

Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea



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ANNEXES TO REPORT 2

Analysis to support the elaboration of the Adriatic and Ionian maritime Action Plan

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Study to support the development of sea-basin cooperation in the Mediterranean, Adriatic and Ionian, and Black sea
ANNEXES to REPORT 2 - Analysis to support the elaboration of the Adriatic and Ionian maritime Action Plan

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0 Introduction to the Annex

This Annex contains detailed analysis carried out for Task 3 whose results have been reported in the Report 2.

Also this Annex has been structured into 4 thematic reports, one for each Pillar. Each report contains:

- **Data mapping:** the purpose of this sub-task is to determine what data are available from a common source and at what NUTS level. Each dataset is useful to describe the basic situation per Pillar in the sectors affected by the EUSAIR discussion paper;
- **External prospective evaluation: EQ 1 specificity of Focus Areas to the sea basin:** specific analysis for each focus area for each Pillar has been reported in order to assess the specificity of the focus area for the Adriatic-Ionian sea-basins;
- **Gap analysis:** detailed gap analysis is reported in this Annex, drafted in tables attached to each of the 4 Thematic report (§ .3). The structure of each table considers first the key barriers/problems identified through the results of the Task 2 (Country Fiches) and needs of the territory as identified in the impact assessment. Therefore, these needs have been matched with focus areas defined within the EUSAIR. As a third step, the table provide an overall description of sectors/focus areas with a particular reference to EUSAIR objectives addressing them.

As a final step, needs of the territory (i.e. without the EUSAIR) and proposed focus areas included in the EUSAIR has been analysed under four perspectives:

- o Legislation/implementation of rules: *is the focus area addressing this need under a legislative point of view?*
- o Technologies and innovation: *is the focus area addressing this need under a technological point of view in order to introduce innovations?*
- o Research and education: *is the focus area addressing this need in terms of research and education?*
- o Socio-economic: *is the focus area addressing this need under a socio-economic point of view?*

In case gaps have been identified, possible solutions have been therefore proposed top fill these gaps.

Furthermore, detailed analysis carried out for assessing the **effectiveness of the governance** has been also reported in this Annex, namely:

- Overview on the main players involved in the Adriatic and Ionian area
- the complete benchmark analysis (EUSBSR vs EUSAIR);
- the assessment on the effectiveness of governance system of the EUSAIR;
- the complete analysis on the stakeholders participation to the meetings/stakeholders events.

In chap. 6, a table has been reported (related to the **Impact assessment** as reported in Report 2), containing the analysis of the EUSAIR objectives and primary and secondary impacts of these objectives in the area.

The last chapter relates to the “**External prospective evaluation: EQ 2 existing international cooperation**” as reported in each Thematic report. This chapter contains:

- Sustainability of cooperation projects analysed;
- List of cooperation initiatives/structures organisations in the area;
- List of cooperation programmes analysed;
- List of cooperation projects identified.

1 Thematic Report- Driving innovative maritime and marine growth (1st PILLAR)

1.1 Data mapping

The 1st Pillar focuses on promoting sustainable economic growth and jobs as well as creating business opportunities from blue economy sectors (such as: aquaculture, fisheries, etc.). In light of this, the main topics to develop are:

- Achieving the sustainable management of fisheries;
- Contributing to the profitability of fisheries;
- Improving the culture of compliance in fishing activities;
- Developing Blue R&D and skills (including clusters) in fisheries, aquaculture, biosecurity, blue energy, seabed mining, marine equipment, boating and shipping;
- Developing tools to properly site aquaculture in waters and the potential co-location with other economic activities.

As regards the **fishery** sector, FAO's dataset contains data on the volume of fish catches landed by country or territory of capture, by species or a higher taxonomic level, in the Mediterranean sea, and year for all commercial, industrial, recreational and subsistence purposes.

EEA's data show the proportion of assessed stocks that are overfished and stocks within safe biological limits according to the magnitude of the regional catch.

More detailed data concern the fishing fleet, but at NUTS 0 level. EUROSTAT publishes data on total engine power, total tonnage and number of vessels of national fishing fleets.

Data gap: also in this case, dataset availability at NUTS-2 level and for non-EU countries is very limited as regards catches (FAO) and as regards stocks within and outside safe biological limits (EEA).

Table 1 - Sources and data for fishery sector

Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference/link to dataset	Data gap
EU/cross-national/ National	FAO	Volume of fish catches by sea basin	All Adriatic-Ionian Countries	0	Yes	Volume of fish catches landed by country or territory of capture (Adriatic or Ionian), by species and for all commercial purposes	Link	Regional data are missing
EU/cross-national	EEA	Status of fish stocks in European fishing regions	-	-	Yes	Proportion of stocks within and outside safe biological limits	Link	-
National	Eurostat	Fishing fleet: total engine power	GR IT SI	0	No	The EU fishing effort is measured here as the total engine power of the fishing fleet.	Link	HR, non-EU countries and regional data are missing
National	Eurostat	Fishing fleet: tonnage	GR IT SI	0	No	Total tonnage of the fishing fleets of EU Member States	Link	HR, non-EU countries and regional data are missing
National	Eurostat	Fishing fleet: number of vessels	GR IT SI	0	No	Total number of fishing vessels	Link	HR, non-EU countries and regional data are missing

As regards **aquaculture**¹, due to the lack of data at regional level we investigated on EU and international sources: EUROSTAT, FAO and IUCN (International Union for Conservation of Nature):

Data on aquaculture production by species (from 2008 onwards) are published in 6 tables:

- Production from aquaculture excluding hatcheries and nurseries (fish_aq2a) by species, by FAO major area, by production method, by aquatic environment in TLW (tonnes live weight) and in Euro;
- Production of fish eggs for human consumption from aquaculture (fish_aq2b) by species, by FAO major area, by aquatic environment in TLW, Euro and Euro/Tonne;
- Input to capture-based aquaculture (fish_aq3) by species in Number, TLW, Euro and Euro/Tonne;
- Production of hatcheries and nurseries at eggs stage in life cycle (fish_aq4a) by species and intended uses in Millions;
- Production of hatcheries and nurseries at juveniles stage in life cycle (fish_aq4b) by species and intended uses in Millions;
- Data on the structure of the aquaculture sector (fish_aq5) by species, by FAO major area, by production method, by aquatic environment in Meters, 1000 of M3 and Hectares.

Before 2008 aquaculture production in quantities (TLW) and in values (thousand of euro) was disseminated through two datasets as showed in the table.

IUCN-Med published three guides for the sustainable development of Mediterranean Aquaculture containing interesting data and information on the subject:

- The 1st guide, focusing on “Interactions between Aquaculture and the Environment”, addresses finfish and shellfish culture, dealing mostly with finfish aquaculture, and specifically cage culture since these activities are predominant in the Mediterranean;
- The 2nd guide, “Aquaculture Site Selection and Site Management”, seeks to provide the reader with a full set of parameters and ideas to reflect upon and apply to aquaculture site selection and site management;
- The 3rd guide, “Aquaculture Responsible Practices and Certification” brings into focus several interesting issues for discussion, such as marketing or management support for certification, and the voluntary versus mandatory approach to sustainability certification.

FAO’s National Aquaculture Sector Overview collection provides a general overview of the aquaculture and culture-based fisheries aspects at the national level. The NASOs Fact sheets contain detailed information on the history of aquaculture, human resources involved in the sector, farming systems distribution and characteristics at regional level, main cultured species contributing to national production, production statistics, description of the main domestic markets and trade, promotion and management of the sector and development trends and issues at the national level.

¹ EUROSTAT definition: aquaculture is defined as the farming of aquatic organisms, including fish, molluscs, crustaceans and aquatic plants. Farming implies some form of intervention in the rearing process to enhance production, such as regular stocking, feeding, protection from predators, etc. Farming also implies individual or corporate ownership of, or rights resulting from contractual arrangements to, the stock being cultivated. For statistical purposes, aquatic organisms which are harvested by an individual or corporate body which has owned them throughout their rearing period contribute to aquaculture, while aquatic organisms which are exploited by the public as a common property resource, with or without appropriate licences, are the harvest of fisheries.

Table 2 - Sources and data available for aquaculture sector

Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregations possibility at sea-basin level	Additional information on dataset content	Reference/link to dataset	Data gap
National	Eurostat	Production from aquaculture excluding hatcheries and nurseries (from 2008 onwards)	GR HR IT SI	0	No	Tonnes live weight and euro	Link	Regional data are missing
National	Eurostat	Aquaculture production in quantities (1984-2007)	All Adriatic-Ionian Countries	0	No	Tonnes live weight	Link	Regional data are missing
National	Eurostat	Aquaculture production in values (1984-2007)	All Adriatic-Ionian Countries	0	No	1.000 euro	Link	Regional data are missing
National	Eurostat	Total Fishery Production (Catch + Aquaculture)	AL BA ME RS	0	No	Tonnes	Link	Aquaculture production need a calculation (Total fishery production less catches)
EU/cross-national /National	IUCN	Sustainable Development of Mediterranean Aquaculture	All Adriatic-Ionian Countries	0	No	Interactions between Aquaculture and the Environment; Aquaculture Site Selection and Site Management; Aquaculture Responsible Practices and Certification	Link	-
EU/cross-national /National	FAO	National Aquaculture Sector Overview (NASO)	All Adriatic-Ionian Countries	0	Yes	Characteristics, structure, performance and resources of the sector; Promotion and management, trends, issues, development of the sector	Link	-

The lack of regional data and, – in non-EU countries – the lack of separate data on freshwater and saltwater aquaculture for the most recent years is to be considered as data gaps for the sector.

As regards **Blue R&D**², due to the lack of data at regional level we investigated on EU and international sources: EUROSTAT, OECD and UNESCO.

EUROSTAT general and regional statistics concerning R&D expenditure and R&D personnel in EU countries are broken down by following institutional sectors: business enterprise (BES), government (GOV), higher education (HES), private non-profit (PNP) and total of sectors. The first two datasets are available for all EU Member States at regional level. Concerning Candidate Countries data are available at national level and by source of funds: industry, government or abroad.

Those datasets give us the total research efforts at national/regional level, but there are not specifications for blue economy sectors. More details on breakdowns, derivations and different units available are found in the EUROSTAT Structural business statistics at national level(only for

² EUROSTAT definition: Research and experimental development (R&D) comprise creative work undertaken on a systematic basis in order to increase the stock of knowledge, including knowledge of man, culture and society and the use of this stock of knowledge to devise new applications.

Italy and Slovenia) by economic activity (NACE Rev. 2, B-F) and by a selection of controlling countries. The economic activities for which it could be possible to elaborate proxies at coastal level are: mining and quarrying, manufacture of coke and refined petroleum products, manufacture of other non-metallic mineral products, manufacture of other transport equipment, water supply, sewerage, waste management and remediation activities, civil engineering and electricity, gas, steam and air conditioning supply.

More detailed dataset at national level are found on the EUROSTAT Research and development database. Information available concern total R&D personnel and researchers in business enterprise sector by economic activity and sex (NACE Rev. 2). Specific Blue economy sectors for which data are available are: building of ships and boats and water transport.

The 2013 edition of Research and Development Statistics (RDS) provides a wide range of recent data on the resources devoted to R&D in all OECD countries and selected non-member economies. Those dataset could be useful to fill gaps in the EUROSTAT ones. Only for building of ships and boats sector is possible to collect data on the R&D personnel and expenditure at national level. Other OECD dataset could be useful to calculate proxies according to the field of science and the socio-economic objectives.

Similar datasets are available from the UNESCO Institute for Statistics. Also this data could be used to fill gaps in OECD and EUROSTAT datasets.

Table 3 - Sources and data available for blue R&D sector

Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference/ link to dataset	Data gap
National/ Regional	Eurostat	Total intramural R&D expenditure (GERD) by sectors of performance	GR HR IT SI	2	Yes	Euro per inhabitant, millions of euro, Purchasing Power Standard and percentage of GDP	Link	Blue economy sectors
National/ Regional	Eurostat	Total R&D personnel and researchers by sectors of performance, sex	GR HR IT SI	2	Yes	Full-time equivalent (FTE), head count (HC), % of employment and % of labour force	Link	Blue economy sectors
National	Eurostat	Gross domestic expenditure on research & development by source of funds	AL BA ME RS	0	Yes	Millions of euro and percentage of GDP	Link	Regional level

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Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference/link to dataset	Data gap
National	Eurostat	Foreign control of enterprises: research and development characteristics by economic activity (NACE Rev. 2, B-F) and a selection of controlling countries	IT, SI	0	No	Total intra-mural R & D expenditure, total number of R & D personnel, share of R&D expenditure in value added, share of R&D employment in the number of persons employed (%)	Link	Other countries
National	Eurostat	Total R&D personnel and researchers, in business enterprise sector by economic activity and sex (NACE Rev. 2)	GR HR IT SI, ME, RS	0	No	Total R&D personnel and researchers by head Count and/or full time equivalent	Link	Regional level and several blue economy sectors
National	OECD	Gross domestic expenditure on research and experimental development (GERD) by sector of performance, source of funds, type of cost, type of R&D, field of science and socio-economic objective	GR, IT, SI	0	No	Million current PPP US Dollars, million constant US Dollars, million of Euros	Link 1 Link 2 Link 3 Link 4 Link 5	Regional level and several blue economy sectors, non EU countries
National	OECD	R&D personnel by sector of employment, occupation, qualification and field of science	GR, IT, SI	0	No	Total R&D personnel and researchers by head Count and/or full time equivalent	Link 1 Link 2 Link 3	Regional level and several blue economy sectors, non EU countries
National	OECD	R&D expenditure and personnel by industry, source of funds, type of costs	GR, IT, SI	0	No	Million current PPP US Dollars, million constant US Dollars, million of Euros	Link 1 Link 2 Link 3	Regional level and several blue economy sectors, non EU countries
National	UNESCO	Science & Technology: R&D personnel, researchers, technicians and equivalent staff, other supporting staff, R&D expenditure (GERD)	All Adriatic-Ionian countries	0	No	Million current PPP US Dollars, million constant US Dollars, million of Euros Total R&D personnel and researchers by head Count and/or full time equivalent	Link	Regional level and several blue economy sectors, non EU countries

Most of the data gaps identified are related to blue economy activities and to the non-EU countries. The wide availability of data from EUROSTAT and OECD could help to develop proxies at both regional and sectoral levels. Starting from the relative economic importance of the sector on the total GVA at regional/national level, it is possible to estimate the weight of R&D (according to the total expenditure and employment figures in R&D) for each sector and region of the Adriatic Ionian sea-basin.

➤ Results of the analysis: data limits and gaps

The main gaps found mainly concern the availability of data at regional level as regards MS and at NUTS 0 level as regards the three potential candidates.

Below is proposed a detailed list of data gaps, emerged after the data mapping exercise:

Fishery

- a) Regional data missing in all countries:
 - Volume of fish catches;
 - Status of fish stocks.
- b) National and regional data missing in Croatia and non-EU countries:
 - Fishing fleet (total engine power, tonnage and number of vessels)
- c) Regional data missing in Italy, Slovenia and Greece:
 - Fishing fleet (total engine power, tonnage and number of vessels)

The network of experts, when possible, may fill the gaps or develop further indicators by using data available at national statistics institutes or ad-hoc studies carried out at national level.

Aquaculture

Data missing for all Adriatic-Ionian countries: production (quantity and value) from aquaculture by method, water environment (fresh or salt water) and species.

Blue R&D

Data missing for all Adriatic-Ionian countries: expenditure and personnel in R&D of the blue economy sector such as bio-technologies, biosecurity, blue energy, seabed mining, marine equipment, aquaculture and fishery.

1.2 External prospective evaluation: EQ 1 specificity of Focus Areas to the sea basin

1.2.1 Fisheries

➤ Focus area: Achieving the sustainable management of fisheries

Despite the efforts that have been carried out by national and European authorities, the fishing industry has now entered into a structural crisis, not only in the basin of the Adriatic and Ionian seas but in the entire Mediterranean area.

The international over-exploitation of fish resources causes abnormal damage to the biodiversity and the reproduction of the main marine species which are normally destined for human consumption. The cause of over-exploitation of fish stocks dates back to the failure in controlling

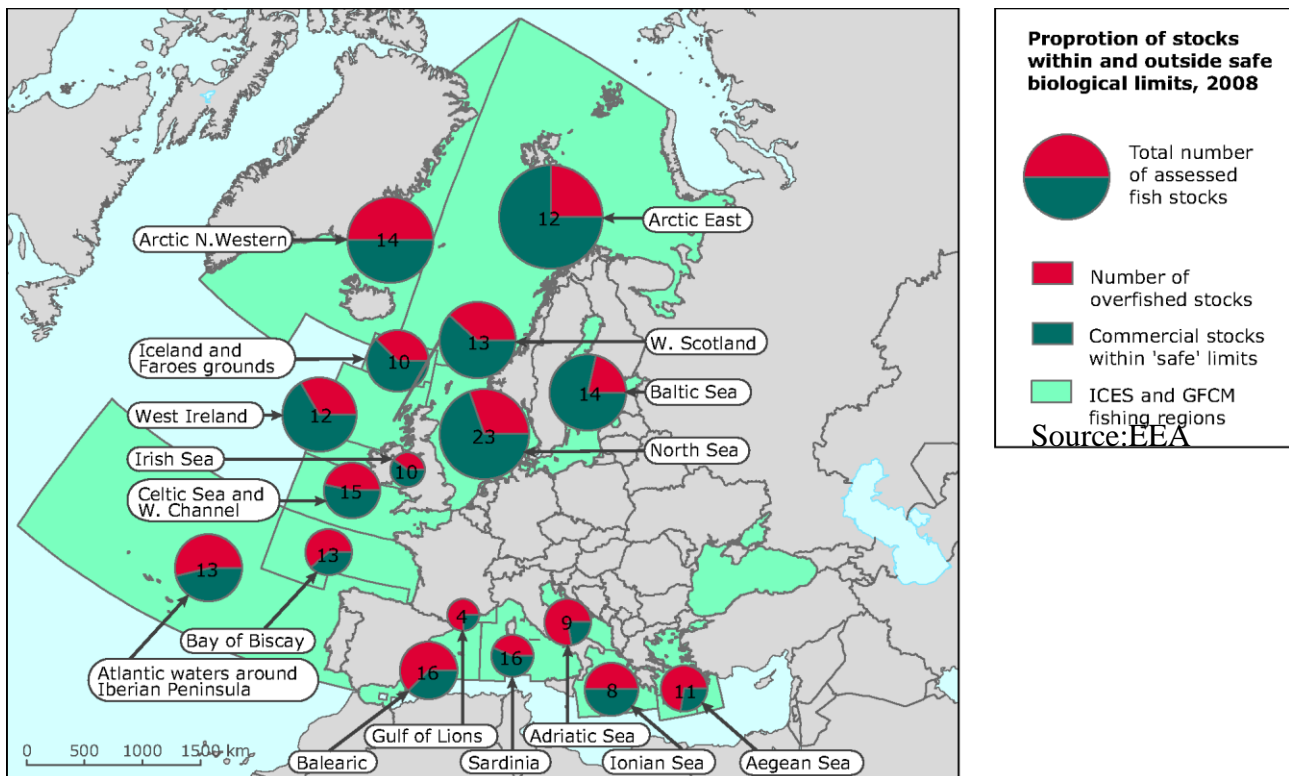
the transfer of the resources present in our seas without worrying about feed-backs. Poor reproductive rates of the species have resulted (even though benefiting of the season closed to fisheries) which prevent the natural reproduction of marine species and therefore cannot guarantee future stocks (young populations should be excluded from the stock).

The elements that contribute to the depletion of fish stocks are attributable to several factors, such as irrational fishing and non-compliance to the natural breeding times specific to each population, fishing methods irrespective of the environment in which it takes place (and often cruel invasive), pollution of the seas and fresh waters systems, reckless tourism activities.

Numerous international studies led up to highlight the issues related to the overexploitation of fish stocks. In the European context, the EEA point out the Status of fish stocks in the Mediterranean fishing regions of Europe, as the following map reports about the whole of overfished stocks in 2008 (Figure 1). In the Adriatic Sea, most of the assessed fish stocks are overfished while the circle indicated for the Ionian Sea shows a larger magnitude of regional catch and an equitable sharing between inside and outside proportions of stocks in a safe biological limit.

Finally, the sustainable management of fisheries, is common to many European fleets, and the need to reverse the negative trend is specific for the whole Adriatic-Ionian geographical area that can represent an exploration territory to base a number of interventions, due to a large presence of fishery-based communities. The European Commission and the European Council, as policy makers planning the strategic development of the sector and driving actions and policies of Member States, has thus an important role.

Figure 1 -Map of the status of fish stocks in European fishing regions (2008)



CONCLUSIONS

As it can be seen in Figure 1, the analysis put into evidence the fact that this topic is specific for the Adriatic area and to a less extent even for the Ionian region. In particular, it seems that the Adriatic

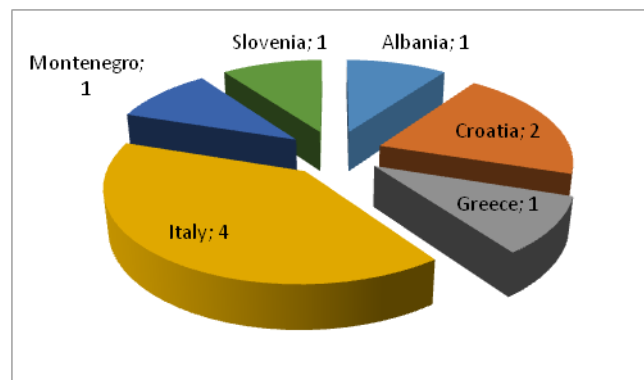
Sea result affected of an irresponsible fishing and inefficient management that causes negative impacts on the environment and fishing economy. More specifically, over-exploitation added to out-dated means, inadequate fishing methods and the shortcomings of conservation, transformation and commercialization systems lead to an inefficient management of the whole fishing supply-chain and determine a structural crisis of the fishing sector. It also has negative impacts on food security as fishing and agriculture are essential activities for human life cycle, environment and eco-systems.

➤ **Focus area: Contributing to the profitability of fisheries**

The Adriatic Sea represents environmental, social and cultural elements bridging the eastern and western shores of the area. As previously explained, fishing and aquaculture activities are recognized among the main man-made factors that are threatening the vitality of the ecosystems, causing economic and social negative effects on coastal communities and other economic sectors (especially tourism). Although EU fishery policy already addresses these issues the solely national application of such policies and the contemporary sharing of common natural resources with non-EU countries did not allow to achieve the EU goals of environment protection.

As far as our research issued, EU cooperation projects focusing on fisheries are limited in number. They are mostly focused on the protection and enhancement of the marine and coastal environment through innovative approaches and usage of technological tools in order to achieve a coordinated management of fishing activities (at institutional and policy level), a direct increase of marine biodiversity and improvement of profitability of fishery activities. Two out of these four projects are funded by interregional cooperation programmes such as Italy-Slovenia, Greece-Italy and one from other national programme. The last one, which is the more relevant from a financial point of view, is funded by IPA Adriatic CBC programme.

Figure 2 - Number of projects per Country involved



Source: our elaboration

Even though every project performs activities different from each other, their projects' objective is common: improve the quality of the marine environment, strengthening at the same time, sustainable development and competitiveness of coastal communities dependent on fishing. Despite that, Italy is the sole country investing a lot in such cooperation activities while both other MS and candidate countries engagement is quite paltry.

Probably this topic has been slightly underestimated. It is thus necessary to ensure the involvement and cooperation of more than one MS, besides the promotion of the engagement of extra-EU countries. It is worth to provide long-lasting responses to such problems, promoting the improvement of the sea and coastal ecosystems by proposing models for a coordinated fishery

management pairing with direct actions for improving fisheries sustainability and strengthening the marine biodiversity.

CONCLUSIONS

Despite the low number of implemented projects focused on the increase of profitability of fishery activities, it is needed to point out the fact that all countries (excepted Bosnia and Herzegovina and Serbia) of the area have implemented specific projects focused on this intervention line in recent years. However, a better designed cooperation across the Adriatic-Ionian sea-basin could trigger a virtuous process of increasing the competitiveness of the coastal communities depending on fishery, widening stakeholders' involvement.

➤ **Focus area: Improving the culture of compliance in fishing activities**

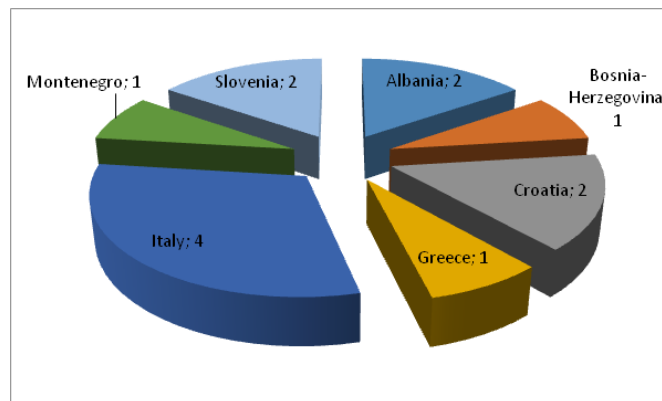
Since 2006, the Commission started identifying the main factors contributing to the economic crisis in the fishing industry and suggested both short-term and long-term responses to improve the economic situation for fishing businesses by promoting measures designed to restore the balance between fishing capacity and fishing opportunities.

Rising fuel prices, coupled with declining fish stocks, have reduced the profitability of the fleet. The 2002 reform of the CFP provided for setting up Regional Advisory Councils (RACs) - stakeholder-led organisations established by the Commission as a vehicle through which to feed recommendations into CFP policy developments - in order to achieve better compliance with the rules by increasing stakeholders' involvement in fisheries management. So far, seven RACs have been set up.

With the aim of ensuring fair competition, conservation of resources and the quality of the scientific advice on which the CFP is based, the Commission has suggested to strengthen controls and step up the fight against illegal, unreported and unregulated (IUU) fishing, which some operators have adopted as a commercial strategy.

In order to address those issues in an efficient way, EU has recognised the relevance of the cooperation across EU sea basins. For this purpose Marine Strategy Framework Directive can be mentioned: “*regional cooperation* means cooperation and coordination of activities between Member States and, whenever possible, third countries sharing the same marine region or sub-region, for the purpose of developing and implementing marine strategies”.

Figure 3 - Number of projects on “improving the culture of compliance in fishing activities” per Country involved



Source: our elaboration

Although EU has thus provided funding in this sector through cooperation programmes, it has not been sufficiently used to address the issue of rationalization of fishing resources and control illegal fishing. According to our survey, only four projects are addressing such a subject. Two of them are funded by IPA Adriatic CBC programme and two by interregional programmes: Italy-Slovenia and Greece-Italy.

IPA Adriatic programme ensures the participation of several partners from both sides of the Adriatic-Ionian Sea region, where only Serbia keep out because of the absence of coastline and thus because of the small amount of fishing activities.

The challenge of protecting and restoring the marine ecosystem can be effectively and efficiently tackled with choices and interventions coordinated at cross-border level, according to a participative approach in which institutions act in coordination with- and with the involvement of- scientific bodies and economic/social actors. Such strategic choices and interventions addressed to an integrated management of the cross-border marine ecosystem can be effective only if they are shared with all countries of the Adriatic basin, going beyond borders and EU or non-EU member status.

CONCLUSIONS

The sustainable use of resources and the integrate control of fisheries across the Adriatic-Ionian Sea basin implies the execution of strategic choices as well as the implementation of practical actions, shared at cross-border level, allowing to stop the impoverishment of natural resources and the co-related economic and social decline of the coastal communities. The involvement of third countries in this intervention line is essential for its successful implementation, supporting “building capacity actions” of candidate/potential candidate countries to comply with the EU *acquis* on fisheries. In terms of geographical area “most affected”, the intervention line encompasses the entire Adriatic-Ionian area, but of course, extra-EU countries are the main recipients of this line.

1.2.2 Blue R & D and skills (including clusters)

➤ Focus area: Developing Blue R&D and skills (including clusters)

“Blue R&D” has far origins in the Adriatic-Ionian region even though this activity has still no generally recognized definition. In this study, we considered as Blue R&D all research and

development activities connected to sectors of marine and maritime economy, as defined in the Blue growth study³. Several European funding programmes support research activities carried out by different research bodies, companies and public entities in trans-national cooperation, alongside with the creation and strengthening of clusters, improvement of skills and knowledge transfer, with the aim of consolidating European leadership in key scientific and technology areas. In this context, the **7th Framework Programme** has played a pivotal role, even though it is not the only programme allowing R&D, skills and clusters development.

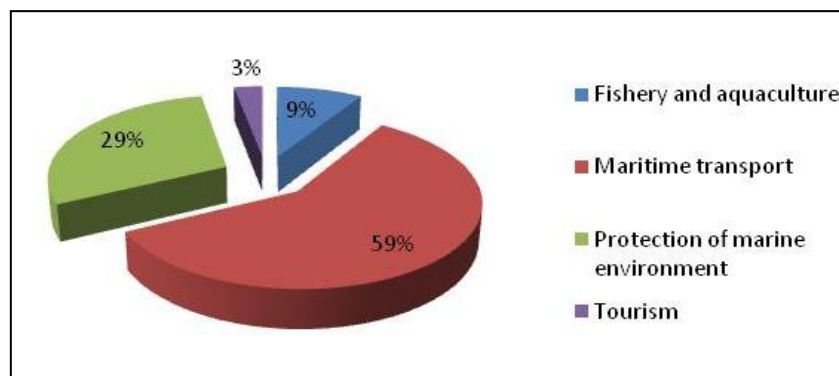
For the purpose of our analysis, four themes have been identified to reflect the most important fields of knowledge and technology where research excellence in marine and maritime field is already ongoing:

- Fishery and aquaculture
- Maritime transport
- Protection of marine environment
- Tourism

Considering the total number of cooperation projects identified which regards marine and maritime issues across the Adriatic-Ionian sea basin, nearly 1 out of 4 of them is connected to the focus area “*Developing Blue R&D and skills (including clusters)*”. Hereby, the majority of them (20) strictly address research and development projects, five regard skills and knowledge transfer, and three the creation and/or strengthening of maritime clusters.

In particular, the percentage distribution of projects per category can be seen in the figure below:

Figure 4 - Percentage of cooperation projects per category



Source: our elaboration

Due to the relevance of topics faced, maritime transport category includes a great majority of projects where almost all cooperation programmes considered are represented. Within this category, Blue R&D projects are focused especially on the introduction of technological innovations for improving maritime transports of passengers and freights, mostly by the use of ICT tools. Moreover, maritime transport category has the highest concentration of projects –namely 8 projects– which comprise also activities of clustering, strengthening of skills and knowledge transfer.

