

CTUR

Cruise traffic and Urban regeneration of city
port heritage
Thematic Network

Baseline Study

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PART I

EXISTING KNOWLEDGE AT EU LEVEL: THE STATE OF THE ART OF THE CRUISE TRAFFIC THEME

1 - Eléments de contexte

Villes portuaires : des villes en mouvement

Depuis plus de 2 décennies, les villes portuaires européennes occupent une place de choix dans l'actualité urbanistique.

1 - Des villes en crise

Les premiers titres de cette actualité sont maussades et alarmistes puisqu'il s'agit pour les élus et les aménageurs de trouver des réponses à l'abandon de vastes emprises par les fonctions portuaires et industrielles, inscriptions spatiales les plus lisibles d'une crise affectant l'ensemble des composantes des villes. Ainsi, au cours des années 1980, les évolutions drastiques du transport maritime (gigantisme naval ; unitisation des charges) et les exigences de restructuration spatiale, technique et humaine des ports, conjuguées aux démantèlements en série des grandes unités de production industrielle (sidérurgie, pétrochimie, construction navale, etc.) ébranlent fortement les bases socio-économiques des villes portuaires avec une accumulation des indicateurs négatifs : déclin démographique, chômage, accentuation des phénomènes d'exclusion sociale, dégradation accélérée des tissus urbains anciens. Les chiffres du tableau ci-dessous attestent de l'ampleur de cette crise¹

Les années 1980-90 : des crises urbaines aux caractéristiques communes

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

INAMA (1992) and other sources

¹ Laboratoire INAMA et al., « Dynamiques des villes portuaires : Marseille et les autres », Rapport de recherche, Plan urbain (MELT), Paris, 1992.

2 - Des villes en mutation

A partir de la moitié des années 1990, la croissance spectaculaire des échanges maritimes avec plus de 25 000 milliards de tonnes de marchandises² qui, annuellement, circulent par les mers et les océans, est favorable aux ports maritimes qui connaissent tous *a priori* un regain d'activités. Les chiffres du trafic conteneur en attestent : entre 1995 et 2005, ce trafic est ainsi passé de 145 millions d'E.V.P. (équivalent vingt pieds) à 275 millions avec un rythme de croissance moyen estimé à 8,9% par an.

Dans cette nouvelle conjoncture, les villes portuaires se doivent dès lors de s'investir dans une double compétition : celle que se livrent les ports pour capter et commander les trafics maritimes ; celle qui anime les villes pour renforcer leur positionnement sur le territoire européen. S'il est démontré que le renouveau économique des places ne suit pas toujours mécaniquement la progression des trafics (A. Lemarchand, 2006), l'actualité urbanistique des villes portuaires n'en est pas pour autant moins festive avec, en Europe, avec des inaugurations en série et toujours médiatisées de nouveaux « waterfronts » en lieu et place des quais et bassins abandonnés par la fonction portuaire moderne. Barcelone, Gênes, Liverpool, Hambourg ou Lisbonne constituent autant d'exemples qui participent à l'affirmation d'un phénomène de « waterfront revitalization », pièce maîtresse d'ambitieux projets de redynamisation de l'ensemble des composantes de la ville. Le défi est d'abord celui de rendre la ville portuaire productive et non plus simple lieu de passage. L'interface ville-port devient ainsi un véritable support expérimental pour l'élaboration de stratégies capables de répondre aux mutations socio-économiques imposées par la mondialisation. L'enjeu est aussi celui de résoudre les tensions entre fonctions portuaires et fonctions urbaines, de répondre aux aspirations des habitants en terme de qualité de vie, d'habitat et d'offre satisfaisante d'équipements et d'espaces publics. Dans tous les cas, l'interface ville-port, hier présentée comme une limite opaque et stérile, constitue désormais une « frange active » sur laquelle s'affirme une même volonté de renouvellement de la forme, de l'image et des dynamiques des villes.

² Data, W.T. O. 2006.

2 - Project topic

L'activité de croisière : un enjeu pour le renouveau de la ville portuaire

1 - Cruise Traffic and Urban Regeneration (C.T.U.R.): généalogie d'un thème

Le thème « Cruise trafic and urban regeneration », initialement proposé par la ville de Naples s'inscrit dans la continuité des travaux conduits de 2005-2007 dans le cadre du groupe de travail SUDEST, centré sur l'étude des spécificités du développement durable des villes portuaires.

Au cours de ce programme, les partenaires ont identifié une même tendance des villes portuaires à proposer l'interface ville-port comme lieu où s'articulent les nouvelles logiques métropolitaines à l'œuvre et où, en quelque sorte, s'organise « le futur de la ville portuaire » :

- dans les périphéries des villes, sont créés de nouveaux terminaux portuaires spécialisés et de grandes zones logistiques ;
- les séquences les plus centrales de l'interface ville-port sont soumises à des interventions urbanistiques de grande envergure qui visent, parmi les objectifs prioritaires, à favoriser une mixité des fonctions : mixité fonctionnelle *vs* quartiers de ville requalifiés ; mixité fonctionnelle *vs* fonctions de tertiaire supérieur et fonctions logistiques ; mixité fonctionnelle *vs* tourisme, loisirs et temps libre. Dans la plupart des situations, l'intention est celle de développer ou de renforcer une mixité entre fonctions portuaires et fonctions urbaines.

Dans de très nombreux projets de waterfront development, l'activité de croisière est proposée comme un élément fort d'une même volonté des villes portuaires de développer/renforcer le secteur du tourisme urbain. La croisière est aujourd'hui devenue un nouveau créneau porteur de la base portuaire. Depuis 10 ans, ce marché a littéralement explosé avec plus de 10 millions de personnes qui embarquent chaque année sur des paquebots, et avec un rythme estimé à 8%/an jusqu'en 2010³. Précisons aussitôt que ce phénomène ne concerne pas seulement les ports du Sud ou ceux relativement déconnectés des flux de marchandises. Il concerne tout autant les ports du Nord et les grands ports de commerce.

En Europe, le thème de l'activité de croisière comme nouvel enjeu économique et marketing des villes portuaires et comme support de régénération urbaine suscite de nombreuses attentions :

- tout d'abord, comme nous le verrons dans la section « Etat de l'art », diverses études comparatives consacrées aux dynamiques des villes portuaires en Europe en soulignent l'importance. Quant aux informations diffusées par les associations spécialisées dans la promotion de la croisière au niveau international et européen, elles démontrent l'ampleur du développement de l'activité de croisière et l'importance de ses retombées économiques.

³ Miami Seatrade, 2006.

- un autre indicateur de l'importance du thème peut être celui du nombre de villes portuaires européennes ayant candidaté au Network C.T.U.R. avec pas moins de X villes.

	Name of institution (precise type of institution)	Region	Member or Partner State	Convergence or Competitiveness
Lead partner	Municipality of Naples	Campania	Italy	Convergence
Partner 1	Municipality of Alicante	Comunidad Valenciana	Spain	Competitiveness
Partner 2	Municipality of Dublin	Dublin	Ireland	Competitiveness
Partner 3	Municipality of Helsinki	Southern Finland	Finland	Competitiveness
Partner 4	Port Authority of Naples	Campania	Italy	Convergence
Partner 5	Municipality of Matosinhos	North	Portugal	Convergence
Partner 6	APDL - Port Authority of Douro and Leixões	North	Portugal	Convergence
Partner 7	Municipality of Rodhes	South Aegean Region	Greece	Competitiveness
Partner 8	Municipality of Rostock	federal state Mecklenburg-Vorpommern	Germany	Convergence
Partner 9	Municipality of Trieste	Friuli Venezia Giulia	Italy	Competitiveness
Partner 10	Generalitat Valenciana	Comunidad Valenciana	Spain	Competitiveness
Partner 11	Municipality of Varna	Varna	Bulgaria	Convergence

2 - La croisière comme générateur de tourisme urbain et comme opportunité pour la valorisation du patrimoine urbano-portuaire (recovery of urban and port building heritage). Les thèmes d'investigation et d'expérimentation de C.T.U.R.

La croisière est une fonction qui implique nécessairement la ville et le port tant pour le lieu d'implantation et la définition des modalités opératoires, que pour l'élaboration de la stratégie de développement. Ainsi, pour être inscrit dans les circuits, il est nécessaire d'offrir des garanties de fiabilité portuaire, mais aussi une « qualité globale » du séjour.

1 - Son développement suppose comme préalable une intervention forte des pouvoirs politiques locaux. Il est alors **question de gouvernance**, entre les institutions publiques « urbaines et territoriales », les autorités portuaires, les acteurs économiques locaux et la société civile. En effet, développer l'activité de croisière suppose un fort engagement de la sphère publique et privée locale dans **la construction de l'image de la ville portuaire**, mais aussi dans le dimensionnement des infrastructures territoriales et urbaines : aéroport international, dimension et standing de l'offre hôtelière, qualité des dessertes de la ville avec l'arrière-pays. Le tourisme de croisière est par ailleurs très favorable à l'émergence **de**

coopération entre les villes. En effet, la fréquentation dépend aussi de son insertion dans une « route », un réseau de villes ayant de ce fait des intérêts convergents.

