characterize the "world class cities" society. But now the older

generation represented by heads and decision makers of the 1990s is nearly retired; new personalities dominate the community feeling.

**In addition Rostock is going to focus on following issues :**

- Improving the tourist potentialities and facilities of Rostock to transform it into a cruise destination.
- Strengthening the cruise industry in Rostock stimulating the local energies and offering new educational skills.
- Deepening the inner waterfront redevelopment scenario.

**4 - Potential contributions and expectations of Rostock**

*Potential contributions*

- Strong experience in cruise traffic and an active cruise industry sector.
- Good practice relating to the enhancement of port heritage.
- Creation of a specific cruise academy.
- Involvement of the university in the cruise development project.
- Exchange with Eastern European countries in the field of urban tourism and cruise activity.

*Expectations*

- Contribute to the change of marketing strategy and marketing activities.
- Stimulate the growing number of cruise ships visiting the Inner City; multilingual information (material) for cruise guests and hosting service enterprises.
- Study about feasibility of the project concerning the development of local “bus ships” and medium sized cruise liners.
- Improvement of skills and revival of maritime traditions.

## Trieste: A gateway to the Mediterranean in the heart of Europe

**The city**

*Location:* Capital of the Friuli Venetia Giulia region

*Population:* 208 710

*Number of people in employment:* -

*Unemployment rate:* -

*Income per capita:* -

**The port**

*Ranking:* international

*Administrative statutes:* State port managed by a public port authority

*Total traffic:* 46,2 m. G.T.

*Container traffic (TEU):* 265 863

*Total passengers:* 114 000 pax

*Cruise passengers:* 55 000 pax

*Direct employment:* -

*Indirect and induced employment:* -

**1 - Key features of the city and the port**

*Location and demographic trends*

Trieste is located 150 km east of Venice, near Slovenia. From the 1970s onwards, the demographic trend has been negative. Furthermore the average age of the population of Trieste is quite high, in fact it is the highest among the regional capitals in Italy. As a consequence, there is a situation of social unbalance because of the different economic needs of persons aged over 65 as opposed to young people (assistance vs. employment). At the end of the 1990s Trieste registered an important immigration flow from the Balkan area (former Yugoslavia)

#### *Strategic importance*

Trieste is the regional capital of Friuli Venetia Giulia and the key port both for the region and for central European countries. From the 1960s up to today, Trieste has been developed as an important centre for scientific research thanks to the presence of many international institutions (ICTP, ISAS-SISSA, Area Science Park).

#### *Business & employment sectors*

Since the end of the Second World War, the most important businesses for Trieste have been trading and financial activities. Thanks to its role as regional capital, an important employment sector in the city is the one related to public services and administration. The industrial trend is negative and the Port is going to reduce its employees. The low impact of the industrial activities on the local economy is an important problem for the employment of young people. Scientific institutions play a key role in the local economy, attracting migrant workers from all over the world.

#### *Place of the port in the local/regional economy*

The Port of Trieste is the most important port in the region and it is also the most important national port for oil traffic, for ferry lines linking Turkey and Italy, and for the coffee business.

## 2 - Key features of the cruise activities and of the urban and port heritage

#### *Evolution and position of the port city on the cruise market*

Trieste has been developing cruise tourism since 2003. During 2008 more than 100 000 passengers have visited Trieste on a cruise. From 2007 Trieste has been a “Home Port” for the most important cruise national companies: Costa Crociere and MSC. Trieste is also a “Port of Call” for many international cruise companies (Cunard, Crystal...).

#### *Evolution and state of the urban tourism*

Tourism is one of the most important sectors for the economic development of Trieste. In the last 10 years a deep change in the role of Trieste has occurred. Now Eastern European citizens consider the city as “the gateway to the Adriatic”. In the last 5 years many investors have chosen the city centre of Trieste to build new hotels, residences, and a lot of buildings have been converted into B&Bs. The traditional source of urban tourism in Trieste (business and scientific conventions) is now paired with an important presence of tourists, who choose Trieste for leisure, for its cultural offer and as the first step of a cruise trip.

#### *Urban and port heritage*

The Trieste Port Authority is going to complete a few important investments in infrastructures aiming at the development of maritime-related businesses such as the cruise, yachting and ferry transportation industries. The Maritime Station, located in the central part of the urban waterfront, is going to regain its original role as port hub for passenger traffic. During the past 20 years the building has been the most important Congress Centre of the city. The Port Authority is building a small Maritime Station with 3 docks for local passenger traffic. In the Old Port there is still the “non-Schengen countries” ferry dock. Some important investments both for tourism and directional centres have been planned in the Old Port area.

## 3 - Key problems, challenges and thematic focuses



## **Problems to resolve and challenges**

### *Imagining together a new future for the Old port*

The Old Port is a large site which has been abandoned for 25 years, except some free areas still devoted to the development of maritime traffic. The area consists of 60 ha at the north entrance to the city, close to the main rail hub, with access routes near the city executive centre.

Since the 1990s several redevelopment projects of the area have been formulated. Despite the alternative in term of spatial composition and level of functional mix, the idea has always been to propose the Old port as a new urban quarter for Trieste. One of the difficulties for setting the project in motion lies in the overlapping of responsibilities in the decision-making process, which characterized the Italian management and planning policies. Another one consists in the relationships between the local actors and their capacity to reach the consensus on the project.