Protection of marine environment is addressed by a 29% of blue R&D projects where the focus is mostly put on energy efficiency, maritime safety and ICZM implementation through the

³http://ec.europa.eu/maritimeaffairs/documentation/studies/documents/blue_growth_third_interim_report_en.pdf

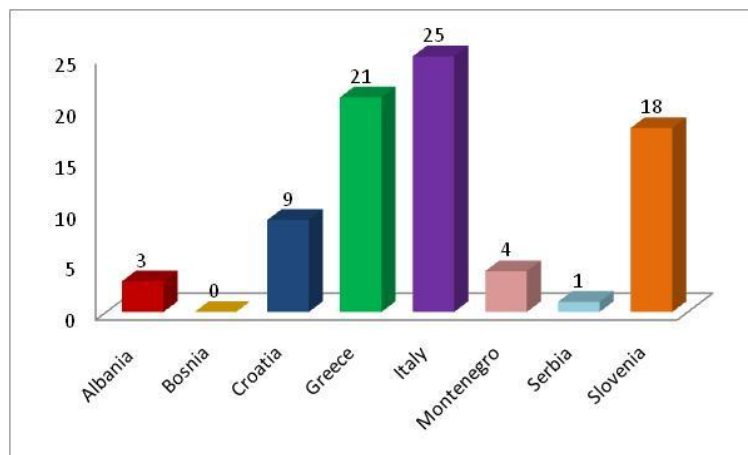
introduction of biotechnological and technological innovation along with the strengthening of common policies and strategies across the Mediterranean sea⁴.

As it can be seen in Figure 4, the last two categories are addressed by Blue R&D projects to a lesser extent even though a couple of relevant cross-border cooperation projects are ongoing within fisheries and aquaculture category (ENRICH, PEGASO, INNOVAQUA). In that respect it is worth to point out the widest initiative concerning fisheries and aquaculture category in Adriatic-Ionian sea basin, which is called Adriamed and implemented by FAO. Its aim is to promote scientific cooperation on fisheries among the Adriatic countries in line with the Code of Conduct for Responsible Fisheries and it is currently the only project involving almost all Adriatic-Ionian countries (Republics of Albania, Croatia, Italy, Montenegro and Slovenia) cooperating on these matters.

Finally, the category related to Tourism is not well addressed either by research projects nor by projects concerning transfer of knowledge or clustering. In fact it is hereby represented only by a component of the project FUTUREMED, funded under the Med Programme. This is mainly due to the fact that tourism is not enough defined as an economic activity, because it is affected by several other economic activities that surround it.

As concerns territorial involvement, the graph below provides a quick view of the participation of Adriatic-Ionian countries in Blue R&D projects:

Figure 5 - Blue R&D and skills (including clusters) projects per country



Source: our elaboration

In the framework described till now, we notice that **Italy** has the widest presence, being partner in all projects within this focus area and leading most of them, especially the ones addressing protection of marine environment and fisheries and aquaculture activities. In fact Italian research has been very advanced and many ideas developed in Italy in the past have been successively applied to develop for example aquaculture in other counties such as Croatia and Greece. This has led nowadays Italian research institutes to play a major role in trying to develop a complete farming system for tuna, including the reproduction stage.

In the ranking coming out from the Figure 2, Italy is followed by **Slovenia** and **Greece** which also show a large involvement in research projects, the latter also leading a quantity of them. Less participation in research projects come from **Croatia**, that keep its involvement only in 9 of Blue R&D projects spread in all the four categories defined above, as well as Slovenia and Greece. Last

⁴ Cooperation projects encompass also other areas of the Mediterranean and are not all specifically focused on the Adriatic-Ionian sea-basin.

come **Montenegro**, **Albania** and **Serbia** which accounts respectively for 4, 3 and 1 project where all of them regards maritime transport and issues related to protection of marine environment. The greatest absent is **Bosnia and Herzegovina**, which deserves a few words since this country does not appear at all in cooperation projects within this focus area (see Figure 2). This is mainly due to the quite recent engagement of Bosnian government to reach EU standards in R&D, which has been formalized in the Stabilisation and Association Agreement (SAA) signed in June 2008, aimed at encourage Bosnia and Herzegovina to develop socio-economic policies, including strengthening the role of science in the country and prospects for national economic growth based on domestic knowledge-intensive businesses⁵.

CONCLUSIONS

As a matter of fact, scientific cooperation in the Adriatic and Ionian area is already well developed and, as an activity aimed at supporting other focus areas, the Blue R&D and the development of skills and clusters is specific to the Adriatic-Ionian sea basin. Of course the level of cooperation is higher between EU countries than it is among EU countries and candidate and/or potential candidate countries. Nevertheless, these latter have a great potential which is limited by old technologies, lack of support schemes, planning and financial funds. It can be predictable an increasing involvement of Croatia, driven by its recent entry in the EU and the consequent accession of Croatian entities to Horizon 2020 funds starting from 2014. Furthermore it appears that Blue R&D presently addresses mainly maritime transport, while it can be enhanced towards issues concerning fisheries, aquaculture and broadly the protection of marine environment.

1.2.3 Aquaculture

Aquaculture is a most promising activity for all Adriatic and Ionian countries, except for Slovenia.

➤ Focus area: Creating new jobs and business opportunities through research and innovation in aquaculture

In **Italy**, innovativeness is a continuous process in aquaculture, for developing new farming methods and trying to farm new species. Despite this, competitiveness is currently a problem for Italian aquaculture. Enterprises are generally very small compared to other countries and profits highly depend on prices of inputs. After several decades of fast development, Italian aquaculture seems to have reached the peak of its expansion.

Marine aquaculture is a strategic sector of the **Greek** economy, with significant contribution to employment figures. Employment in the sector is above the EU average. Steady growth rates in combination with the export orientation of the sector and cost competitiveness are considered as two opportunities indicating that the sector can be further developed in the next years. Currently, many major firms are under reengineering or merging to address competition issues in a more global perspective.

In **Croatia**, over the period 2007-2012, total production decreased by 42% because of the collapse of shellfish production (-91%) due to export barriers and decrease of pelagic fish. Creating new jobs and business opportunities through further research and innovation is crucial.

In **Bosnia-Herzegovina**, aquaculture is a most promising activity but is very limited and the development of the production may be limited within the next years because of the limited space available. The objective of this sector is to maintain the activity of the two companies.

⁵http://ec.europa.eu/euraxess/pdf/research_policies/country_files/Bosnia&Herzegovina_CountryFile_2012_FINAL.pdf

Aquaculture is still not developed in **Montenegro**. Researches executed by the Institute of Marine Biology in Kotor showed that the aquatic environment, especially Boka, have remarkable conditions for natural development and artificial cultivation of mariculture – collection of brown and red algae, cultivation of mussels and oysters. Despite those potentialities, technologies applied to date are rather old.

Aquaculture in **Albania** is growing slowly constrained by slow growth in the domestic market demand and limited in the access to exports, especially towards the EU (molluscs). Export market constraints are mainly due to gaps in food safety standards and certification. Development of the sector is also hampered by lack of support schemes and by limited access to finance.

CONCLUSIONS

Research and innovation is a fundamental topic to develop for Italian aquaculture where the sector seems to have reached the peak of its expansion, for Croatian aquaculture because of the great fall of the production in latest years, and for Greece. The remaining eastern countries of the Adriatic sea basin shows a small development of this sector. Nevertheless these countries have a great potential which is limited by old technologies, lack of support schemes, planning and financial funds. As attested, seems that the EU intend to strengthen its attention on aquaculture, trying to reduce its reliance on fish from abroad, to develop self-sufficiency without concurrence among producers coming from different EU countries. A further common goal for the entire basin of the Adriatic-Ionian is a more export oriented aquaculture.

➤ **Focus area: Developing tools to properly site aquaculture in waters and the potential co-location with other economic activities**

In **Italy**, potentiality for shellfish aquaculture is almost unlimited, considering that it does not need external feeding, but polluting effects must be carefully considered. On the other hand, extensive aquaculture in brackish lagoons has been receiving increasing consideration for its traditional aspects and for the conservation of habitat and ecosystem services.

In **Greece**, regarding the environmental sustainability of the sector, in the context of the current legislative regime, investors have to submit preliminary environmental impact studies and environmental impact assessment for licensing. Moreover, during the operation phase, farms are monitored in order to ensure that corresponding legislation is applied and quality of the environment is not affected, which results in securing both the preservation of marine environment, the quality of the products and human health.

Due to the collapse of shellfish production, aquaculture in **Croatia** needs a co-location with other economic activities.

Competition with tourism needs to be solved in **Bosnia-Herzegovina**.

In **Montenegro**, spatial plan for Special Purpose Coastal Zone (2007) determined areas for mariculture in the Bay of Kotor on the basis of data on the quality of the natural environment, existing and planned use of space, population density, infrastructure, economic, social and public activities on the subject area. Aquaculture zones are defined in three categories according to the degree of meeting required conditions. Environmental sustainability in the Bay of Kotor is probably guaranteed, thanks to a careful planning of the most suitable zones for aquaculture. Further growth in the bay does not appear possible, but mariculture can find new forms of development in open waters.

There are concerns for the negative environmental impact in some aquaculture zones in **Albania** – environmental impact assessment is needed.

CONCLUSIONS

Due to the collapse of shellfish production in Croatia and due to the stagnation of production in the other Italian regions, developing the potential co-location with other economic activities is very important, as already happens on the Italian side of the Adriatic, where aquaculture is strictly linked to the conservation of the habitat and the ecosystem services.

Aquaculture production differentiation could boost the development of the activity, but it needs to be coordinated with other marine and maritime activities, in order to optimize the use of spaces available. MSP and ICZM implementation could represent the key tools for an efficient space planning. Especially in Greece, Albania and Montenegro there is a lack of planning in the most suitable zones for aquaculture.

As told for the previous focus area, the co-location is a need to be tackled in those countries with already established productions (Croatia, Italy and Greece), where development of new sites needs a proper space planning, in coordination with other activities. This already happens in Italy (especially on the North-Adriatic shore), where aquaculture is strictly linked to the conservation of the habitat and the ecosystem services, but also to tourism.

1.3 Gap analysis

Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> Over-exploitation of fish stocks 	Achieving the sustainable management of fisheries	<p>As underlined in the EUSAIR and as also emerged from Task 2, overexploitation of fish stocks is one of the main problems in fishery sector in the entire Adriatic. The issue has been tackled in the EUSAIR in the following objectives:</p> <ul style="list-style-type: none"> Improving good management for sustainable fisheries, including through the development of multiannual plans and other measures such as, inter alia, Marine Protected Areas in their wider sense; Improving the culture of compliance, saving resources, facilitating the collection, and transfer of data and information and enhancing cooperation for the monitoring and control of fishing activities; Performing regular stock assessment for mixed fisheries in the Adriatic and Ionian Sea within a precautionary and ecosystem approach to fisheries management 	<p>The EUSAIR envisages the alignment of national legislations to EU rules as derived from the CFP. Also the improvement of the "culture of compliance" with the purpose of saving resources has been envisaged, ensuring also the alignment of non-EU countries to EU rules in the fishery sector</p>	<p>For the purpose of improving the culture of compliance aimed at saving resources and fish stocks, the EUSAIR asks for specific support to the collection and transfer of information for monitoring and control of fishing activities. Cooperation is supported for exploiting research results and develop technological capacities Innovation is supported by adapting fishing gears and methods to new obligations derived from the CFP</p>	<p>Specifically as regards Research and Innovation in the 1st Pillar, the EUSAIR points to two main objectives: (i) assisting interregional collaborative processes among private, research and public sector aimed at exploiting research results, also in the fishery sector and (ii) Increasing the academic and professional mobility and the level of qualification of the workforce. Both objectives support the sustainable management of fishery</p>	<p>Gaps identified:</p> <p>The sustainable management of fishery indirectly generates an increase of profitability of the sector in general, with higher incomes for fishermen and wider availability of the natural resource. On the other hand, sustainability of fishery is also linked to the reduction of fishing efforts but this may have a negative impact on socio-economic conditions of fishermen. An effort to limit this impact has not been expressly envisaged in the EUSAIR</p>
			<p>No gaps identified No actions needed</p>	<p>No gaps identified No actions needed</p>	<p>No gaps identified No actions needed</p>	<p>Proposed actions:</p> <p>Support to diversification of fishing activities in order to reduce fishing efforts of the fishermen in the Adriatic sea For EU countries, FLAGs could represent the natural tool for addressing this gap. IPA (e.g. IPA Adriatic) could be used for funding initiatives as such in non-EU countries</p>

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Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> Insufficient "business resource efficient culture" 	Contributing to profitability of fisheries	<p>The Adriatic-Ionian sea-basin is characterized (as underlined in Task 2 and in the impact assessment) by weak involvement of stakeholders and weak interrelation of business, research and the public sector. This lack of "business resource culture" limits the profitability of the fishery sector. Under a general point of view, most of the EUSAIR specific objectives in 1st Pillar are focused to increase the profitability of fisheries. A specific objective is exclusively dedicated to this issue:</p> <ul style="list-style-type: none"> Increasing the profitability and sustainability of fisheries and aquaculture activities 	<p>Gaps identified:</p> <p>The CFP reform gives emphasis to the "social dimension" of fishing activities, reducing fishing costs and increasing incomes. Viability of coastal communities is also priority in the CFP (through the reinforcement of former Axis 4 of EFF)</p> <p>The EUSAIR mention the compliance to CFP obligations only as regards "fishing methods and gears". A wider inclusion of the CFP objectives in the EUSAIR could be envisaged</p>	<p>A specific objectives is dedicated to enhance business resource culture ("• Assisting interregional collaborative processes among private, research and public sector, aimed at exploiting research results, develop technological and innovative capacities and create and exploit knowledge")</p>	<p>Specifically as regards Research and Innovation in the 1st Pillar, the EUSAIR points to two main objectives: (i) assisting interregional collaborative processes among private, research and public sector aimed at exploiting research results, also in the fishery sector and (ii) Increasing the academic and professional mobility and the level of qualification of the workforce.</p> <p>Both objectives contribute to increase the profitability of the sector.</p> <p>The formation of maritime clusters and research networks is also supported in the EUSAIR</p>	<p>Under a socio-economic point of view, the EUSAIR's specific objective aimed at increasing the profitability of fishery activities is linked to the improvement of sector operators condition under different points of view (economic, working conditions, social, etc.)</p> <p>This specific objective could be also aimed at increasing the "attractiveness of the sector" in terms creating new jobs opportunities</p>
			<p>Proposed actions:</p> <p>Include the CFP's objectives in the EUSAIR, with special mention of CFP's "social dimension" objectives. The EUSAIR should also include specific support to capacity building in candidate and potential candidate countries to align their fishery policies to CFP objectives.</p>	<p>No gaps identified</p>	<p>No actions needed</p>	<p>No gaps identified</p>

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Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> Weakness of culture of compliance by fishermen 	Improving the culture of compliance in fishing activities	<p>A specific objectives in the EUSAIR is dedicated to tackle this problem, namely:</p> <ul style="list-style-type: none"> Improving the culture of compliance, saving resources, facilitating the collection, and transfer of data and information and enhancing cooperation for the monitoring and control of fishing activities 	<p>The improvement of the “culture of compliance” as specified in the EUSAIR objective might be supported by legal obligations. Furthermore, the EUSAIR objective “Ensuring full compliance to EU fisheries legislation in candidate/potential candidate countries” guarantees the alignment of non-EU countries</p>	<p>For the purpose of improving the culture of compliance aimed at saving resources and fish stocks, the EUSAIR asks for specific support to the collection and transfer of information for monitoring and control of fishing activities. Cooperation is supported for exploiting research results and develop technological capacities Innovation is supported by adapting fishing gears and methods to new obligations derived from the CFP</p>	<p>Specifically as regards Research and Innovation in the 1st Pillar, the EUSAIR points to two main objectives: (i) assisting interregional collaborative processes among private, research and public sector aimed at exploiting research results, also in the fishery sector and (ii) Increasing the academic and professional mobility and the level of qualification of the workforce. Both objectives contribute to increase the “culture of compliance”. The formation of maritime clusters and research networks is also supported in the EUSAIR</p>	<p>Within the EUSAIR, “Improving the culture of compliance” is basically addressed to enhance cooperation for monitoring and control of resources, for the purpose of preserving stocks. Improving the sustainability of fishery sector and adopting the “culture of compliance” have socio-economic impact. Therefore, the EUSAIR tackle this problem also under a socio-economic point of view</p>
			No gaps identified	No gaps identified	No gaps identified	No gaps identified
			No actions needed	No actions needed	No actions needed	No actions needed
<ul style="list-style-type: none"> Risk to lose competitiveness the shipbuilding, boating and logistics industries Blue biotechnology has not yet developed its full potential 	Developing Blue R&D and skills (including clusters)	<p>These key barriers/problems have been tackled in the EUSAIR, dedicating the following objectives.</p> <ul style="list-style-type: none"> Stimulating the development of maritime clusters and research networks, as well as the formulation of research strategies to develop blue bio-technologies and spur innovation in fisheries, aquaculture, biosecurity, blue energy, seabed mining, marine equipment, boating and shipping Establishing Adriatic-Ionian technological platforms for 	<p>Despite the EUSAIR does not envisage a specific legislative measure for developing R&D, a specific objective is proposed exclusively dedicated to overcome this problem.</p>	<p>The EUSAIR clearly addresses the key barriers/problems identified within the overall development research activities and the adoption of “innovations” and transfer of technologies in different activities of the blue economy</p>	<p>As for “Technology and Innovation”, also for in terms of Research and innovation, the EUSAIR for this specific problems does not present gaps. The objective “Increase the academic and professional mobility” is also functional to develop potential of unexploited maritime activities</p>	<p>Under a socio-economic point of view, no gaps have been identified. As a matter of fact, the development of scientific cooperation, the establishment of research networks and maritime clusters and the development of unexploited maritime activities are expected to generate benefits to occupation and national economies in general</p>
			No gaps identified	No gaps identified	No gaps identified	No gaps identified

Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
		collaboration amongst the scientific community, public authorities and maritime industries on areas such as boating, shipping and marine equipment <ul style="list-style-type: none"> Assisting interregional collaborative processes among private, research and public sector (also in connection with smart cities development), aimed at exploiting research results, develop technological and innovative capacities and create and exploit knowledge 	No actions needed	No actions needed	No actions needed	No actions needed
<ul style="list-style-type: none"> Small-scale and fragmented farming industry Short on clustering Poor/limited access to capital or loans for innovation for aquaculture firms Time-consuming and potentially costly administrative procedures and bureaucracy for farming activities 	Creating new jobs and business opportunities through research and innovation in aquaculture	Within the 1 st Pillar, measures explicitly devoted to aquaculture sector regard: <ul style="list-style-type: none"> development of tools to site aquaculture (in co-location with other activities); improvement of profitability of aquaculture sector development of clusters and research networks (also in aquaculture); Establishment of technological platforms for enhancing cooperation in aquaculture sector (e.g.: development of new products). Looking to key problems identified, it emerged that the following issues have not been tackled: <ul style="list-style-type: none"> limited access to capital administrative burdens for licensing 	Gaps identified: Compared to key barriers identified, the main gap identified in the EUSAIR under a legislative point of view regards the lack of measures aimed at reducing administrative burdens for licensing and for achieving farming permission, which resulted to be common in all countries of the Adriatic and Ionian area. Given that marine aquaculture resulted as a most promising activity in all countries (therefore it is important under a "sea-basin perspective"), this issue needs to be included in the EUSAIR	In terms of Technology and Innovation, clustering is encouraged in the EUSAIR, which could generate direct benefits on the production scale, reducing fragmentation of the sector. The development of the "technological platforms" for enhancing collaboration amongst stakeholders in the sector may help to reach this objective. However, it emerged that farmers in the Adriatic and Ionian sea-basins have limited access to finance for innovating their productions/processes. This gaps has been dealt in the "socio-economic section" on the right No gaps identified For access to finance, see the last column on the right	Specifically as regards Research and Innovation in the 1st Pillar, the EUSAIR points to two main objectives: (i) assisting interregional collaborative processes among private, research and public sector aimed at exploiting research results, also in the fishery sector and (ii) Increasing the academic and professional mobility and the level of qualification of the workforce. Both objectives contribute to the development of the aquaculture sector in general No gaps identified	Gaps identified: All objectives mentioned in the EUSAIR referred to the aquaculture sector should support the overall development of the sector, generating socio-economic benefits. On the other hand, the analysis carried out on all countries (Task 2) pointed out that all farmers in the area have difficult access to loans and to capital in general. Access to finance, which has proven one of the main challenges for the aquaculture sector in the Adriatic-Ionian, has not been encompassed in the EUSAIR.

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Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
			<p>Proposed actions: Reduce administrative burdens and constraints for the development of the aquaculture sector. Speed up and streamline licensing procedures and permissions for new farming plants. Set up a macro-regional working group to explore the feasibility of standardizing licensing procedures in the area.</p>	No actions needed	No actions needed	<p>Proposed actions: Include specific guarantee schemes at the macro-regional level to finance these actions (enabling banks and other lenders to lend to SMEs that do not have the proven track record needed for a commercial loan). The EUSAIR should encompass specific actions to support innovation in the sector. A macro-regional set of guidelines should be adopted for developing and building "sustainable farming plants" that will increase production.</p>
<ul style="list-style-type: none"> Limited access to space and licensing 	Developing tools to properly site aquaculture in waters and the potential co-location with other economic activities	By analyzing country fiches, this problem emerged in many countries (Montenegro, Slovenia, etc.) with limited maritime space. The EUSAIR dedicates a specific objective for managing water space especially for the purpose of co-locating farming plants with other activities: <ul style="list-style-type: none"> Developing tools to properly site aquaculture, including tools to identify activities for potential co-location with other economic activities 	Co-location of marine aquaculture with other maritime activities is part of a wider maritime spatial planning which should be adopted in the entire area. Harmonization of MSP and ICZM is included in the 3 rd Pillar of the EUSAIR. Therefore, in terms of "legislation", no gaps have been identified, since it has been already included in the 3 rd Pillar. As regards licensing problem, please refer to the previous problem analyzed	A specific objective of the EUSAIR is dedicated to "Stimulate the development of maritime clusters and research networks" also for the purpose of spurring innovation in aquaculture. Co-location with other maritime activities (e.g. with offshore wind or with coastal tourism) should be supported by research activities aimed at producing feasible projects for limiting space exploitation	Besides what reported in "Technology and Innovation", which applies also to this field, the EUSAIR asks for "Increasing the academic and professional mobility and the level of qualification of the workforce", also as regards fish farmers and related workforce	The EUSAIR's objective aimed at co-locating aquaculture with other maritime activities does not present gap in socio-economic terms. In fact, as an indirect effect, it could increase the numbers of farms and support the development of other activities
			No gaps identified	No gaps identified	No gaps identified	No gaps identified
			No actions needed	No actions needed	No actions needed	No actions needed

2 Thematic Report – Connecting the region (2nd PILLAR)

2.1 Data mapping

Given their position at cross-roads of east-west and north-south axes of Europe, the Adriatic and Ionian Seas constitute an important transport route for goods, passengers and energy. This pillar intends to address regional gaps and barriers by removing bottlenecks in key transport and energy infrastructures.

Based on the EUSAIR discussion paper, the following focus areas have been identified:

- Optimizing interfaces, procedures and infrastructures to facilitate trade with southern, central and eastern Europe;
- Optimizing integrated, demand-based, low-carbon maritime transportation network across the region;
- Environmental and economic sustainability;
- Improving the culture of compliance in flag and port state control, liability and insurance of shipping, ship sanitation and control, accident investigation and port security;
- Enhancing cooperation between national or regional maritime authorities on maritime traffic information exchange through SafeSeaNet;
- Developing of decision support systems, accident response capacities, and contingency plans;
- Ensuring adequate sources of information and geographical data for crews and navigators.

As regards **Maritime transport**⁶, EUROSTAT dataset reports gross weight of goods (in tonnes), passenger movements (in number of passengers) as well as vessel traffic (number of vessels and gross tonnage). Data for transport of goods in containers are also expressed in volume terms (TEUs = 20 ft equivalent unit). Since maritime transport data are calculated using data collected at port level, they are available in EUROSTAT at port, Regional, Maritime Coastal Area (MCA) and country levels.

The data are presented as follows:

Table 4 - Sources and data available for maritime transport

Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference/link to dataset	Data gap
National/ Regional	Eurostat	Maritime transport - Goods (gross weight) - Annual data - All ports - by direction	GR HR IT SI	3	Yes	Thousand tonnes	Link	Ports need to be aggregated by NUTS 3
National/ Regional	Eurostat	Maritime transport - Goods (gross weight) by ports and direction (inwards, outwards) and type of traffic (national and international)	GR HR IT SI	3	Yes	Thousand tonnes. Detail for ports of logistical platform of the North Adriatic port Association	Link	Ports need to be aggregated by NUTS 3
National/ Regional	Eurostat	Maritime transport - Passengers - Annual data - All ports - by direction	GR HR IT SI	3	Yes	1000 Passengers	Link	Ports need to be aggregated

⁶ EUROSTAT definition: maritime transport is the carriage of goods and passengers by sea-going vessels, on voyages undertaken wholly or partly at sea. The data collected from National Statistical Authorities are port statistics: information on goods handled in ports, passengers embarked and disembarked and vessel traffic. Detailed information is collected on the type of cargo and passengers, geographical areas where the partner ports are located, type, size and nationality of ships used to carry out that transportation.

Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference/link to dataset	Data gap
National/ Regional	Eurostat	Maritime transport - Passengers - Quarterly data - Main ports - by direction (inwards, outwards) and type of traffic (national and international)	GR HR IT SI	3	Yes	1000 Passengers. Detail for ports of logistical platform of the North Adriatic port Association	Link	by NUTS 3 AL BA ME RS
National	Eurostat	Freight transport: sea - total inward and outward	AL BA ME RS	0	Yes	Million tonnes	Link	Data are not continuous for BA and ME
National/ Regional	Eurostat	Maritime transport - Vessel traffic by type and size of vessels	GR HR IT SI	3	Yes	Number and gross tonnage of vessels	Link	Ports need to be aggregated by NUTS 3 AL BA ME RS

The main data limits on maritime transport of goods concern the missing aggregation of ports' data by NUTS 3 region, but it is just a matter of data-elaboration since data actually exists, while for Albania and Bosnia-Herzegovina data on transport of goods are not continuous. Passengers' data and traffic by type and size of vessels for all non-EU Countries are missing.

Concerning **maritime safety and security**, there are a few regional and quantitative public data available for this type of issues.

The main data source for all these topics is the European Maritime Safety Agency (EMSA) whose mission is *"to ensure a high, uniform and effective level of maritime safety and security, as well as prevention of and response to pollution by ships within the EU"*. EMSA's most important publications are:

- The Maritime Accident Review 2010 provides selective and aggregated information on EU maritime accidents.
- The EMSA annual report. It is an account of the work undertaken by EMSA in 2012 to enhance the quality of shipping, strengthen maritime safety and achieve cleaner oceans. It measures the added value of EMSA's activities and services for the EU in general and its principal stakeholders in particular - EU Member States, Iceland, Norway and the Commission.

SafeSeaNet is a vessel traffic monitoring and information system, managed by the EMSA and under the responsibility of DG MOVE and established in order to enhance maritime safety, port and maritime security, marine environment protection, efficiency of maritime traffic and maritime transport. SafeSeaNet Statistical reports contain information and data about the movements of ships, on the precise nature of the cargo on board if carrying dangerous or polluting materials and on those ships posing potential risks to the safety of shipping and the environment.

Table 5 - Sources and data for maritime safety

Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference/link to dataset	Data gap
EU/cross-national /National	EMSA	Document. Maritime accidents that occur in a region	GR HR IT SI	0	Yes	Number and type of accidents in EU	Link	Regional data are missing
Cross-national/ National		Document. Maritime transport and environmental issues	IT SI	-	Yes: Adriatic	Traffic routes and intensity, area of increased risk of sinking and collision, areas of increased risk of groundings, oil spill density	Link	-
EU/cross-national /National	EMSA	Document. SafeSeaNet Statistical reports	EU	3	No		Link	-
EU/cross-national /National	EMSA	Document. Annual report 2011 of EMSA	EU	-	No	Ongoing activities on safety of European maritime space	Link	-

➤ Results of the analysis: data limits and gaps

Missing data are listed below:

Maritime transport

National and regional data missing for Albania, Bosnia-Herzegovina and Montenegro:

- number of passengers by main port, direction (inwards, outwards) and type of traffic (international and national);
- vessel traffic by type and size of vessel and by main port.

Safety and security of maritime space

There are few regional and quantitative public data available for this type of issues. For the purpose of our analysis, the following basic data are needed:

- Number and type of accidents in the EU;
- Traffic routes and intensity.

2.2 External prospective evaluation: EQ 1 specificity of Focus Areas to the sea basin

2.2.1 Maritime transport

➤ Focus area: Optimising interfaces, procedures and infrastructures to facilitate trade with southern, central and eastern Europe

In **Italy**, significant investments have been done in recent years in the short sea shipping sector, by updating infrastructural facilities in several ports. Improvements for reducing the environmental impact of ships and for developing smart technologies are also widespread to the passenger ferry services, especially if we consider that many ships may realize freight and passenger transport at the same time. Ports in the Northern Adriatic cannot still have direct routes with far-east depending on transshipment ports.

Greek shipping has a leading role in the European and international shipping industry. Deep Sea Shipping industry is characterized by high degrees of innovation and competitiveness since there are investments related to new ships orders and the establishment of new technologies on board, while there is diversification trend regarding the expansion to new market segments.

In **Croatia** short-sea shipping activity decreased in the last year. Nevertheless, short-sea shipping still has a great potential in Croatia. It already represents 84% of maritime freight and Croatia has the potential to increase its influence within the Balkan regions in terms of logistic (imports and exports of goods). Passenger transport is performed by larger vessels and thus the sector is looking for more efficiency.

The development of short-sea shipping in **Slovenia** has to be partly attributed to the positive approach of the port of Koper in embracing innovations in the sector (in terms of logistics, intermodality, and EU strategies). The port and its managing company are very sensitive to innovation in general, and it is believed that in the future the approach will remain similar. The development of deep-sea shipping in Slovenia does not seem driven by the introduction of innovative process, as it is more related to the strategic position of the port of Koper, as well as on a generalized increase in maritime transport.

Despite the strategic location of the Bar port, **Montenegro** is not competitive yet on international market of short sea shipping due to insufficient investments in infrastructure development and equipment, delays in structural reforms and privatization. In order to implement such possibilities, construction of new and reconstruction of existing terminals for combined transport at the railroad stations of Bar, Podgorica and Bijelo Polje is planned. The planned upgrade and modernization of the port is expected to elevate its importance for trade in the region by the implementation of the national investment project. Also, direct impact on improvement of foreign-trade balance will be achieved. The project is considered as the initiation of significant shipping development in Montenegro.

In **Albania**, as a result of these investments, the anchoring and processing capacities and the port efficiency have increased, accompanied with an increase in the volume of goods processed in ports accounting to around 5,429 thousand tons of processed goods in 2011, as compared with 4,332 thousand tons in 2007. The major weight of work is covered by Durres port as a result of investments in building the new passengers terminal.