2 - La croisière entretient des liens très intimes avec **le tourisme urbain** : les flux de personnes qu'elle génère est conditionnée par la qualité de l'offre culturelle de la ville. Ces dernières années, nombre de villes portuaires, quelque soit leur rang dans la hiérarchie urbaine, se sont ainsi concentrées sur **la création d'équipements culturels d'importance nationale voire internationale.** Le musée Guggenheim à Bilbao constitue le meilleur exemple de cette tendance très marquée.

Le patrimoine urbano-portuaire intervient ici comme une composante propice à l'affirmation de la singularité des lieux et l'offre d'une expérience inédite aux visiteurs. Mais tandis que pour certaines villes (Naples, Barcelone, Amsterdam, etc.), la présence d'un patrimoine urbain « historique » d'exception permet déjà d'asseoir leur notoriété touristique, d'autres villes éprouvent plus de difficultés à faire valoir l'intérêt artistique et culturel de leur cadre bâti. Pour ces dernières, la solution retenue sera alors celle de valoriser le patrimoine industriel et portuaire, investi d'une forte valeur identitaire et sociale, et toujours perçu comme un espace curieux et dépaysant par les visiteurs, et de le faire basculer dans le champ du culturel ou des loisirs. Toutefois, se posent évidemment la question du réemploi de ces vastes édifices et celle de la capacité d'absorption par les villes de taille moyenne. La **fonction commerciale**, dans ses aspects les plus novateurs, peut ici venir au renfort du maintien et de la valorisation des plus grandes structures portuaires historiques. Les entrepôts et les terre-pleins peuvent ainsi constituer autant d'opportunités pour redynamiser et diversifier l'infrastructure commerciale dans le coeur des villes. En associant des commerces moyen-haut de gamme spécialisés sur des créneaux en vogue avec un environnement doté d'une forte identité (patrimoine, bassins et plans d'eau), ces réalisations se proposent aujourd'hui en pôle urbain d'un nouveau genre.

3 - **Au niveau de l'emploi**, la croisière, et le tourisme urbain qu'elle génère, exigent des compétences professionnelles spécifiques et qualifiées :

- dans la formation des personnels à bord (équipage) ;
- dans les services urbains (hôtellerie, restauration, commerce, etc.) ;
- dans les déplacements et transports au niveau local, régional, national et international ;
- dans les services aux navires (avitaillement, etc.)
- dans les secteurs de l'industrie navale et de l'industrie (acquisitions réalisées par les lignes de croisières).

Cela suppose donc la mise en place de **formations professionnelles spécifiques** ouvertes aux populations locales afin d'en maximiser **les retombées sociales** dans la ville.

3 - E.U. State of Art

La croisière en Europe : connaissances et expériences

Dans ce chapitre, est présentée une vue générale du développement de l'activité de croisières en Europe, ses spécificités, ses exigences, son organisation et ses impacts sur les villes et les régions (socio-économiques, politico-managériaux, culturels, urbanistiques, environnementaux). Tandis que le thème de la croisière est étroitement lié à celui au tourisme urbain - thème abordé par C.T.U.R.- nous faisons toutefois le choix de centrer plus spécifiquement cet état de l'art sur la relation ville, port et croisière afin de souligner son originalité et son importance.

1 - Quelques éléments de méthode

1.1 Méthodologie

This state of the art has been carried out through:

- the analysis of the general existing bibliography;
- visit of the specific internet websites of the European ports and of the European associations promoting the Cruise traffic;
- visit of the website of the International Association of Cities and Ports (IACP) specialized on the knowledge and the promotion of the seaports;
- study and documents on the theme provided by the CTUR partners (local studies; studies carried out in the framework of the European and trans-regional networks);
- city visits to see the concerned area 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 this visits some interesting local studies have been offered in order to better face specific challenges and issues;
- information exchange among the partner in the framework of the first and the second workshop organised in the first phase.

Concerning the actual knowledge about the theme of the European cruise traffic, it looked variegated and finally not analyzed in depth. This situation is certainly linked to the recent development of the cruise industry in Europe (about 10 years) and the lack of provisions about its great impact, through the economic stakeholders, on cities and ports.

1.2 Les principales références mobilisées

1.2.1 - Nous signalerons tout d'abord la volumineuse littérature sur les relations ville-port en Europe : approches générales ou thématiques ; monographies ; études et documents institutionnels et techniques, étude de cas, etc.

Parmi ces références, une attention particulière a été accordée aux études réalisées dans le cadre de réseaux de l'E. U. :

- Project *Plan the city with port*, INTERREG III C - Programme Hanse Passage ;
- Project New EPOC (Renewing economic prosperity for port cities), INTERREG III C ;
- Project « Waterfront development », INTERREG IIC ;

- Project SUDEST (Sustainable development of sea towns), URBACT I.

Si aucun de ces projets européens ne s'est spécifiquement consacré à l'étude de l'activité de croisière et de ses impacts, certaines bonnes pratiques ont été néanmoins identifiées en matière d'aménagement des terminaux et gares passagers, de valorisation du patrimoine portuaire et, de manière générale, en matière de gestion et de valorisation de l'interface ville-port.

1.2.2 *Rapports et documents des instances européennes sur les politiques portuaires :*

- Report *On a European ports policy*, Committee Transport and tourism, European Parliament (2008) and others documents.
- Report *Port policy consultation 2006-2007*, Energy and transport DG, European Commission (2007) and others documents.
- Report, *A port policy for all seasons*, Contribution of European sea ports organisation (ESPO) to the European Commission's consultation on a future E.U. policy of seaport (May 2007) and others documents⁴.

Ces documents discutent et définissent les éléments nécessaires à la mise en place d'une politique maritime intégrée. La mise au point de cette politique passe par la consultation de la société civile et de l'ensemble des parties intéressées ainsi que par les analyses d'impact globales.

1.2.3 *Rapports, studies et documents des instances locales ou nationales*

- Port of Helsinki (2007), *Helsinki : North European Port Icon*, by E. Van Hooydonk.
- Southampton City Council (2005), *Southampton cruise tourism*, by TTC international & Roger Tym & Partner
- Institut de recherche en stratégie industrielle et territoriale (2005), « Les villes portuaires en Europe : analyse comparative » (2005) by Rozenblat C., Rodrigues-Malta R. et alii

Ces documents éclairent sur les situations particulières. Leur valeur tient également dans leurs apports méthodologiques et dans les enjeux qu'ils identifient et les recommandations qu'ils formulent. La prise en compte de ces documents, quand ils existent, sera essentielle dans la phase d'implémentation de C.T.U.R. En effet, ils constituent une base pour tenter d'établir une comparaison des méthodes d'approche.

1.2.4 *Documents et études produits par les organisations du tourisme et les associations de promotion de la croisière*

- ODIT France (2007), *Les croisières maritimes*, Etudes ODIT ;
- European Cruise Council (2007), *Contribution of cruise tourism to economies of Europe*, by G.P. Wild (International) et al. ;
- Cruise Baltic (2007), *Ten countries on a string* ;
- Others informations and documents consulted on the web site of European Cruise Council, Cruise Europe, MedCruise, Cruise Baltic⁵.

La valeur de ces documents est variable :

- beaucoup sont de nature informative et les approches sont essentiellement quantitatives (avec des biais possibles puisque le traitement d'une place portuaire suppose son adhésion à l'association).
- d'autres offrent des orientations méthodologiques pour interpréter les données et dressent un état des lieux synthétiques de l'activité de croisière en Europe.

⁴ www.espo.be

⁵ www.europeancruisecouncil.com - www.cruiseurope.com - www.medcruise.com www.cruisebaltic.com

2 - The importance of the cruise activity in Europe : facts and figures⁶

La croisière est actuellement une des activités touristiques les plus dynamiques comme en atteste la croissance simultanée entre l'offre et la demande. Dans le monde, environ 14 millions de croisiéristes ont navigué et une trentaine de navires sont en commande.

2.1 La demande de croisière en Europe

- Almost 3.3 millions of Europeans residents booked cruise in 2005.
- Europeans represented 23% of all cruise passengers worldwide in 2005, compared with 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 of these visited ports in Mediterranean, the Baltic and European regions and generated 13.1 million passenger visits during 2005

2.2 Une offre en augmentation

La construction de navires toujours plus grands et luxueux atteste de l'optimisme des armateurs :

- at the end of 2006, there were 35 cruise vessels on order for worldwide trading with 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 mondial fleet : current state and previsions

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

Source : ODIT

Une évolution majeure concerne le gigantisme des nouveaux navires. Le prochain géant des mers (livraison 2009), Le navire *Genesis* de la Royal Caribbean Cruise Line (livraison 2009), comptera parmi les « géants des mers » avec une capacité d'accueil de 5 400 passagers plus les 2 600 membres d'équipages soit 8 000 personnes.