The main goal of the project is to integrate the Old Port areas into the city-centre's urban fabric. Today, a tourism-oriented approach is being developed, combined with a set of projects for the transformation of port facilities into management headquarters. The project constitutes a key element to revitalize and qualify the waterfront.

### *Reorienting the basis of the local economy.*

Tourism - considered as a set of services – is one of the most important economic resources for the city of Trieste. The tourism sector that is most likely to grow is the one revolving around the port's passenger traffic. Considering the characteristics of the Cruise&Yacht landings in the port of Trieste - they are located in a central area of the urban waterfront – important development goals can be achieved by devoting more urban areas to these activities.

The social implications of this project are closely intertwined with one of the project's expected results, namely the possibility to consider tourism as one of the development targets for new job opportunities and new entrepreneurial activities. Such a perspective could guarantee to the inhabitants of the city a generational continuance in managing decision processes and development policies for the city.

### **In addition, Trieste is going to focus on following issues:**

- Revitalizing the Old port taking into account the port heritage potential (an alignment about 20 old warehouses).
- Developing the cruise and nautical tourism as new base of the local economy.
- Becoming a home port and call port and a Mediterranean lead port on the Central and Eastern European cruise market.

## **4 - Potential contributions and expectations of Trieste**

### *Potential contributions*

- Experience in enhancement and re-using of port heritage.
- Waterfront redevelopment project according a special care to the port heritage.

### *Expectations*

- Exchanging experience with the CTUR partners and getting new competences in order to develop efficient strategies to attract the cruise companies and to increase the cruise traffic.
- Keys learning to develop a marketing strategy to promote Trieste as a cruise port and tourist destination.



# Region Valenciana /Valencia One port, many destinations

## The city

*Location:* Capital of Valenciana Region

*Population:* 810 064

*Number of people in employment:* 380 400

*Unemployment rate:* 10.3%

*Income per capita:* € 21 230 (regional figure)

## The port

*Ranking:* international - lead position in Mediterranean

*Administrative statutes:* State port managed by Valencia Port, a public company

*Total traffic:* 54 m. G.T.

*Container traffic (TEU):* 3,05 m. TEU

*Total passengers:* 474 814 pax

*Cruise passengers:* 111 283 pax (2007)

*Direct employments:* 8 697

*Indirect and induced employments:* 1 541 & 5 413

## 1 - Key features of the city and the port

### *Demographic trends*

Valencia is the third city in Spain and it lies on central area of the Mediterranean coast of Spain on the plain of the river Turia.

Throughout the twentieth century the city has multiplied its initial population by two or three, with the maximum periods of demographic growth seen during the years 1930-1940 and during the seventies. The nineties were years of demographic stability due to the effect of the decrease in migratory movements, which were a fundamental factor for growth during previous years, and also for the reduction in the birth rate. During the most recent years the strong foreign migratory currents have once again been provoking a new dynamic increase in the population.

The progressive increase in life expectancy and the reduction in the birth rate have been reflected in a pyramid of ages that narrows at its base and widens at the top, with an increasing weight of the older generations. Even so, the population of the city continues to be relatively young, with 19% concentrated in the generation aged 15 to 29, and 33% in the 30-49 age group.

### *Strategic importance*

Valencia is one of the main industrial centres on the Mediterranean. It has also become a European Congress Centre as well as an important focal point for international business and trade fairs.

Valencia has a number of important cultural and academic institutions that are becoming increasingly important in the development of the city: the University, the IVAM (Valencia Institute of Modern Art), the Palace of Music or the City of Arts and Sciences contribute an undeniable added value to the city and to its metropolitan surroundings as centre of culture and leisure. Valencia is a cosmopolitan city and is ideal for commerce and cultural exchange.

Valencia has a good network of transport infrastructures and it is connected with the rest of the country and main international destinations: an international airport, a train station in the centre of the city with national and international connections completed by a bus station, ferry lines to Balearic Islands and cruise lines, 2 motorways (AP-7 and A-23) connecting Valencia to the European motorways network and a dual carriageway connecting Valencia to Madrid.

Thanks to this closeness with the sea, its expertise in staging important events and the unstinting efforts of central, regional and local government, Valencia was selected ahead of 65 other cities around the world as the host of the 32nd America's Cup.

### *Business & employment sectors*

The city of Valencia is, fundamentally, an area of services whose influence reaches out far beyond the limits of its municipal area. Today the active population in the services sector is 74% of the total, with a large

portion of these in the final demand activities, wholesale and retail, of specialized services for businesses and professional activities.

Even so, the city maintains an important industrial base, with 14% of the population working in this sector, which is made up of small and mid-size companies. Those that particularly stand out are the paper and graphic arts sectors, wood and furniture, metallic products and footwear and clothing.

On the other hand, the agricultural activities, even though their importance is relatively minor, still survive within the municipal area, occupying a total of 3.668 hectares, mostly occupied by horticultural cultivation.

The economy of the city has enjoyed positive dynamic growth during recent years, which can be seen reflected in the unemployment figures, registration of vehicles, or in construction licenses. The dynamism of the city as an economic centre and as a place of reference for a multiplicity of economic activities is also reflected in the strength of institutions which are key for economic development such as the Valencia Trade Fair, the Port authority, the Stock Exchange, the Congress Palace or its Universities.