CONCLUSIONS

According to the national issues above mentioned we can conclude that this topic is relevant for maritime transport sector especially in the northern Adriatic, where investments in innovation are

required. On the contrary, in the southern Adriatic priority is given to investments in infrastructures, which resulted to be obsolete and inadequate to respond to market demands. As a general bottleneck, procedural constraints and bureaucratic burdens (especially in port operations) need to be streamlined and fastened.

➤ Focus area: Optimising the connections across the region (taking into account islands connectivity)

Italy has been strongly engaged in protecting and developing its maritime industry for a long time. Short-ship shipping is essential for a country like Italy which can rely upon two very populated islands and a plenty of minor islands and archipelagos. Concerning passenger ferry services, private enterprises begun to be relevant only recently so it is soon for drawing results of this liberalization process. Many routes, especially with minor islands, have to be maintained, regardless of economic results, to guarantee basic movement facilities to inhabitants. As a consequence, more investments focused at reducing the environmental impact of ships by using clean fuel and streamlining operations at docks, especially for Ro-Ro traffic, are necessary.

In **Greece**, the majority of cargos transported in national ports is conducted through SSS. The activity secures the constant supply and connectivity within the Greek territory.

In **Croatia**, passenger ferry services at local level are very developed but a renewal of fleet is necessary.

In **Slovenia**, the port of Koper is competitive in terms of port charges for general cargo vessels (albeit Trieste's overall charges are lower). Supply chain integration, planned infrastructural investments, and last but not least its geographic position in the Adriatic (Koper is the closest port to central Europe) led us to think that it will become even more competitive in the future, especially as regards SSS which is benefitting inter alia from the "Motorways of the Sea" (MoS).

In **Montenegro**, passenger ferry services sector is very developed at local level. Mostly it offers small cruises along the coast transporting tourists to the near islands. A favorable geographical position offers the opportunity for creating ferry connections also with neighboring countries.

In **Albania**, passengers' destinations include primarily Italy and Greece. More specifically, the major origin and destination are the Adriatic ports of Bari, Brindisi, Ancona and Trieste. Most of the routes are realized by Italian companies. Passengers' transportation traffic with ships, increasing year by year, has seen considerable growth.

CONCLUSIONS

Local routes in the Adriatic and Ionian seas are strategic under different points of view and for many types of transport (passengers, goods...). Therefore the need to optimise connections in the region is specific for the area, especially taking into account the accentuated insularity of the area (Croatia and Greece, mainly) with the purpose of guaranteeing basic movement facilities to inhabitants, goods and tourism and a low-carbon maritime transportation network.

➤ Focus area: Environmental and economic sustainability

Due to its geographical position, **Italy** plays a pivotal role within the network "Motorways of the Sea", especially in relation with Balkan and Northern African countries. The development of Adriatic routes, such as routes towards Spain, represents an opportunity to decrease road traffic and

to reduce emissions, engendering thus a positive impact on environment. The process of EU expansion in Balkan countries should increase travel opportunities between Italy and Croatia, Montenegro and Albania. Spain, Malta, Greece and North Africa are also ordinary destinations for passenger ferry services: the development of these routes in place of other means of transport (i.e. road and air transports mainly) may cause a sensitive decrease in emissions.

Greek deep sea shipping (DSS) is fully applying all the international and European environmental regulations and the majority of ship-owners move beyond compliance standards. By way of investing in ships with advance technologies for enhancing their energy efficiency, they use cleaner fuels and participate to voluntary environmental programs such as speed reduction programs. Currently, there is a strong trend towards the enhancement of the social corporate responsibility profile of the sector with specific focus on the protection of the marine environment and the sustainable operation of the sector, beyond legislative obligations.

SSS is characterized by high degree of energy-efficiency compared to other means of transport.

Passenger ferry services have a great importance in **Croatia** for connections with Italy and internal connections between Croatian seaports. This activity is one of the conditions for the sustainable development of tourism and the local development of Croatian islands.

In **Slovenia**, the port of Koper is very active in ensuring sustainability and considerable efforts have been made to reduce the environmental impact of SSS and port activities in general. Nevertheless, the intrinsic characteristics of the activity pose serious threats to the marine environment, especially if one considers the limited length of Slovenian coasts. The effort made by Koper are to be praised, but the magnitude of the sector and the environmental impact of SSS and related port activities in such a limited space risk to have a negative impact on other maritime activities, as well as on the marine environment itself.

In **Montenegro**, at the moment, no specific threats for environmentally sustainable growth of this activity have been identified. Concerning the economic sustainability, with the intention to undertake concrete steps in order to implement investment program of maritime economy revitalization, the Government prepared a study on the economic viability of investment in ship procurement “Crnogorska plovidba”. Results of economic-financial analysis show that investment program is feasible and financially sustainable.

The **Albanian** law for the “Protection for maritime environment from pollution and damage” aims to protect the marine environment of the country from pollution and damages, prevent their diversion caused by human activities in marine and coastal area, which disrupt water quality, damage the resources of the sea coast, risk fauna and flora, threaten human health and hinder the normal development of activities in this environment.

Despite the application of national and international regulations, the environmental sustainability is still an important priority for the entire basin and especially for the northern Adriatic, because both passenger ferry services and short sea shipping activities are very developed and their environmental impact needs to be reduced.

CONCLUSIONS

This focus area has a transversal role in the maritime transport area, being it a main component of all specific challenges identified in the EUSAIR discussion paper. The optimisation of connections across regions should adopt environmental-friendly measures, most of all in maritime transportation and especially in short-sea shipping, passenger ferry services and cruise. The environmental sustainability is an important priority for the entire basin but it has a particular significance for the northern Adriatic, where vessels traffic (cruise and short-sea shipping) is massive.

2.2.2 Maritime safety and security

- **Focus area: Improving the culture of compliance in flag and port state control, liability and insurance of shipping, ship sanitation and control, accident investigation and port security**

Although maritime safety is traditionally based on the role of flag states, the EU considered it appropriate to complete the *flag state approach* by a *port state approach*. This means that inspections might also be made by the authority of the MS of the port where the boat is located. This is seen by many as the most effective tool to reduce substandard shipping in their waters.

With the "Erika" and "Prestige" accidents off the European coasts, shortcomings of the European standards were highlighted. It was then decided to strengthen the existing legislations and complete them with new measures.

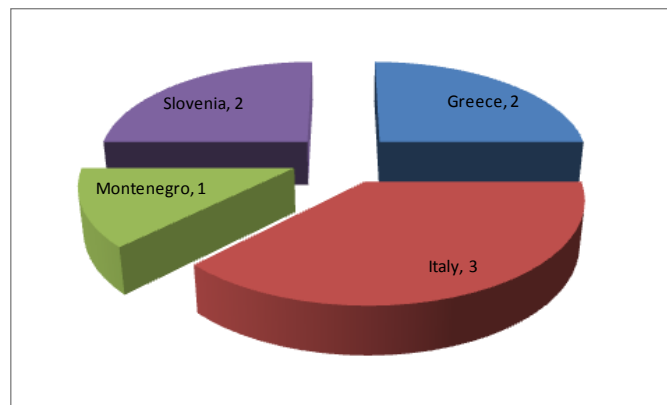
The EU has built its legislation on IMO Resolutions and the Paris Memorandum of Understanding on Port State Control, that since 1982 provides the framework to carry out their inspection duties. In 2009, as a part of the 3rd Maritime Safety Package, the European Parliament and Council adopted Directive 2009/16/EC which ensures that, as of 1 January 2011, the "New Inspection Regime" (NIR) of the Paris MoU applies in all the EU coastal states plus Canada, Croatia, Iceland, Norway and the Russian Federation. The NIR is based on an advanced IT information system ("THETIS ") managed by the European Maritime Safety Agency (EMSA). It will enable the participating countries to have all merchant ships calling into European ports (more than 70,000 ships movements per year) under continuous control and track the performance of flag states, recognised organisations and individual shipping companies. The NIR will benefit quality shipping, concentrating inspection efforts on risky ships and low performance companies. Good operators will benefit from less frequent inspections.⁷

In spite of those efforts, the need for some third countries in the Adriatic-Ionian Sea region to improve their performance is still perceived. According to our researches on cooperation initiatives in the EU space, only few projects are connected to security in maritime space. Among them only 3 projects show activities linked to this topic and just four countries are implicated, three Member States (Italy, Greece and Slovenia) and one candidate country (Montenegro), under two EU programmes. The SAFEPORT project, under the cross border programme Italia-Slovenia, led by the Port Authority of Venezia (Italy); FUTUREMED, under the Med Programme, led by the Lazio Region Transport Direction (Italy); the project MED.I.T.A., led by Interporto Toscano Amerigo Vespucci S.p.A. (Italy). The three projects are focused on environmental and transport sustainability, port safety, green port and traceability of goods through technology and procedural innovations with the aim of speed up the access control operations and data acquisition process besides security procedures.

As it is also illustrated in Figure 6, it has to be noticed that Italy is involved in this type of projects, which is confirmed by the fact that Italy plays the role of lead partners for all the three projects, where it is represented by several partners in every project, too. This outcome let us to conclude that the Italian long experience in maritime security field -due to its huge coastline length- is likely broadly recognized across the Adriatic-Ionian region. Greece shows also a wide presence in these cooperation projects even if not leading anyone of them, while the engagement of candidate and potential candidate countries, as well as Croatia as a new MS, it is still lacking.

⁷http://ec.europa.eu/transport/modes/maritime/safety/actions_en.htm

Figure 6 - Number of projects per Country involved



Source: our elaboration

CONCLUSIONS

On account of the aforementioned outcomes, this topic has a little role within the 2nd Pillar. Generally speaking, even if this priority is relevant for the EU this is scarcely reflected in cooperation across the Adriatic-Ionian Sea region, that appears to be affected in 3 out of 83 projects on maritime issues. On the other hand, it appeared to be relevant at EU and international levels, with the purpose of establishing the common compliance in the area (including candidate/potential candidate countries) with existing rules. There is not a specific area most affected by this intervention line, given that the entire region is interested in pursuing these rules.

➤ **Focus area: Enhancing cooperation between national or regional maritime authorities on maritime traffic information exchange through SafeSeaNet**

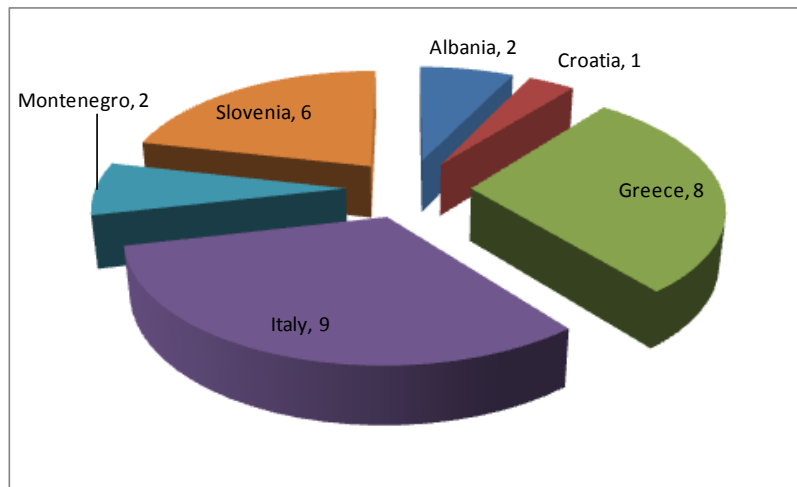
Since 1993, SafeSeaNet was established as a centralised European platform for maritime data exchange, linking together maritime authorities from across Europe. It enables EU Member States, Norway, and Iceland, to provide and receive information on ships, ship movements, and hazardous cargoes.

Under the responsibility of each Member State, maritime surveillance is performed by different administrations which, operating in a coordinated and interagency manner, can better succeed – through data and information exchange- in meeting their own institutional aims.

Therefore, being stated that each country has its own VTMIS system, EU has invested good amount of resources through CBC programmes for promoting the cooperation on maritime traffic information exchange in the Adriatic-Ionian region. Nine projects have been identified in the last programming period 2007-2013. Most of them addresses data system exchange exclusively, while few include one or more activities in the field of maritime security in the framework of a wider project.

Italy has VTS since 1992 and the current Italian system VTMIS is an example of an integrated network able to ensure coverage capillary and in real time of nearly 8.000 km of coastline. The Italian VTMIS is made up by a National Centre installed in Rome at the operational centres of the General Command of the Harbour Coast Guard and by Area Centres arranged at the Maritime Directions towards which information collected from local sites, from sensor sites and three mobile units (also called workstations furniture Carrate - PMC) are sent.

Figure 7 - Number of projects per Country involved



Source: our elaboration

Characteristics identified above for the previous topic also apply in this case. Italy still maintains its leading position both for the presence of Italian partners in the consortium and for number of projects in which it has the function of lead partner (6 projects out of 9).

Greece plays an important role in such a cooperation field, too. Considering Greek geography, with extensive coastline of 16.000 km, 3.000 islands and dense local and international shipping traffic, it can be characterized as a particularly "sensitive" region. Hence, in 2000 the Greek government started a challenging project for the exchange and processing of sea traffic data. Four VTS centres, three Regional Traffic Services (RTS) centres and thirteen Remote Sensor Sites (RSS) were installed. With the aim to enhance safety of navigation in the sea area and port waters, the VTS centres, are installed in areas under Coast Guard responsibility and are charged with enforcing sea traffic management regulations, in a manner similar to the one applied by air traffic management centres.⁸

Grounded onto their experience, it is noticeable in the following figure that Greece plays a role almost equal to the role of Italy, both for the presence in cooperation projects and for the position of leadership in three projects out of nine.

Slovenia, as the oldest EU MS of the eastern coast of the Adriatic Sea, already collaborate with Italy and Croatia on the project VTMIS since the previous programming period 2000-2006, so it shows a level of sufficient involvement in cooperation with the EU- it is the third country for presences. On the contrary, Albania, Croatia and Montenegro are scarcely engaged in these projects.

CONCLUSIONS

This focus area resulted to be peculiar in the Adriatic-Ionian sea-basin, given that 9 out of 83 projects on maritime issues encompass this topic. Again, it concern the area as a whole, despite limited role is envisaged for Serbia and Bosnia-Herzegovina due to their small coastlines.

⁸http://www.intracom.gr/intracom_it_services/en/company/profile/success_stories_government/vt_mis.htm

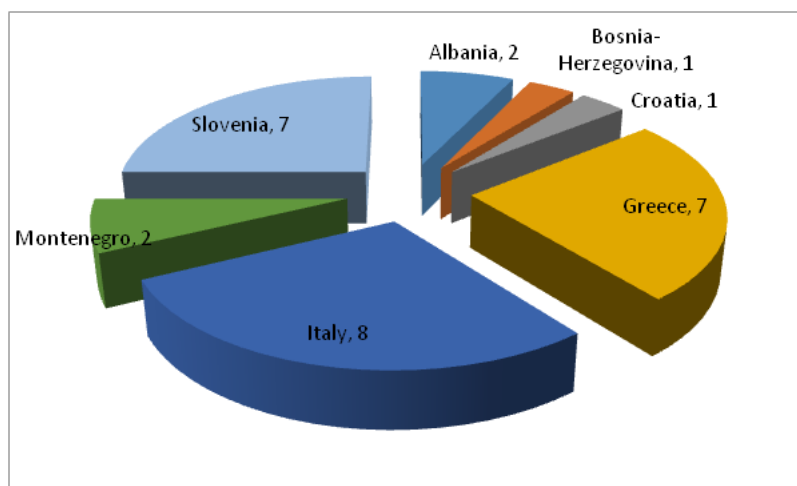
➤ **Focus area: Developing of decision support systems, accident response capacities, and contingency plans**

European seas and coasts combine dense traffic routes with areas of serious danger to shipping. With the "Erika" and "Prestige" accidents off the European coasts, shortcomings of the European standards were highlighted. It was then decided to strengthen the existing legislation and complete it with new measures. For this reason the EU has taken action to establish within its area a VTMS with a view to enhance safety and efficiency of maritime traffic, improve the response of authorities to incidents, accidents or potentially dangerous situations at sea, including search and rescue operations and contribute to better prevention and detection of pollution by ships. With the Erika II package, the Directive 2002/59/EC sets up a notification system for all ships bound for or leaving EU ports. The Directive besides establishing an EU-wide VTMS for receipt, storage and exchange of data on ships' movements, dangerous and polluting cargoes and on accidents and incidents, also requires each maritime MS to draw up contingency plans for accommodating ships in distress in places of refuge and provide tools to improve the response of authorities to incidents, accidents or potentially dangerous situations at sea.⁹

Costa Concordia accident, nearly 2 years ago, brought into question again the ability of EU authorities to prevent such events and it has certainly reinforced the urgent need to improve the aforementioned tools and to make available the new ones quickly.

Anyhow, the EU MS has started working together on these issues. Overcomes of our research on cooperation projects concerning this topic are similar to the previous two examined.

Figure 8 - Number of projects per Country involved



Source: our elaboration

Cooperation projects built around the accident response capacities and contingency plan, shows a common feature. They mostly work on capitalisation of results of other previous projects focusing on the same subject. The best effort has been done by the Med Programme, through four projects under the programme's specific Objective 2.3: "Maritime risks prevention and strengthening of maritime safety", where Italy, Greece and Slovenia were involved.

⁹http://ec.europa.eu/transport/modes/maritime/safety/actions_en.htm

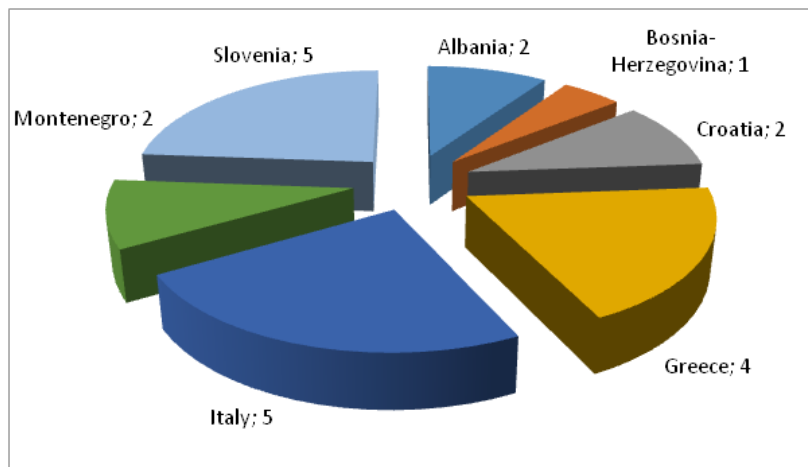
Due to its challenging nature, it is worth to mention also the project NEREIDS, which is a scientific cooperation project, funded by the 7th Framework Programme. The idea behind NEREIDS yields on developing a system of systems that permits a complete and meaningful maritime picture and permits solving the most challenging technological drawbacks that current services have to face on. This objective is completely aligned with what promoted by the EUROSUR program: "Awareness in the maritime domain requires monitoring the compliance of all activities, detecting with the help of surveillance and ship reporting system anomalies that may signal illegal (security threats) acts and generating intelligence that enables law enforcement authorities to stop unlawful entry into the EU area".

CONCLUSIONS

Italy, Greece and Slovenia play the most important role, while, candidate and potential candidate countries are still less engaged in cooperation across the sea basin with respect to what concern maritime security issues. This focus area is highly specific in the area: 9 cooperation projects (out of 83) encompass the development of accident response capacities and contingency plan.

- **Focus area: Ensuring adequate sources of information and geographical data for crews and navigators**

Figure 9 - Number of projects per Country involved



Source: our elaboration

For what concerns tools for this focus are, 6 cooperation projects out of 83 have been implemented. Funding programmes are: transnational Med Programme (two projects), IPA Adriatic Cross-border Cooperation Programme (two projects), TEN-T (one) and the cross-border European Territorial Cooperation Programme Greece-Italy 2007-2013 (one).

CONCLUSIONS

The geographical distribution of projects covers the whole Adriatic-Ionian Sea basin, even though - as it happen in the other topics of the 3rd Pillar-Italy, Greece and Slovenia shows a relevant engagement if compared to extra-EU members.

In addition to the above it is worth mentioning the European Marine Observation and Data Network. EMODNET portal is a source of high quality geographical dataset which involve partners

from all EU countries in the collection, among other topics, also of data about bathymetry, sea-bed mapping and hydrogeological issues. Adriatic and Ionian seas are fully affected by this project.

➤ **Focus area: Enhancing cooperation between national or regional maritime authorities with the EU to face major oil spills through EMSA**

The activities of the European Maritime Safety Agency (EMSA) in the field of marine pollution preparedness and response are focused on providing operational assistance and information to MS. Among other services the Agency is involved in:

- The Network of Stand-by Oil Spill Response Vessels distributed along the European coastline;
- CleanSeaNet, the satellite-based oil spill and vessel detection and monitoring service covering European waters.

The Network of Stand-by Oil Spill Response Vessels has been built up and maintained through annual procurement procedures since 2005. The Network of pollution response vessels (at the end of 2012, EMSA was maintaining contracts for 18 fully equipped Stand-by Oil Spill Response Vessels, one of which for the central Mediterranean) is channeled to requesting states through the Monitoring and Information Centre (MIC) of the EC in Brussels. Therefore each Member States have the prime responsibility regarding response to pollution incidents in their waters (Member states have also their own pollution response vessels).

CleanSeaNet, the European satellite based oil spill monitoring and vessel detection service, was set up to support MS' actions to deliberate on accidental pollution in the marine environment in the framework of Directive 2005/35/EC, as amended, "on ship-source pollution and on the introduction of penalties, including criminal penalties, for pollution offences" and in particular Article 1013. The service, available for all EU countries, is based on the near real time analysis of Synthetic Aperture Radar (SAR) satellite images for oil pollution and vessel detection.

The Consultative Technical Group for Marine Pollution Preparedness and Response (CTG MPPR) provides an EU platform for MS that contribute to the enhancement of preparedness and response to accidental and deliberate pollution from ships. The status of on-going priority actions and planned activities was reviewed by the Group held on 24 October 2012, including updates on the revision of the "EU States Claims Management Guidelines" and on the progress of the Technical Correspondence Group on Dispersants, established in 2012. This Group identified and compiled a list of 50 Deepwater Horizon related studies relevant to dispersant usage and reviewed the studies on the basis of eight specific areas of interest. The Agency participated, as part of the EC delegation, in the work and meetings of the IMO's MEPC OPRC/HNS Technical Group meetings. EMSA also took part in the Correspondence Group for developing Guidelines for International Offers of Assistance in case of catastrophic oil spills. With respect to the Regional Agreements, the Agency also provides technical support to the European Commission, as part of the European Union delegation, during relevant meetings.

EMSA hosted the 8th Inter-Secretariat meeting in 2012, attended by representatives of the Regional Agreements. Areas of common interest identified included the use of dispersants, risk assessment methodologies, oiled wildlife response, places of refuge, and research and development (R&D). An update on R&D projects undertaken within the various Regional Agreements in the field of marine pollution preparedness and response was compiled.

Figure 10 - Map of the identified facilities and EMSA's vessels in the Central Mediterranean Sea (2012)



Source: EMSA

CONCLUSIONS

EMSA support to Member States, to EU Commission and to regional cooperation, is therefore essential. As regards the Adriatic-Ionian sea-basin, the agency is involved in offering not only the means to deal with oil spills at sea, but also playing an important role to face emergency with technical advices and support, coordination activities, research, and management. The EMSA agency is also involved in technical support for projects and in training activities in candidate and potential candidate countries. The aim of the project was to train officers on ship inspections and to apply PSC procedures to assist in developing the efficient structures, human resources and procedural skills needed to implement the PSC directive to the same standards as EU Member States. Therefore, cooperation in this field of activities exists but it needs to be strengthened, especially involving non-EU countries.

2.3 Gap analysis

Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> • Bottlenecks in key transport infrastructures • Low interoperability of transport modes, need to integrate sea-borne, inland water-borne and land transport, including TEN-T • Shipping industry's potential to serve as a basis for further economic development is not fully realized 	Optimizing interfaces, procedures and infrastructures to facilitate trade with southern, central and eastern Europe	The key barriers identified are fully addressed by the EUSAIR, hence we didn't find gaps related to objectives concerning shipping industry improvement and transport infrastructures development. In particular, the problems identified has been included in the following objectives: <ul style="list-style-type: none"> • Optimizing interfaces, procedures and infrastructures to facilitate trade with southern, central and eastern Europe, also by ensuring the rapid implementation of a maritime transport space without barriers; 	The EUSAIR promotes a rigorous implementation of the EU and international rules in order to foster the development of a quality shipping. No gaps identified	The EUSAIR envisages interventions towards the setup of maritime clusters and networks able to spur innovation in maritime transport and improve interfaces and infrastructures, including smart transport systems and freight tracking. No gaps identified	Stimulating the setup of maritime clusters, platform and research networks as well as the formulation of a research strategy to spur innovation in maritime transport is a tool identifies by the EUSAIR in order to improve interfaces and infrastructures. No gaps identified	From a socio-economic point of view, EUSAIR do not shows gaps. As a matter of fact, the development of scientific cooperation, research networks and maritime clusters can generate benefits to occupation and national economies in general. No gaps identified
		<ul style="list-style-type: none"> • Improving hinterland connections of seaports to TEN-T and enforcing the development of inter-modality in the Adriatic-Ionian region through the establishment of freight villages and land corridors; • Reducing isolation of islands and remote areas by improving their access to transport and energy services; 	No actions needed	No actions needed	No actions needed	No actions needed

ANNEXES to REPORT 2 - Analysis to support the elaboration of the Adriatic and Ionian maritime Action Plan

Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> Sustainable and safe land and sea-borne connections are not universally in place in the region 	Optimising the connections across the region (taking into account islands connectivity)	<p>By the <i>Analysis of Blue Growth needs and potential per country</i> (Task 2), passenger ferry services results as a most promising activity for number of countries (notably, Albania, Croatia, Italy, Montenegro). Nevertheless, no specific references to passenger ferry services is included in the EUSAIR.</p> <p>In the meanwhile, we highlighted that a specific reference to the development of this MEA will be done while facing the following objectives of the EUSAIR:</p> <ul style="list-style-type: none"> Improving hinterland connections of seaports to TEN-T and enforcing the development of inter-modality in the Adriatic-Ionian region through the establishment of freight villages and land corridors; Reducing isolation of islands and remote areas by improving their access to transport and energy services. 	<p>The EUSAIR shows a strong engagement in the promotion of the culture of compliance with existing EU and international rules, affecting all the objectives defined in the 2nd pillar.</p>	<p>From a technological perspective, the EUSAIR envisages interventions towards the setup of platforms and research strategies able to spur innovation in the nautical sector and smart transport systems. Moreover it envisage the exploitation of ICT tools such as e-services and e-government solutions, including open data production and use.</p>	<p>The EUSAIR strategy envisages the setup of specific financial instruments to support research in the pillar's area alongside with the promotion of the academic and professional mobility.</p>	<p>EUSAIR strategy, through the proposed improvement of the access to transport, envisages to reduce the isolation of islands and remote areas. As a consequence, it engenders positive effects on any other economic sector which could easily find its development in the whole region. Furthermore the strategy by strengthening the level of qualification of the workforce, will engender positive effects on the employment, too.</p>
		<p>No gaps identified</p> <p>No actions needed</p>	<p>No gaps identified</p> <p>No actions needed</p>	<p>No gaps identified</p> <p>No actions needed</p>	<p>No gaps identified</p> <p>No actions needed</p>	
<ul style="list-style-type: none"> Bottlenecks in key energy infrastructure Adapt intermodal transport towards resource efficient and environmentally friendly management models 	Environmental and economic sustainability	<p>Environmental and economic sustainability is considered as a cross-cutting issue in the four pillars of the EUSAIR. Within the 2nd pillar, it has a greater relevance due to the high impact that an improper management of maritime traffic can have on the environment. In that respect, the EUSAIR defines the following objectives:</p> <ul style="list-style-type: none"> Increasing efficiency and reducing the environmental impact of transport systems, notably by providing alternative, sustainable and 	<p>The EUSAIR shows a strong engagement in the promotion of the culture of compliance with existing EU and international rules, affecting all the objectives defined in the 2nd pillar. In particular it envisages measures towards the minimization of pollution from ship traffic, oil spills, emissions to air and litter.</p>	<p>The EUSAIR supports the energy efficiency and the reduction of the environmental impact of transport systems. It thus promotes sustainable and environmentally friendly alternatives and combined transport solutions, in order to reach an efficient transport system.</p>	<p>Within the EUSAIR a large relevance is granted to academic and professional mobility and the improvement of qualification of the workforce. These measures combined with specific financial measures supporting research and innovation in the pillar's area, specifically addresses the key barrier.</p>	<p>The environmental and economic sustainability of the maritime transport generates indirect benefits to populations living in the Adriatic and Ionian sea basin.</p>
<p>No gaps identified</p>	<p>No gaps identified</p>	<p>No gaps identified</p>	<p>No gaps identified</p>	<p>No gaps identified</p>		

Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
		environmentally friendly, combined transport solutions. <ul style="list-style-type: none"> • Minimization of pollution from ship traffic, in particular oil, emissions to air and litter; • Addressing energy dimension, as far as a macro-regional approach may facilitate a positive impact on accessibility, energy efficiency and environment; • Preserving security of environment during transport of dangerous goods and activities related to the energy sector; • Developing environment-friendly fuels in marine transport as well as implementation of renewable energy sources; • Regulatory reform and rationalization at each energy interconnection point in the regional system; • Increasing the resilience of infrastructure to natural and man-made disasters (including the accompanying coastal development and infrastructure). 	No actions needed	No actions needed	No actions needed	No actions needed
<ul style="list-style-type: none"> • There is not always a rigorous implementation of the EU and international rules (due to a culture of weak compliance with rules) 	Improving the culture of compliance in flag and port state control, liability and insurance of shipping, ship sanitation and control, accident investigation and port security	Although maritime safety is traditionally based on the role of flag states, the EU considered it appropriate to complete the flag state approach by the port state approach. Improving the culture of compliance is a specific objective of the EUSAIR	With the "Erika" and "Prestige" accidents off the European coasts, shortcomings of the European standards were highlighted. It was then decided to strengthened the existing legislations and complete them with new measures. The EU has built its legislation on IMO Resolutions and the work by the Paris Memorandum of Understanding on Port State Control. In 2009 was adopted Directive 2009/16/EC which ensures that, as of 1 January	Exploring the setup of specific innovative financial instruments supporting innovation in this pillar's area is a key instrument for the EUSAIR's objectives achievement. Culture of compliance could be positively affected by the transparency of common and innovative financial instruments	The need to improve the culture of compliance in maritime safety and security does not present gap in education terms because the EUSAIR objective aimed at increasing the level of qualification of the workforce could have positive effects also on culture of compliance on workplaces	The EUSAIR objective aimed at supporting capacity building in safety and security matters in national and regional administrations, in particular in candidate/potential candidate countries does not present gap in socio-economic terms. In fact, as an indirect effect, it could decrease the culture of non-compliance with rules of