Cette augmentation de la capacité de la flotte a un impact très fort sur les chantiers navals européens. En effet, les principaux chantiers qui dominent le marché mondial de la construction des paquebots sont européens : *Fincantieri* (Italie) ; *Meyer Werft* (Allemagne) ; *Aker Finyards* et *Akeryards* (Finlande). A titre indicatif, retenons que le dernier paquebot - 2500 passagers et 987 membres d'équipage - commandé par la compagnie MSC aux chantiers de la *Fincantieri* a coûté quelque \$ 420 million.

2.3 Cruise activity : a dynamic source of economic activity

The cruise industry⁷ 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 expenditures throughout Europe by the cruise lines and their passengers :

⁶ Pour les chiffres, nous référons aux études de l'ODIT (2007), *La croisière maritime* et de l'ECC (2007) *Contribution of cruise tourisme to economies of Europe*.

⁷ « The European cruise industry is defined as those cruise-related activities that take place in Europe including cruise itineraries that visits 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).

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

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

Direct jobs (2005)	Indirect jobs (2005)	Induced jobs (2005)
33 700 european residents were employed by cruise line operating in Europe (crewmebers ; administrative staff)	69 000 indirect jobs were generated through the purchases of goods and services by companies that supply and support the cruise insdustry's direct suppliers	28 200 induced jobs resulted from the spending by directly and indirectly impact employees
22 600 european residents are employed by the shipbuilding industry		
33800 plus was 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

3 - Les enjeux de l'activité de croisière pour les villes portuaires européennes.

3.1 Se positionner sur le marché de la croisière.

Selon l'étude ODIT (2007), le marché européen présente un très fort potentiel de développement :

- il s'agit d'une marché qui n'a pas encore le stade de « maturité »
- de nombreuses populations européennes n'ont pas consommé ce type de tourisme
- les bassins portuaires offrent de nombreuses possibilités de développement
- l'offre de destinations à fort contenu culturels est forte et diversifiée.

Insérer le tableau : le marché européen de la croisière (doc pdf). ODIT p. 13 Faire tableau

Insérer le tableau « European cruise passengers by source country, 2005 p. 10

Insérer le tableau « European cruise passengers by country of destination », 2005 p. 11

Insérer le tableau Leading EU Cruise Ports in 2005 p. 9

3.1.1 Nord et Sud, 2 marchés de la croisière en forte progression

Le marché de la croisière en Europe se distribue sur le bassin méditerranéen (Mediterranean waters) et sur le bassin nord-européen, 2 bassins aux dynamiques variables :

Le marché de la croisière en **Méditerranée** est particulièrement dynamique. En dépit des **contraintes de saisonnalité**, il rivalise avec le marché des Caraïbes, soit le marché le plus actif (47% du marché mondial)⁸ :

- 61 compagnies et 126 navires croisent sur la Méditerranée (2005)

⁸ Source Miami Seatrade 2006

- en 2005, il a enregistré un nombre d'environ 1.9 millions de passagers

La Méditerranée offre de réelles capacités de développement eu égard à son fort potentiel culturel et le grand nombre de destinations possibles. Toutefois, ce bassin souffre d'une fréquente inadaptation des infrastructures portuaires pour l'accueil des méga navires de croisière (plus de 3 000 passagers) qui croisent de plus en plus nombreux dans ce bassin.

Le bassin de l'Europe du Nord est très saisonnier mais bénéficie d'excellents équipements portuaires et des marchés européens les plus importants (Allemagne - Royaume Uni).

- 42 compagnies (2004) et 87 navires croisent sur les eaux de l'Europe du Nord.

- en 2005, il propose une l'offre potentielle de 619 000 passagers (E.C.C. 2007).

3.2 : Ville et port : décider et gouverner ensemble

3.2.1 Exigence d'une coopération entre ville et port

Développer l'activité de croisière engage une multitude d'acteurs : le port ; la ville ; les institutions territoriales (Régions, Provinces, etc.) ; les institutions publiques spécialisées (tourisme, transport, etc.) ; les acteurs économiques ; la société civile locale selon les cas.

Ce choix repose au préalable sur une volonté et une capacité de la municipalité et de l'autorité portuaire à collaborer/coopérer pour définir une stratégie d'action (choix de l'implantation ; modalités opératoires) et, au-delà, partager une vision commune du futur de la ville portuaire.

L'étude « Comparaison des villes portuaires en Europe » (2005) enseigne la difficulté à parvenir et à formaliser cette entente préalable. Cette difficulté tient souvent dans le régime d'administration des grands ports européens que l'on peut regrouper grossièrement en grandes catégories⁹ :

- Ports relevant de l'administration de l'Etat : France ; Italie ; Espagne ; Chypre ; Irlande, Lituanie, Malte, Portugal, Slovénie
- Ports relevant de l'administration municipale : Belgique, Hollande, Allemagne (ville et Etat), Suède, Danemark, Finlande, Lettonie (Etat et ville), Pologne (Etat et ville)
- Ports dits « privés » ou « partiellement privatisés » : Royaume Uni ; Grèce (Etat et privé).

Le statut du port explique ainsi partiellement la capacité de certaines villes à réagir rapidement à la formation de vastes friches portuaires et industrielles par la formulation de stratégie de reconversion fonctionnelle de leur(s) waterfront(s). En effet, ce n'est pas un hasard (et les études l'attestent !) si les projets de waterfront redevelopment les plus précoces et les plus avancés sont observés dans les situations de « ports municipaux » (Rotterdam, Anvers, Copenhague, Hambourg, etc.). Il semblerait que la position du curseur entre logiques de marché et logiques de qualité de vie puisse y être plus facilement et collectivement définie.

Dans les autres situations, le consensus sur un futur partagé entre la ville et le port apparaît comme toujours plus long et plus difficile à atteindre. A ce titre, la collaboration entre ville et port est toujours identifiée et encouragée : par les partenaires des réseaux européens (PCP et NEW EPOC - INTERREG IIIC ; SUDEST - URBACT I ; Contributions of ESPO) les nouvelles politiques portuaires nationales (Espagne, Italie et aujourd'hui la France) ou européennes

⁹ Ces catégories doivent bien sûr être affinées en fonction des modalités de gestion (publique - publique-privée - privée), de l'autonomie du financement (autonomie, autonomie partielle), du statut parfois spécifique d'un port dans son pays d'appartenance.

(notamment lors de la consultation de la Commission pour la définition une politique portuaire européenne).

Si atteindre le consensus entre la ville et le port est parfois difficile, la scène européenne offre aujourd'hui un certain nombre de bonnes pratiques :

- Au Havre (France), un Comité de *pilotage* a été créé à l'initiative de la municipalité associant l'autorité portuaire et l'ensemble des acteurs institutionnels publics, les acteurs économiques privés (via la Chambre de commerce), les acteurs associatifs des quartiers, un pôle d'expertise (publique et privé).
- A Bilbao (Espagne), la société publique *Ria 2000* en charge de la régénération urbaine rassemble à parité égale les acteurs institutionnels publics. Les décisions sont prises à l'unanimité et le fonctionnement repose sur un principe de « good governance » entre les partenaires. La société civile et les acteurs privés sont regroupés dans l'association publique-privée *Metropoli 30* qui constitue une force de proposition, de promotion de la ville. Elle est également garante du respect du Plan stratégique pour la revitalisation de l'aire métropolitaine.
- A Gênes (Italie), la ville et le port oeuvrent communément dans la société publique *Porto Antico* en charge de la reconversion du vieux port et dans l'Agence du Plan en charge de l'élaboration du schéma urbano-portuaire.
- En Espagne, la nouvelle loi des ports (1992 ; 1997) encourage l'entente entre ville et port. Tandis qu'elle autorise les autorités portuaires à identifier une zone de services pouvant accueillir des loisirs et des équipements urbains, la loi engage à développer cette zone au terme d'une collaboration entre la ville et le port. L'opération *Port Vell* à Barcelone a servi de références à de nombreuses villes portuaires espagnoles.

3.2.2 Se rassembler pour une promotion de la croisière dans la ville portuaire et sur le marché international

Comme vu précédemment, la croisière constitue une « industrie » à part entière (E.C.C., 2007). Cette activité doit donc être gérée de manière coordonnée et promue par des actions concertées entre les différents acteurs de la croisière. Ces actions ont lieu « en amont de l'escale » dans le but d'attirer de nouveaux clients (les compagnies de croisières ; les croisiéristes) mais également « pendant l'escale » pour satisfaire les clients et les croisiéristes.

La formule retenue pour établir les coopérations et définir les actions est le plus souvent celui du « Club croisière » pouvant regrouper : l'autorité portuaire ; la chambre de commerce, la municipalité, les sociétés maritimes, l'office du tourisme, les compagnies de tourisme, les compagnies de transports (collectifs, taxis), les associations de commerçants, etc.