#### *Place of the port in the local/regional economy*

The port has a powerful area of direct influence. The area of influence encompasses a radius of 350 km, which generates 51 percent of Spain's GDP and includes half the entire working population of the country. Located in the core of the Region of Valencia, the port has highly convenient road and rail connections to the centre of Spain, making it the ideal natural port for Madrid, and an essential platform for Iberian Peninsula. As a hub port on the Western Mediterranean, Valencia port enables goods to be distributed efficiently within a radius of 2000 km, not only to countries in the south of the European Union, but also to countries in northern Africa - Morocco, Algeria, Tunisia and Libya - representing an immense market of 243 million consumers.

Similarly, its privileged geo-strategic position in the centre of the western Mediterranean coastline, in line with the east-west maritime corridor crossing the Suez Canal and the Straits of Gibraltar, positions it as the first and last stopover for all major regular shipping lines connecting America, the Mediterranean waters and the Far East.

Valencia port is the leading commercial port on the western Mediterranean coast in terms of containerised cargo volumes and ranks first in Spain in terms of container traffic apart from being among the top ten European ports and top fifty world ports in container handling. It handles regular passenger traffic to and from the Balearic Islands and Italy and also has an emerging cruise ship market in increase.

All of this means that Valencia port plays a highly relevant role in the economic development of its area of influence and beyond, it is the maritime gateway for production and consumer goods to and from the entire Iberian peninsula. It is estimated that Valencia port provides direct or indirect employment for over 15 000 people and generates business worth over 1.1 billion euros.

## 2 - Key features of the cruise activities and of the urban and port heritage

#### *Evolution and position of the port city on the cruise market*

The Port of Valencia has noticeably increased its activity as a destination for cruise ships, with 110 port calls and 106 502 passengers in 2005. In addition to cruise ships, the port also receives regular passenger traffic from the Balearic Islands and Italy. The total number of passengers served by the Port of Valencia rose to 335 803 in 2005.

#### *Evolution and state of the urban tourism*

Urban tourism in Valencia has been increased in the last years, mainly foreigners due to different factors:

- cultural: museums, urban heritage and the creation of "Ciudad de las Ciencias";
- business: Congress Palace Fairs and so on;
- Leisure and international events: Formula 1 urban circuit, America's Cup, beaches, golf and so on.

#### *Urban and port heritage*

Valencia has accumulated enormous wealth from all the cultures which have resided here over the centuries (Muslims, Goths ...). Stroll through Valencia and feel the plurality and evolution of a city where prosperous historical tradition and recent and innovative architecture stand side by side.

The historic centre with its religious temples, Gothic Baroque and Modernist monuments, the varied and renowned museums, the architectural projects such as the City of Arts and Science designed by S. Calatrava, and the Conference Palace are but a few of the many attractions which Valencia has to offer its visitors.

Valencia port has taken on the responsibility of caring for and conserving the cultural heritage it has acquired over the years. Highlights are the "Edificio del Reloj" (clock tower) an emblematic buildings located at the entrance to the port; the modernist style of the port sheds, former warehouses for the storage of grain and other goods; and the "Edificio del Varadero", or Drydock building, a former repair shop for medium-sized vessels. Some of these buildings have been or are still in the process of being surrendered by the port authority to the city

### 3 - Key problems, challenges and thematic focuses

#### **Problems to resolve and challenges**

##### *An international event as a catalyst of the waterfront redevelopment*

The relationships between port and city have always been neglected in Valencia. City and port have had an independent development since their origin, bringing great contradictions, problems with coexistence and the port deterioration. But nowadays the city is again looking to the sea and reassuming and implementing some urban plans designed in the XIX century, aimed at bringing Valencia closer to the port.

The naming of Valencia as the venue for the XXXII America's Cup (2007) meant a new and extraordinary boost to port-city integration and an exceptional platform for its international projection, as well as a commitment to build sufficient infrastructure to host the America's Cup at a level befitting one of the world's premiere events. Part of that infrastructure is Port America's Cup - with its brand new 700-berth marina right at the heart of the Cup action and literally minutes from the race course area - "the stadium". Port America's Cup is nestled against la Malvarossa with its promenade, restaurants, clubs and bars - it is 'The Beach' of Spain's most happening city. Moreover the project of "Real Marina Juan Carlos I" is in implementation phase.

In less than four years, the maritime district will be spectacularly transformed, that will open Valencia to the sea, and it will change the 1 350 000 m<sup>2</sup> of waterfront. Two architect's offices, GTM and Jean Nouvel, will join their projects, which won the contest, in order to reorganize the waterfront. The challenge is now to use these drastic transformations in order to generate positive effects in some districts of the historic city.

##### *Carrying on the regeneration of the historic city in relationship with the waterfront redevelopment*

The historic centre of Valencia is one of the largest in Europe. But for years it suffered great degradation process. In 1992 the RIVA Plan was created, with a historic management office working within the framework of successive collaboration agreements between the regional and local governments. It culminates in significant interventions, creation of rehabilitation areas and recovering heritage, not only in the historic centre but also in other historic districts and the seaside districts.

However the situation continues to change and although many of the problems have been solved, Valencia i still has plenty of contrasts: important monuments can still hide buildings in ruin and degraded areas.