Key Barriers/Problems	Focus Area	GAP ANALYSIS						
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic		
			<p>2011, the "New Inspection Regime" (NIR) of the Paris MoU applies in all the EU coastal states.</p> <p>Supporting capacity building in safety and security matters in national and regional administrations, in particular in candidate/potential candidate countries is a key objective of the EUSAIR</p> <p>No gaps identified</p>			<p>the entire coastal population</p> <p>No gaps identified</p>		
			No actions needed	No actions needed	No actions needed	No actions needed		
<ul style="list-style-type: none"> Problems related to environment, illegal traffic, marine security, etc., especially for those Eastern European Countries 	<ul style="list-style-type: none"> Enhancing cooperation between national or regional maritime authorities on maritime traffic information exchange through SafeSeaNet Ensuring adequate sources of information and geographical data for crews and navigators 	<p>By analyzing country fiches, this problem emerged in all countries of the Adriatic-Ionian sea-basin. The EUSAIR dedicates specific objectives for improving maritime safety and security:</p> <ul style="list-style-type: none"> Enhancing cooperation between national or regional maritime authorities with the EU, establishing mechanisms to enable maritime traffic information exchange between national VTMIS systems through SafeSeaNet, notably for candidate and potential candidate countries; Developing modern security technologies in the ports of the region 	<p>The EUSAIR intends to put in place, also in legislative terms, the right conditions for a more secure and safe marine and maritime space. For this purpose, two specific tools have been included in the discussion paper: (I) the development of a decision support systems and (II) the support capacity building in safety and security matters in national and regional administrations</p> <p>No gaps identified</p>	<p>In terms of Technology and Innovation, maritime security is encouraged in the EUSAIR by exploring the setup of specific innovative financial instruments supporting innovation in maritime safety and security activities and by promoting the adoption of e-services and e-government solutions, including open data production and use</p> <p>No gaps identified</p>	<p>In terms of Research and Education, maritime security is an objective to reach in the EUSAIR by stimulating the formulation of a research strategy to spur innovation in maritime surveillance, including energy saving and efficiency in the nautical sector, smart transport systems, freight tracking, and by increasing the academic and professional mobility and the level of qualification of the workforce.</p> <p>No gaps identified</p>	<p>Supporting capacity building in safety and security matters in national and regional administrations, in particular in candidate/potential candidate countries could generate positive socio-economic impacts</p> <p>No gaps identified</p>		
					No actions needed	No actions needed	No actions needed	No actions needed
						<p>Gaps identified:</p> <p>EUSAIR encourage the development of accident response capacities (oil spills are included) and contingency</p>	<p>EUSAIR aims to exploring the setup of specific innovative financial instruments supporting innovation in marine and coastal</p>	<p>Gaps identified:</p> <p>A specific objective of the strategy is the minimization of pollution from ship</p>

Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
	<p>through EMSA</p> <ul style="list-style-type: none"> Developing of decision support systems, accident response capacities, and contingency plans 	<p>Adriatic ports. The issue has been tackled in the EUSAIR, since it has been included in the following objective (from Pillar 2):</p> <ul style="list-style-type: none"> Continuing improving sub-regional cooperation and monitoring the existing mechanisms, as regards prevention, preparedness and coordinated response to major oil spills. 	<p>plans. However, there are no specific references to legislative measures for enhancing cooperation to face oil spills.</p> <p>Proposed actions:</p> <p>Strengthen Directive 2005/35/EC “on ship-source pollution and on the introduction of penalties, including criminal penalties, for pollution offences”. Support capacity building in potential candidate/candidate countries in order to align them to Directive 2005/35/EC.</p> <p>Set up a working group at macro-regional level to define a common decision system to enable all countries of the area to work together to prevent/tackle major environmental disasters, and to streamline cooperation among countries.</p>	<p>environment monitoring system (including the monitoring of oil spills)</p> <p>No gaps identified</p> <p>No actions needed</p>	<p>traffic, in particular oil, emissions to air and litter. However, no specific research initiatives are developed in the EUSAIR to address the oil spills problems.</p> <p>Proposed actions:</p> <p>Enhance CleanSeaNet through research programmes at macro-regional level. CleanSeaNet is the satellite-based oil spill and vessel detection and monitoring service covering European waters, working on real time analysis of Synthetic Aperture Radar (SAR).</p>	<p>response capacity”, the poor involvement of civil society resulted to be missing in the EUSAIR.</p> <p>Proposed actions:</p> <p>Improve governance at macro-regional level by sharing knowledge with citizens and increasing their involvement in consultation processes. Set up citizens' advisory councils to involve civil society in prevention/response to environmental disasters and increase the involvement of population in the review and oversight of resource industry operations that can potentially affect their lives.</p>

3 Thematic Report – Preserving, protecting and improving the quality of the environment (3rd PILLAR)

3.1 Data mapping

Anthropogenic pressure, eutrophication caused from river runoff, marine litter and waste released from households, touristic facilities and waste dumps, intensive maritime transport are the main issues to be faced under the third pillar. In light of this, possible focus areas to develop are:

- Ensuring good environmental and ecological status of the marine and coastal environment;
- Strengthening the Natura 2000 network;
- Reducing marine litter, better waste management in coastal areas;
- Enhancing cooperation between national or regional maritime authorities with the EU to face major oil spills through EMSA.

Below is a description of datasets useful to give an overview of the status of marine environment in Adriatic and Ionian seas from all focus areas' points of view.

The European Environmental Agency (EEA) publishes the Common Database on Designated Areas (CDDA) and the European database on Natura 2000 sites. Both datasets are geographical and can be viewed and analyzed through any GIS software to produce spatial information about coastal and marine protected areas according to the IUCN classification for CDDA and according to Natura 2000 classification network. It is possible thus to have information on the regional distribution of protected areas and their related classification¹⁰. Moreover, the EEA provides wide set of information on the status and quality of Europe's rivers, lakes, groundwater bodies and transitional, coastal and marine waters, and on the quantity of Europe's water resources.

The EEA also presents the latest information as reported by Member States (EU27) for the 2012 bathing season in compliance with the EU Bathing Waters Directive. Using the WISE Bathing Water Quality data viewer it is possible quickly verify the quality of coastal and freshwater bathing waters by country, region, province and explore how bathing waters have changed over the last years.

The EUROSTAT database on the environmental protection expenditure (EPE) in Europe includes all activities directly aimed at the prevention, reduction and elimination of pollution or any other degradation of the environment. It provides detailed data (NACE Rev. 1.1 and NACE Rev. 2) and indicators. The scope of environmental protection is defined according to the Classification of Environmental Protection Activities (CEPA 2000), which distinguishes nine environmental domains¹¹. Available data cover:

- four economic sectors (public sector, business sector, specialized producers and households),
- several economic variables (total expenditure, total investments, pollution treatment investments, pollution prevention investments, total current expenditure, internal current expenditure, fees and purchases, receipts from by-products, subsidies/transfers and revenues)
- The nine environmental domains mentioned above.

¹⁰ Classification is based on the management objectives of the related protected area. There are 6 categories of protected areas. For more information please see the IUCN Guidelines (Link)

¹¹ These domains are the following : protection of ambient air and climate; wastewater management; waste management; protection and remediation of soil, groundwater and surface water; noise and vibration abatement; protection of biodiversity and landscape; protection against radiation; research and development and other environmental protection activities

The regional environment and water EUROSTAT databases on waste statistics contain data at regional level (NUTS 2) on generation and treatment of municipal waste, population connected to wastewater collection and treatment systems, wastewater generation and discharge. Water statistics by River Basin Districts (RBD) are available too and refer to population connected to wastewater treatment by RBD and generation (by source and by sector) and discharge (by type of collecting system) of wastewater.

OECD¹² too publishes a statistical database where it is possible to find general government accounts and government expenditure by function, among which is environment protection.

The **United Nations Economic Commission for Europe (UNECE) publishes the Environmental Performance Reviews for the Eastern Europe countries**, an assessment of the progress made by countries in reconciling their environmental and economic targets, and meeting their international environmental commitments. Publications contain data and information also about economic instruments and expenditure for environmental protection.

Finally, the last dataset concerning the 3rd Pillar is the **EUROSTAT population density data base by NUTS 3 region**.

Unfortunately, all the above described datasets are often fragmented both spatially and temporally.

12 Organisation for Economic Co-operation and Development

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Table 6 - Sources and data available for the 3rd Pillar

Main topic	Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference/link to dataset	Data gap
Ensuring good marine and coastal environment: developing MSP and ICZM at national and cross-border levels	EU/cross-national /National/ Regional	EEA	Geographical dataset. National Protected Areas according their IUCN classification and year of establishment	All Adriatic-Ionian Countries	3	Yes	Number and surface of national coastal and marine protected areas. It gives information on environment protection at different coastal levels	Link	-
	EU/cross-national /National/ Regional	EEA	Geographical dataset. Waterbase - Transitional, coastal and marine waters	All Adriatic-Ionian Countries	3	Yes	Status and quality of European rivers, lakes, groundwater bodies and transitional, coastal and marine waters	Link	-
	National	Eurostat OECD UNECE	Environmental protection expenditure in Europe by economic sector and environmental domain	All Adriatic-Ionian Countries	0	No	Euro, EUR per capita and % of GDP	Link 1 Link 2 Link 3 Link 4	-
	EU/cross-national /National/ Regional	EMODNET	Geographical dataset: physical habitats; chemistry; biology; physics; human activity (in the next months)	GR HR IT SI	3	Yes	Geographical dataset, line, pint, polygon and raster concerning European seas' characteristics	Link	Dataset for HR and non-EU countries
Preserving biodiversity, ecosystems by implementing the European Natura 2000 ecological networks	EU/cross-national /National/ Regional	EEA	Geographical dataset. Natura 2000 Sites. Natura 2000 is the EU's centerpiece for protecting biodiversity	GR, IT, SI	3	Yes	Number and surface of Natura 2000 coastal and marine sites	Link	Emerald networks geographical dataset for HR and non-EU countries
Reducing marine litter through better waste management in coastal areas and reducing anthropogenic pressure	National/ Regional	Eurostat	Generation and treatment of municipal waste	HR IT SI	2	Yes	Waste generated, Thousands of tonnes	Link	GR
	National/ Regional	Eurostat	Treatment of waste	HR IT SI RS	0	No	Tonnes	Link	Regional data are missing
	National/ Regional	Eurostat	Population connected to wastewater collection and treatment systems	HR IT SI	2	Yes	Percentage	Link	GR
	National/ Regional	Eurostat	Population connected to wastewater treatment by RBD	European RDB	-	Yes	Percentage	Link	-
	National/ Regional	Eurostat	Wastewater generation and discharge by RBD	European RDB	-	Yes	Volume (mio m3/year) BOD (1 000 kg O2/day) N-total (1 000 kg/day)	Link	-
	National	Eurostat	Municipal waste collected	AL BA ME RS	0	No	Kg/person/year	Link	Regional data are missing
	National/ Regional	Eurostat	Population density	All Adriatic-Ionian Countries	3	Yes	People per sq. km of land area	Link	-

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Main topic	Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference/link to dataset	Data gap
	National/ Regional	EEA	Status of bathing water	GR HR IT ME SI	3	Yes	Indicators of microbiological pollution (and other substances) throughout the bathing season (May to September) in popular bathing places	Link Link	-
	EU/cross-national /National/ Regional	EEA	Document. Priority issues in the Mediterranean environment	All Adriatic-Ionian Countries	3	Yes	Report and assessment of pollution in the Mediterranean seas at national level	Link	-
	EU/cross-national	UNEP	Document. Marine Litter: A Global Challenge	-	-	No	The document presents and analyses available information on marine litter in the whole Mediterranean sea	Link	

➤ **Results of the analysis: data limits and gaps**

Our analysis has pointed out the following data gaps:

National data missing for Croatia and non-EU countries:

- Emerald network geographical dataset (the Emerald Network is based on the same principles as Natura 2000 and represents its de facto extension to non-EU countries);
- Environmental protection expenditure;
- Status of bathing water (except Montenegro).

National and regional data missing for Greece and non-EU countries:

- Generation and treatment of municipal waste

From a general point of view, specific and up-to-date statistics on marine litter and oil spills do not exist in any Country of the Adriatic-Ionian sea-basins.

3.2 External prospective evaluation: EQ 1 specificity of Focus Areas to the sea basin

➤ Focus area: Ensuring good marine and coastal environment: developing MSP and ICZM at national and cross-border level

The Convention for the Protection of the Mediterranean Sea Against Pollution (the so called *Barcelona Convention*) was adopted on 16 February 1976 by the Conference of Plenipotentiaries of the Coastal States of the Mediterranean Region for the Protection of the Mediterranean Sea, held in Barcelona. The Convention entered into force on 12 February 1978. The original Convention has been modified by amendments adopted on 10 June 1995 by the Conference of Plenipotentiaries on the Convention for the Protection of the Mediterranean Sea against Pollution and its Protocols, held in Barcelona on 9 and 10 June 1995 (UNEP(OCA)/MED IG.6/7). The amended Convention, recorded as “Convention for the Protection of the Marine Environment and the Coastal Region of the Mediterranean” has entered into force on 9 July 2004.

The Convention's main objectives are:

- to assess and control marine pollution;
- to ensure sustainable management of natural marine and coastal resources;
- to integrate the environment in social and economic development;
- to protect the marine environment and coastal zones through prevention and reduction of pollution, and as far as possible, elimination of pollution, whether land or sea-based;
- to protect the natural and cultural heritage;
- to strengthen solidarity among Mediterranean coastal States;
- to contribute to improvement of the quality of life.

The environmental protection expenditure can be used as a proxy to estimate the overall level of environmental protection for Adriatic and Ionian regions. We used only data about the general government expenditure (according to the Classification of Functions of Government, COFOG) because they are the most available data for our countries of interest.

Concerning environmental expenditure, data for Italy, Croatia and Slovenia come from Eurostat¹³ (2011) while for Greece they come from OECD (2011). For Albania (2011) and Montenegro (2006) we collected data from the UNECE Environmental Performance Reviews. Concerning Montenegro, information on total domestically-financed environmental expenditure is hard to come by. A breakdown of government expenditures according to the Classification of Functions of Government (COFOG) exists only for the 2006 Montenegro central government budget plan. For Bosnia-Herzegovina, because of the fragmented nature of the political structure of both countries, finding statistical data on internal environmental expenditure is virtually impossible. The budgets available on the Internet do not have specific information on environmental expenditure.

Environmental expenditure in the coastal regions has been estimated on the basis of the percentage of protected coastal areas present in them. The results of this calculation were used to estimate the expenditure only for Adriatic-Ionian regions. Further proxies have been used to calculate the expenditure only for Adriatic and Ionian area as for Sicily, Calabria and Basilicata in Italy, for

¹³For further deepening see Table 9 in the Thematic Report 3 of Report 2

Dytiki Ellada, Attiki in Greece and Peloponnesus, on the basis of the relative coastal length. Data about protected areas (Natura 2000 sites and national protected areas) come from EEA.

Table 7- Environmental expenditure in Adriatic Ionian countries

	National total (million euro)	Coastal regions		Adriatic and Ionian regions	
		Total (million euro, estimate)	% over the national expenditure	Total (million euro, estimate)	% over the coastal expenditure
Greece	1.059,0	323,0	30,5	70,9	22,0
Croatia	142,8	49,1	34,4	49	100
Italy	13.860,0	2.591,8	18,7	922,9	35,6
Slovenia	290	0,4	0,1	0,4	100
Albania	3,4	0,5	13,7	0,5	100
Montenegro	3,8	<i>not relevant</i>			
Bosnia	n.a	<i>not relevant</i>			
Adriatic and Ionian Countries	15.358,7	2.964,8	19,3	1.043,8	35,2

Source: our elaboration on EUROSTAT, OECD, UNECE and EEA dataset.

According to our estimates (Table 7):

Environmental expenditure in **Albania** coastal areas is very low (0,5 million of euro, 13,5% of the total national expenditure). The environmental sector is largely dependent on international financing and a very high proportion of public environmental expenditure is coming from external sources;

In **Bosnia-Herzegovina** and **Montenegro** the expenditure for ensuring good environmental and ecological status of the marine and coastal environment is not relevant. According to the very general information available, the Federation of Bosnia and Herzegovina spent 0,9% of its budget on environmental protection in 2009. Data gaps concerning Montenegro's protected areas do not allow us to calculate the environmental expenditure in coastal regions. In both countries the environmental sector is largely dependent on international financing;

In **Croatia**, according to our estimate, the environmental expenditure in coastal areas in 2011 was about 34% of the total national expenditure (142,8 million of euro). The growing prosperity of the country has augmented the ability of the population to pay fees, charges and taxes for an improved environment. It has also increased the use of natural resources and overall consumption (e.g. due to tourism), and therefore the pressures on the coastal environment;

In **Slovenia**, the environmental expenditure for coastal areas (0,4 million euro estimated) is only 0,1% of the total national expenditure, due to the small coastal length.

In **Italy**, despite the high coastal length of Adriatic and Ionian seas, the expenditure for Adriatic-Ionian environment is almost 29,4% of total regional expenditure. Governmental efforts are mainly addressed to other coastal regions (Tyrrhenian first);

In **Greece**, the national expenditure for environmental protection is low, but a good percentage (22%) of this low funds availability is dedicated to the Ionian regions.

CONCLUSIONS

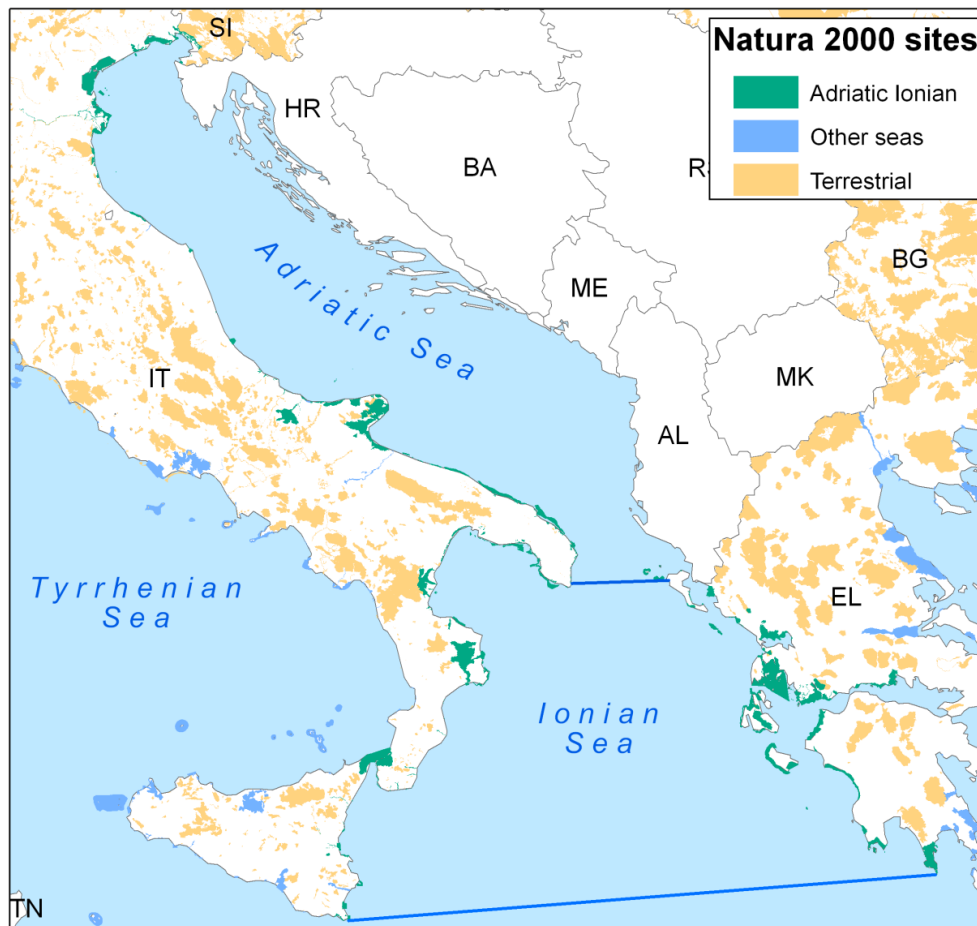
The analysis put into evidence that public effort in protection of marine and coastal areas does not play a priority role in central government expenditures. For this purpose, the role of the EUSAIR is

strategic for enhancing and optimising public commitment marine and coastal environment protection. No specific area can be considered as “more affected”, since it is common to all littoral countries.

➤ **Focus area: Strengthening the Natura 2000 network, the MSFD and the Barcelona Convention and its protocols**

Natura 2000 is the centerpiece of EU nature & biodiversity policy funded on Birds and Habitats Directives. Many sites have been designated according to both Nature Directives, either in their entirety or partially. The figures for the global Natura 2000 sites (SPAs + SCIs) have been obtained by GIS analysis, using the electronic spatial boundaries provided by MSs for each of their sites. The calculation used eliminates possible overlap between Birds Directive sites and Habitats Directive sites. Further calculation have been done with the same GIS methodology to estimate the coastal and marine areas of Natura 2000 sites of Adriatic-Ionian sea-basin level as showed in the map below.

Figure 11 - Map of Natura 2000 sites in Adriatic-Ionian sea-basin (2013)

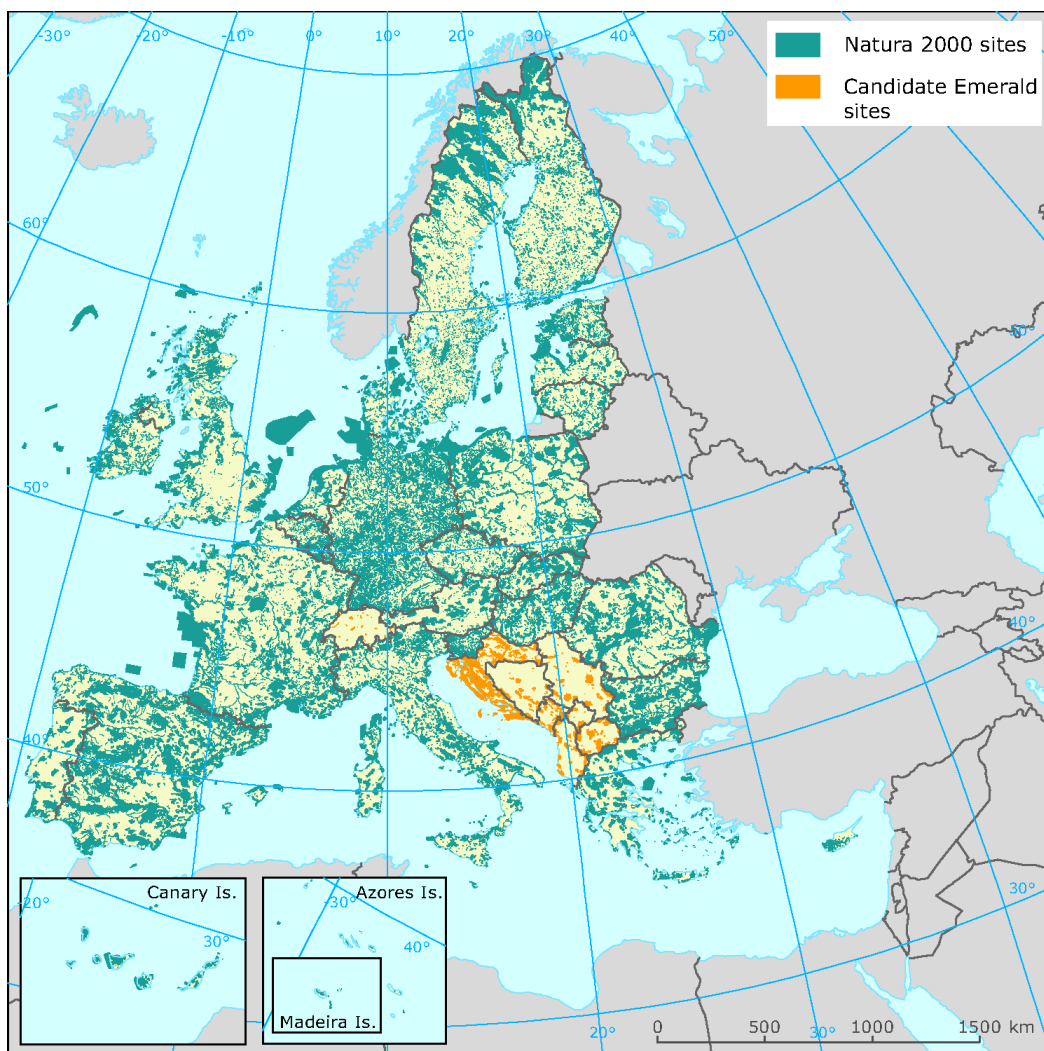


Source: our elaboration on EEA dataset

Natura 2000 sites in the Adriatic-Ionian sea-basin are a small part of the total European network. We estimated that only almost 1,0% of total Natura 2000 network area (950.000 square Km in 2011) is located in the Adriatic and Ionian seas or on their coasts (green sites on the map). The Italian Adriatic central coast and the lower Italian Ionian coast are the less affected by Natura 2000 sites.

The same calculation was not possible for Emerald Network sites in non-EU countries. The Emerald network is an ecological network to conserve wild flora and fauna and their natural habitats of Europe, which was launched in 1998 by the Council of Europe as part of its work under the Convention on the Conservation of European Wildlife and Natural Habitats or Bern Convention that came into force on 1 June 1982. The Bern Convention was signed by the 46 Member States of the Council of Europe, together with the European Union. In order to fulfill the obligations arising from the Convention, particularly in respect of habitat protection, it produced the Habitats Directive in 1992, and subsequently set up the Natura 2000 network. The Emerald Network is based on the same principles as Natura 2000, and represents de facto its extension to non-EU countries. Geographical dataset availability for Emerald sites (that appears quite larger in non-EU countries and in Croatia as showed in figure 2) will provide us with more realistic figures about the status of habitat and biodiversity protection in the Adriatic and Ionian waters and coasts.

Figure 12 - Map of Natura 2000 and Emerald networks sites (2012)



Source: EEA

As regards the Marine Strategic Framework Directive (MSFD), all Adriatic and Ionian countries of the EU have accomplished their reporting obligations. There are not specific indicators for assessing the “specificity” of the MSFD to the Adriatic-Ionian sea-basins. However, under a qualitative point of view, the overarching objective of the MSFD – achieve or maintain Good Environmental Status of the EU’s marine waters by 2020 – perfectly meets the needs of the Adriatic and Ionian sea-basin

to (i) mitigate the impact of anthropic activities on marine and coastal areas and (ii) protect the quality of the environment. Furthermore, the MSFD can be considered specific for this context given the fact that the Directive strongly supports the adoption of a regional approach for implementing it. Especially art. 6 pushes EU MS to seek cooperation with third countries for the implementation of the MSFD in a regional context.

As regards the Barcelona Convention and related protocols, it has to be taken into account that the Mediterranean was the first region to adopt an Action Plan for the protection of the marine environment against pollution. At present, all countries of the Adriatic and Ionian sea-basin have ratified the convention. However, not all Protocols have been signed/ratified by the Adriatic and Ionian countries. The EUSAIR could strengthen the role of the Barcelona Convention within the area, encompassing and aligning to its objectives.

CONCLUSIONS

Actually the analysis put into evidence the fact that in the Adriatic Ionian area Natura 2000 sites are a small part of the total European network (we estimated that around 1,0% of total Natura 2000 network area is located in the marine or coastal areas in the Adriatic-Ionian). For non-EU countries, the Emerald Network is based on the same principles as Natura 2000, and represents its extension de facto to non-EU countries. Emerald Network is widely developed in these countries, especially in Croatia. Enhancing and extending Natura 2000 network through new sites selection and management practice and recognizing Emerald network sites for environmental planning in the Adriatic and Ionian basins are certainly two priority topics of 3rd Pillar.

As for the MSFD and the Barcelona Convention, it resulted to be specific for the Adriatic and Ionian sea-basin, given the current needs of pursuing cooperation for protecting the environment (also involving non-EU countries).

➤ **Focus area: Reducing marine litter, better waste management in coastal areas**

Marine litter is recognized as a growing emergent pressure on the coastal and marine environment. It has trans-boundary impacts on wildlife and habitats as well as on human activities and health.

Following the Rio+20 conference, the EU is part of an international commitment to reduce marine litter significantly by 2025. A main contribution to this commitment is the Marine Strategy Framework Directive (MSFD). The MSFD determines that EU Member States will implement measures to achieve or maintain good environmental status of the marine environment by 2020. Marine litter is identified as one of the main threats to reach this objective.

At present, there is insufficient data from official sources to assess the problem of marine litter properly. Moreover, in view of the overall monitoring requirements for MSFD purposes, Member States will need to develop innovative and cost-efficient monitoring methods and tools.

The issue of marine litter and related information on the types and amounts in the Mediterranean is rather complicated as it is addressed on the one hand by sub-regional and local authorities in most countries, and by competent NGOs on the other hand. A relatively systematic and reliable source for amounts and types of litter were the existing NGO initiatives in the region. NGO's efforts are the most significant in terms of surveying and cleaning beaches and the sea and providing information on the volume and types of litter existing in the Mediterranean.

According to the analysis carried out by UNEP in 2009:

Italy's coastline stretches 7.500 km and the whole territory is located in drainage basins flowing into the Mediterranean Sea. Major environmental problems are caused by urban and industrial wastewater, agricultural run-off and shipping. Urbanization of the coastline is also occurring because of tourist infrastructure development. The river Po is a very important pollution vector in the area transporting urban and industrial wastewater as well as agricultural run-off from its drainage basin to the Adriatic Sea (eutrophication problems). Also petroleum hydrocarbon contamination, caused by intense maritime traffic, occurred in Adriatic and Ionian seas;

Slovenia has a short coastline on the Adriatic sea (46,6 km). Major environmental problems are related to discharge of partly treated urban and industrial wastewater and run-off from agricultural land;

In **Greece**, localized environmental problems are caused by poorly treated urban and industrial wastewater, and run-off from agricultural areas;

In **Croatia**, the main problems are the ongoing physical alterations in many areas which are the results of intense uncontrolled construction along the coastline (recreational buildings, tourist facilities, marinas and small harbors). This has led to dumping and depositing of inert materials. Another threat to the coastline is fish farming, which has caused habitat degradation in the vicinity of the fish cages and conflicts with the tourist business;

The Mediterranean coast of **Bosnia and Herzegovina** on the Adriatic is 25 km long. The pollutants generated in the drainage basins of the major Bosnian rivers of Neretva (from the nearby towns of Konjic, Mostar, Caplinja, Ploce and Metcovic) and Trebisnjica (from the towns of Bileca and Neum) can be carried to the Adriatic Sea, affecting its environment. The major pollution problems are untreated urban wastewater and occasional stockpiles of obsolete chemicals;

In **Montenegro**, the major pollution problems are untreated urban wastewater, eutrophication of coastal waters and uncollected solid wastes;

In **Albania**, the main problems are stockpiles of obsolete chemicals, untreated urban wastewater and solid wastes (discharge of untreated urban wastewater, beach erosion and illegal construction on the coastline).