Les actions de ces organisations de nature associatives consistent :

- à dispenser de l'information auprès des professionnels, des croisiéristes, des membres de l'équipage, de la population locale ;
- à promouvoir la destination par la participation aux foires internationales et spécialisées sur la croisière, la navigation et le tourisme (le salon Seatrade à Miami est incontournable) ;
- à favoriser la coordination des formalités passagers (douanes ; police), des transports (rail/air/route), à assurer l'animation de l'escale (marchés locaux sur les quais), à établir une Charte de qualité ;
- à orienter les décisions locales en matière de planification portuaire et urbaine et en matière de projets urbano-portuaires compatibles avec les attentes du secteur de la croisière.

Là encore, la scène européenne offre de nombreuses bonnes pratiques :

- A Marseille (France), le *Club de la Croisière Marseille-Provence* (1996) est animé par la Chambre de commerce, la municipalité et l'autorité portuaire. Il associe l'ensemble des institutions publiques concernées et l'ensemble de la filière professionnelle. Il est un véritable outil de promotion auprès des opérateurs de la croisière avec, en 2007, un succès auprès du groupement MSC Crociere, Costa Crociere et Louis Cruise qui garantit à la ville à l'horizon 2010 quelque 450 escales et un trafic d'un million de passager. Par ailleurs, ce *Club* tente d'orienter (avec plus ou moins de succès) les orientations du projet urbano-portuaire Euroméditerranée (320 ha) pour la création d'équipements urbains favorables à la croisière.

- In Copenhagen (Denmark), 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. Le pari semble tenu puisque Copenhague, en quelques années, s'est positionné comme le premier « home port » de la Baltique (environ 400 000 passagers). Ce succès tient aussi dans une forme coopération à une autre échelle choisie par les Ports de Copenhagen et de Malmö (Suède) : celui de jouer la carte de la coopération interportuaire. En effet, ces deux ports ont mis en synergie leur complémentarité et ont fusionné jusqu'à ne fusionner qu'une seule entité juridique, Copenhagen-Malmö Port (CMP). Ce rapprochement a permis à cette nouvelle entité d'accéder à des positions de leadership en Europe sur de nombreux secteurs notamment la croisière et le trafic ro-ro.

A ce stade de l'analyse, il convient d'introduire les notions de « Home port » et de « Port of call », notions fondamentales qui définissent le statut de la ville portuaire dans la chaîne de la croisière. Le statut de « **Home port** » est très avidement convoité par les villes portuaires puisqu'il désigne ces quelques ports où les passagers embarquent/débarquent sur le navire pour commencer et achever leur voyage touristique. Les bénéfices économiques sont dès lors importants, exprimés en tourisme urbain (nuit/s passée/s dans la ville avant l'embarquement et après le débarquement), en services aux membres de l'équipage et en avitaillement des navires. Ce statut est, dans tous les cas, étroitement lié à la présence d'un aéroport de haut niveau, avec des lignes internationales voire intercontinentales directes. En Europe, où le train à grande vitesse concurrence parfois l'avion, la présence d'une telle ligne constitue également une alternative ou bien un avantage supplémentaire comme à Amsterdam (122 105 croisiéristes en 2005) ou Barcelone (1,2 millions de croisiéristes en 2005). En moyenne, les dépenses par croisiéristes dans un « Home port » sont estimées à 100 € par personne (ECC, 2007).

Le statut de « **Port of call** » qualifie les ports d'escale du circuit touristique. Les retombées économiques sont moindres, estimées à 53 € par personne (ECC, 2007), sans impact réel sur le dynamisme de la structure hôtelière. Certes, les bénéfices ne sont pas négligeables et les villes portuaires sont aujourd'hui en vive compétition pour devenir les escales des grands circuits. Toutefois, à l'heure où les navires offrent une multitude d'activités dans un cadre luxueux et où les tour-operators offrent des escales sous forme de « package all inclusive », pour les concurrencer, les acteurs locaux doivent être créatifs et offrir des alternatives originales. Par ailleurs, il est nécessaire de souligner que de nombreux « home ports » sont aussi des « ports of call » très appréciés par les compagnies et les passagers (Barcelone, Venise, Copenhague, Stockholm).

3.3 - Planifier, équiper et valoriser les potentiels dans le cadre d'une synergie ville et port

3.3.1 Des schémas d'aménagement urbano-portuaires pour une intégration des espaces et des fonctions

Dialogue entre ville port, mixité des fonctions, réutilisations et revalorisation des espaces portuaires en déclin, durabilité sont les maîtres mots des interventions sur l'interface ville-port. La conciliation entre logiques portuaires et logiques urbaines n'est ni évidente, ni toujours possible et des compromis sont donc nécessaires. Les réseaux de travail européens (PCP ; SUDEST ; New EPOC) qui se sont concentrés sur les enjeux contemporains des villes portuaires identifient pareillement de l'importance de l'élaboration d'un schéma d'aménagement urbano-portuaire. Aujourd'hui, en Europe, et plus particulièrement en Italie, en Espagne et en France où les ports relèvent de la compétence de l'Etat, le législateur encourage voire impose l'élaboration d'un tel document de planification au terme d'un partenariat entre la ville et le port. Il s'agit alors, au terme d'une démarche intégrée, d'évaluer les compatibilités entre les fonctions, de favoriser quand cela est possible leur mixité, d'améliorer l'accessibilité ville-port et les déplacements urbains.

En matière de planification urbano-portuaire, Gênes (Italie) constitue un cas d'études exemplaire et offre des bonnes pratiques tant dans le domaine de la gouvernance que dans la méthodologie adoptée :

- c'est tout d'abord de manière simultanée et concertée que la municipalité et l'autorité portuaire ont entrepris l'élaboration de leur document de planification à la fin des années 1990.

- pour l'élaboration du plan d'aménagement urbano-portuaire imposé par la loi des ports de 1994, à l'initiative du port, *l'Agence du plan* a été créée associant l'autorité portuaire, la municipalité, des experts de renommée internationale (M. Smets ; R. Koolhaas ; B. Secchi ; M. Solà-Moralès) et un groupe pluridisciplinaire d'universitaires. Cette démarche a permis de recomposer l'ensemble du port en identifiant les points de tension voire de conflit et en proposant des solutions acceptables par les riverains (un parc nautico-récréatif comme zone tampon), de réserver la totalité de l'arc portuaire originel aux activités récréatives et aux fonctions portuaires « soft » (croisières ; ferries ; plaisance), de repenser la globalité des déplacements dans l'aire métropolitaine. Il est de fait que cette démarche a fortement participé à une régénération globale de la ville portuaire tant en matière de trafic conteneur, de croisière que de qualité de vie nettement améliorée.

- Dans le Nord de l'Europe, Stockholm constitue un exemple de planification stratégique (Stockholm, Visions 2030) où le développement des 3 ports est totalement intégré. Le secteur portuaire de Vartån, au terme d'une nouvelle mixité entre fonctions urbaines et portuaires, est désigné comme un des pôles participant activement à élever la ville au rang de capitale de la Scandinavie... mieux... de « world class city ».

Dans les formes les plus exemplaires, les nouveaux schémas d'aménagement urbano-portuaires visent, au terme d'une démarche intégrée, à évaluer les compatibilités entre les fonctions, à favoriser - quand cela est possible - leur mixité, à améliorer l'accessibilité ville-port et les déplacements urbains.

Redéfinir l'interface ville-port en identifiant les in/compatibilités, les interdépendances, la nature des dynamiques foncières, les possibles améliorations environnementales. En matière de croisière, les impacts négatifs sur la ville (réels ou perçus) sont relativement moindres que ceux générés par le trafic des marchandises. Cette fonction portuaire « soft » permet d'offrir un nouvel usage aux quais, aux plans d'eau et au terre-plein devenus inadaptés au trafic des marchandises tout en créant des « porosités »

physiques entre la ville et le port. On retiendra ici qu'en Espagne, où l'activité de croisière atteint des records (+ de 5 millions de croisiéristes en 2007, soit une augmentation de 23,5% par rapport à 2006), plus de € 230 millions sont programmés pour la période 2008-11 dont un important volet concernant la dimension environnementale.

Favoriser la mixité des fonctions urbaines et portuaires

Tandis que les premières opérations de reconversion urbano-portuaires proposaient une suppression radicale des fonctions portuaires (les London Docklands en sont le meilleur exemple), la tendance actuelle consiste à associer les fonctions portuaires « soft » à des fonctions urbaines qualifiées : fonctions tertiaires, fonctions culturelles et récréatives, fonctions commerciales. Dans les situations de « ports municipaux » où le régime des emprises portuaires apparaît comme moins contraignant et où la gouvernance ville-port est plus étroite, la fonction résidentielle est également fortement développée sur les quais.

Depuis quelques années, la croisière constitue une fonction privilégiée par les programmes de développement mixte, évaluée comme compatible avec la vie urbaine et comme support privilégié de développement ambitieux. Par ailleurs, en associant croisière et fonctions urbaines, l'objectif est celui de pallier aux problèmes de la saisonnalité de la croisière et, notamment, celui du non usage des équipements durant les mois d'hiver.