Moreover, the Municipality is involved in different projects aiming to link the city to the port and the seaside: enlargement and enhancement of the Blasco Ibañez as a "Sea avenue", achievement of the urban regeneration of Cabanyal, a historic seaside district which will be strongly transformed by the enlargement of Blasco Ibañez Avenue, creation of a new metro line to link the seaside districts, "Ciudad de las Ciencias", Russafa and the city centre.

##### *Adapting Valencia to the needs of the cruise tourism*

The Port Authority provides a high quality of service to both the ships and the cruise passengers visiting Valencia. It also carries out promotional activities and supports cruise operators. In fact the America's Cup, the Formula 1 circuit and "La Ciudad de las Ciencias" have become great attractions for cruise tourism undergoing strong expansion in Valencia. However, nowadays, Valencia is not adequately prepared to host that special kind of tourism. First, it is necessary to study how to offer the historic districts and the cultural heritage as another option for the cruise tourists' excursions. It means taking into account the interests of the tourists and the duration of their visit, and "opening" new routes through the historical districts of Valencia. Furthermore the time of the city (shops, cultural facilities and activities) must be harmonized with the time of the calls in order to get the better economic impact of the cruise tourism.

**In addition, Valencia is going to focus on following issues:**

- Liking cruise tourism to urban regeneration of the historic districts
- Adapting the offers to the cruise tourists' needs

**4 - Potential contributions and expectations of Region Valenciana/Valencia**

*Potential contributions*

- An ambitious waterfront redevelopment in progress
- Wide experience in urban-port planning and revitalization
- Innovative and specific tools to lead the regeneration of historic districts
- An experience in organization and management of international events

*Expectations*

- Getting a collection of best practices in cruise activity from the partners and the network
- Focusing the attention of the impacts of cruise tourism on the historic district
- Promoting cultural tourism
- Creating new facilities in the historic districts
- Rising the cruise activity as dynamic business

**Varna: a gateway to 3 500 years of history**

<p><b>The city</b>  <i>Location:</i> Bulgaria- Regional capital  <i>Population:</i> 350 661 (in increase)  <i>Number of people in employment:</i> n. k.  <i>Unemployment rate:</i> 2.34 % (2007 i.e. 3 times less than the national rate.</p>	<p><b>The port</b>  <i>Ranking:</i> international - regional ranking  <i>Administrative statutes:</i> owned by 3 public administrations (National Port authority, Military, Municipality)  <i>Total traffic:</i> 7, 4 millions G.T.  <i>Container traffic (EVP):</i> 99 713 TEU (2007)  <i>Total passengers:</i> n.k.  <i>Cruise passengers:</i> n. k. - 30 calls (2007)  <i>Direct employment:</i> 1 600</p>
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**1 - Key features of the city and the port**

*Demographic trends*

Varna is the second largest city in Bulgaria having recently taken over from Plovdiv in terms of residents, commuters and GDP. It is located in the north east region of the country with the City and Municipality of Varna being the local regional administrative capital. It has the largest port on the Bulgarian coast line

handling the largest quantity of cargo. There have been a number of investments made in the infrastructure of the port with renewal of rail links in recent years allowing expansion and growth.

Varna is one of the few cities in Bulgaria with a positive population growth. In the period 1997-2003 the population of Varna Municipality increased by 4.6%, while the population of Bulgaria generally decreased by 5.8%.

#### *Strategic importance*

Varna is the second most important economic centre for Bulgaria after Sofia and one of the major hubs for the Black Sea region.

The city is located on the European routes E70 to Bucharest and E87 to Istanbul and Constanta, Romania; national motorways A-2 (Hemus motorway) to Sofia and A-5 (Cherno More motorway) to Burgas.

The city is a great and famous university centre : University of Economics; The Nikola Vaptsarov Naval Academy; Medical University; Technical University; the Chernorizets Hrabar Varna Free University—the first private university in the land after 1989, three junior colleges, and two local branches of other Bulgarian universities. There are four Bulgarian Academy of Sciences research institutes (Oceanology, fisheries, aero and hydrodynamics, and metallography), a government research institution (shipping), and a now-defunct naval architecture design bureau. Varna is home to a total of 2 500 university staff and researchers and over 30 000 students.

Tourism is of foremost importance with the suburban beachfront resorts with a total capacity of over 60 000 beds (2005), attracting millions of visitors each year (4.74 million in 2006, 3.99 million of whom were international tourists). The resorts received considerable internal and foreign investment in the late 1990s and early 2000s.

Varna has some of the finest and oldest museums, professional arts companies, and arts festivals in the nation and is known for its century-old traditions in visual arts, music, and book publishing, as well as for its bustling current pop-culture scene. Over the past few decades, it developed as a festival centre of international standing. Varna is a front-runner for European Capital of Culture for 2019, planning to open several new high-profile facilities such as a new opera and concert hall, a new exhibition centre, and a reconstruction of the Summer Theatre, the historic venue of the International Ballet Competition.

#### *Business & employment sectors*

The economy is service-based, with 61% of net revenue generated in trade and tourism, 16% in manufacturing, 14% in transportation and communications, and 6% in construction. There have been a number of FDI (Foreign Direct Investment) projects in the retail sector with 3 new shopping malls having opened and another 5 under construction or on the drawing board.