CONCLUSIONS

In consideration of the above, this topic is fundamental for 3rd Pillar. Although useful data on marine litter exist in the region (types, quantities, etc.), they are inconsistent and geographically restricted. Standardized research data for statistical purposes concerning the problem of litter in the Mediterranean are a necessity. The lack of international legal instruments (except for IMO/MARPOL Annex V which deals only with garbage from ships) or Global Programmes – makes it difficult to tackle the problem. There is non-existent, insufficient or ineffective coordination among the various institutions and authorities – both national and regional – involved in environmental management and more specifically in waste management. It is thus necessary to ensure the involvement and cooperation of administrative stakeholders at different levels and regional/national scales and obtain the vertical integration and cooperation among the various sector-branches of the administration (fisheries, tourism, environment, industry, port activities, etc.).

3.3 Gap analysis

Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> High anthropogenic pressure and competition for space make habitats and species in the region highly susceptible to pollution and eutrophication; Coordination and harmonization of approaches related to Integrated Coastal Zone Management (ICZM) and Marine Spatial Planning (MSP) is sometimes weak 	Ensuring good marine and coastal environment: develop in MSP and ICZM at national and cross-border levels	<p>Anthropogenic factors such as fishing, fish-farming, pollution with toxic substances, increasing salinity and pollution of coastal lakes/estuaries, increasing turbidity (due to plankton blooms, bottom trawling, sand mining and erosion of shores) and over-exploitation, alter the ecosystem and degrade the regional habitats. This problem emerged in many countries of the Adriatic-Ionian sea-basin and it has been included in the following EUSAIR objectives:</p> <ul style="list-style-type: none"> Addressing eutrophication by transnational coordinated actions on both point sources and diffuse sources and by enhancing the recycling of nutrients; Preserving and improving coastal environmental quality by protecting cultural and natural heritage such as coastal and maritime cultural landscapes, including from the impact of climate change <p>The lack of harmonization and coordination cause economic and planning inefficiencies in ICZM and MSP, as showed in SWOT analysis within the country fiches. The issue has been included in the objective:</p> <ul style="list-style-type: none"> Improving harmonization and coordination in MSP and ICZM, also by facilitating related conflict resolution between local and national or supranational approaches 	<p>In April 2013, the EU Strategy on Adaptation to Climate Change has been adopted which encourages, among others, the development of macro-regional and local adaptation strategies based on risk and vulnerability assessment. A more effective and coordinated approach to the challenges of climate change should be facilitated within the EUSAIR</p> <p>No gaps identified</p>	<p>The EUSAIR aims to strengthen interregional cooperation of innovation stakeholders (private, research and public sector) by means of existing and new cluster-type cooperation initiatives in order to develop missing monitoring tools for the identification of sensitive areas</p> <p>No gaps identified</p>	<p>The EUSAIR envisage an increasing cooperation in marine research on issues regarding impact of climate change on coastal areas</p> <p>No gaps identified</p>	<p>The EUSAIR aims to: introduce integrated coastal zones management and maritime spatial planning through exchange of best practices, comparing methodologies and pursuing a participative process of collaboration, increase the academic and professional mobility and the level of qualification of the workforce</p> <p>No gaps identified</p>
		No actions needed	No actions needed	No actions needed	No actions needed	

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Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> Loss of biodiversity due to degradation and loss of habitats leads to loss of valuable ecosystem goods and services they provide, affecting the overall quality of environmental health 	Strengthening the Natura 2000 network, the MSFD and the Barcelona Convention and its protocols	Habitat loss and biodiversity changes have been tackled in the EUSAIR since it has been included in the following objectives: <ul style="list-style-type: none"> Preserving biodiversity, habitats and ecosystems and their services by implementing the European ecological network Natura 2000 and managing it, considering also related work within the Barcelona Convention; Dealing with Invasive Alien Species. Ensuring good environmental and ecological status of the marine and coastal environment by 2020 in line with the relevant EU acquis and the Ecosystem Approach of the Barcelona Convention 	Gaps identified: Legislative measures to ensure the good environmental and ecological status of the marine and coastal environment	The EUSAIR aims to strengthen interregional cooperation of innovation stakeholders (private, research and public sector) by means of existing and new cluster-type cooperation initiatives in order to develop missing monitoring tools for the identification of areas important for the protection of biodiversity No gaps identified	The EUSAIR envisage an increasing cooperation in marine research on issues regarding the impact of climate change on marine ecosystems and in management plans for migratory marine species besides an increasing academic and professional mobility and the level of qualification of the workforce No gaps identified	The EUSAIR aims to introduce integrated coastal zones management and maritime spatial planning through exchange of best practices, comparing methodologies and pursuing a participative process of collaboration No gaps identified
			Proposed actions: Maritime Strategy Framework Directive (MSFD) implementation: adopt a macro-regional perspective that also involves candidate and potential candidate countries within the context of "implementing the MSFD". More specifically: <ul style="list-style-type: none"> agree on a common approach to monitoring for all descriptors and develop a concrete project proposal for each descriptor determine Good Environmental Status (GEnS) indicators and create observatories in the sub-region, based on existing mechanisms such as the Global Ocean Observing System (GOOS) as well as new mechanisms establish a common infrastructure platform in terms of data collection, marine research, lab analysis, etc., through, e.g. common survey programs, research vessels and laboratories. Seek cooperation with candidate and potential candidate countries within the MSFD and the Barcelona Convention contexts in order to ensure the coordination of actions in the same marine region for the same objectives.	No actions needed	No actions needed	No actions needed

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Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> • River runoff • Marine litter from land-based activities 	Reducing marine litter, better waste management in coastal areas	<p>Marine litter often poses significant risks to marine life. The major sources of the litter in the sea-basin are land-based activities as highlighted in EQ1: household waste, releases from touristic facilities and run-off from waste dumps.</p> <p>The issue has been tackled in the EUSAIR, since it has been included in the following objectives:</p> <ul style="list-style-type: none"> • Reducing marine litter through cleaning programmes and better waste management in coastal areas; • Supporting waste and waste water management, in particular in urban areas and along the coast and rivers 	<p>Gaps identified:</p> <p>Supporting waste and waste water management is a specific challenge of the EUSAIR but concerning this topic there is a lack of international legal instruments for ensuring good waste management and waste reduction as highlighted in the study</p>	<p>Gaps identified:</p> <p>Technologic innovations on waste treatment are a key investment sector for the Adriatic and Ionian growth as highlighted from stakeholders. However, in the EUSAIR there is no reference to specific initiatives addressed to develop innovations in the sector of waste treatment.</p>	<p>Gaps identified:</p> <p>Research on waste treatment is a key investment sector for the Adriatic and Ionian growth as highlighted from stakeholders. Nevertheless, no specific research initiatives are developed in the EUSAIR to address the waste pollution problems.</p>	<p>In the EUSAIR the involvement of the civil society is expected through cleaning programmes</p>
			<p>Proposed actions:</p> <p>Prepare a regional policy for the assessment, prevention and reduction of marine litter pollution in the region.</p>	<p>Proposed actions:</p> <p>Investments on waste treatment</p>	<p>Proposed actions:</p> <p>Undertake a life-cycle analysis of marine litter to examine, e.g. its sources and the impact of the particles on the marine environment. Set up collaboration among different sectors to develop new processes for recycling marine litter.</p>	<p>No gaps identified</p>

4 Thematic Report – Increasing regional attractiveness (4th PILLAR)

4.1 Data mapping

According to the Maritime Strategy (as defined in the COM(2013) 713) and to the EUSAIR discussion paper, the following focus areas have been identified for **coastal and maritime tourism**:

- Supporting the sustainable development of coastal and maritime tourism through innovation and common marketing strategies and products;
- Guaranteeing the environmental sustainability of the sector;
- Promoting the sustainable development of cruise tourism;
- Enhancing the value and appreciation of cultural heritage.

With reference to the **Tourism sector** in EU MSs, EUROSTAT publishes a dataset about **occupancy of tourist accommodation** establishments at national level, monthly and annual data on **arrivals**, nights spent and occupancy rates at tourist accommodation establishments. At regional level these datasets concern annual arrivals, nights spent at tourist accommodation establishments at NUTS 2 level. Up to reference period 2011 (i.e. Directive 95/57/EC), the statistics cover enterprises that regularly or occasionally provide overnight accommodation for tourists. This largely (but not exhaustively) overlaps with the activities that fall under NACE Rev.2 groups 55.1, 55.2 and 55.3. From reference period 2012 onwards (i.e. Reg 692/2011), the statistics cover groups 55.1, 55.2 and 55.3 of NACE Rev.2.

Dataset about the capacity of tourist accommodation establishments in EU MSs are provided by EUROSTAT as follows:

- at national level, on the number of establishments, bedrooms and bed places by NACE,
- at regional level on the number of establishments, bedrooms and bed places by NACE at NUTS 2 level, by degree of urbanization and by coastal/non-coastal area.
- Data on number of establishments, bedrooms and bed places are available by Activity at NUTS 3 level until 2011.

Up to 2011 (i.e. Directive 95/57/EC), the statistics cover enterprises that regularly or occasionally provide overnight accommodation for tourists. This largely (but not exhaustively) overlaps with the activities that fall under NACE Rev.2 groups 55.1, 55.2 and 55.3. From reference period 2012 onwards (i.e. Reg 692/2011), the statistics cover groups 55.1, 55.2 and 55.3 of NACE Rev.2.

Details about datasets accommodation are available in the table below.

The dataset about cruise tourism reports the number of cruise passengers making a sea journey on a cruise ship, and the number of passengers making a short visit to a tourist attraction associated with a port while retaining a cabin on board. The data are provided by EUROSTAT at port level, Regional level, Maritime Coastal Area (MCA) level and country level.

Table 8 - Sources and data available for the 4th Pillar

Geographical level	Source of data	Type of data	Geographical coverage	NUTS level	Aggregation possibility at sea-basin level	Additional information on dataset content	Reference / link to dataset	Data gap
National/ Regional	Eurostat	Arrivals in tourist accommodation establishments by type	GR HR IT SI ME RS	2	Yes	Number	Link	Data are not continuous for ME and RS
National/ Regional	Eurostat	Nights spent in tourist accommodation establishments by type	GR HR IT SI ME RS	2	Yes	Number	Link	Data are not continuous for ME and RS
National/ Regional	Eurostat	Establishments, bedrooms and bed-places by type	GR HR IT SI ME	3	Yes	Number	Link	-
National	Eurostat	Candidate countries and potential candidates: tourism	AL BA ME RS	0	Yes	Number of bed places and arrivals	Link	Regional data are missing
National/ Regional	Eurostat	Maritime transport (cruise detail) - Passengers - Annual data - All ports - by direction	GR HR IT SI	3	Yes	1000 cruise passengers starting and ending a cruise; cruise passengers on excursion	Link	Ports need to be aggregated by NUTS 3

➤ Results of the analysis: data limits and gaps

The main data gaps for the tourism sector concern non-EU Countries for which regional data (coastal) are missing. The following data are missing for Albania, Bosnia-Herzegovina, Montenegro and Serbia:

- Number of bed places and accommodation establishments by type;
- Number of arrivals in accommodation establishments by type;
- Nights spent in tourist accommodation establishments by type;
- Numbers of cruise passengers by main ports.

At geographical level, some Italian and Greek NUTS 2 border on other seas (Sicilia, Calabria, Basilicata, Peloponnesus, Dytiki-Ellada and Attiki are surrounded also by Tyrrhenian, Mediterranean and Aegean seas)¹⁴. Therefore, for instance, in order to weigh the environmental footprint of tourism (topic: sustainability of the sector), national statistical sources should be used; or, if using EUROSTAT data, there is the necessity to calculate proxies for time series and indicators relevant to our area of interest.

Finally, a further important piece of information is missing for all countries of the Adriatic and Ionian sea-basin and concerns the "reasons for travel" and it is important to understand the type of tourism in a certain area.

¹⁴ In some cases, also NUTS 3 overlook to other seas (e.g. Cosenza province overlook to Ionian and Tyrrhenian seas).

4.2 External prospective evaluation: EQ 1 specificity of Focus Areas to the sea basin

Coastal and maritime tourism is a most promising economic activity common for all Adriatic and Ionian countries.

- Focus area: Supporting the sustainable development of coastal and maritime tourism through innovation and common marketing strategies and product

In **Italy**, despite interesting e-tourism initiatives supported by public bodies such as the Ministry of Cultural Heritage and tourism, small enterprises and coastal destinations often work uncoordinated, and due to budget reasons tend not to associate innovation to a potential enlargement and enhancement of their tourist offer.

In **Greece**, national policies promote new forms of touristic products focusing on niche markets, with green orientation enhancing the competitiveness of the sector and its sustainability.

The extensive investment planned on tourist ports and marinas is expected to increase considerable berth capacity and attract international demand.

The Croatian Tourism Development Strategy until 2020 (elaborated in 2013 by the Ministry of Tourism) has four objectives: (i) investments, (ii) upgrading the accommodation structure and quality, (iii) new employment, (iv) increase in the tourist consumption. Therefore, the engagement of public bodies is relevant through National strategy for tourism. Yachting and marinas also has great potential of growth in **Croatia** in relation to coastal tourism.

In **Slovenia**, coastal tourism is a rather traditional activity, where innovation is often disregarded. However, Slovenia become aware that it did not have enough competitive advantages and thus it is making great effort to diversify its touristic offer by placing the emphasis on environment-friendly and elite tourism. In addition the Tourism and Internationalisation Directorate at the Ministry of Economic Development and Technology each year gives the “Sejalec” award to the most innovative touristic products, an approach that denotes particular sensitivity towards the introduction of innovations in tourism. Slovenia thought to come around this problem by using its tourist destinations, offering better organizations, quick access to original and qualified tourist products.

In **Bosnia-Herzegovina** this sector is very limited. The challenge for Neum, the only coastal town in the country, is to develop its attractiveness for tourists from Bosnia and Herzegovina and for tourists from foreign countries who may visit Bosnia and Herzegovina, for example while they are spending their holidays in Croatia (Mostar). Better road connections and development of hotels (presently there is a large importance of unregistered accommodations) would strengthen this attractiveness.

The entire coastal area of **Montenegro** is developed in order to offer tourist services and it is still in a development-phase. Intensive construction in the last few decades was primarily residential and commercial for tourism and thanks to tourism. Nevertheless, the position of the country is weak, it lacks of financial potential, diverse tourist products with sufficient accommodation capacities, well qualified staff and well-functioning public utility infrastructure. Also, cruise and yachting in Montenegro are in stage of expansion. Since nautical tourism is one of the most favoured selective type of tourism, one of the goals of Montenegrin Government and Public Company for Montenegrin Coastal Zone Management is to develop this kind of tourism. The development of nautical tourism in Montenegro, among other things, presupposes the modernization of the existing

marinas and the construction of new ones, in accordance to the National Spatial Plan and the Special Purpose Spatial Plan for Coastal Zone.

Albania has very little experience of modern-day tourism. Its geographical and political isolation, combined with the political problems of the past decades, has prevented the anticipated upturn in the sector from occurring.

CONCLUSIONS

Under a general point of view, coastal tourism represents a key sector in all countries of the Adriatic and Ionian sea-basins, as emerged in the analysis of Blue Growth potential for the Mediterranean countries. This first focus area is crucial for the economic and environmental sustainability of the sector and for its competitiveness in both Adriatic and Ionian seas. The need to diversify the tourist offer, especially developing green tourism and focusing on niche markets, is a priority to strengthen through innovation and common marketing strategies in traditionally tourist countries (Italy and Greece), in relatively new destination (Slovenia and Croatia) and in Montenegro, Albania and Bosnia-Herzegovina, which are still out from international mass-tourism but have in the meantime significant growth potential.

➤ Focus area: Guaranteeing the environmental sustainability of the sector

In **Italy**, despite several efforts, coastal tourism remains an activity exerting great pressure on coastal environment. There is a good number of initiatives aimed at improving and promoting the sustainability of coastal tourism (e.g. the so-called “Blue-flag beaches”), but the results are still uncertain.

Greek national legislation foresees environmental authorization for all kind of intervention in the tourist sector. Moreover, there is a strategy for the promotion of green tourism, aiming at enhancing the efficient and environmental responsible operation of tourism enterprises (for example energy, water saving, waste management etc). Investments with green orientation and education ensuring the sustainability of the sector are also promoted.

The majority of the professional leisure fleet is sailing boats, which implies that environmental pressures are limited. Also, in the sector all regulations regarding the air emissions and noise emissions are applied.

Environmental protection policies are identified as existing drivers for the sector's growth in **Croatia**. This activity is considered strategic and aims at encouraging its growth in a sustainable way.

Slovenia is placing great attention to making tourism sustainable and environment-friendly. However, it should be noted that most efforts made in this direction seem to address country and mountain tourism rather than tourism in coastal areas. In addition, the development of the tourism is increasing the pressure on the coastal environment as a consequence of the building of houses and resorts.

In **Bosnia-Herzegovina**, at the moment, no specific threats for an environmentally sustainable growth of this activity have been identified.

One of the commitments of the Government of Montenegro is to ensure sustainable development of coastal tourism which is already a vital economic sector and one of the goals is to make Montenegro a high-yield tourism destination. Due to the weak position of the country, the excessive user concentration in summer months on the coast needs to be faced. Accounting for the grey

market, the coast makes up over 95% of all overnight stays - mostly in the period July-August. This peak load has adverse economic, ecological and quality impacts. It overstretches the infrastructure and beach capacity, impairs job attractiveness and sometimes conveys an impression of mass tourism in the high season.

Some concern about the environmental sustainability of further growth of the coastal tourism, including building of new facilities such as hotels and marinas, does exist. The Public Enterprise for Coastal Zone (PECZM-“Morsko dobro”) of Montenegro has a central role in order to balance economic and environmental aspects, and its importance in the future is expected to increase in order to guarantee this equilibrium. In some areas, construction related to tourism has been developed without any planning and proper infrastructure. One big concern is untreated sewerage waters that are leaked directly into the sea in many tourist regions and cities. Health Institute has monitored the main coastal areas, indicating which are the most problematic ones.

CONCLUSIONS

Coastal tourism is directly linked to the quality of the environment, as a significant parameter which improves the attractiveness of a destination and affects the experience of tourists. Tourism can affect the full range of environmental parameters and thus its efficient management and the protection of resources is crucial for the whole Adriatic and Ionian seas.

➤ Focus area: Promoting the sustainable development of cruise tourism

In **Italy**, the debate over cruise tourism sustainability has received much attention in the last year, as a consequence of the Costa Concordia accident, which on 13 January 2013 partly sank after striking a rock off the eastern shore of the Isola del Giglio, in Tuscany. Since then, several initiatives aimed at improving sustainability in the sector have been carried out (e.g. Venice Blue Flag II, and "eco-sustainability memorandum of understanding" between cruise lines, the Venice Council, the passenger terminal and the port authority). However, several concerns still remain as regards the impact on the territory and resources depletion.

In **Greece**, regarding the environmental sustainability of the sector, no violations of the international regulations have been reported. Large port authorities have environmental management systems. Moreover, most destinations are small islands which means that only smaller cruise ships can visit them and the environmental impacts are limited. On the other hand, there are larger destinations and marquee destinations which face congestion issues requiring quotas and measures for mitigating any kind of negative externalities.

This activity has a limited economic weight compared to other activities but met a large growth in the last years and has great potential in **Croatia** in terms of development of new destinations and increase of the number of stops. One of main issue is the seasonality of the activity and the limited number of seaports concerned. The main area benefiting of these growth is the city of Dubrovnik, which is a stop on international cruises in the Mediterranean Sea. The future growth of the sector will be linked to the possibility to welcome more visitors in Dubrovnik and/or to develop the cruise activity in other cities, notably Split.

That sector is still relatively new and small in **Slovenia** and so it has not yet reached a saturation point. There is great concern in Slovenia for the impact that cruise ships might have on the coastal environment, especially after the Costa Concordia accident in 2012.

CONCLUSIONS

The sustainability of cruise tourism is an issue debated in EU member states, but at different levels of intensity. In Italy, and then on the west coast of the Adriatic and Ionian Seas, several concerns still remain as for the impact on the territory and resources depletion. In Greece, in the eastern part of the Ionian Sea, the larger destinations are facing congestion issues and requiring quotas and measures for mitigating any kind of negative externalities. The eastern coast of the Adriatic seems therefore less affected by this topic. However, as also reported in the analysis of Blue Growth potential for each country of the Mediterranean, cruise tourism has a reckoned relevance for the whole region, especially considering both: (i) size of the activity at present in the main “home countries” (Italy and Greece) and (ii) the potential of other countries in the area as “port of call”.

➤ Focus area: Enhancing the value and appreciation of cultural heritage

Despite the huge potential of the Southern regions in terms of attractiveness and season duration, coastal tourism in the South of **Italy** seems “less attractive” to international tourists. This is also due to the poor infrastructure endowment and the low level of exploitation of cultural heritage.

The new direction of tourist development in **Slovenia** is based on the development of the following kinds of tourism: health and wellness tourism, coastal tourism, mountainous tourism, countryside tourism, business and congress tourism, cultural tourism, casino and entertainment tourism, ecological tourism, recreation tourism, adventure tourism, transit and excursion tourism.

Despite the rich cultural and historical heritage, coastal tourism in **Montenegro** is mainly based on swimming tourism thanks to its natural resources and clean bathing water, so the Montenegrin coast experienced an expansion of private beaches, restaurants, bars, hotels near the coast and also domestic offer of accommodation which are the main resource of earnings and jobs.

Currently, Montenegro is trying to develop climatic, health and medical tourism, sports (sailing, rowing, windsurfing, diving, boat renting etc.), nautical, congress tourism (especially out of season) as well as agro-tourism and cultural events.

In **Albania**, the growth rate is exceptionally high if compared with most tourist destinations around the world. Such growth brings both opportunities and challenges like the appreciation of cultural heritage.

CONCLUSIONS

In order to strengthen the attractiveness of the area, this last focus area is the key priority common to all countries of the area with different development potential. Coastal cultural heritage is obviously world-renowned and more spread in countries as Italy and Greece, but cultural heritage has a huge potential also for Croatia, Slovenia, Montenegro and Albania (although it is inland).

4.3 Gap analysis

Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
<ul style="list-style-type: none"> Increasing competition from other destinations, seasonality, and increasing requests for customized experiences; Poor macro-regional approaches to coastal, maritime and other forms of tourism prevent the strengthening of governance and participation of private actors and International Financial Institutions 	Supporting the sustainable development of coastal and maritime tourism through innovation and common marketing strategies and product	<p>Since competitiveness is an issue widely sought and highly promoted through recent European policies (e.g. the Europe 2020 strategy), also EUSAIR take charge of promoting competitiveness. Such engagement is defined through the following objectives:</p> <ul style="list-style-type: none"> Supporting the sustainable development of coastal, maritime and hinterland tourism while reducing seasonality of demand,; Encouraging innovation, clustering and developing of new common marketing strategies and products, including tourist promotion through common branding; Improving coordinated governance in the tourism sector among private and public entities; Developing the links between health tourism and active ageing (Life-science industry). 	<p>With regards to the COM (2010)352 “Europe, the world’s n.1 tourist destination. A new political framework for tourism in Europe”, EUSAIR envisage the capitalization on existing tools and initiatives.</p>	<p>The EUSAIR, in compliance with the objectives of the Europe 2020 strategy, largely promote the use of technologies and innovation in the sector of tourism, especially to ensure networking and connectivity among clusters and platforms of operators in the sector of tourism and stimulating smart specialization and smart communities for collaboration among private and public subjects.</p>	<p>The EUSAIR encompass a large set of actions concerning research and education in the field of tourism. In particular it promotes the academic and professional mobility to foster the competitiveness of tourism SMEs</p>	<p>Referring to the increasing ageing of European population and with reference to recent policies and initiatives toward an active ageing (e.g. European Year for Active Ageing and Solidarity between Generations – 2012), EUSAIR envisage the promotion of <i>health tourism</i> and <i>silver tourism</i></p>
		<p>No gaps identified</p> <p>No actions needed</p>	<p>No gaps identified</p> <p>No actions needed</p>	<p>No gaps identified</p> <p>No actions needed</p>	<p>No gaps identified</p> <p>No actions needed</p>	
<ul style="list-style-type: none"> Frequently improper management of intensive tourism activities 	Guaranteeing the environmental sustainability of the sector	<p>Tourism is often recognized as the economic backbone of coastal regions. However, improper management of intensive tourism activities can engender negative effects on the same features upon which it strongly depends. At this regard, EUSAIR, tackle this issue by the following objective:</p> <ul style="list-style-type: none"> Limiting its environmental footprint and taking into consideration the impacts of a changing climate; Improving quality management and 	<p>Gaps identified:</p> <p>The EUSAIR discussion paper does not reference legislative measures to enhance the management of intensive tourism activities</p>	<p>In the EUSAIR a proper management of intensive tourism activities is promoted. In particular, it largely promotes the use of technologies and innovation in the sector of tourism, especially to ensure a better management of destinations and sustainability of tourism activities. EUSAIR also highlight the need to create a quality management of destination through the use of ICT</p>	<p>Scientific collaboration and research strategies to spur innovation and creativity in the tourism sector, are largely promoted in the EUSAIR. Moreover it envisage a high involvement of cultural/tourism operators in exchanges of experiences in the field of education and lifelong learning</p>	<p>In the EUSAIR the sustainability of tourism from a socio-economic point of view is a specific objective to reach through the promotion of local products, cultures and values. The exploitation and the development of local resources is per definition environmentally sustainable since it enhances life conditions, creating jobs opportunities at local level.</p>
				<p>No gaps identified</p>	<p>No gaps identified</p>	<p>No gaps identified</p>

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Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
		<p>sustainability, e.g. through the European Tourism Quality Label (ETQ) or other joint labels, as well as the promotion of service innovation (e.g. through the use of ICT)</p> <ul style="list-style-type: none"> Promoting tourism activities and services based on local products (agro and sea foods) , culture and values, to support active social inclusion and opportunities for youth in remote areas and areas exposed to demographic changes 	<p>Proposed actions:</p> <p>Limit the impact of intensive tourism flows in the Adriatic-Ionian region by establishing proper monitoring mechanisms and legislation, especially in candidate and potential candidate countries. Collect data on coastal tourism in order to set monitoring mechanisms, and also duly plan strategic interventions in the sector, especially as regards candidates and potential candidate countries. The collected data should also be harmonised at sea-basin level.</p>	No actions needed	No actions needed	No actions needed
<ul style="list-style-type: none"> Concerning the cruise sector there is a general tendency to fail to locally capture the economic benefits and mitigate the possible negative effects of short and massive tourist arrivals 	<p>Promoting the sustainable development of cruise tourism</p>	<p>As it has been highlighted also in our analysis, cruise tourism shows a strong potential for growth. The EUSAIR acknowledges these potentialities and encompasses it through the following objective:</p> <ul style="list-style-type: none"> Promoting the sustainable development of cruise and nautical tourism. Establishing links of those forms of tourism with other forms of regional economic development 	<p>Gaps identified:</p> <p>The EUSAIR discussion paper does not reference legislative measures that could enhance cruise tourism while mitigating negative effects of massive but transient tourists arrivals</p>	<p>Gaps identified:</p> <p>The EUSAIR discussion paper does not reference technological instruments and innovative tools that could enhance cruise tourism while mitigating negative effects of massive but transient tourists arrivals</p>	<p>In the EUSAIR scientific collaboration and research strategies to spur innovation and creativity in the tourism sector, are largely promoted. It envisages a high involvement of tourism operators in exchanges of experiences in the field of education and life-long learning that can affect also cruise tourism operators specifically</p>	<p>In the EUSAIR there are clear references to socio-economic issues to enhance cruise tourism while mitigating negative effects of short massive tourists arrivals. The adoption of a cruise tourism management plan should also entail socio-economic benefits specifically resulting from potential links of this sector to other forms of tourism or to the overall regional economic development</p>
			<p>Proposed actions:</p> <p>Develop a management plan for cruise tourism destinations that calls for more intensive and concrete cooperation in the region. Reinforce regulations for on-board sewage treatment..</p>	<p>Proposed actions:</p> <p>Take advantage of existing technologies developed for the tourism sector in general. The EUSAIR largely promotes the use of technologies and innovation in tourism, especially to ensure better management of destinations and</p>	No gaps identified	No actions needed

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Key Barriers/Problems	Focus Area	GAP ANALYSIS				
		Overall comparison with EUSAIR's objectives	Legislation/implementation of rules	Technologies and Innovation	Research and education	Socio-economic
			Further analyse the possibility of developing cruise tourism management plans at national level, recognizing that only at local level it is possible to balance and coordinate the needs of local population, tourists and shipping companies. Develop macro-regional tourism governance in order to define an integrated cruise offer in the Adriatic-Ionian sea basin and optimize the use of resources and cultural heritage.	sustainability of tourism activities		
<ul style="list-style-type: none"> Cultural and archaeological heritage in the region represents a strong asset which is not fully exploited, and there are many alternative or innovative and sustainable forms of tourism which have not been sufficiently developed and/or integrated with festivals and creative industries 	Enhancing the value and appreciation of cultural heritage	<p>The EUSAIR addresses the issue of cultural heritage development and promotion, through the following objectives:</p> <ul style="list-style-type: none"> Enhancing the value and appreciation of culture and natural heritage, also including links with the development of creative enterprises and services; Promoting tourism activities and services based on local products (agro and sea foods), cultures and values, to support active; 	With regards to the COM (2010)352 “Europe, the world’s n.1 tourist destination. A new political framework for tourism in Europe”, EUSAIR envisage the capitalization on existing tools and initiatives	EUSAIR, in compliance with the objectives of the Europe 2020 strategy, largely promote the use of technologies and innovation in the sector of tourism, especially to ensure a better management of destinations and sustainability of tourism activities	From the research and education point of view, the EUSAIR can be considered as fully compliant. It encompass several objectives aimed at promoting the enhancement of tourism destination management through skills development and academic and professional mobility	Through the collaboration of public and private sector and the incentives to tourism activities and services based on local products, the EUSAIR demonstrate its engagement for the enhancement of socio-economic aspects linked to the tourism sector
			No gaps identified No actions needed	No gaps identified No actions needed	No gaps identified No actions needed	No gaps identified No actions needed

5 Overall assessment on the proposed EUSAIR

5.1 External prospective evaluation: EQ 3 Governance system

5.1.1 Overview on the Adriatic-Ionian governance – main actors

As a first step of the analysis, the mapping of all actors composing the governance system in the area is indeed needed in order to define the openness degree and the size of the participative action undertaken by the EU for the purpose of building up the Strategy.