On peut ici distinguer plusieurs catégories de mixité fonctionnelle :

- une *mixité horizontale*, soit une association d'équipements urbains et portuaires sur un même secteur. A Barcelone ou à Amsterdam le terminal croisière compose ainsi, dans un même secteur, avec un dispositif d'équipements urbains diversifiés. A Copenhague, le terminal croisière de Langelinie compose plus spécifiquement avec du logement de haut standing et des immeubles de bureaux. Insérer photo CPH. A Hambourg, le Cruise center est une composante du projet Hafen City.

- une *mixité verticale*, soit un empilement des fonctions portuaires et urbaines sur un même édifice selon le modèle des *Terrasses de marbre à Gênes* (insérer photo) qui, au XIXe siècle, surplombaient le port de commerce. Marseille illustre une situation de mixité horizontale (petite croisière et ferries sont insérés dans un dispositif culturel et de loisir) et de mixité verticale (les niveaux supérieurs d'un terminal passagers sont réservés à un grand centre commercial et à une vaste terrasse avec vue sur le port).

Il est important de souligner que la fonction croisière est soumise à de fortes contraintes de sécurité : sécurité des passagers lors des embarquements/débarquements ; sécurité nationale ; mise en sécurité des quais lors des manœuvres des navires. L'association fonction croisière et fonction urbaine est donc extrêmement contraignante et appelle des réponses innovantes.

Améliorer les transports et les qualités des déplacements urbains

La croisière est génératrice de flux de personnes. La question des transports est donc essentielle en terme d'accessibilité et en terme de qualité.

- En terme d'accessibilité, il s'agit de relier le terminal croisière et la ville à son hinterland. Comme nous l'avons souligné, le statut de « home port » est étroitement lié à la présence d'un aéroport d'envergure internationale ou/et à celle d'une ligne ferroviaire grande vitesse. Entre l'aéroport, la gare ferroviaire, et le port, il s'agit donc de développer une liaison de transport direct et « confortable ». A ce titre, la situation marseillaise est exemplaire puisque le réseau ferré autorise la ligne de train TGV d'accéder au terminal croisière.

- En terme de liaison ville-port, il s'agit d'améliorer la qualité des liaisons entre terminaux passagers et le centre de la ville notamment lorsque le terminal est localisé dans une zone portuaire éloignée (Marseille), parfois dans un paysage très industriel (Bremerhaven).

Ainsi, développer l'activité de croisière suppose une redéfinition des déplacements urbains et métropolitains. L'élaboration d'un nouveau schéma de transport visant à améliorer

quantitativement et qualitativement les déplacements urbains et portuaires constitue un préalable indispensable (Recommandations SUDEST ; PCP)

3.2. 2 Des équipements portuaires dotés d'un potentiel d'usage urbain

La croisière est une activité « glamour » par excellence. Toutefois, au-delà de la magie des paquebot à quai, la croisière impose une dotation en infrastructures portuaires de grand gabarit aptes à des navires toujours plus grands.

Dans certains cas, les terminaux croisière résultent des anciennes fonctions passagers transatlantiques et/ou coloniales. Quand les caractéristiques nautiques des bassins et des quais le permettent, les gares maritimes existantes peuvent être ainsi reconverties pour l'accueil de la fonction comme à Gênes. Toutefois, la taille des navires et l'importance des flux passagers (nombre et rythme) impose le plus souvent la conception d'un nouveau terminal.

Identifiée comme une composante forte des opérations de waterfront redevelopment, la qualité architecturale de l'édifice et l'intégration de fonctions urbaines sont activement recherchées. Ce point peut-être illustré par le terminal croisière d'Amsterdam : une architecture épurée qui s'insère dans un dispositif plurifonctionnel. Insérer photo. Le nouveau terminal croisière de Stockholm peut également être indiqué : il s'agit d'un édifice flexible qui, hors saison, fonctionnera comme un hall d'exposition et pourra accueillir 2000 visiteurs. Insérer photo.

Dans de nombreux cas, sur le modèle du Musée Guggenheim de Bilbao, la reconversion du secteur urbano-portuaire est dynamisée par la création d'un équipement urbain d'envergure régionale, nationale voire internationale. Le plus souvent, il s'agit pour les villes d'élever la conception de l'édifice au rang de véritable événement international d'architecture. Précisons que ce souci de l'audace architecturale vaut tout autant pour les équipements culturels que pour les équipements commerciaux. Ainsi, à Gênes, la gare croisière est ainsi étroitement associée à la conception d'un vaste centre commercial et récréatif au cœur du vieux port. Insérer image.

A Marseille, dans l'ambitieuse programmation d'équipements culturels sur les quais, le centre commercial « Les terrasses du port » assume une fonction très importante : l'édifice en surplomb des bassins crée une intéressante porosité entre la ville et le port. La terrasse accueillera des restaurants et sera ouverte aux citoyens pour offrir un espace de détente avec vue imprenable sur le port et sur la mer, une vue longtemps confisquée aux citoyens par les entrepôts et le viaduc autoroutier. Insérer image.

3.3.3 Elever la ville portuaire au rang de destination touristique

Renforcer l'image du port

Les recommandations récentes pour la mise en œuvre d'un *Action plan for an integrated maritime policy* ou bien encore les résultats de consultation pour une politique portuaire européenne (2006-07) encouragent pareillement à promouvoir la visibilité des ports et des espaces maritimes.

L'image du port et sa perception par les citoyens peut être améliorée par une nouvelle attitude des ports à l'égard de la ville mais aussi et surtout par la programmation d'actions spécifiques en partenariat : valorisation de l'héritage maritime et portuaire ; organisation d'événements festifs et culturels à l'intérieur du port ; création de journées « portes ouvertes » aux habitants ; organisation de visites du port ; dotation en équipements pour le tourisme et les loisirs.

Ces recommandations croisent les recherches récentes d'E. Van Hoodydonk (2007, 2008) qui démontre comment les ports sont dotés d'« immaterial soft values » et de « material soft values » qui demeurent souvent inexploitées. Les premières relèvent du champ de l'imaginaire et de l'histoire : mythe, légende, source d'inspiration artistique et de fierté pour les habitants. Les secondes concernent le patrimoine historique du port, la force du « paysage » d'un port en activité, son potentiel d'accueil pour de nouvelles activités touristiques et de loisir. Dans certaines villes, la force de l'image du port est telle que le statut du port est élevé à celui de véritable « icône » comme par exemple Hambourg, Rotterdam ou Barcelone. La notion de « soft value » ouvre donc de nouvelles perspectives pour le développement du port avec la ville. A ce titre, le port d'Anvers apparaît comme particulièrement innovant avec la commande d'une étude pour évaluer de son potentiel « iconique ».

Certaines actions pour promouvoir l'image du port et de la ville portuaire sont aujourd'hui identifiables :

- Conduire une réflexion préalable sur le potentiel « iconique » du port comme l'a réalisé le port d'Anvers ;
- Organiser une grande manifestation publique dans le port pour affirmer l'identité portuaire et maritime de la ville. A Hambourg, en 2008, un « Cruise days festival » a ainsi été organisé avec une spectaculaire ship parades of cruise liners (Queen Mary 2, MS Deutschlan, MS Columbus, etc.) qui a attiré environ 1 million de visiteurs. Par ailleurs, comme on l'observe parfois, à la belle saison, le port peut être transformé en scène artistique pour recevoir des concerts et des projections cinématographiques.
- Révéler le potentiel paysager du port. Dans certains cas, la force paysagère du port est exploitée par une mise en lumière des bassins, des édifices et des outils. Le port de Saint-Nazaire constitue un exemple en la matière, un exemple suivi avec plus ou moins de réussite par d'autres ports européens. On peut retenir ici le cas d'Hambourg où le projet artistique « Blue port » a consisté en une somptueuse mise en lumière du port dans le cadre du « Cruise days festival ».
- Proposer le port actif comme spectacle. Les mouvements des navires, le ballet des marchandises ou l'embarquement des passagers sont autant de scènes de la vie ordinaire des ports très prisés par les citoyens. De nombreux ports comme Rotterdam ou Anvers amènent les citoyens au cœur de la vie portuaire en organisant des visites touristiques très appréciées par le public. Il peut s'agir également de rendre le port « visible » par un travail sur la transparence de la grille du port ou bien encore en créant de véritables balcons sur le port. Nous avons cité l'exemple des « Terrasses du port » à Marseille. Nous pouvons également retenir l'exemple de Copenhague avec une promenade organisée sur un ancien mur d'enceinte portuaire ; ou bien encore celui de Gênes où est étudiée la possibilité de transformer l'actuel viaduc autoroutier en corniche urbaine pour les citoyens.

Le patrimoine portuaire comme identité et comme ressource touristique

Parmi les actions visant à renforcer l'image du port, celles relatives à la valorisation du patrimoine portuaire à l'intérieur du port et dans les espaces urbains associés méritent une attention particulière. En effet, le patrimoine portuaire et industriel est toujours doté d'une forte résonance identitaire. Ainsi, dans des villes profondément marquées par la disparition récente d'activités traditionnelles, le maintien et la valorisation des grands totems du port et de l'industrie (grues, silos, entrepôts, cheminées, etc.) constitue un enjeu fort, prenant même parfois valeur de volet social des programmes de reconversion économique.