In September 2004, *FDI Magazine* (a *Financial Times* Business Ltd publication) proclaimed Varna *South-eastern Europe City of the Future* citing its strategic location, fast-growing economy, rich cultural heritage and higher education. In April 2007, rating agency Standard & Poor's announced that it had raised its long-term issue credit rating for Varna to BB+ from BB, declaring the city's outlook "stable" and praising its "improved operating performance".

Real estate has been a boom area for the city blending some old architecture with new modern buildings. The expansion of the city has been through the development of "Villa" residential areas as well as multi occupancy buildings.

#### *Place of the port in the local/regional economy*

The port serves mainly containers, grain, cement, clinker, fertiliser and soda freights. Ships are served by agencies, brokers, pilots, suppliers, forwarders. The total numbers of serving personnel is over 25,000 pax. Sea transportation is mainly operated by the Bulgarian Marine Fleet, and a slight portion by small private companies. Freight is processed by Varna Port Complex. Varna Municipality hosts Port Varna – East, a dry dock, a petrol terminal, Port Topolite, a timber terminal and a Military Marine Base. Added to these and going inland are the connections with Varna and Beloslav Lakes and the building of Port Varna West and the Ferry Terminal. This provides for a better use of the different kinds of transportation and organisation of loading operations, taking these out of the city, with a definite environmental effect.

The port used to be one of the major employers in the city but since the fall of the Communist era the economic transition has moved towards more service based industries such as tourism. Notwithstanding this



fact the port area and the associated industries such as ship building and repairs still remains a major employer.

## 2 - Key features of the cruise activities and of the urban and port heritage

### *Evolution and position of the port city on the cruise market*

During the Communist era the port of Varna was a favourite destination for cruise and passenger ferry routes with numerous ships berthing during the tourist season at the purpose made terminal which still exists today. After the collapse in 1989 the number of ships visiting the port declined and for a period there were zero visits. In recent years the numbers have increased with on average 25-30 passenger cruise ships berthing and visiting Varna. These ships range in size from the medium to the larger cruise ships that visit such ports as Istanbul, Nice and Barcelona etc. Varna has now started to become a port of call and is being heavily promoted by cruise line operators and being included on their itineraries. At present this is nascent but is a key issue for the Municipality and is something that it wants to develop as part of the overall strategy of the Municipality for economic growth and tourism linked to cultural and heritage development.

### *Evolution and state of the urban tourism*

Varna has always been a tourist centre even during the time of the Turkish Ottoman occupation. This was continued during the communist era. After the administrative changes in 1989 there was a period of instability but then after 1992 things got better economically and the “Beach Resorts” had major investments and the number of tourists increased. Varna and the immediate area is a hot spot for summer tourists from across Europe and the former socialist countries. The tourism infrastructure is well developed with hotels, restaurants and associated facilities.

The Municipality is determined to increase the value and spend of the tourist profile away from the all inclusive tourist to higher value cultural and heritage tourist.

### *Urban and port heritage*

In terms of heritage Varna is one of the oldest cities in the world. Long before the Thracians populated the area around 1200 BCE, several prehistoric settlements best known for the neolithic necropolis, eponymous site of old European Varna culture and the world's oldest and largest find of gold artifacts (mid-5th millennium BCE radiocarbon dating), which is on display in the city. The city is host to diverse architecture from the Ottoman periods through to the more modern architecture of today including a legacy of communist high rise multiple occupancy buildings.

The port area is currently un-dynamic and is a mixture of commercial, and leisure. There are plans to make major changes to the port and water front areas to make it more of a mixture of recreational facilities, residential and commercial usage. The plans are based and modelled on some of the more successful water and port frontage cities across Europe.

## 3 - Key problems, challenges and thematic focuses

### **Problems to resolve and challenges**

#### *Revitalisation of the city and port to upgrade the tourism level*

The City of Varna is a port city under revitalisation after many years of under investment in key areas except for the real estate and tourism industries. A key aspect of that revitalisation is the development of the port area and cruise industry in an attempt to attract higher value tourists and develop the city.

Until now the city and its environs is a magnet for lower value all inclusive tourists who stay in the resorts on the periphery and outside of the city limits. In order to increase local wealth and economic opportunities the City and Municipality knows that it has to do something to the port area so as to make it more attractive to a wider range of tourist, including those from the cruise industry.

#### *Revamping and refurbishing the obsolete port areas*

The City and Municipality of Varna has the intention and approved plans to totally revamp and refurbish the whole of the port area giving greater public access creating new recreational facilities and commercial opportunities. There are plans to redevelop some parts of the old industrial port area creating new improve commercial opportunities therefore new employment opportunities. The plans include the development of a

marina suitable for super yacht berthing, a residential area mixed with commercial facilities. Almost all cultural and heritage sites are within easy walking distance from the port area even for elderly visitors.

#### *Associate cruise terminal and recreational facilities in the port area*

Today, the cruise ship terminal which is a 2 story building with the terminal on the ground floor and office and space for commercial activities is under renovation. A new fish restaurant and a boat sales and chandler office and shop have opened. There is extensive renovation to the building structure and decoration. In a more ambitious way, the cruise industry and the development of the port area as a recreational and mixed use area is seen to be a vital part of the overall plan for the development of Varna as a destination for tourism in all its forms, cruising is one aspect, but also the linking of the associated cultural and heritage sites of interest, accommodation providers, industries and businesses. At present there is an outline plan for the development of the port area which will include the provision of facilities for cruise ships and associated activities.