Because of the dimension of the action undertaken and given the number of countries involved, the governance system resulted significantly heterogeneous. Furthermore, the presence of extra-EU countries (i.e. Albania, Bosnia-Herzegovina, Montenegro) with their related administrative peculiarities has contributed to make coordination activities more challenging if compared to other similar experiences (e.g. the EU Strategy for the Baltic Sea Region¹⁵).

Within this frame, national administrations of coastal states (EU members, non-EU or candidate countries), acting through their National contact points, are the main promoters of cooperation initiatives in the area and have been (and still are) involved at all levels with an active political commitment and supporting the participation of stakeholders in different cooperation initiatives. As having an important role within the governance in the area, national administrations (and the EU as well) have strongly encouraged the involvement of Regions and other local actors, in order to enlarge the basis for discussions as far as possible and consolidate the bottom-up approach in building up the Strategy.

On the other hand, if littoral countries represent the political tool promoting cooperation within the area, the core part governance system has been constituted by an array of associations, organisations and initiatives which have contributed to increase the cooperation in the area actively participating to trans-national cooperation projects.

In particular, for the purpose of this analysis it is necessary to mention:

- The [Adriatic Ionian Initiative](#) (AII), involving Albania, Bosnia & Herzegovina, Croatia, Greece, Italy, Serbia, Montenegro and Slovenia, whose activities are divided into four “Round tables”: (i) small- and medium entrepreneurship, (ii) transport and maritime cooperation, (iii) tourism, culture and interuniversity co-operation ([UNIADRION](#) is a result of this effort, encompassing 36 Universities of the area, whose main activity is to : to support the creation of links among Universities and R&D centres) and (iv) environment and fire protection.
- [Forum of Adriatic and Ionian Cities](#): it is composed by 55 cities from all littoral countries of the area and it is aimed at developing the economic, social, environmental and cultural heritage of the Adriatic and Ionian coastal cities and to collaborate on European integration and enlargement, by promoting innovative forms of decentralized cooperation and partnerships between local authorities of the area;
- The [Adriatic-Ionian Euro-region](#), composed by regional authorities of the relevant countries, is the institutional framework for jointly defining and solving important issues in the Adriatic area, mainly aimed at: (i) supporting the creation of an area of peace, stability and co-operation; (ii) Protecting the cultural heritage and the environment; (iii) supporting the sustainable economic development of tourism, fishery and agriculture and (iv) solving transport and other infrastructure issues.

¹⁵ In the EUSBSR, extra-EU countries are not part of the Strategy. However, cooperation initiatives with EU neighbouring countries (Russia, Norway and Belarus) are welcome.

- Forum of the Adriatic and Ionian Chambers of Commerce: it is a transnational, non-profit association linking the chambers of commerce of countries located on both Adriatic and Ionian coasts: Italy, Croatia, Bosnia and Herzegovina, Montenegro, Slovenia, Greece and Albania. It is aimed at strengthening synergies and opportunities for socio-economic development in the area, focusing on the following fields: agriculture, environment, women's entrepreneurship, transports, tourism and fisheries/aquaculture.
- The Central European Initiative: is an intergovernmental forum promoting political, economic, cultural and scientific cooperation among its Member States (Albania, Austria, Belarus, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Hungary, Italy, Macedonia, Moldova, Montenegro, Poland, Romania, Serbia, Slovakia, Slovenia, Ukraine). The aim of the political cooperation is to supply the countries and their institutions with a flexible, pragmatic platform for regional cooperation, while focusing on their preparation to a future EU accession. Special attention is given to capacity building of the non-EU CEI Member States. CEI is in a unique position to act as a bridge between macro-regions, such as the Baltic, Danube, Adriatic and Black Sea Regions.

These and many other cooperation initiatives¹⁶ still contribute to enhance and enrich interactions and exchanges between different stakeholders in the area. Thanks to this, in few years, it has been possible to note an increased perception among stakeholders of the Adriatic and Ionian seas as common ground for dialoguing and not as a barrier or frontier, especially for some “sensitive issues” such as the protection and sustainable development of the Adriatic-Ionian region.

To this regard, the strong commitment of the EU institutions to enhance and boost these efforts represents the key element in the Adriatic-Ionian region. Since the invitation of the Council reported above, the support of EU institution towards the development of a macro-regional strategy has been progressively strengthened, with special regard to the maritime component, where cooperation initiatives appeared not to be “specifically and regularly dealt with in an integrated manner”¹⁷. By adopting a bottom-up approach and involving a great number of relevant stakeholders of the area, several consultation initiatives (workshops, high level conferences, stakeholders meetings, etc.) were undertaken in order to gather useful inputs from stakeholders for the purpose of drafting an Action Plan of the Maritime Strategy for the Adriatic and Ionian Seas.

The consequent Communication on a Maritime Strategy for the Adriatic and Ionian Seas (COM(2012)713) and the extensive consultations with stakeholders held in Athens, Trieste, Portorož and Zagreb constituted a solid basis for the development of a wider EU Strategy for the Adriatic and Ionian Region (EUSAIR), in which the “maritime component” represents the core part of it. Following the meeting of the EUSAIR National Contact Points held on in Rome in 2013, the content of the Maritime Strategy’s pillars have been “reshuffled” in the new EUSAIR, whose draft Communication accompanied by an Action Plan should be adopted by the Commission during the first semester 2014 and submitted to the Council for adoption in the second semester.

Indeed the role of the EU in supporting and streamlining consultation processes has revealed to be pivotal for the successful finalisation of the EUSAIR. On the other hand, the EU effort in the region can be seen from another “more operational” point of view and can be sought under an array of programmes (directly managed or co-funded by the EU), financial instruments, trans-national and cross-border cooperation programmes which have significantly contributed to increase the

¹⁶The complete list of initiatives and cooperation programmes is available at §8.1.2 and §8.1.3

¹⁷ Roadmap: Maritime strategy for the Adriatic and Ionian Sea Basins, 04/2012,

http://ec.europa.eu/governance/impact/planned_ia/docs/2011_mare_039_maritime_strategy_ionian_and_adriatic_sea_en.pdf

cooperation level in the area and to create different micro-governance systems within each of these tools.

5.1.2 Assessment of the governance system

5.1.2.1 Benchmark analysis – the European Union Strategy for the Baltic Sea Region (EUSBSR) vs. the EU Strategy for the Adriatic and Ionian Region (EUSAIR)

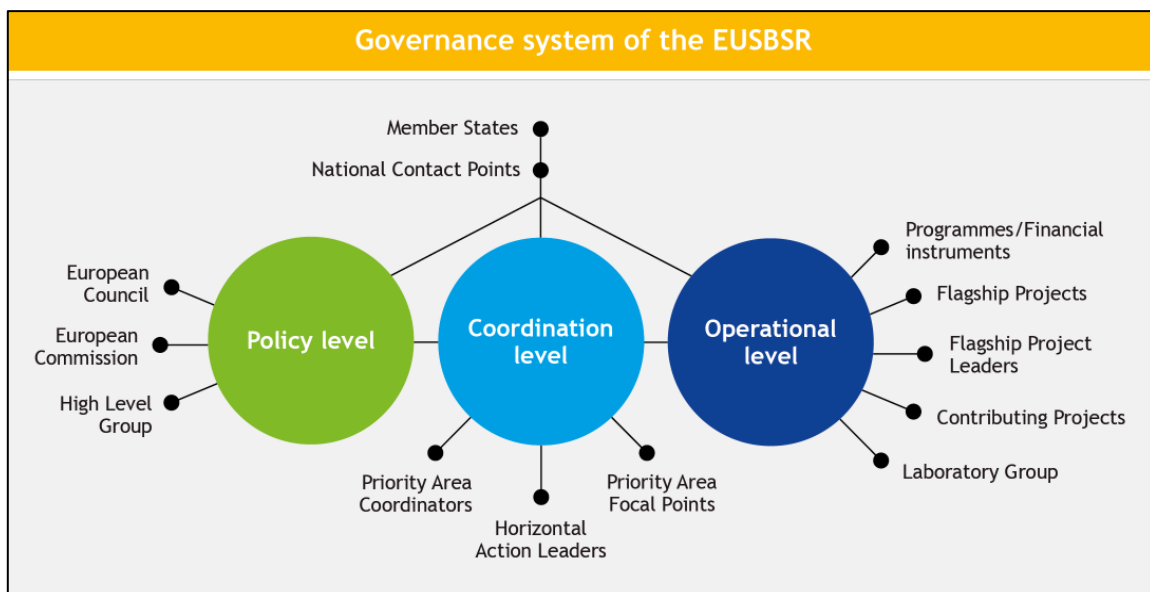
In this section a benchmark between the EUSBSR and the EUSAIR is proposed. Given that a Strategy of the Adriatic-Ionian macro-region does not exist yet and consequently it is not possible to define a “governance system”, it is proposed to limit the analysis to the context of the process leading towards the EUSAIR.

A quick snapshot on the lessons learned on the EUSBSR governance allows to identify those weaknesses emerged in the Baltic context which should be taken into account in the elaboration of the EUSAIR governance. Of course, these “hesitations” highlighted in the Baltic should not be taken as absolute values and considered potentially valid also for the Adriatic-Ionian. Each sea-basin has its own characteristics and structures. This means that governance systems, despite have been successfully experienced in other contexts, needs to meet specificities of a given sea-basin. Therefore no specific “governance model” exists but on the other hand it is important that all systems comply with the same rule set out by the Commission (the “Three No’s” principle: no new rules, no new funds, no new institutions). This should encourage the use of existing cooperation structures on an interregional or intergovernmental level.

EUSBSR

The EUSBSR governance system can be characterised as a complicated multi-level governance system. Tasks are divided into three main levels, i.e. (a) the policy level, (b) the coordination level, and (c) the operational level. However, all three levels are interlinked and connected to each other. The following presentation of the main subjects involved in the governance structure follows the structure presented in Figure 13.

Figure 13 - Governance system of the EUSBSR



Source: EUSBSR website

Member States

The Member States – i.e. national administrations led mainly by the Prime Minister’s office or the Ministry of Foreign Affairs – belong to the most important stakeholders in the decision making level of the EU Strategy for the Baltic Sea. The Member States are responsible for:

- Implementing the EUSBSR through ensuring the political commitment of all governmental levels as well as an adequate capacity for the implementation;
- Ensuring that the Strategy will be respected in national and regional strategic planning, and existing policies and programmes;
- Supporting National Contact Points in the national coordination of the Strategy as well as Priority Area Coordinators and Horizontal Action Leaders;
- Appointing National Contact Points, the Priority Area and Horizontal Actions Focal Points.

National Contact Points

The National Contact Points are staffed by civil servants from the office of the Prime Minister or Minister of Foreign Affairs of each member state involved in the Baltic Sea macro-regional strategy. The National Contact Points:

- Ensure the overall coordination of and the support to the EUSBSR implementation in their home countries
- Provide information to national institutions, they offer them consultation and seek their greater involvement
- Facilitate the involvement of relevant stakeholders from their country as well as from other states of the macro-region
- Maintain the policy dialogue and work with national coordination bodies to initiate operational action
- Encourage a dialogue between relevant programmes and financial instruments and national stakeholders for the alignment of resources
- Identify the Priority Area Focal Points and Horizontal Action Focal Points.
- Formulate and communicate the national positions on the EUSBSR and the Action Plan
- Support Priority Area Coordinators and Horizontal Action Leaders in the implementation of the Strategy and monitor implementation activities of the EUSBSR
- Promote the visibility of the Strategy.
- Cooperate with other National Contact Points, in order to secure coherence among the countries and exchange best practices.

European Council

The European Council (general affairs sessions) approves the main guidelines for the Strategy. It is responsible for the adoption of the Action Plan and the initiation of suchlike procedures. The Council emphasised the need for a stronger role of National Contact Points in the national coordination of the EUSBSR (Council Conclusions, 2009, 3125th General Affairs Council Meeting; Council Conclusions, 2012, 3180th General Affairs Council Meeting) and of Priority Areas Coordinators and Horizontal Action Leaders in the thematic and transnational implementation of the Strategy (3125th General Affairs Council Meeting, 15 November 2011). Moreover, the Council

has stressed that the alignment of the Europe 2020 objectives, as well as of the Integrated Maritime Policy are necessary for the visible implementation of the Strategy (ibid).

European Commission

The European Commission [mainly coordinated by the DG Regional Policy (DG Regio)] plays an active role in the decision-making process of the EUSBSR and is present in the whole implementation of the macro regional strategies. Its role is manifold. Its leading role comprises the following:

- Strategically coordinating the key delivery stages of the EUSBSR.
- Considering the EUSBSR when planning relevant policy initiatives and programmes
- Promoting and facilitating the involvement of stakeholders of the entire macro-region and supporting them in the EUSBSR implementation
- Encouraging the dialogue and cooperation with stakeholders from other interested Baltic Sea Region States
- Supporting an alignment of national policies/strategies/programmes with the EUSBSR
- Identifying and addressing obstacles to the effective implementation of the EUSBSR
- Ensuring disseminating information, best practices and lessons learned in the implementation of the EUSBSR
- Ensuring an adequate internal capacity for the implementation of the EUSBSR
- Consulting on a regular basis with Member States, inter alia through the National Contact Points
- Evaluating and reporting on the progress in the implementation of the Strategy
- Seeking therefore endorsement from the Council or respectively from the High Level Group on the proposed amendments
- Organising the Annual Forum and launching meetings to promote dialogue and discussions around the implementation of the EUSBSR.

High Level Group

The High Level Group is comprised of senior civil servants from each European Union member state (EU 28) and one representative of the Committee of the Regions. Besides, representatives from the European Investment Bank and the Nordic Investment Bank also take part. The members of the High Level Group are appointed by the Ministry of Foreign Affairs or the Prime Minister's Offices of each country and follow the respective national procedure for civil servant appointments. The tasks of the High Level Group can be summarised as follows:

- Advising the European Commission on the EUSBSR objectives, development and implementation
- Commenting on the reviews and updates of the EUSBSR and the Action Plan
- Proposing actions to the European Commission and Member States for strengthening the implementation of the EUSBSR.
- Proposes actions that may contribute to the implementation of the Council Conclusion on the review of the EUSBSR, that may identify and address obstacles to the effective implementation of the EUSBSR

- Proposes actions so as to promote the macro regional approach in developing new policies and in aligning of programmes and financial instruments.

Priority Area Coordinators

The Priority Area Coordinators are responsible for the coordination of the necessary actions for the Priority Areas, which aim at the better implementation of the EUSBSR. Within the EUSBSR governance system there are by now 17 Priority Areas. The Priority Area Coordinators are representatives of national or regional administrations and institutions with large differences to be noted between MS in the hierarchical level they represent within their own institutions. They play an important role in the implementation of the EUSBSR. The procedure for the appointment of the Priority Area Coordinators is generally rather complicated. Usually it is the outcome of negotiations among the different Member States, mainly a following the “first come, first serve” principle. Whereas PAs with relevance to maritime economic activities are not evenly distributed among MS (see below), overall involvement of BSR MS is relatively even when it comes to all given PACs/HALs (with exception of Estonia, which plays an active coordinative part in one PA only – also see Annex I). For some PAs, Steering Committees or networking structures have been set up to facilitate an involvement of stakeholder from all EU BSR Member States. However this process is not finalised yet and there is room for increasing the level of transparency in decision making.

The tasks include of a Priority Area Coordinator include:

- Facilitating the involvement of and cooperation with relevant stakeholders from the entire macro-region
- Implementing and following up of all activities of their Priority Area with regard to the defined targets and indicators,
- Reviewing the relevance of the Priority Area as it is described in the Action Plan and proposing updates or amendments,
- Facilitating policy discussions in the region,
- Developing and implementing actions and flagship projects,
- Conveying relevant results and recommendations of on-going and completed flagship projects to the policy level,
- Ensuring communication and visibility of the Priority Area,
- Maintaining a dialogue with funding programmes on an alignment of funding flagship projects under their Priority Area,
- Liaising and cooperating with other Priority Area Coordinators and Horizontal Action Leaders to ensure coherence between the operational levels and avoid the duplication of actions,
- Monitoring and reporting progress within the Priority Area.

Horizontal Action Leaders

Horizontal Actions as cross-sectoral entities of the EUSBSR intend to support territorial cohesion in the Baltic Sea, by:

- Aligning available funding and of policies to the priorities and actions of the EU Strategy,
- Cooperating on the transposition of EU Directives,
- Developing of integrated maritime governance structures in the Baltic Sea region,

- Strengthening multi-level governance, spatial planning and sustainable development.

The tasks of the Horizontal Action Leader mostly correspond to those of the Priority Area Coordinators described above.

Whereas PAs are mainly coordinated by one or two BSR MS, Horizontal Actions are predominantly led by one of the numerous transnational organisations already present within the BSR before the set up of the EUSBSR.

In all cases the work of PACs/HALs is financed by the organisations / institutions, who have agreed to take over this task. Only with the revised Action Plan 2013 the European Commission has opened a financial line, which provides annual support to the PACs/HALs for some of their actions.

Priority Area Focal Points and Horizontal Action Focal Points

Priority Area Focal Points and Horizontal Action Focal Points are appointed by the Member States. Mainly, they serve as link between the EUSBSR and the national level for all matters regarding the corresponding Priority Area and Horizontal Action. There are only Focal Points for Member States not occupying the position as Priority Area Coordinator or Horizontal Action Leader, respectively. The tasks of the Focal Points for the Priority Area/ Horizontal Action can be summarised as follows:

- Participating in the national coordination regarding the Strategy,
- Providing information on the Priority Area or the Horizontal Action,
- Identifying relevant contact persons in their home country for the implementation of the Priority Area/Horizontal Action, inter alia for flagship projects,
- Assisting the Priority Area Coordinator and the Horizontal Action Leader to ensure visibility and communication,
- Ensuring that stakeholders are informed on relevant decisions taken.

INTERACT Point Turku

The INTERACT Point Turku supports the implementation of the EUSBSR by acting as a bridging organization between Priority Area Coordinators, Horizontal Action Leaders, and structural funds programmes. It has even set up a Laboratory Group set up for supporting the EUSBSR. Furthermore, the INTERACT Point Turku fosters and involves territorial cooperation within the Strategy by disseminating information, managing networks and facilitating interaction between the main actors.

➤ EUSBSR: Lessons learned

The high complexity in the governance structure of the EUSBSR contributes on the one hand to a broad involvement of actors but also causes hesitance. Given the broad nature of the strategy and the absence of single institutions for their implementation, rather complex implementation mechanisms have been developed. These rely on a wide range of organisations that take over responsibilities and carry through coordination tasks.

The multiplicity of actors brings the risk that a strategy could lose (a) focus and (b) the ownership and responsibility felt by the single stakeholders. If the feeling of ownership and subsequently commitment and responsibility towards the strategy declines, the entire strategy is weakened. This leads ultimately to the question whether the complexity needed for the elaboration and in particular

for the implementation of the strategies is too high to actually being able to make use of the manifold potentials for better coordination offered by them.

There are signs that the commitment is not always as high as might be desirable or needed. Savbäck et al. (2011) point at the need for increased support and commitment by the Member States including a strengthening of their National Contact Points and the Priority Area Coordinator.

Apart from governmental institutions, actors from academia, business and NGOs should be encouraged to participate in the macro-regional strategy. Especially the private sector is currently underrepresented in the EUSBSR.

Political leaders should remain involved in the implementation of the strategy, in order to keep up momentum. Increased attention by policy and decision makers and a clear political will are crucial. Thus a macro-regional strategy should be forcefully communicated.

The relation between a macro-regional strategy and other major strategies (e.g. Europe 2020, Vision 2020, Smart Specialisation Strategy) needs to be spelt out, in order to secure commitment of actors to all strategic approaches. The relation between all regional strategies needs also to be clarified and strengthened, in order to avoid overlapping and possible asymmetries in implementing different objectives/priorities/pillars.

It needs to be ensured that relevant actors at national level are informed about the strategy and receive the chance to actively participate in its implementation, inter alia through generating ideas for flagship projects. The task to raise awareness among national and sub-regional stakeholder falls into the responsibility of National Contact Points.

EUSAIR

The process leading towards the EUSAIR has been characterised by a high involvement of several stakeholders and public actors which have strongly interacted since the first workshop in Athens (February 2012). Actually, it is necessary to mention that cooperation effort in the area has always been remarkable, especially after the Balkan crisis through a plethora of interventions and cooperation initiatives. On the other hand, although the number of these initiatives, an overall lack of coordination among actors operating in different fields has been noted.

A two-level governance has been settled in the Adriatic Ionian Region, (i) Policy level and (ii) Operational level, with a lack of coordinating intermediate level between the two. Actually, in some instances (e.g. the Adriatic-Ionian Initiative) it has been possible to register a combination of the two levels, but without (or with limited) interconnections with other fields/initiatives.

Specifically as regards the process towards the EUSAIR, thanks to the common interest of National authorities and through the intervention of the EU institutions, the need to consolidate the cooperation in the area has been strengthened progressively and in few months the awareness of being part of a region has growth remarkably among stakeholders.

Following the approach of the benchmark analysis, below we report the actors involved in this process.

Countries (EU Member States and candidates/potential candidates)

Countries in the area represented the “engines” of past and current cooperation initiatives and are the key actors committed to develop and implement the Strategy. Adriatic and Ionian Countries were the initiator of this process leading towards the EUSAIR, as they expressively asked the Commission to support construction of a strategy for the area.

No specific role has been defined yet within the strategy but it is worth to mention their active involvement to workshops and conferences organised. Furthermore, they have designed National contact points and Focal Points for consultations, especially in view of the next steps of the Working Groups designated within the discussion paper of the EUSAIR.

National Contact Points/Focal point

Designated by each Country, National Contact Points are personnel from the office of the Prime Minister or Minister of Foreign Affairs and have mainly a political role. National Contact Points ensure the overall coordination of and the support to the 4 Working Groups (one for each pillar) in order to identify Objectives, Priority Areas and actions to be included in the EUSAIR's Action Plan. They ensure also coordination among national Focal points according to the related Working Group.

National Focal points have been designed by the related Country and will participate to each Working group according to their field of expertise.

European Council

The Council of the European Union was the first promoter of the Adriatic-Ionian macro-region, expressing in December 2011 its support to the "ongoing work of Adriatic and Ionian Member States to enhance maritime cooperation with non-EU neighbours in the area within the framework of a macro regional strategy". Indeed, strengthened maritime cooperation has been considered useful as a first step towards a future macro-regional strategy as currently being promoted by the concerned coastal States. A first acknowledgement of such a macro-regional strategy was included in the European Council Conclusions of June 2011, in which "Member States are invited to continue work in cooperation with the Commission on possible future macro-regional strategies, in particular as regards the Adriatic and Ionian region".

European Commission

The European Commission has played a pivotal role within the entire process and actively keeps on coordinating the construction of the Strategy. The original objective of launching a "maritime strategy", started by DG MARE, has been embedded in a wider Adriatic and Ionian macro-regional strategy, managed by DG REGIO.

In general, the European Commission plays an active role in the decision-making process and is present in all steps undertaken for the construction of the Strategy by launching and coordinating all workshops/conferences and ensuring continuity of the process, encouraging the dialogue and cooperation among stakeholders.

5.1.2.2 Analysis of the governance system in the Adriatic-Ionian: effectiveness

As mentioned in § 5.1, since a strategy does not exist yet, the effectiveness of the governance in the Adriatic-Ionian will be limited to the process which is leading towards the EUSAIR. As general definition, the effectiveness is measured as "achieved results with respect to the original objectives". Within this context, it is proposed to cross-check objectives derived from conclusions of each of the three workshops (Athens, Trieste and Portorož) and the high level stakeholders conference with Pillars and objectives defined in the EUSAIR discussion paper.

Each workshop/conference will be analysed by “round tables”, reporting if and how conclusions of each round table have been translated in the current EUSAIR pillars/objectives.

✓ *Athens – Stakeholders’ workshop on maritime affairs. Towards a strategy for the Adriatic and Ionian Macro-Region*

The Athens workshop was structured into four round tables (Fishery, Protection of the Marine Environment, Blue Growth and safer and more secure Adriatic Ionian space). Each round table generated a set of possible actions and, in some cases, potential projects to be implemented, grouped by main topics.

Below, conclusions of each round table are matched with the EUSAIR pillars.

Round table on fishery

Four topics have been identified in this round table, namely:

- Sustainable management of fisheries and aquaculture;
- Commercial aspects of fisheries and aquaculture;
- Fisheries policy/Harmonized legislation and application of regulations/ Cross border cooperation (including on monitoring, control, and surveillance);
- Research, scientific cooperation and exchange of knowledge

All these topics and related actions identified have been included in the EUSAIR discussion paper, 1st Pillar (Driving innovative maritime and marine growth). Among the others, two specific challenges have been stressed within the EUSAIR, (i) the development of sustainable management of fishing activities with the purpose of preserving stocks in the Adriatic-Ionian and enhancing cooperation efforts for the development of sustainable fishing practices and (ii) support to implementation of EU *acquis* on fisheries in candidate/potential candidate countries

Round table Protection of the Marine Environment

In the Athens workshop, this round table has identified not only topics and actions to implement, but also possible projects to be included in a future regional strategy. The 5 topics identified – (i) Data and Databases, (ii) Environmental Research, (iii) Spatial Planning, Coastal Zone and Water Resources Management, (iv) Protected areas and (v) Civil protection – have been translated into the 3rd Pillar of the EUSAIR. It has to be noted that all actions proposed have been included in the discussion paper, with the exception of two, both belonging to “Environmental research” topic:

- Study the anthropogenic effects of erosion. (Land is being lost through coastal/soil Erosion every year; this is a priority area for the Ionian Region, where erosion is high);
- Assess the impacts of Oil and Gas Exploration in the Ionian on marine life, especially on marine mammals (e.g. whales).

To this regard, it has to be noted that the these actions, although they represent two important issues with an high impact on the marine and coastal environment, cannot be considered as actions but rather as possible projects to implement. However, despite there is not a direct relation between the actions identified in Athens and the objectives defined in the EUSAIR paper, it is possible to allocate them within the 3rd Pillar, in the overall context of “increasing cooperation in marine research on issues regarding impact of climate change on coastal areas and marine ecosystems”.

Round table on Blue Growth

The Blue Growth round table was the most manifold table, encompassing many topics for different thematic areas, from tourism to transport to energy. Also in this case, potential projects were identified within each topic.

Seven main topics were identified, namely:

- Knowledge Management and Entrepreneurship
- Cultural Heritage Tourism
- Development of a Common Macro-Region Maritime Strategy
- “Green” Economy and Sustainable Use of Marine Resources
- Renewable Energy
- Facilitate transport and intermodality in the Adriatic-Ionian Macro-Region
- Development of Motorways of the Sea (MoS) in the Adriatic-Ionian macro-region

All these topics have been integrated mainly in the 2nd Pillar (Connecting the Region) of the EUSAIR and partly in the 4th (Increasing regional attractiveness). Some of them (e.g. knowledge management and entrepreneurship) have been “reshuffled” in other objectives more specifically linked to concrete sectors/activities.

Round Table on a safer and more secure Adriatic Ionian space

The 3rd Pillar of the EUSAIR discussion paper has encompassed all the three topics discussed in the round table. Strong emphasis has been given to enhance cooperation between EU national or regional maritime authorities with candidate and potential candidate countries, in order to enable maritime traffic information exchange between national VTMISS systems.

Also the implementation of safety and security standards in line with EU and IMO rules has been strengthened, in order to develop the culture of compliance in flag and port state control.

➤ **Conclusions on the Athens workshop**

All topics/actions emerged during the round tables of the Athens workshop have been integrated in the EUSAIR discussion paper and related Pillars/objectives.

✓ **Trieste – Stakeholders’ workshop on maritime affairs. Towards a strategy for the Adriatic and Ionian Macro-Region**

The Trieste workshop was structured into 3 round tables (Blue Growth, Protection of the marine environment and fisheries and Competitive and sustainable transport and a safer and more secure marine space). Conclusions drafted for each round table was structured by topic, reporting for each shortcomings, actions and potential projects.

Below, conclusions of each round table are matched with the EUSAIR pillars.

Round Table on Blue Growth

Main focuses of this round table were tourism and R&I in maritime sector, deployed into three topics: (i) tourism, (ii) transport and (iii) research and innovation.

Almost all actions identified in the tourism topic have been included in the EUSAIR discussion paper, 4th Pillar “Increasing regional attractiveness”. The emphasis given in Trieste to the creation of a specific Adriatic-Ionian brand and to the development of “integrated tourism” has been translated in the EUSAIR in many objectives. For instance, emphasis has been placed on the improvement of quality management and sustainability of the tourism, through the adoption of existing labels or the creation of new ones within the area. For this purpose, clustering initiatives are supported in order to create common brands and enhancing marketing strategies.

Only for the specific action identified in Trieste aimed at developing indicators for measuring tourism sustainability [TTC: Tourism Carrying Capacity (use intensity for a tourist area) and SCC: Social Carrying Capacity (people perception)] it has not been possible to find a direct correspondent objective in the EUSAIR.

The topic “transport” and all related actions has been included in the 2nd Pillar “Connecting the Region”. The development of intermodal connections, whose importance was put into evidence in Trieste, has been widely encompassed in the EUSAIR.

Finally, the third topic “research and innovation”, because of its horizontal characterisation, has been included basically in all Pillars. As a matter of fact, each Pillar has a specific section dedicated to Research, innovation and SME development, which proves the key importance given to Research activities in the forthcoming Strategy.

Round Table on Protection of the marine environment and fisheries

Six topics have been identified in this round table, encompassing three macro-themes: enhancement of the management system of coastal and marine areas, development of cross-border maritime spatial planning and data collection and dissemination in order to increase knowledge of the marine area.

Especially as regards the last point, the round table underlined the need to develop specific monitoring tools for collecting and disseminating scientific information through the creation of dedicated database and Observatory network. The purpose of this action is to translate “data to systems” and increase capacity building of the area with respect to marine environment.

It has to be taken into account that topics and related actions identified in this round table were not directly linked to fisheries topic.

Within the EUSAIR, all actions identified in this round table have been widely encompassed in the 3rd Pillar, also including the development of Observation systems. For this purpose, the creation of cluster-type cooperation initiatives has been encouraged, in order to “develop missing monitoring tools for the identification of sensitive areas and areas important for the protection of biodiversity, for the determination of ecological status indicators, for developing management plans for migratory marine species”.

Round table on Competitive and sustainable transport and a safer and more secure marine space

All the three topics and related actions derived from this round table have been broadly included in the EUSAIR discussion paper.

Actually the first topic, “Competitive and sustainable transport in the Adriatic and a Safer and more Secure Adriatic Sea as key features of the agenda of the Adriatic-Ionian Macro-Regional Strategy”, whose actions and potential projects were aimed at boosting the adoption of the Adriatic and Ionian Macro-Regional strategies as an overall cooperation framework, appeared to have an horizontal approach, common to all Pillars. As a matter of fact, this topic has been concretely translated into the EUSAIR discussion paper, which represents the first basis of the future Strategy.