Si le maintien des « pièces patrimoniales » les plus remarquables est dans tous les cas recommandable et envisagé, il est toutefois nécessaire de souligner la diversité de l'inventaire patrimonial du port et la difficulté de le reconverter en équipement urbain.

Pourtant, de nombreuses villes portuaires se sont montrées particulièrement inventives pour conserver et valoriser des édifices très spécifiques :

- A Saint-Nazaire (France), l'énorme et indestructible base sous-marine (480 000 m³ de béton ; 300 m. de long, 130 m. de large ; 18 m. de hauteur) a été transformée en « équipement » polyvalent avec terrasse sur le port. Cette structure accueille notamment « L'escale atlantique » : dans un décor reconstitué de paquebot de rêve, les visiteurs sont embarqués dans le monde de la croisière d'antan.
- A Marseille et à Amsterdam, les anciens silos sont transformés pour recevoir respectivement une salle de concert et de la fonction résidentielle.

En Europe, les attitudes à l'égard du patrimoine portuaire varient. On peut ainsi opposer le waterfront de Gênes où la majorité des édifices portuaires ont été conservés au waterfront de Barcelone où seul le grand entrepôt a été maintenu. Mais, dans tous les cas, le patrimoine du port et de l'industrie apparaît toujours comme une opportunité pour développer de nouvelles activités culturelles, ludiques et commerciales soit par association avec un édifice moderne, soit par développement d'une fonction urbaine qualifiée dans « l'écrin patrimonial ».

Il est de fait que développer l'activité de croisière signifie pour la ville de s'imposer comme « destination touristique » privilégiée. Mais toutes les villes ne sont pas dotées d'un patrimoine architectural et urbain d'exception. Elles sont aussi parfois très fortement concurrencées par les villes de l'arrière-pays comme on l'observe à Livourne où les croisiéristes débarquent pour visiter Florence et Pise. Aussi, comme on l'observe à Marseille ou à Liverpool, le patrimoine portuaire, peut servir de nouveaux « marqueurs territoriaux » pour accrocher l'intérêt du visiteur et le guider ensuite dans la découverte d'un « style de ville » original en terme de loisirs, d'événements culturels et de shopping. A ce titre, le cas d'Anvers est remarquable si l'on considère comment « la ville au grand port moderne » est aussi devenue « une ville de mode au style de vie raffiné ».

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PART II

PARTNERS PROFILE... THE STATE OF THE ART

The URBACT network C.T.U.R associates 9 port cities from 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, to enhance the port and urban heritage in the way to strengthen the identity, the image and the quality of life of the port city.

1. Key features of the city and the port

Alicante (Spain) *Maritime Station, a gateway to the historical city*

Some figures

The city

Location: Spain - Region of Valencia

Population: 329 947 (city) 1.8 m (metropolis)

Number of people in employment: 778 000 (metropolis)

Unemployment rate: 5,9 %

The port

Ranking: international- regional

Administrative statutes: Port of state

Total traffic: 3.8 millions G.T. (2006)

Container traffic (TEU): 173 000 TEU (2006)

Total passengers: 362 000 pax (2006)

Cruise passengers: 55 000 pax - 60 calls (2006)

Number of direct employed: -

Demographic trends

Alicante is in southeast Spain and it is the second most important city within the Valencian Community. Since the end of the 90's, Alicante knew a positive demographic trend due to the arrival of European, Hispano-Americans and Muslim migrants. Nowadays, with a 4.04 % of the Spanish population and a 37.36 % of the Valencian Community population, Alicante has become the 5th 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 is well connected to 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 rapid commercial and industrial development, conferences seat, tourism and university.

Business & employment sectors

The main industries in the province of Alicante 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 is established in Elche, Elda,

Petrer and Villena. The toys industry concentrated in the [Ibi](#) and Onil area is another traditional industry. But these three industrial productions are strongly threatened by the hard competition with the Asian industries. During the last 20 years the marble quarrying and processing sector has growth, mostly in the Novelda and Pinós area.

The province of Alicante is principally known for its massive tourism sector. The [Costa Blanca](#), generally mild and sunny, 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 province of Alicante for their vacation time.

Place of the port in the local/regional economy

The Port of Alicante has always been an industrial and commercial port. As the city, the Port of Alicante, has growth a lot during last 10 years.

In 2003, cruise traffic in Alicante increased by 43.9% more than 2002; numerous meetings and approaches have been held with the aim to support the cruise tourism. Now, Alicante has a new Maritime Station allowing simultaneous disembarkations at the same time or mooring of large cruise ships. Furthermore, it offers multiple possibilities to organize cruise meetings.

Dublin (Ireland) *Cruise tourism linking between city, port and docklands*

Some figures

The city

Location: Capital city of Ireland

Population (2006): 506 201

Number of people in employment: 2.1 m (national figure)

Unemployment rate: 5.5% (national figure)

Income per capita: € 46 801 (GDP); € 40 084 (GNP) (national figure)

The port

Ranking: international - first port in Ireland

Administrative statutes: State port managed by a Private limited Co.

Total traffic: 31.1 m G.T. (2007)

Container traffic (TEU): 2.2 m. TEU (2007)

Total passengers: 1.5 m pax (2007)

Cruise passengers: 100 000 pax (2007) 80 calls (2008)

Number of direct employments: 165

of Number indirect and induced employments: 3 500

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 that has a population of just under 3 millions.

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 five fold increase in throughput in 15 years reflecting the growth of the city and the economy.

Helsinki (Finland) *A home for all boats*

Some figures

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 a Harbour Committee

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

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

Total passengers: 8.5 m pax (2006)

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

Number of direct employed: 276

Number of employed in cruise sector: 470 (direct - 2007); 700 (indirect and induced - 2007)

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.

Matosinhos & Port of Leixões (Portugal)

Challenges of a cruise terminal to the surrounding area and the Northern Portugal

Some figures

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: €14 126 (national figure)

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 (TEU) : 433 437 m. TEU (2007)

Total passengers : 15 863 pax (2007)

Cruise passengers : 15 863 pax (2007)

Number of direct employments: 5 800

Number of indirect and induced employments: 9 200

Demographic trends

Situated on the Atlantic coastline, Matosinhos is the 8th 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 belongs to the municipality of Matosinhos, which is integrated within the Greater Oporto Metropolitan Area, the second biggest one of Portugal.

The city-port border area presents a population density (2711 inhabitants per km²) greater than the municipal (Matosinhos) average (2685 inhabitants per km²). When compared with the Matosinhos average, the age structure of the city-port area shows a relatively more

concentrated distribution of frequency on people aged 65 and more years, than on 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 accesses and is equipped with advanced information systems for vessel's 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 port entrance is always open to navigation, without sea tide restrictions.

The Port of Leixões also has a tourism hinterland with high-interest and distinctive attractions, from an excellent range of high quality and large capacity hotels, and located close to an international airport. Regarding 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, 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 78877 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 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.

Naples *The port in the heart of the city* & Port Authority of Naples (Italy)

Some figures

The city

Location: Capital of the Campania region

Population: 1 m.

Number of people in employment: 288 190 (35.1%)

Unemployment rate: 17.8%

Income per capita: € 16 000

The port

Ranking: regional and international

Administrative statutes: State port managed by a public port authority

Total traffic: 21.5 m. G.T.

Container traffic (TEU): 461 000

Total passengers: 9 m. pax

Cruise passengers: 1.2 m. pax

Number of direct employments: 5 000

Number of indirect and induced employments: 2000

Location and demographic trends

Naples is the third largest city of Italy, and is also the most important of the south Italy; it lies on the Tyrannical coast of 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 km². 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 remarkable administrative autonomy and decentralized functionalities.

Strategic importance

The city was founded by Greek colonists in 6th century b.C.. The Greek Roman road network remains preserved until today in the historical centre, and the stratification of the following ages left, during the subsequent centuries, monuments of great value. This is the reason thanks to 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 are crucial elements 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. Actually it counts more than 100.000 students, and is structured in 3 poles and 13 faculties. Besides the Federico II, in Naples exist 4 more universities, 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 strong unemployment rate, whose effects have been only in part replaced by the tourism incomes (the tourism experienced a great growth since 1994, in occasion of the G7) that contributed to the maintenance of the economic status quo of the city.

The highest 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 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 of 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 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.

Rhodes (Grece) *Modern approach in a medieval port*

Some figures

The city

Location: Capital of Rhodes Island

Population: 53 709 (2001).

Number of people in employment: 24 935 (2001)

Unemployment rate: 16%

Income per capita: > € 20 000 (national figure)

The port

Ranking: international passenger port (ferries and cruise)

Administrative statutes: Municipal port managed by a port authority

Total traffics: 1, 8 m. G.T. (2007)

Container traffic (TEU): no container traffic

Total passengers: -

Cruise passengers: -

Number of direct employments: -

Number of indirect and induced employments: -

Demographic trends

The island is located in the South Eastern edge of the Aegean Sea and it is the 3rd larger 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 a 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% over 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.