#### *Associating all the public actors in a global project*

The localised problem is that all actions to date have been disjointed and uncoordinated across all levels of interests. There is little or no civil society participation and little contact between the different political, authority and other tourism actors. The main reason behind this is the co ownership of the port area which is split between the Municipality, the Ministry of Defence or Military and the Port authority which is part of the Ministry of Transport. In order for the development to take place a series of complicated land transactions have to take place alongside National Government permission. This is a slow and painful process with other national issues higher up the agenda and as such the development of Varna port is not seen as being a national priority.

There is an outline plan for the port and cruise industry development but this has mainly been drawn up by those with vested economic interests which has led to a series of uncoordinated actions by investors looking after their returns on investment which at times does not join up in a holistic vision for the city as a whole.

The challenge for Varna will be to bring all parties together from across all interested stakeholder sectors in uniting on a vision and method for the sustainable development of the port and cruise industry for the betterment of the city and all stakeholders as whole.

#### **In addition Varna is going to focus on following issues:**

- Planning the waterfront revitalisation in an overall approach of the port city development.
- Cruise activities as an opportunity for the local economy and for the betterment of the environment and quality of life.
- Stimulating the collaboration between the public actors and all the stakeholders; organizing the participation of the citizen in the project.

#### **4 - Potential contributions and expectations of Varna**

The identification of good practices from other port cities in the preparation and implementation of port and cruise industry development is very important for Varna to institute an integrated, sustainable and suitable development of the cruise industry which embraces all participants at all levels. Transfer of good practices from the project will ensure that Varna becomes a must visit destination linking with the already developed cruise industry and its operators.

# SYNTHESIS

# 1. Network CTUR: a representative sample

## A heterogeneous sample...

At first sight, the partners of the CTUR network constitute a heterogeneous sample in terms of urban and port reality.

*The “population” criterion distributes the port cities into 5 main categories :*

- national capitals of northern Europe with more than 500 000 inhabitants (Dublin, Helsinki);
- regional capitals of southern Europe with more than 800 000 inhabitants (Naples, Valencia);
- cities with a population between 200 000 and 350 000 inhabitants, region capital (Varna, Trieste, Rostock) or not (Alicante);
- a peripheral city with about 160 000 inhabitants included in the metropolitan area of Porto (Matosinhos);
- a medium-sized city with about 55 000 inhabitants, capital of an island of the Greek archipelago (Rhodes).

*The “port traffic” criterion distributes the port cities into 3 main categories:*

- non-specialized and trans-national main port characterized by their high traffic level in containers (Valencia; Dublin);
- non-specialized ports that are important at national and trans-regional levels (Helsinki, Leixões, Naples, Trieste, Rostock);
- ports that are important at regional level, non-specialized (Varna, Valencia) or more or less specialized (Rhodes).

*The “passenger traffic” criterion distributes the port cities into 4 main categories:*

- ports with a total passenger traffic higher than 8 million passengers (Naples, Helsinki);
- ports with a cruise traffic higher than 1 million passengers (Naples) and higher than 300 000 (Helsinki), in lead position in the Mediterranean and the Baltic regions;
- ports with an increasing cruise traffic of about 100 000 passengers (Alicante, Dublin, Rostock, Valencia);
- ports recently opened to cruise traffic (Rhodes, Varna, Leixões).

Main figures and conceptual challenge

	City		Port				Port city
	Populatio	Unemployme	Traffic	Container	Total pax	Direct jobs	Conceptual

	n	nt	GT	(TEU)	Cruise pax	Indirect/induced	challenge
Alicante	329 947	5,9 %	3.8 m	173 000	362 000	-	<i>Maritime station, a gateway to the historic city</i>
					97 988	-	
Dublin	506 201	5.5 %	31.1 m	2.2 m	1.5 m	165	<i>Cruise tourism linking between city, port and docklands</i>
					100 000	3 500	
Helsinki	563 531	5.2 %	13.4 m	431 000	8.5 m	276	<i>A home for all boats</i>
					330 000	470/700	
Matosinhos Leixões	169 104	8 %	15 m	433 437	15 863	5 800	<i>Challenge of a cruise terminal to the surrounding area and the northern Portugal</i>
					15 863	9 200	
Naples	1 m.	17.8 %	21.5	461 000	9 m.	5 000	<i>The port in the heart of the city</i>
					1,2 m.	2 000	
Rhodes	53 709	16 %	1.8 m	no	-	-	<i>Modern approach in a medieval port</i>
					-	-	
Rostock	200 000	13.2 %	26,5 m	no	2.5 m	3 800	<i>Awaking the sleeping beauty</i>
					115 000	5 600/15 000	
Trieste	208 710	-	46.2 m.	265 863	114 000	-	<i>A gateway to the Mediterranean in the heart of Europe</i>
					55 000	-	
Valencia	810 064	10.3 %	54 m.	3,05 m.	474 814	8 697	<i>One port, many destinations</i>
					111 283	1 541/5 413	
Varna	350 661	2.4%	7.4 m	99 173	-	1 600	<i>Port as gateway to 3500 years of story</i>
					-	-	

... but a relevant sample

With such a heterogeneous sample, that is to say there is nothing to compare and exchange between the partners?