The other topics (maritime surveillance and ports/transport development) have been totally included in the 2nd Pillar “Connecting the region”.

➤ Conclusions on the Trieste workshop

All topics/actions emerged during the three round tables of the Trieste workshop have been integrated in the EUSAIR discussion paper and related Pillars/objectives.

Only for the following action identified in the “Blue Growth” round table it has not been possible to identify a direct correspondent objective in the EUSAIR discussion paper.

“Development of indicators for measuring tourism sustainability:

- TTC: Tourism Carrying Capacity (use intensity for a tourist area)
- SCC: Social Carrying Capacity (people perception)”

✓ Portoroz – Stakeholders’ workshop on maritime affairs. Towards a strategy for the Adriatic and Ionian Macro-Region

The third Stakeholders’ workshop, held in Portorož, Slovenia, replicated the same structure of Trieste, with three round tables, each of which produced a set of conclusions, grouped by topic and actions. Possible projects have been proposed for each topic.

Round table on Competitive and sustainable transport and a safer and more secure marine space

The round table drew general conclusions of the consultation process among stakeholders, putting “cooperation on maritime safety/security” as a key point in the Adriatic Ionian macro-regional strategy. The main purpose of this action is to limit the impact of vessels traffic (leisure boats during summer period, oil tankers and other “dangerous goods”, etc.) in the Adriatic, also through the adoption/strengthening of specific cooperation programmes (Vessel Traffic System – VTS, Automatic Identification System – AIS, etc.).

The EUSAIR discussion paper has keenly endorsed the outcomes of the round table, explicitly in the 2nd Pillar where a specific objective has been dedicated to the purpose.

Round table on Healthier marine environment and sustainable fishery

The first topic identified incited to implement the Marine Strategy Framework Directive (MSFD), tracing the possible path for increasing cooperation at regional and scientific levels and developing a common Macro-Regional Marine & Maritime Data Base.

Although the EUSAIR discussion paper encourages cooperation initiatives specifically as regards environmental issues, no specific mention to the implementation of the MSFD has been done.

The remaining 6 topics (fisheries, good environmental status, marine protected areas, management of marine species, marine litter, seabed abrasion) and related actions have been included in the 3rd Pillar of the EUSAIR.

Round table on Blue growth

Topics dealt in this round table touched several themes: tourism, transport, MSP and ICZM, governance.

As regards tourism, 5 of the 11 topics developed in the conclusions highlighted the need to strengthen tourism attractiveness and innovativeness, fostering spatial planning for tourism activities and sustainability of the sector. The EUSAIR paper has dedicated the entire 3rd Pillar to increase regional attractiveness, widely including all actions identified.

Only one topic was dedicated to transportation: “Sustainable mobility development – increased efficiency of urban transportation”, aimed at increasing the efficiency of urban transportation, decongestion public transportation and developing common quality standards.

Urban transportation issue has not been included in the main objectives of the EUSAIR discussion paper, or at least no direct link to a specific objective is noticeable.

The issue of implementing ICZM and MSP principles in the Adriatic – Ionian region has covered a relevant role in the Blue Growth round table, since three topics were dedicated to this. Cooperation and bottom-up processes were encouraged for developing integrated MSP and ICZM in the region. These actions have been fully encompassed in a specific objective of the 3rd Pillar (“Preserving, protecting and improving the quality of the environment”) of the EUSAIR discussion paper.

The remaining two topics had a general approach, which can be found as common values of all Pillars of the EUSAIR.

➤ Conclusions on the Portorož workshop

An action identified in the Portorož workshop has not been included in the EUSAIR discussion paper, namely the “Implementation of the Marine Strategy Framework Directive”.

All others actions have been included in the EUSAIR discussion paper.

✓ Zagreb: High level stakeholder conference: “Setting an agenda for smart, sustainable and inclusive growth from the Adriatic and Ionian seas”

The high level stakeholders’ conference was structured into six Working Groups (WG) and has followed the structure by Pillar of the COM (2012)713. Three WGs were dedicated to the first Pillar of the Communication (Maximising the potential of blue economy), the other three WGs to Pillar II (Maritime Spatial Planning (MSP), Integrated Coastal Zone Management (ICZM) and land-based pollution), Pillar III (Safer, cleaner and more secure maritime space) and Pillar IV (Sustainable and responsible fisheries).

WG 1: Setting the conditions for innovation and competitiveness: maritime workforce and clusters

The support to clustering initiatives and integrated research with reference to shipping-related actions were the most important topics included in the conclusion. Importance was also given to dissemination of clustering good practices within the EU and to plan state intervention mechanism for supporting the shipping sector.

All actions identified in this WG have been widely taken into account in the EUSAIR. Although some actions have more a horizontal approach – encompassing more than one Pillar of the EUSAIR – in general all WG actions have been included in the 2nd Pillar “Connecting the Region”.

WG 2: Maritime transport and island sustainable development

WG 2 conclusions were structured into two sections, the first one related to overall issues related to maritime transport, the second one related to island connection and their sustainable development.

Without going in detail through all ten topics reported, both sections have been widely encompassed in the EUSAIR discussion paper, in the 2nd Pillar “Connecting the region”. Especially as regards the development of islands, a specific objective has been included in the EUSAIR (“Reducing isolation of islands and remote areas by improving their access to transport and energy services”). This issue remains pivotal for Croatia and Greece, where development limits derived from their high insularity need to be addressed and the overall framework of the Strategy is a valid tool for the purpose.

WG 3: Maritime tourism

The WG 3 was focused not only on tourism, but also to other tourism-related issues. Specific actions were identified, for example, for reducing environment externalities of cruise tourism or for promoting marine protected areas as a common cultural heritage.

The EUSAIR has integrated all actions derived from this WG in the 4th Pillar, strengthening links between different tourism and environmental activities. Specifically as regards cruise and yachting tourism, the EUSAIR supports the promotion of sustainable development of both activities.

WG 4: Maritime Spatial Planning (MSP), Integrated Coastal Zone Management (ICZM) and land-based pollution

The second Pillar of the COM(2013) 713 has become part of the 3rd Pillar of the EUSAIR discussion paper.

Although the new proposal does not detail possible priorities to achieve, the Pillar has broadly included all actions identified in the WG conclusions. However, as restated in the EUSAIR, cooperation and harmonization in MSP and ICZM involving all different countries of the area remains the key priority to reach, also within the forthcoming Strategy.

WG 5: Safer, cleaner and more secure maritime space

The WG 5, totally dedicated to Pillar III of the Communication, has been included in the 2nd Pillar of the EUSAIR. All actions identified in this WG, despite their level of details in the conclusions, have been fully included in the EUSAIR objectives.

Cooperation between national and maritime authorities in the areas – supporting also candidate and potential candidate countries – is encouraged in EUSAIR for the purpose of enabling maritime traffic monitoring systems.

WG 6: Sustainable and responsible fisheries

Conclusions of this WG were structured into three sections and all topics and related actions have been encompassed in the EUSAIR’s 1st Pillar, excepted for topic “Marine Protected Areas (MPA) / Fishing Protected Areas (FPA)”, whose actions could be ascribable also to the 3rd Pillar (management of protected areas).

In the WG, significant emphasis were given to scientific cooperation and exchange of practices for the conservation of stocks. The EUSAIR has adopted maritime research for the conservation and management of stocks as the core element of the 1st Pillar.

➤ Conclusions on the Zagreb conference

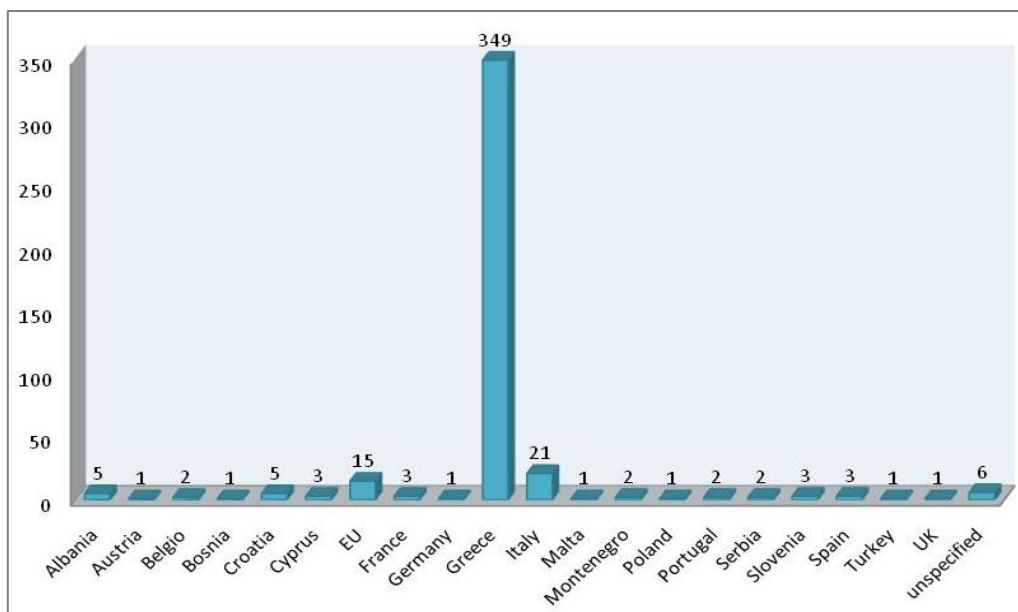
All topics and related actions identified in the conference have been encompassed in the EUSAIR discussion paper.

5.1.2.3 Analysis of the governance system in the Adriatic-Ionian: stakeholders' participation

✓ Athens – Stakeholders' workshop on maritime affairs. Towards a strategy for the Adriatic and Ionian Macro-Region

According to data available, a total of 428 people were invited to the first workshop hosted in Athens. As it can be seen in Figure 2, among them a great majority came from Greece. This disproportion, however, can be entirely attributed to the closeness of the venue. Italian and EU representatives ranked at the second and third positions. A few number of stakeholders was also invited from all over the Europe, including authorities coming from candidate and potential candidates' countries, e.g. the Turkish Ministry of Foreign Affairs.

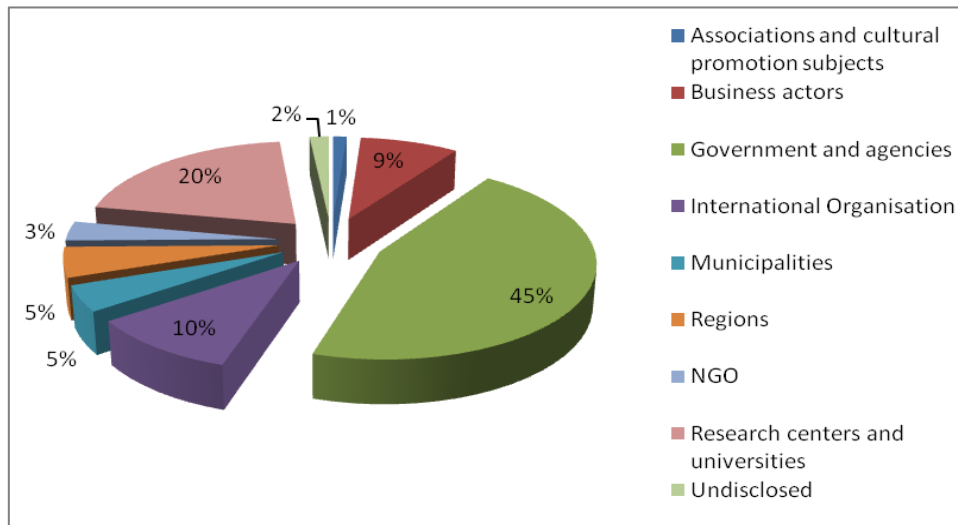
Figure 14 - Country of origin of stakeholders' invited to the 1st Stakeholders' workshop in Athens



Source: our elaboration

Looking at the categories of subjects invited to the Athens workshop, we find the following situation: less than half of people invited were delegates of governments and governmental agencies while one out of five was a representative of research centres and universities mostly related to environmental and maritime issues. A quite relevant percentage of involved stakeholders also represents the interests of international organisations and business actors while local administration delegates, NGOs and associations seems to be involved to a less extent.

Figure 15 - Stakeholders categories invited in Athens



Source: our elaboration

It should be noted that governmental institutions were always engaged in such initiatives.

Moreover, one should note that this first workshop held in Athens embeds the whole European area (Atlantic coastal countries such as France, Spain and Portugal were present in the list of invited) and “Government and governmental agencies” is the most numerous category invited to this event.

As shown in the charts above, a significant number of stakeholders, encompassing all different categories were invited in the Athens’ workshop, most likely as consequence of the fact that this was the first step of the consultation process towards the EUSAIR.

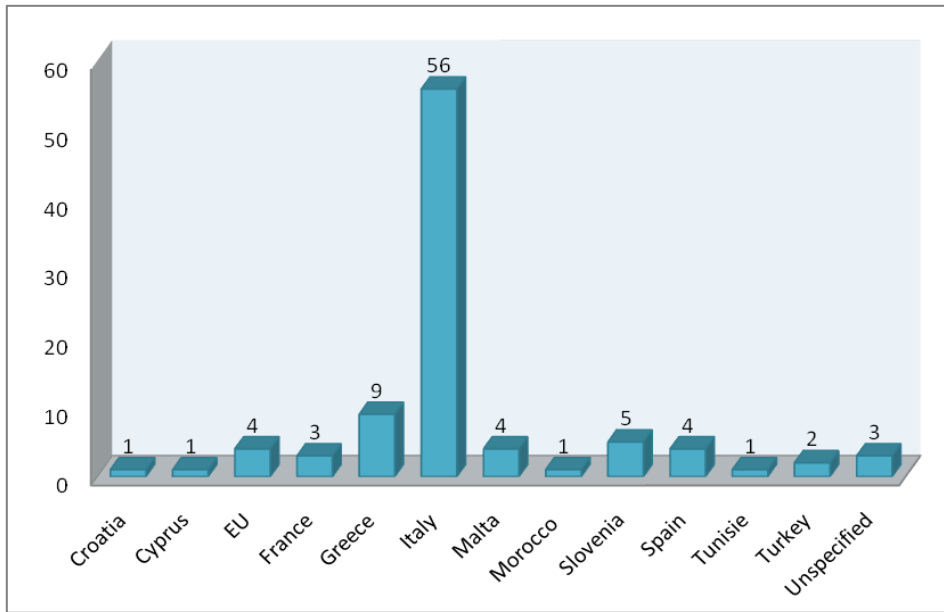
Therefore, in terms of number of stakeholders, typologies and countries of origin, the Athens workshop fully met the COM(2012)713 requests.

✓ *Stakeholders’ workshop on maritime affairs – Trieste 12-13 June 2012*

As for the second workshop held in Trieste (Italy), a lower number of stakeholders was invited if compared to Athens workshop. Less than one hundred people, mostly coming from Italy, were invited to the event.

Also Greece was quite well represented by delegates of government and governmental agencies equally to by representatives of business actors. Slovenia ranks third with five delegates, before EU, Malta and Spain with only three representatives each. Even though Croatia at that time was in a status of pre-adhesion and despite being located close to the venue, only one Croatian representative of an International organisation was invited. On the contrary, two institutional delegates were invited from Turkey and two countries from the African side of Mediterranean Sea (Morocco and Tunisia) were invited too.

Figure 16 - Country of origin of stakeholders' invited to the 2nd Stakeholders' workshop in Trieste

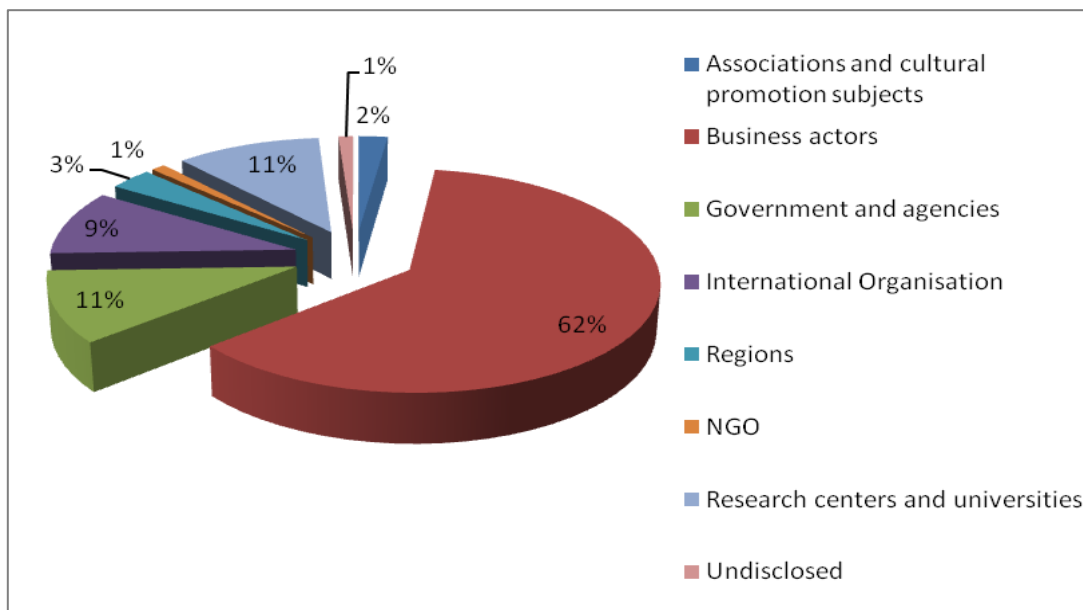


Source: our elaboration

Therefore, if we look at the percentage of stakeholders invited per category, a great majority of them were representatives of business actors even though keynote speakers were mostly exponents of government and governmental agencies and research centres and universities. A number of stakeholders invited were from governmental institutions and international organisation, while regions, associations and NGOs were involved only marginally.

Therefore, in terms of number of stakeholders, typologies and countries of origin, the Athens workshop fully met the COM(2012) 713 requests.

Figure 17 - Stakeholders categories invited in Trieste

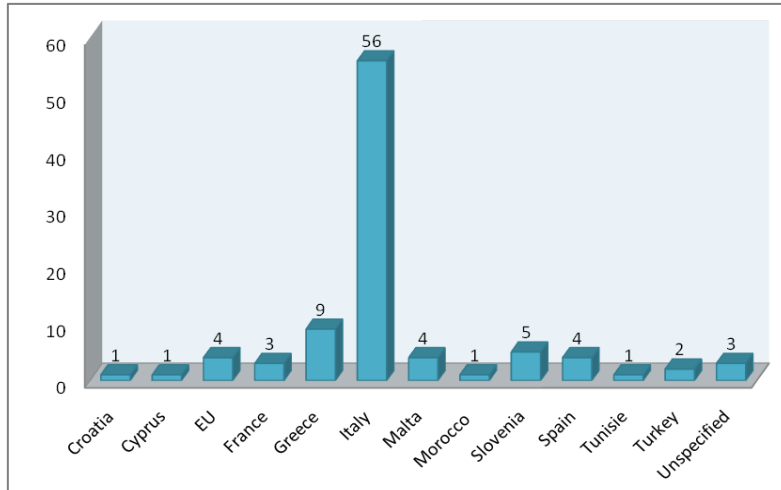


Source: our elaboration

✓ Stakeholders' workshop on maritime affairs – Portorož 17 September 2012

The third stakeholder workshop held in Portorož shows a situation definitely similar to previous workshop. It seems to be the continuation of the discussion started during the Trieste's workshop, with a great majority of people invited coming from Italy, Greece and Malta, with a minor involvement of stakeholders coming from candidate and potential candidate countries.

Figure 18 - Country of origin of stakeholders' invited to the 3rd Stakeholders' workshop in Portorož

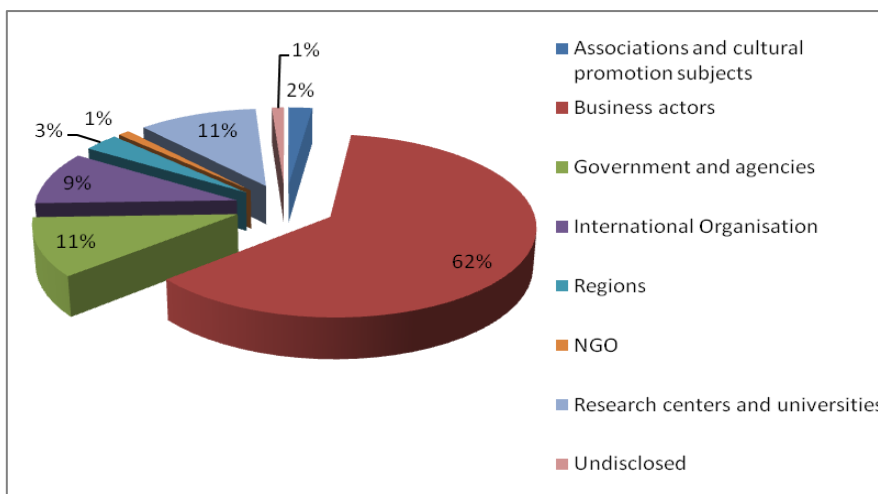


Source: our elaboration

If compared with Trieste's, Portorož stakeholder's workshop shows a similar distribution also for as far as sectors of provenience of the invited stakeholders are concerned. Business actors are widely represented, before international organisations, research centres, universities and institutional exponents, even though the latter are keynote speakers during the three round tables organised within the event.

Therefore, in terms of number of stakeholders, typologies and countries of origin, the Athens workshop fully met the COM(2012) 713 requests.

Figure 19 - Stakeholders categories invited in Portorož

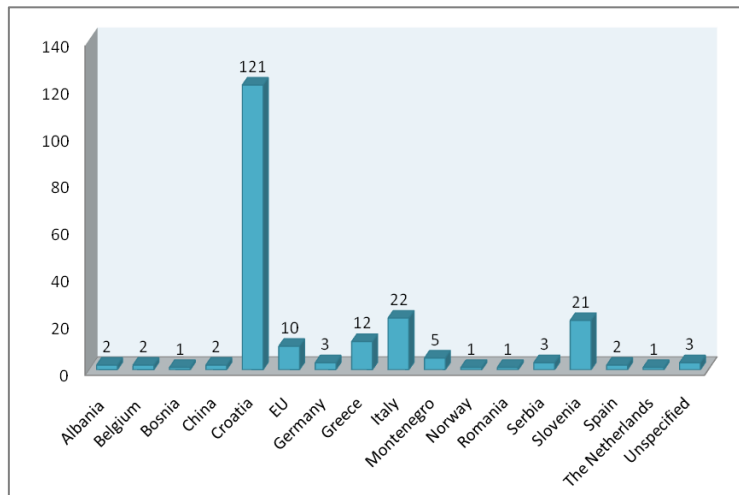


Source: our elaboration

✓ High Level Stakeholder's conference – Zagreb 6 December 2012

Due to its similar purposes, the high level stakeholder's conference held in Zagreb, is comparable with figures illustrated for the first stakeholder's workshop in Athens. As a matter of fact, more than two hundred stakeholders were invited to this last workshop. They come in large part from Croatia even though a good number of them are also representatives of the EU Members from Adriatic-Ionian region, i.e. Italy, Greece, Slovenia. Moreover, few representatives were invited per each other EU member state along with two representatives from China.

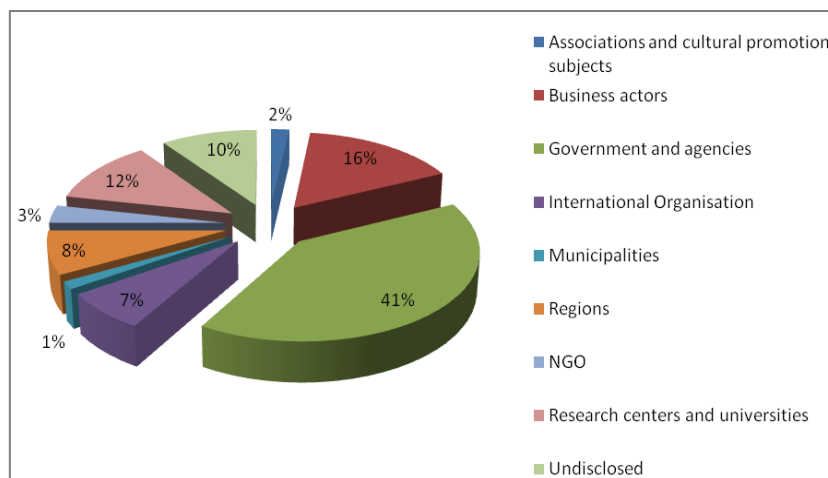
Figure 20 - Country of origin of stakeholders' invited to the High level stakeholders' conference in Zagreb



Source: our elaboration

As concerning categories of stakeholder's invited, we highlight a different picture if compared to previous workshops. We observe an almost equal percentage of stakeholders per category, with a predictable high involvement of government and governmental agencies' representatives. Other categories stood at an average of 12% each, except for associations, NGOs and municipalities.

Figure 21 - Stakeholders categories invited in Zagreb



Source: our elaboration

6 Assessment of the social, economic, legal and environmental impacts

The table below suggests that that ‘smart management and coordination’, which would result from the Action Plan, can be expected to result in economic, social and environmental benefits, without additional funds being necessary, and that:

- 1st Pillar and 2nd Pillar would have a primary impact that would generate economic, social, and environmental benefits;
- 3rd Pillar’s primary impacts would be mainly environmental in nature; and
- 4th Pillar’s primary impacts would be predominantly economic and social in nature.

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Table 9 - Expected primary and secondary benefits of potential priority actions included in an Action Plan

Pillar and possible activity/action	Primary emphasis/impact of activity/action	Secondary impact
1st Pillar: Driving innovative maritime and marine growth		
Developing market intelligence and services to ensure that marketing of fisheries and aquaculture products in the region is clear, efficient and fully compliant with applicable rules.	Economic (functioning of the market)	
Promoting common marketing and consumer awareness on Adriatic-Ionian seafood products, including seafood traceability and quality certification systems.	Economic (functioning of the market, GVA of seafood businesses)	
Improving good management for sustainable fisheries, including through the development of multiannual plans and other measures such as, inter alia, Marine Protected Areas in their wider sense.	Environmental (stock and habitat status)	Economic / Social (fleet GVA and employment)
Increasing the profitability and sustainability of fisheries and aquaculture activities.	Economic (fleet GVA)/ Environmental (stock and habitat status)	Social (jobs)
Improving the culture of compliance, saving resources, facilitating the collection, and transfer of data and information and enhancing cooperation for the monitoring and control of fishing activities.	Environmental (stock and habitat status)	Social (jobs) / Economic (GVA)
Developing tools to properly site aquaculture, including tools to identify activities for potential co-location with other economic activities.	Environmental (habitat status) / Economic (reduced costs of business)	Social (jobs) / Economic (GVA)
Assisting interregional collaborative processes among private, research and public sector (also in connection with smart cities development), aimed at exploiting research results, develop technological and innovative capacities and create and exploit knowledge.	Social (regional networking and sharing)	
Stimulating the development of maritime clusters and research networks, as well as the formulation of research strategies to develop blue bio-technologies and spur innovation in fisheries, aquaculture, biosecurity, blue energy, seabed mining, marine equipment, boating and shipping.	Economic (cost reductions/GVA increases)	Social (jobs)
Assisting to adapt fishery methods and gears to the new obligations deriving from the Common Fishery Policy reform.	Environmental (stock and habitat status)	Economic / Social(fleet GVA and employment)
Performing regular stock assessment for mixed fisheries in the Adriatic and Ionian Sea within a precautionary and ecosystem approach to fisheries management (state of stocks, fishing pressure levels, catch/discards composition, habitat mapping, genetics, tagging, etc.), in close cooperation with FAO and GFCM initiatives, as well as with the Regional Advisory Council for the Mediterranean (RACMED).	Environmental (stock and habitat status)	Economic / Social(fleet GVA and employment)

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Pillar and possible activity/action	Primary emphasis/impact of activity/action	Secondary impact
Establishing Adriatic-Ionian technological platforms for collaboration amongst the scientific community, public authorities and seafood industries and operators in the area of aquaculture (e.g. to develop new fish feed formulations and test their environmental effects and clinical/sanitary aspects; to study new/emerging species for aquaculture, with a greater potential for processing into value-added products; to promote selective breeding).	Environmental (reduced used of capture fish as feed)/ Economic (GVA from processing and improved growth rates)	Social (public health, jobs)
Establishing Adriatic-Ionian technological platforms for collaboration amongst the scientific community, public authorities and maritime industries on areas such as boating, shipping and marine equipment.	Social (regional networking and sharing)	Economic (GVA)/ Environmental (status)
Increasing the academic and professional mobility and the level of qualification of the workforce, including taking into account transparency and frameworks of qualifications (notably with regard to candidate and potential candidate countries).	Social (quality of flexibility of jobs/labour market)	Economic / Environmental
Ensuring full compliance with EU fisheries legislation in candidate/potential candidate countries (e.g. through IPA).	Social / Environmental / Economic	
Pillar 2: Connecting the Region		
Optimizing interfaces, procedures and infrastructure to facilitate trade with southern, central and eastern Europe, also by ensuring the rapid implementation of a maritime transport space without barriers.	Economic (competitiveness, trade movements, investment flows, functioning of the market)	Social (jobs)
Improving hinterland connections of seaports to TEN-T and enforcing the development of intermodality in the Adriatic-Ionian region through the establishment of freight villages and land corridors.	Economic (competitiveness, trade movements, investment flows, functioning of the market)/ Social (regional inter-connectedness)	
Enhancing cooperation between national or regional maritime authorities with the EU, establishing mechanisms to enable maritime traffic information exchange between national VTMIS systems through SafeSeaNet, notably for candidate and potential candidate countries.	Economic (reduced costs) / Social (regional inter-connectedness)	
Improving the culture of compliance in flag and port state control, liability and insurance of shipping, accident investigation and port security.	Environmental (Fish stock and status) / Social (safety)	
Developing modern security technologies in the ports of the region.	Social (public safety) / Economic (protection of assets)	
Reducing isolation of islands and remote areas by improving their access to transport and energy services.	Social (regional inter-connectedness. Labour mobility)	Economic
Increasing efficiency and reducing the environmental impact of transport systems, notably by providing alternative, sustainable and environmentally friendly, combined transport solutions.	Environmental (environmental status and positive impacts on climate change)/ Economic (efficiency)	Social
Minimisation of pollution from ship traffic, in particular oil, emissions to air and litter.	Environmental (pollution reductions)	
Continuing improving sub-regional cooperation and monitoring the existing mechanisms, as regards prevention, preparedness and coordinated response to major oil spills.	Environmental (reduced occurrence of disasters and the impacts)	Economic/ Social