Rostock (Germany) *Awakening the sleeping beauty*

Some figures

The city

Location : City in the state of Mecklenburg-West Pommerania

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 Pommerania)

Total traffic. 26.5 m. G.T.

Container traffic (EVP) : no container traffic

Total passengers : 2, 5 m. pax

Cruise passengers : 115 000 pax

Number of direct employments : 3 800

Number of indirect and induced employments : 5 600 (10.000 15 000 included the maritime sectors)

Location and demographic trends

The German NE-Hanseatic City of Rostock is a medium sized harbor city, ideally located in the triangle Berlin-Copenhagen-Hamburg. 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 20th century Rostock had to manage a demographic and economic collapse. These negative trends are stopped and nowadays Rostock begins 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 as been nearly partly changed by moderate gentrification; the Inner City community is reorganized by 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 countries 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 (nº1 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 3200, Port of Rostock 5500, DSR group 2530, ship yards 1400. 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 fishery port, on the West side of the river Warnow still exists, but it has been changed

into a simple multiple business activities with some turn-over. The 2 shipyards in Rostock-Warnemünde, Rostock NW, use their own port basin and embankment. The former ferry embankment for the ferry connection Rostock Scandinavia closed and it has been moved to the main harbour in Rostock NE. This basin 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

Trieste (Italy) *A gateway to the Mediterranean in the heart of Europe*

Some figures

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 traffics: 46,2 m. G.T.

Container traffic (TEU): 265 863

Total passengers: 114 000 pax

Cruise passengers: 55 000 pax

Number of direct employments: -

Number of indirect and induced employments: -

Location and demographic trends

Trieste is located 150 km east of Venice, near Slovenia. From the 1970's 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 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 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.

Region Valenciana /Valencia (Spain) *One port, many destinations*

Some figures

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 traffics: 54 m. G.T.

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

Total passengers: 474 814 pax

Cruise passengers: 111 283 pax (2007)

Number of direct employments: 8 697

Number of indirect and induced employments: 1 541 & 5 413

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 Palace of Congresses or its Universities.

Place of the port in the local/regional economy

The port has a powerful area of direct influence. It 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, Valenciaport 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.

Valenciaport 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 Valenciaport 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 Valenciaport provides direct or indirect employment for over 15,000 people and generates business worth over 1.1 billion euros.

Varna (Bulgaria) *The port as gateway to 3 500 years of history*

Some figures

The city

Location: Bulgaria- Regional capital

Population: 350 661 (in increase)

Number of people in employment:

Unemployment rate: 2.34 % (2007 i.e. 3 times less than the national rate.

Income per capita : SPA 9 500 (national figure)

The port

Ranking: international - regional ranking

Administrative statutes: owned by 3 public administrations (National Port authority, Military, Municipality)

Total traffics: 7, 4 millions G.T.

Container traffic (TEU): 99 713 TEU (2007)

Total passengers: n.k.

Cruise passengers: n. k. - 30 calls (2007)

Number of direct employed: 1600

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 faculty 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 which 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 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, and forwarders. The total numbers of serving personnel is over 25,000 pax. Sea transportation is mainly operated by Bulgarian Marine Fleet, and a slight portion – by small private companies. Freights are 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 inlands 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 and 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 shipbuilding and repairs still remains a major employer.

2. Key features of the cruise activities and of the urban and port heritage

Alicante

Evolution and position of the port city on the cruise market

Alicante realized that cruise market could be another option to bring tourist to the city. A new Maritime Station was built 5 years ago. The Port of Alicante has known a good evolution during last ten years. For 2008, the cruise passengers forecast is 97988 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 always a sun and beach destination for those who are looking for a 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, 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 lines with white houses, pedestrian commercial centre, panoramic views from the castle of Santa Barbara and many others 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 remember the different cultures and religions that have settled the city.

Dublin

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.

Helsinki

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 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 of the port heritage into urban facilities: Hotel Grand Marina, which used to be harbour storage, 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.

Matosinhos & Port of Leixões APDL

Evolution and position of the port city on the cruise market

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

Its location in the Atlantic front is perfect to link up the circuits of the Mediterranean and of the 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 in 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 to 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 of the XVIII^e century, streets whose commercial developments has turned it into an interesting urban centre; public

gardens and sidewalks charms and the picturesque religious shrines. The historic heritage concerns also 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, the design of streets and avenues where the industries gathered.

Naples and Port Authority of Naples

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 passengers 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 have been 1.160.000 in comparison to 968.459 in year 2006, increasing of 8.3%. In Year 2008 more than 1.500.000 passengers are expected. The increase is more clearly visible comparing the amount of cruise passengers landed to Naples in 2001 (469.632 pax) with today data, increasing of 145 %.

The Port Authority has decided to establish a new management trust of cruise terminal, Terminal Napoli S.p.a. ; 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 *Naples Model* for everyone in this division. This project, developed in a long time, through a patient mediation, has made the leading world cruise companies get involved into this new share team, such as Costa Crociere, MSC Crociere, Royal Caribbean. Naples Terminal Trade, Marinvest, Intership and 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 of 10%, as a straight consequence of growth of local and tourist transport, being now the second in the world for passengers number, 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 continue traffic growth to these destinations confirms the coastal navigation talent of the Port of Naples, now steadily considered a crucial entrance in sea highways and an important connection port for Tyrannical 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 by many general factors, that refer to the city and its image perceived usually 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 11th 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 manufactures, 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 (understanding protocol with the Region to create the museum of the emigration), industrial area "ex Cirio" (various proposals), the "Casa del Portuale" (actually the seat of the offices of the port workers' cooperative), the former "Juta" (converted into subsidiary maritime station "calata Porta di Massa"), Mercato square (various proposals, but none of which concrete).

The Maritime Station (currently under transformation) was built in 1934 by 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 bearing structures.

Rhodes

Evolution and position of the port city on the cruise market

While Rhodes has been for decades a very important tourist destination, the cruise tourism was not the major product. But nowadays the 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 1960's, the island is a very popular international tourist destination which has been elected recently as the 1st among the European Destinations and 5th 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 1990's, 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 to alternative models of tourism such as convention tourism, cultural tourism and cruise tourism.

Urban and port heritage

The port is placed side by side to 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 B.C. In the port, there are many monuments from different eras as the Ancient Greek era, the medieval era, the Ottoman Period era, etc.

Rostock

Evolution and position of the port city on the cruise market

Rostock has 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 hard, 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 "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 toll 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, cranes) have 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.

Trieste

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 reached Trieste on a cruise. From 2007 Trieste is a "Home Port" for the most important cruise national companies: Costa Crociere and MSC. Trieste is also a "Call Port" 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 East 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, which 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 on infrastructures aiming at the development of maritime-related businesses such as the cruise, the yachting and the 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 passengers 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.

Valencia Region/Valencia

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

Varna

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 passengers 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 artefacts (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 & thematic focuses

Alicante

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, which 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. There are only ten minutes walking from each other, but many times the commercial offer is more suggestive attractive 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 its 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 businesses 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 a strong confusion every time in each departure, so 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 to promote that area, in October 2008 a big race "Volvo Ocean Race" will depart from our city; this event will give a great media repercussion to the city. The Municipality and the Valencia Community government have made a lot of works 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 choice more often Barcelona and Valencia as port home.

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.

Dublin

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 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 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; 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.

Dublin is going to focus on 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.

Helsinki

Problems to resolve and challenges*Creating a new harbour: Vuosaari, an 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 harbour 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.

Further 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.

Matosinhos and Port of Leixões APDL

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 drawn up in 2004, the port authority has undertaken a prior project for the Refurbishment of the South Mole and adjacent areas which includes a new passengers terminal, a nautical recreation port (300 vessels and support services) and complementary urban zones.

One of the challenges of the project - without compromising the necessary requirements of security of the port - is also to strengthen the role of the new waterfront as a leisure and entertainment zone, including wide-range 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 to the Cruise Atlantic Europe Project. This project has been instigated by a set of Atlantic ports: ports of Lisbon, Leixões (lead partner of the project), Coruña, Bilbao, Lorient - Belle Ile, Cork and Dover, in collaboration with a several regional and local entities.

The objective of the project is to contribute to the reinforcement of the competitiveness of the Atlantic area in the European cruise tourism market in strong expansion, contributing to economic growth and employment and to the enhancement of the natural and cultural heritage. Given the ever-longer 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 revitalizing an urban zone characterized by some negative indicators in physical, socio-economic and environmental fields.

In fact, the main problem of Matosinhos is the lack of attractive tourist places for the cruise passengers which ignore and "jump" the city in favour of Porto and others regional places. Thus, the challenge is to up-grade the attractiveness of the city through the revitalization of the commercial infrastructure and restaurants, and the creation of cultural facilities and urban services in deprived areas. In a general way, the cruise terminal will participate to the strengthening of the quality of life of Matosinhos.