First of all, it is worth stressing that the will of the port cities to participate and to encourage the CTUR network implies that they have altogether the same feeling of belonging to a common reality, which is an essential basis to exchange questions and experiences. Thus, the latest period of crisis of the urban-port system everywhere in Europe (and in the world), and the needs of an adjustment to the globalization dynamics, have encouraged the port cities to come together in order to think on common issues and, probably, to share a relative common fate.

Therefore, despite their urban differences and port realities, the port cities involved in the CTUR network constitute a relevant sample:

- all the port cities identify the port as a strong component of their local economy, culture, society and identity.
- all of them are currently involved in an ambitious project to redevelop the port-city interface in accordance with a sustainable approach, transforming often derelict port and industrial areas into new urban quarters, or trying to improve the relationships between hard/soft port functions with the urban neighbourhoods.
- all of them are experiencing a significant increase in cruise traffic and are elaborating strategies to control and stimulate its impacts on the local economy as well as possible. In this way, the network CTUR represents a well-balanced sample allowing to study and exchange on the features of the different European cruise markets: the Baltic market (Rostock, Helsinki), the Atlantic North market (Dublin, Matosinhos-

Leixões), the Mediterranean market (Alicante, Valencia, Naples, Rhodes, Trieste), and the Black Sea market (Varna).

- most of the port cities have a broad urban heritage that sometimes benefits from an international label (Naples; Rhodes); all of them have initiated specific policies to enhance and promote it. In any case, the port heritage is recognized as an essential component of the urban identity and, currently, it is the subject of particular care.

## 2. Key problems and challenges within the CTUR theme

The port cities of the network CTUR are not at the same development level of cruise activity and are not at the same stage in the implementation of their projects. Nevertheless, their key problems and challenges concerning the general adaptation of the port cities in physical, socio-economic, cultural and managerial terms to the requirements of the cruise sector are similar.

### **Planning and spatial organization**

- Planning the waterfront revitalisation (including derelict industrial areas) in an overall approach of the port city development.
- Bringing the cruise traffic to the core of the city, improving the connection between the cruise terminal and the city centre or developing the cruise infrastructures most closely with the city centre.
- Improving the urban accessibility to the cruise terminal and, more generally, to the port in terms of efficient collective transports and in term of quality (landscape; security) of the pedestrian ways.
- Improving the organization of the passenger port separating cruise traffic and ferry traffic.
- Rationalizing the organization of the port functions setting up the hard functions in a suitable location and taking into account their environmental impacts.
- Transforming a port-industrial derelict area into a new city quarter.
- Mixing housing and cruise traffic in a same area and, more generally, creating a mix between maritime and urban activities within the framework of an integrated approach of sustainable development.
- Conceiving new cruise terminals as open doors between the port and the city.
- Improving the infrastructures and facilities of the passenger terminal to strengthen the position of the port city on the cruise market and to become a major “home port”.
- Developing urban facilities in the port area without compromising the requirements of security

### **Governance and management**

- Enhancing the governance efficiency to stimulate local energies.
- Encouraging the partnerships between the port authority and the municipality, between the several public bodies and between the public and private actors. In nearly all cases, the challenge is to associate all the public actors in a global project.
- Associating the citizens in the port-city strategy and/or project(s) and identifying the local population as the main target of the economic and social impacts of the cruise activity (research of methodological approaches).

### **Economic and social challenges**

- Developing the cruise activity as a new employment sector.
- Awakening the interests of the local population (inhabitants and economic actors) to the cruise activities and its potential economic and social impacts.
- Harmonizing the time of the city and the time of the cruise call considering that in some cities the shops are closed between 2 p.m. and 4 p.m., and, in almost cases, on Sunday.
- Developing/strengthening the cruise industry sector in the port city offering training courses and vocational educations adapted to the specific skills required (land based and on board jobs). In this way, it means encouraging first and foremost the access of young people (training courses) and low-qualified workers (vocational education) to the employment opportunities.
- Adapting the employment in the cruise sector to the new nationalities of the passengers

### **Tourist promotion of the port, the city and its neighbourhoods**

- Increasing the image and the attractiveness of the port city as a vibrant and “unique” destination at the international level.
- Promoting the image and the attractiveness of ordinary inner cities or neighbourhoods to neutralize the “jump effect” towards more famous destinations.
- Enlarging the impacts of the cruise traffic to the regional hinterland offering original tours and diversifying the tourist offers.
- Taking the opportunity of a major media event to redevelop the quality of the port-city interface, to enhance the urban and port heritage and to improve the quality of life in the derelict neighbourhoods.
- Improving the tourist potentialities and cultural facilities to transform the city into a cruise destination.
- Proposing the waterfront as a tourist and recreational place.
- Promoting the cultural heritage of the city and proposing it as an original and interesting one to the cruise tourists. In this way, it means imagining new itineraries in the city allowing the discovery of the urban heritage and all the cultural places.
- Bringing up the level of tourist services to improve the well-being of the cruise tourists in the port and in the city.



### **Enhancement of the urban and port heritage**

- Enhancing the industrial port heritage by elaborating specific inventories.
- Researching innovative practices to re-use the original port and industrial “icons” (silos, shipyards, power stations, etc.).

### **Improvement of the quality of life and environmental components**

- Improving the quality of life for the communities living in the surrounding areas of the cruise terminal and, more generally, living on the port-city interface.
- Resolving problems of pollution and contaminated areas.

## 3. Themes and sub-themes to exchange

From the key problems and challenges, three general thematic routes can be identified to approach the topic of “Cruise traffic and port city heritage as a key for the sustainable regeneration of the port city” in its entirety. Therefore for each main topic, many practical sub-themes have been identified by the partners in their baseline study and during the two meetings of the CTUR network.

### **1 - Transforming, regenerating, adapting the physical and environmental components of the “port-city system”:**

- Enhancing the **attractiveness** of the port city: creation/modernization of port infrastructures and facilities in favour of the cruise traffic, improvement and strengthening of cultural and commercial infrastructures, insertion of recreational and cultural places in the port territory, and neutralization of the negative “gateway” effects.
- Improvement of the port **accessibility** (multimodal transport connection) and of passenger mobility, and reinforcement of the **safety** inside the port and on the port-city interface.
- Development of **functional diversity** on the port-city interface and port obsolete areas.
- **Protection and enhancement** of the port **buildings heritage**: re-use the industrial and port “totems” as high value “containers”, and enhancing the iconic and identity value of the port.
- Resolution of problems of **pollution** and contaminated areas.
- Management of negative cruise traffic **impacts on the environment**.

### **2 - Planning and managing the cruise development within a global port city project**

- Institution of a good (better) **governance between port, city and other local stakeholders** including the citizens.
- Development of **public-private partnerships** in economic and social matters.
- Conception of new tools to allow, encourage and integrate the **participation of the citizens** in the decision-making process.
- Conception of **innovative planning tools** to transform and organize the city port in an integrated vision.
- Creation of **innovative communication tools** to promote, in a global dimension, the port city and its features (specific know how and skills; tourist potentialities, etc.).

### **3 - Cruise traffic and port heritage as economic and social generator**

- **Evaluation of the cruise and tourism impacts** on the local/sub-local economy in order to identify strengths and weaknesses and build an efficient port city strategy (Research of methodological approaches).
- **Development of the cruise industry sector** in the port city revitalising the maritime tradition and know how in a global approach: attracting the cruise industry head-quarters; proposing **training courses and vocational education** adapted to the skills required by the cruise industry and tourism activities associated (land based and onboard jobs; skilled jobs in the tourist sector, etc.).
- Awakening the local economic sphere to the cruise challenges: offer of specific products and services; adaptation of the **time of the city to the cruise calls**; proposing **innovative tourist guides and routes**; consciousness raising to **re-use the port heritage** in an economic but also in a social way.
- Allowing and encouraging **the access of young and low-qualified workers** to the employment opportunities in the cruise and tourism sectors.
- Orienting the positive cruise and tourist impacts towards the **derelict neighbourhoods**.
- Offer of **social housing** in mixed programmes developed on the obsolete port areas.

## 4 - Experiences and good practices within the network

Within the CTUR network some experiences and good practices have already been identified. These will be an excellent basis for the exchange, the learning activities and the local action plans.

First good practices identification within the network CTUR

Themes	Good practices
<p><b>Transforming, regenerating, adapting the physical and environmental components of the “port-city system”</b></p>	<ul style="list-style-type: none"> <li>▪ Experience in large-sized and successful port-city regeneration project (Dublin).</li> <li>▪ Redevelopment (completed or project in advanced stage) of obsolete port area in attractive port-urban place (Valencia, Dublin, Helsinki, Naples, Alicante, Matosinhos-Leixões, Trieste).</li> <li>▪ Interesting conversion of port heritage in commercial, cultural or/and tourist facilities (Dublin, Helsinki, Rostock, Naples).</li> <li>▪ Enhancement of the old maritime station (Naples, Trieste).</li> <li>▪ Cruise terminal as a junction between the port and the city (Leixões, Naples).</li> <li>▪ Mixed functional programme (cruise and housing) to transform a port area (Helsinki).</li> <li>▪ Re-distribution of the port functions on the territory (Helsinki).</li> <li>▪ Improvement of the port accessibility (Naples).</li> </ul>
<p><b>Planning and managing the cruise development within global port city project</b></p>	<ul style="list-style-type: none"> <li>▪ Organization of major media events to encourage the port-city spatial and functional integration (Alicante; Valencia; Naples).</li> <li>▪ Specific urban regeneration agency (Dublin).</li> <li>▪ Development of cruise activity in a city strategic plan (Helsinki).</li> <li>▪ Commerce and restaurants renewal strategy (Matosinhos).</li> <li>▪ Management trust for the cruise terminal (Naples).</li> <li>▪ Specific public company associating port, city and other public stake-holders to revitalize a central urban-port area (Naples).</li> <li>▪ Innovative tools to lead the regeneration of historic and deprived neighbourhoods (Valencia; Naples).</li> </ul>
<p><b>Cruise traffic and port heritage as economic and social generator</b></p>	<ul style="list-style-type: none"> <li>▪ Lead position on a specific cruise market (Helsinki, Naples).</li> <li>▪ Specific educational tools for residents of deprived areas (Dublin).</li> <li>▪ Thematic tourist routes in the city (Alicante).</li> <li>▪ Creation of a cruise academy settled in a port heritage building (Rostock).</li> <li>▪ Head quarters of a cruise company settled in a port heritage building (Rostock).</li> </ul>