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

Another and important challenge of the project is to stimulate the employment growth related to the cultural and leisure activities linked to the sea. At the scale of Matosinhos, the cruise tourism offers some perspectives of employment to the local population in a context of growth of unemployment, low qualification and 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

Matosinhos and the Port authority of Leixões are going to focus on following issues:

- Opening an urban window on the port to reinforce the relationships between the port and the city.
- Developing urban facilities in the port area without compromising the requirements of security.
- Promoting cruise activities as a catalyst for the urban regeneration of deprived areas.
- Proposing the cruise terminal as a new door to discover the hinterland of Northern Portugal and to stimulate the tourism sector.

Naples and Port Authority of Naples

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 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 impulse and guide the waterfront transformation. At the end of an international competition, the award project introduced the concept of "filtering line" that redefines the connection between the city and the port and transforms the confines into a great resource: re-organization of the flow of mobility (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 commercial strip created as a linear building on the 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 activities and free time. 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 mobility the "municipal transport plan" and the "100 metropolitan stations plan" aims to correct and to strengthen the mobility within the metropolitan area. In this framework, *The "Municipio station" of Naples metro line 1* is become the occasion of an urban regeneration of the monumental area. It lies in the hearth of the monumental area of the city, strictly connected both with the historical centre and with the passenger port area. *The modernisation of the tram line Municipio – S. Giovanni and the revamping of Marina street*, two projects today in progress, aim to transform Marina street, currently reduced in a continue series of disconnected and decaying parts along the port, into a boulevard to access to the city for the outsiders coming from 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 tutelage of the historical goods 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-thematic cultural circuits and coordinated initiatives to promote the artistic handicraft.

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 since 1996 collaborates with UNESCO in order to create a new great event able 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 of marketing for the city that will implement within 2013 important infrastructural and integrated urban regeneration interventions.

Creating a "sea training pole"

An understanding protocol has been signed on April 2008 to implement an assessment of feasibility, finalised to the creation of the "Sea Training Pole" of the Campania Region. The objectives of the project in study are to develop a permanent Training Pole for some professional workers in the maritime sector, in order to improve – following the interests of the young in Campania Region that are looking for a stabile and secure job, the occupational basin formed by the careers of the whole maritime sector, i.e. the personnel both on board and on ground. The actual situation of the job market in this sector, experiences 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 bettering the existing ones, widening the integration of the transports towards hinterland destination, developing the cruise tourism and the naval dockyard sector. It is foreseen the implementation of 8 courses (one of which 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 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 to 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 to integrate and complete the endowment system of the waterfront (made up above all by the new tourist port of "Vigliena" and by the new university seat in the former Cirio plants, two important initiative 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 mobilizing of the private resources, in addition to the public ones, with remarkable benefits to the local development and to the employment.

The city of Naples and the Port authority of Naples are going to focus on following issues:

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

Rhodes

Problems to resolve and challenges

Need to extend the port infrastructure

The port of Rhodes is the only one 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 the 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 4th 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.

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

Rostock

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 fisher 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 rise up Rostock as a cruise tourist destination and not only as " a gateway to Berlin".

Strengthening the cruise industry sector

The economic environment is opportune to develop 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-bases 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, which 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 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 important 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.

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.

Trieste

Problems to resolve and challenges

Imagining together a new future for the Old port

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

Since the 1990's 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 to set 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 developed, combined with a set of projects for

the transformation of port equipment 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 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 axes 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.

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.

Valencia Region/Valencia

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 to approach Valencia 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 m² 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 virtuous effects in some districts of the historic city.

Carrying on the regeneration of the historic city in relationships 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 is still plenty of contrasts : important monuments can still hide buildings in ruin and degraded areas.

Moreover, the Municipality is involved in different projects aiming to hang on 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 support cruise operators. Effectively America's Cup, Formula 1 circuit and "La Ciudad de las Ciencias" have become great attraction for cruise tourism in strong expansion in Valencia. However, nowadays, Valencia is not enough 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 in account the interests of the tourists and duration of the visit, "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.

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

Varna

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 environs is a magnet for lower value all inclusive tourist 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 stories building with the terminal on the ground floor and has 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 an 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.

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 collaborations between the public actors and all the stakeholders; organizing the participation of the citizen in the project.

PART 3

POTENTIAL CONTRIBUTIONS AND PARTNERS EXPECTATIONS

Alicante

Potential contributions

- Strong efforts in favour to a physical and functional integration port-city.
- Strong relationships between port, city and provincial institutions to promote at the international level the city-port as a cruise place.
- 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 in a furthermore attractive destination for tourists.
- To attract the old town of Alicante to the cruise market as a new option for their excursion.
- To revalue the old town and the urban heritage.

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; 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

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.

Matosinhos and the Port of Leixões APDL

Potential contributions

- Good relationships between the city and the port authority, 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.
- Outline for the renewal of the commerce/restaurants streets are already drawn up.

Expectations

- Learning how to make powerful 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 hinterland interactions.
- Debating about the better strategies to elaborate port projects with a strong urban integration and development potential.
- Encouraging the identification of Matosinhos as a tourist place.

Naples and Port Authority of Naples

Potential contributions

- Presence of a new management trust of cruise terminal considered as "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 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.

- An economic positive 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 the 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

Potential contributions

- A good experience in tourism activity and
- 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 TN CTUR
- The CTUR project will be a good opportunity to exchange best practices for the best integration of the cruise tourism in the economical and social life of the city.

Rostock

Potential contributions

- Strong experience in cruise traffic and an active cruise industry sector.
- Good practise 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

- Contribution 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 reanimation of maritime traditions.

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 cruise port and tourist destination.

Valencia Region/Valencia

Potential contributions

- An ambitious waterfront redevelopment in progress
- A large 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

Expectations

The identification of good practices from others port city 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 good practices from the project will ensure that Varna becomes a must visit destination linking with the already developed cruise industry and its operators.

PART 4 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 criterion "population" distributes the port cities in 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 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 criterion "port traffic" distributes the port cities in 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 criterion "passengers traffic" distributes the port cities in 4 main categories:

- ports with a total passenger traffic higher than 8 millions 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 about 100 000 passengers (Alicante, Dublin, Rostock, Valencia);
- port recently opened to the cruise traffic (Rhodes, Varna, Leixões).

Main figures and conceptual challenge

	City		Port				Port city
	Population	Unemployment	Traffic GT	Container (TEU)	Total pax	Direct jobs	Conceptual challenge
					Cruise pax	Indirect/induced	
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 a so 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 last 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 bring 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 in new urban quarter, or trying to improve the relationships between hard/soft port functions with the urban neighbourhoods.
- all of them are knowing a significant increase of the cruise traffic and are elaborating strategies to control and stimulate as well as possible its impacts on the local economy. 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: Baltic market (Rostock, Helsinki), Atlantic North market (Dublin, Matosinhos-Leixões), Mediterranean market (Alicante, Valencia, Naples, Rhodes, Trieste); Black sea market (Varna).
- most of the port cities have a wide urban heritage that benefits sometimes of 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 a 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 the cruise activity and are not at the same stage in the carrying out 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 bettering 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 terms of quality (landscape; security) of the pedestrian ways.
- Bettering the organization of the passenger port separating cruise traffic and ferry traffic.
- Rationalizing the organization of the port functions setting up the hard functions on adequate area and taking into account their environmental impacts.
- Transforming a port-industrial derelict area in 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.
- Bettering 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

- Bringing up the governance efficiency stimulating the 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 any case, the challenge is to associate all the public actors in a global project.
- Associating the citizens to 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 (ground and on board jobs). In this way, it means to encourage 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 great media event to redevelop the quality of the port-city interface, to enhance the urban and port heritage and to better the quality of live in the derelict neighbourhoods.
- Improving the tourist potentialities and cultural facilities to transform the city in 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 to imagine 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 elaborating specific inventories.
- Researching innovative practices to re-use the original port and industrial “totems” (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 confront

From the key problems and challenges, 3 general thematic entrances can be identified to confront the topic “Cruise traffic and port city heritage as a key for the sustainable regeneration of the port city” in its whole dimensions. Therefore for each main topic, many practical sub-themes have been identified by the partners in their baseline and during the two meetings of the network CTUR.

1 - Transforming, regenerating, adapting the physical and environmental components of the "port-city system":

- Rising 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 recreational and cultural places in the port territory; neutralization of the negative "gateway" effects.
- Improvement of the port **accessibility** (multimodal transport connection) and of the passenger mobility; 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"; rising 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 efficiency 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 educations** adapted to the skills required by the cruise industry and tourism activities associated (ground and onboard jobs; skilled jobs in 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**; proposition of **innovative tourist guides and routes**; consciousness raising to **re-use the port heritage** in an economic but also in a social way.
- Allow and encourage **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 the mix programmes develop on the obsolete port areas.

4 - Experiences and good practices within the network

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

First good practices identification within the network CTUR

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