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Pillar and possible activity/action	Primary emphasis/impact of activity/action	Secondary impact
Increasing the resilience of infrastructure to natural and man-made disasters (including the accompanying coastal development and infrastructure).	Economic (lifespan of economic assets increased)	Social / Environmental
Addressing energy dimension, as far as a macro-regional approach may facilitate a positive impact on accessibility, energy efficiency and environment.	Economic (efficiency)/ Environmental (reduced energy use)	
Preserving security of environment during transport of dangerous goods and activities related to the energy sector.	Environmental (reduced risk of disasters impacting environment)	
Developing environment-friendly fuels in marine transport as well as implementation of renewable energy sources.	Environmental (positive impacts on climate change, reduced energy use)	
Creating energy seasonal balancing opportunities.	Environmental (reduce energy use)	Social / Economic
Regulatory reform and rationalisation at each energy interconnection point in the regional system.	Economic (efficiency)/ Environmental (reduced energy use)	
Stimulating the setup of maritime clusters, platforms and research networks as well as the formulation of a research strategy to spur innovation in maritime transport and surveillance, including energy saving and efficiency in the nautical sector, smart transport systems, freight tracking.	Economic (GVA, efficiency)	Environmental
Exploring the setup of specific innovative financial instruments supporting research, innovation and SME development in the pillar's areas.	Economic (efficient use of funds)	
Increasing the academic and professional mobility and the level of qualification of the workforce, including taking into account transparency and frameworks of qualifications (notably with regard to candidate and potential candidate countries).	Social (job mobility and quality)	Economic
Developing low carbon transport systems: transforming the challenge of decarbonisation in a driver for innovation, by developing the clean economy and the renewable marine energy sources (waves, seawater streams).	Environmental (climate change benefits, reduced energy use)	
Supporting capacity building in safety and security matters in national and regional administrations, in particular in candidate/potential candidate countries.	Social (safety, security)	
Encouraging the development of decision support systems, accident response capacities and contingency plans.	Social (governance improvements, skills development)	
Promoting the adoption of e-services and e-government solutions, including open data production and use.	Social (transparency, availability of information)	Economic
3rd Pillar: Preserving, protecting and improving the quality of the environment		
Addressing eutrophication (mainly in the Adriatic Sea) by transnational coordinated actions on both point sources (e.g. nutrients and nitrogen discharges from municipal waste and wastewater treatment facilities or industries) and diffuse sources (e.g. nitrates from agriculture) and by enhancing the recycling of nutrients.	Environmental (water quality)	Economic / Social

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Pillar and possible activity/action	Primary emphasis/impact of activity/action	Secondary impact
Preserving biodiversity, habitats and ecosystems and their services by implementing the European ecological network Natura 2000 and managing it, considering also related work within the Barcelona Convention.	Environmental (biodiversity, habitats and ecosystems status)	Economic / Social
Dealing with Invasive Alien Species. Ensuring good environmental and ecological status of the marine and coastal environment by 2020 in line with the relevant EU acquis and the Ecosystem Approach of the Barcelona Convention.	Environmental (ecological status)	
Reducing marine litter, including through cleaning programmes and better waste management in coastal areas.	Environmental (reduced litter and waste)	
Improving harmonisation and coordination in MSP and ICZM, also by facilitating related conflict resolution between local and national or supranational approaches. Supporting waste and waste water management, in particular in urban areas along the coast and rivers.	Social (conflict reduction) /Environmental (reduced waste and resulting water quality improvements)	Social / Economic
Preserving and improving coastal environmental quality by protecting cultural and natural heritage such as coastal and maritime cultural landscapes, including from the impact of climate change.	Social (culture protection)	Economic / Social
Strengthen interregional cooperation of research and innovation stakeholders (private, research and public sector) by means of existing and new cluster-type cooperation initiatives in order to develop missing monitoring tools for the identification of sensitive areas and areas important for the protection of biodiversity, for the determination of ecological status indicators, for developing management plans for migratory marine species.	Social (skills and knowledge development) / Environmental (biodiversity protection)	
Strengthening cooperation and exchange of best practices among managing authorities of Marine Protected Areas aiming to improve capacity to preserve biodiversity and ecosystems.	Environmental (increased areas protected and restricted use) / Social (networking)	
Increase cooperation in marine research on issues regarding impact of climate change on coastal areas and marine ecosystems.	Environmental (climate change resilience)	Social / Economic
Introducing integrated coastal zones management and maritime spatial planning through exchange of best practices, comparing methodologies and pursuing a participative process of collaboration.	Environmental (better recognition of areas of importance needing protection)/ Social (reduced conflict)	Economic
Developing planning capacity on adaptation to climate change at regional and local level and encouraging the development of a macro-regional climate adaptation strategy based on risk and vulnerability assessments.	Environmental (climate change adaptation) / Economic / Social(reduced impact of climate change on businesses and jobs)	Social / Economic
Exploring the links with relevant Horizon 2020 research agendas (i.e. maritime research and biotechnology research).	Environmental (environmental knowledge)	
Increasing the academic and professional mobility and the level of qualification of the workforce, including taking into account transparency and frameworks of qualifications (notably with regard to candidate and potential candidate countries).	Social (labour mobility and skills)	Economic
4thPillar: Increasing regional attractiveness		
Capitalizing on existing tools and initiatives in the framework of EU tourism policy.	Economic (efficiency in use of funds)	Social
Supporting the sustainable development of coastal, maritime and hinterland tourism while reducing seasonality of demand, limiting its environmental footprint and taking into consideration the impacts of a changing climate.	Economic (GVA) / Social (jobs)/ Environmental (minimized impact of tourism)	

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Pillar and possible activity/action	Primary emphasis/impact of activity/action	Secondary impact
Promoting the sustainable development of cruise and nautical tourism. Establishing links of those forms of tourism with other forms of regional economic development.	Economic (GVA)	Social
Enhancing the value and appreciation of culture and natural heritage, also including links with the development of creative enterprise and services.	Social (cultural protection)	Economic
Encouraging innovation, clustering and developing of new common marketing strategies and products, including tourist promotion through common branding.	Economic (GVA)	Social
Improving coordinated governance in the tourism sector among private and public entities.	Economic (GVA, use of funds) / Social (coordination, skills)	
Enhancing and improving safety and security of all tourism products, especially diving, sailing and adventure tourism type of products.	Social (safety and security)	
Improving quality management and sustainability, e.g. through the European Tourism Quality label (ETQ) or other joint labels, as well as the promotion of service innovation (e.g. through the use of ICT).	Economic (branding increases value) / Environmental (label standards ensure environmental protection)	Social
Developing the links between health tourism and active ageing (life-science industry).	Social (health) / Economic (GVA for tourism businesses)	
Promoting tourism activities and services based on local products (agro and sea foods), cultures and values, to support active social inclusion and opportunities for youth in remote areas and areas exposed to demographic changes.	Economic (GVA for tourism businesses) / Social (protection of local activity, culture, support for youth)	
Fostering competitiveness of tourism SMEs, improving quality of tourism services and supporting innovation.	Economic (GVA)	Social
Stimulating Smart Specialisation and Smart communities (and coherence amongst Smart strategies) through the creation of Adriatic-Ionian thematic tourism platforms (including resources efficiency in the tourism sector) for collaboration amongst the scientific community, public authorities and businesses, as well as the formulation of research and innovation strategies to spur innovation and creativity in the tourism and cultural sectors.	Economic (efficiency, GVA) / Social (research skills)	
Increasing the academic and professional mobility and the level of qualification/skills of the workforce, including taking into account transparency and frameworks of qualifications (notably with regard to candidate and potential candidate countries).	Social (mobility and skills)	Economic
Facilitating inter-cluster and inter-platform connectivity.	Economic (GVA)	Social
Facilitating networking and mobility of artists and cultural operators in the frame of contemporary production and creative industries, as festivals.	Social (mobility, culture)	Economic
Promoting exchange of experiences on education, skill development and lifelong learning for tourist and cultural operators.	Social (skills, culture)	Economic

7 Other annexes: External prospective evaluation: EQ 2 existing international cooperation

7.1 Sustainability of cooperation projects

Besides simply listing all concluded and ongoing cooperation projects in the Adriatic-Ionian, it may be useful to analyse their sustainability over time, in order to understand whether cooperation produces results that can be capitalised in the future. By sustainability, we therefore mean the capacity of a project to produce results and set up mechanisms that can endure after project conclusion.

To do so, we have submitted a questionnaire to project managers of all cooperation projects surveyed, where we have asked if and how their project is sustainable over time, and/or its results have been or will be capitalised. We received answers from 27 project manager, out of 76 contacted (22%). Our sample is therefore very limited, and the conclusions provided below should be taken with a grain of salt.

Despite the low number of respondents, some general trends can be easily detected. In principle, nearly all project managers contacted declared that their projects are to be considered sustainable over time. In our opinion, this is closely related to the fact that sustainability over time is a fundamental award criteria in virtually all funding programmes. Application forms generally contain a specific paragraph where it is requested to describe how projects can endure after their conclusion. Since, most projects surveyed are still ongoing (69%) project managers mainly limited to explain what initiatives they have planned to set in place to ensure that their project will be sustainable over time. The problem with this kind of information is that its reliability is impossible to verify, in that most projects are still ongoing and we cannot possibly have any idea at present whether what has been declared by project manager will actually become reality.

A very interesting indication can be found in the answers given on concluded projects. These represent 30% of the answers received, this percentage is very close to their actual number over the total number of projects (which is 31%). Differently from ongoing projects, project managers of concluded projects have provided verifiable answers. What has turned out is that most concluded projects are at present being evaluated for further funding under a new call, or have been followed by capitalisation projects. On the one hand, this could be received favourably, since it testifies that there is a willingness to go further with cooperation. On the other hand, however, this also points to the fact that these projects are never really sustainable over time and their results are only partially capitalised, since they depends on further funding to keep going. What often happens, in a nutshell, is that, notwithstanding results achieved, cooperation projects tend not to set in place sustainable mechanisms that can endure after their conclusions, unless they receive further funding.

This should not come as a surprise, if we look at the approaches proposed to ensure sustainability over time. Most project managers, indeed, mentioned rather traditional tools which, albeit important, have proved to have a low added value in terms of sustainability. The most frequent of them are: memoranda of understanding (where partners commit themselves to continue cooperation after project conclusions); production of guidelines and various materials; action plans and/or business plans that define what will be done after project conclusion; actions aimed at strengthening institutional capacity to make sure that other subjects may take advantage of results achieved, etc. These approaches are typically found in applications forms, and correspond to the answers given by the project managers contacted. The problem with these approaches is that only rarely do they actually contribute to sustainability. In actual fact – and this is confirmed by the answers provided

by the project managers of concluded projects – what happens is that cooperation goes on only if a new funding source is available. The only exception is when projects produce physical outputs such as software and/or hardware (e.g. INTE-TRANSIT), Observatories (e.g. FutureMed), infrastructure (e.g. two aquaria are being build under Apreh, and TEN-T projects generally finance the construction of port and rail infrastructures).

What could be done in the future to improve this aspect? The current approach clearly is not sufficient to ensure sustainability. This was also confirmed in interviews with stakeholders, where many lamented that, despite some projects had been widely-acknowledged as successful, it was impossible to capitalise their results after conclusion, because they could not have access to further funding. This situation also produces an enormous duplication of efforts, since many current project share the same principles and approaches as projects carried out in the previous financial period, only that the former do not build on the latter, because results were not really capitalised. An important part of cooperation gets lost.

The macro-regional strategy, especially if with a dedicated cooperation fund, could partially mitigate this problem, by serving as a single collector of all cooperation projects in the region. Nonetheless, there remains a problem as to how to ensure that projects can endure after their conclusion. A possible solution in the framework of the macro-regional strategy could be to build a catalogue of best practices (i.e. projects commonly acknowledged as successful experiences with useful results) that will constitute future priorities of an Action Plan, with dedicated budget lines. In this way it will be possible to mainstream results to the benefit of the whole macro-region, and not only of partners involved in cooperation. Another possibility could be to link best practices with national operational programmes of EU funds (such as ESF, ERDF, EMFF, EARDF), i.e. aligning nationally-managed EU funds according to successful cooperation experiences. This could be done either through a periodic review of operational programmes during the financial period, or at the end of the financial period.

7.2 List of cooperation initiatives/structures organisations

➤ The Adriatic-Ionian Euroregion¹⁸

The *Adriatic Euroregion* (AE) was created on 30 June 2006 in Pula, Region of Istria, Croatia for transnational and interregional cooperation between regions of the Adriatic coastline.

The Adriatic Euroregion is the institutional framework for jointly defining and solving important issues in the Adriatic area. It consists of 26 members - regional and local governments from Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Montenegro and Slovenia.

The aims of the AE are the following:

- Forming an area of peace, stability and co-operation;
- Protection of the cultural heritage;
- Protection of the environment;
- Sustainable economic development in particular of tourism, fishery and agriculture;
- Solution of transport and other infrastructure issues.

The Adriatic Euroregion is divided in 6 technical Commissions, namely for:

- Tourism and culture;

¹⁸<http://www.adriaticionianeuroregion.eu>

- Fisheries;
- Transport and infrastructure;
- Environment;
- Economic affairs;
- Welfare.

➤ The Adriatic-Ionian Initiative¹⁹

The *Adriatic-Ionian Initiative (AII)* was established at the Conference on the Development and Security in the Adriatic and the Ionian Sea in Ancona on 19 - 20 May 2000. In that occasion the Ancona Declaration was adopted by those member countries committed to co-operate in order to strengthen peace and security in this part of Europe, good neighbourly relations, economic development, land transport connections, eliminate all forms of crime, technical assistance, environmental protection, health and cultural co-operation, tourism development and maritime co-operation.

The *Adriatic-Ionian Council* was established at the ministerial level, and it decides on all basic and specific issues, including the areas and forms of co-operation between the Initiative member states, co-operation with other international organizations and initiatives, as well as political issues in the region.

This platform for cross-border/international cooperation includes representatives of Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Montenegro, Serbia and Slovenia. The Initiative's work is carried out through round tables which are divided in four thematic units: Round Table for environment and Fire Protection, Round Table for Tourism, Culture and Interuniversity Co-operation, Round Table for Small- and Middle-Sized Entrepreneurship and Round Table for Transport and Maritime Affairs.

The Adriatic-Ionian Initiative dealt and deals with among others:

- The Adriatic Action Plan, adopted in 2003;
- Contingency plan for the Adriatic, including a Sub-regional Contingency Plan for the Northern Adriatic (Slovenia, Italy and Croatia), to be coordinated by the Regional Marine Pollution Emergency Response Centre for the Mediterranean Sea (REMPEC) issued in 2005;
- Proposal for the designation of the Adriatic Sea as a Particularly Sensitive Sea Area (PSSA);
- Strategic Environmental Assessment of Maritime Activities including Ballast Water Issue.

Among their best efforts, we mention UniAdrion²⁰, which was born on the occasion of the International Conference entitled "Culture as a Bridge - The Interuniversity Cooperation in the Adriatic-Ionian Basin" held on 15th -16th December 2000 in Ravenna, Italy.

UniAdrion is a "*Network of Universities*" established with the purpose to create a permanent connection among Universities and Research centres from the Adriatic-Ionian Region, mainly through the realization of didactic initiatives, such as training courses, masters, research projects.

¹⁹<http://www.aai-ps.org/>

²⁰<http://www.uniadrion.net/>

➤ The Adriatic Sea Partnership²¹

Originally a Slovenian initiative in cooperation with the Regional Environmental Center, the Adriatic Sea Partnership (ASP) was launched at the Mediterranean Action Plan (MAP) sub-regional conference on the Sustainable Development Strategy for the Adriatic in Portorož, Slovenia, June 5-6, 2006.

Financial support for the first phase of ASP has been provided by the Italian Ministry for the Environment, Land and Sea and the Slovenian Ministry of the Environment and Spatial Planning. The ASP promotes the extension of the existing initiatives in partnership with new ones by establishing an operative international body on the basis of political commitment by littoral countries, to fill a gap and act as a common platform for binding commitments and regional cooperation on action to protect the Adriatic Sea and promote its sustainable use. In fact, the ASP concept builds upon and brings together existing mechanisms and tools for cooperation on the Adriatic Sea, including the Trilateral Commission for Protection of the Adriatic Sea among Italy, Slovenia and Croatia, the Adriatic-Ionian Initiative and others.

In order to reach these goals, Slovenia developed the ASP concept with the support of the Regional Environmental Centre, based on the successful case of the Sava River Basin Initiative, where four countries joined together to establish new institutional arrangements including a river basin commission to ensure joint management and protection of the river basin leading towards sustainable development.

Through the ASP, the relevant countries and partners have begun to facilitate project preparation and implementation aimed at protection and sustainable development of the Adriatic region through a comprehensive umbrella partnership and a platform for joint action based on commitments by littoral states and stakeholders with appropriate institutional arrangements.

It now counts a total of 12 partners including environmental ministries, international organisations and scientific partners, however the ASP is open to all and is based on full cooperation with existing Adriatic initiatives and coordination with implementation of MAP and EU programmes.

➤ AdriaPAN²²

AdriaPAN, the Adriatic Protected Areas Network, is a bottom-up initiative, started by 2 Italian marine protected areas, Miramare and Torre del Cerrano. The aim of the network is to make contacts between Protected Areas in the Adriatic easier, to improve their partnership effectiveness, both in management and planning activities. AdriaPAN is a growing network with a great potential for joining efforts in environmental protection, sustainable development.

10 Italian Protected Areas, both marine and coastal, initially signed the Cerrano Charter, the founding act of AdriaPAN. Now the number has increased. It counts about 40 members from all countries bordering the Adriatic Sea, and more than 30 associated organizations (institutions, NGOs, businesses, etc.) interested in collaborating on AdriaPAN initiatives. Joining the network is free and the only requirement is to officially subscribe the Cerrano Charter, to achieve the mission herein defined.

AdriaPAN is an integral part of the wider MedPAN (network of Marine and Coastal Protected Areas managers in the Mediterranean), within such network it represents and promotes the ecological, cultural and economic specificities of the Adriatic Sea and coast.

²¹<http://asp.rec.org>

²²<http://www.adriapan.org/index.php/en/home-en>

The main objective of the network is to initiate a technical process in support of all MPA managers and staff in the Adriatic, by providing services to improve effective management. It aims at sharing energies and knowledge to promote common programmes of international and regional cooperation for environment protection, sustainable development, green tourism and biodiversity conservation.

The network has great potential to protect biodiversity, cultural heritage and landscape. AdriaPAN, in fact, has carried forward several EU-level projects (such as Serenissima, Hearth of Adria, Ritorno, ReSCWe, BySEAcle, ChaMon, TEA, PANforAMaR) and is now developing and implementing regional strategies, plans and programmes.

In 2008 AdriaPAN gained international recognition during an event promoted by MedPAN, at the IUCN "IV World Conservation Conference". In 2010 the network has also been recognized by AII (Adriatic-Ionian Initiative), an international organization coordinated by the Foreign Ministers of the Adriatic countries (Albania, Bosnia Herzegovina, Croatia, Greece, Italy, Montenegro, Serbia, Slovenia) for the constitution of a EU Adriatic Macroregion.

➤ Central Europe Initiative²³

The CEI is an intergovernmental forum promoting political, economic, cultural and scientific cooperation among its Member States. Its core mission is: Regional Cooperation for European Integration. Its member Countries are: Albania, Austria, Belarus, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Hungary, Italy, Macedonia, Moldova, Montenegro, Poland, Romania, Serbia, Slovakia, Slovenia, Ukraine.

In this context, the aim of the political cooperation is to supply the countries and their institutions with a flexible, pragmatic platform for regional cooperation, while focusing on their preparation to a future accession to the European Union (EU). In doing so, special attention is given to capacity building of the non-EU CEI Member States which, thanks to its ideal location, is pursued through know-how transfer and exchange of experience among those countries which are members of the EU and those which are not. The CEI is actively engaged in supporting projects in various areas of cooperation, also through the mobilisation of financial resources providing greater possibilities for studying, financing and executing national and international projects.

Moreover, the CEI is in a unique position to act as a bridge between macro-regions, such as the Baltic, Danube, Adriatic and Black Sea Regions.

The CEI's added value lies in the specific combination of operational structures and funds and instruments.

The Organisation's priorities within the established areas of cooperation are clearly defined in the triennial Plan of Action.

➤ FAO AdriaMed project: "Scientific Cooperation to Support Responsible Fisheries in the Adriatic Sea"²⁴

FAO-AdriaMed project is a Regional Project of FAO, operative since September 1999 and funded by the Italian Ministry of Agriculture, Food and Forestry Policies (MiPAAF) and since 2007 by the European Commission. AdriaMed was conceived to contribute to the promotion of cooperative fishery management between the participating countries: Albania, Croatia, Italy, Serbia, Montenegro and Slovenia .

²³<http://www.cei.int/>

²⁴<http://www.faoadriamed.org/>

The Project aims to promote scientific cooperation among the Adriatic states in order to improve the management of fishing activities in conformity with the Code of Conduct for Responsible Fisheries (FAO 1995). AdriaMed aims to contribute decisively to enlarging the scope of information on the Adriatic Sea, related to shared fishery resources, knowledge that is often fragmented and localised to different territories. As biological resources are not limited to geopolitical boundaries, scientific knowledge of resources within a single nation is not adequate for the responsible management of those resources.

Main objectives of the Project:

- to develop a common cognitive basis to support international processes aimed at fishery management;
- to reinforce the scientific coordination among the different institutions interested in fishing activity;
- to establish a permanent network among the main institutions present in the Adriatic that are involved in fishery management activities.

➤ [FAO EastMed project: “Scientific and Institutional Cooperation to Support Responsible Fisheries in the Eastern Mediterranean”²⁵](#)

The sub-regional project “*Scientific and Institutional Cooperation to Support Responsible fisheries in the Eastern Mediterranean- EastMed*” is a partnership between the Food and Agriculture Organization of the United Nations (FAO), the Ministry of Foreign Affairs and the Ministry of Rural Development and Food of Greece, the Ministry of Agriculture- Food and Forestry Policies (MiPAAF) of Italy, the EU Directorate General of Maritime Affairs and Fisheries (DG-MARE), and the countries with waters included in the GFCM Geographical Sub-Areas (GSAs) 19-20 and 22-28. The Project executed by FAO and funded by Greece, Italy and DG-Mare, will support the development of regionally-consistent fisheries management plans among the Eastern Mediterranean countries. It is planned to run for five years, at an estimated total cost of USD 4.8 million. The project is operational since September 2009. EastMed with the other members of the Mediterranean Projects “family” , such as AdriaMed, ArtFiMed, CopeMed, MedFisis, MedSudMed and Med-LME together form an integrated and coordinated whole, supporting the Mediterranean countries in achieving sustainable fisheries management in the region.

The project’s longer-term development objective aims at contributing to the sustainable management of marine fisheries in the Eastern Mediterranean, and thereby at supporting national economies and protecting the livelihoods of those involved in the fisheries sector. The project’s immediate objective aims at supporting and improving the capacity of national fishery departments to increase their scientific and technical information base for fisheries management and to develop coordinated and participative fisheries management plans in the Eastern Mediterranean sub-region.

In order to achieve its objectives, the project will work closely with the Fisheries Departments with which it will be in contact through the National Focal Points and it will function through the national Fisheries Directors. Its Coordination Committee will establish and support the Country Participatory WGs (CPWGs) for ensuring the stakeholders involvement and operate data collection programs on statistics and information, on Stock Assessment, on Marine Environment and Ecosystems, on Economics and Social Sciences.

²⁵<http://www.faoeastmed.org/index.html>

➤ The Forum of the Adriatic and Ionian Chambers of Commerce²⁶

The *Forum of the Adriatic and Ionian Chambers of Commerce* is a transnational, non-profit association linking the chambers of commerce of countries residing on both Adriatic and Ionian coasts: Italy, Croatia, Bosnia and Herzegovina, Montenegro, Slovenia, Greece and Albania.

The aim of the association, established in 2001, owing to the will and vision of the founding chambers of commerce, those of Ancona and Split, is to strengthen the synergies and opportunities for socio-economic development of the Adriatic and Ionian area.

With the scope of achieving better coordination of its activities, the Forum identified topics of common interest from which six Workgroups were created: Agriculture, Environment, Women's Entrepreneurship, Transports, Tourism and Fisheries/Aquaculture. Furthermore, a Workgroup on EU Project Management and the International Court of the Adriatic and Ionian Area were established.

The AIC Forum is one of the major promoters of the ambitious Adriatic and Ionian Macroregion project. This strategy represents a joint governance system that involves various participants, diverse politics and attributes present on the territory of the area, increasing the value of cultural heritage and the richness of diversities.

The Macroregion transforms the concepts of territorial cohesion, environmental protection, sustainable economic and social development into tangible results and it does so by utilising existent networks, without creating new structures. Those networks, in conjunction with the AIC Forum, form an organism involved in development, in the process of sustainable growth and in the dissemination of experiences and potentials present in the economic productivity of the Adriatic - Ionian area.

➤ The Forum of Adriatic and Ionian Cities²⁷

On the initiative of the Municipality of Ancona and ANCI (Italian National Association of the Municipalities) and with the approval of the “Charter of Ancona “ on 30th of April 1999 was born in Ancona the *Forum of Adriatic and Ionian Cities*. This association brings together the coastal cities of the 7 countries of the Adriatic-Ionian Basin: Italy (28 cities), Slovenia (2 cities), Croatia (9 cities), Bosnia and Herzegovina (1 city), Montenegro (3 cities), Albania (5 cities) and Greece (5 cities).

The Forum aims to build and develop the economic, social, environmental and cultural heritage of the Adriatic and Ionian coastal cities and to collaborate on European integration and enlargement. It pursues this goal by promoting innovative forms of decentralized cooperation and partnerships between local authorities of the member countries.

➤ Regional Cooperation Council²⁸

The Regional Cooperation Council (RCC) was officially launched at the meeting of the Ministers of Foreign Affairs of the South-East European Cooperation Process (SEECP) in Sofia, on 27 February 2008, as the successor of the Stability Pact for South Eastern Europe.

Through a regionally owned and led framework, the RCC focuses on promotion and enhancement of regional cooperation in South East Europe (SEE) and supports European and Euro-Atlantic

²⁶<http://www.forumaic.org/>

²⁷<http://www.faic.eu>

²⁸<http://www.rcc.int/>

integration of the aspiring countries. The RCC provides operational capacities to and works under the political guidance of the SEECF. In line with its Statute and guided by the principles of all-inclusiveness, the main tasks of the RCC are to represent the region, assist the SEECF, monitor regional activities, exert leadership in regional cooperation, provide a regional perspective in donor assistance – notably the EU's Instrument for Pre-accession Assistance (IPA) programme – and support increased involvement of civil society in regional activities.

The RCC functions as a focal point for regional cooperation in SEE and its key role is to generate and coordinate developmental projects of a wider, regional character, to the benefit of each individual participant, and create an appropriate political climate susceptible to their implementation.

The work of the RCC focuses on the priority areas of economic and social development, energy and infrastructure, justice and home affairs, security cooperation, building human capital, and parliamentary cooperation as an overarching theme. The organization develops and maintains close working relationships with all relevant actors and stakeholders in these areas, such as governments, international organizations, international financial institutions, regional organizations, civil society and the private sector.

The annual budget of the RCC Secretariat is slightly under 3 million euro, 40% being the contribution by the region of South East Europe, 30% by the European Commission and the remaining 30% by other RCC participants.

The RCC is supported by the Secretary General, a Secretariat based in Sarajevo, Bosnia and Herzegovina, and a Liaison Office in Brussels.

➤ Trilateral Commission for the protection of the Adriatic

The *Trilateral Commission for the protection of the Adriatic* originates from the bilateral commission between Italy and Yugoslavia (1974), which was re-launched in 1992, including Italy, Croatia and Slovenia. Montenegro has recently become a member of the initiative. Even though the other Adriatic countries – Albania and Bosnia and Herzegovina – do not form part of the Trilateral Commission, their interest in activities conducted by the Trilateral Commission was expressed.

The trilateral commission is responsible for the implementation of international research programs between these countries on the northern flanks of the Adriatic Sea. It was the starting point of the political process resulting in the three Adriatic projects that are included in the MSSD action plan.

The main goal of the Trilateral Commission is the protection of the Adriatic Sea and coastal areas against pollution. Therefore, main topics approached by the Commission are:

- Ballast water management in the Adriatic Sea;
- Implementation of the Sub-Regional Intervention Plan for Cases of Sudden Adriatic Sea Pollution;
- EU Marine Strategy Directive;
- The integrated management of coastal areas and safe harbours.

The Trilateral Commission presents the adequate institutional framework for the cooperation of the Adriatic states in the field of marine environmental protection. Moreover, the work of the Trilateral Commission has proved to be an efficient model, housing different aspects of marine environmental issues and providing for appropriate response to new challenges.

7.3 List of cooperation programmes analysed

➤ Instrument for Pre-Accession Assistance (IPA)²⁹

The Instrument for Pre-Accession (IPA) is the financial instrument established by the European Union (EC Regulation n. 1085/2006) to assist Candidate Countries and Potential Candidate Countries (beneficiary Countries) in their progressive alignment with the standards and policies of the European Union, including where appropriate the "*acquis communautaire*", with a view to membership.

Assistance is provided on the basis of the European Partnerships of the potential candidates and the Accession Partnerships of the candidate countries, which means the Western Balkan countries, Turkey and Iceland. The IPA is intended as a flexible instrument and therefore provides assistance which depends on the progress made by the beneficiary countries and their needs as shown in the Commission's evaluations and strategy papers.

The IPA was designed so as to address the needs of the beneficiary countries within the context of pre-accession policy in the most appropriate way. Its main aim is to support institution-building and the rule of law, human rights, including the fundamental freedoms, minority rights, gender equality and non-discrimination, both administrative and economic reforms, economic and social development, reconciliation and reconstruction, and regional and cross-border cooperation. It is the result of joint programming work carried out by the relevant participating countries and is part of the cooperation process in the Adriatic area. The Programme draws its strength and incisiveness from the wide experience, gained during the previous Programme period producing concrete results from the studies and analysis financed in the past.

In this framework we can clearly distinguish between IPA Cross Border Cooperation Programme and Bilateral Cooperation programmes co-funded by the IPA instrument. In this study, we analysed both programmes, focusing our attention on cooperation projects dealing with maritime activities across the Adriatic-Ionian region, by taking into consideration the following:

- IPA ADRIATIC CBC Programme 2007-2013³⁰
- "Greece-Albania" IPA Cross-Border Programme 2007-2013³¹
- "Slovenia-Croatia" IPA Cross-Border Programme 2007-2013³²

➤ INTERREG IV

The *Interreg initiative* is designed to strengthen economic and social cohesion throughout the European Union, by fostering the balanced development of the continent through cross-border, transnational and interregional cooperation. Special emphasis has been placed on integrating remote regions with those that share external borders with the candidate countries. One of its main targets is to diminish the influence of national borders in favour of equal economic, social and cultural development of the whole territory of the European Union.

²⁹http://europa.eu/legislation_summaries/agriculture/enlargement/e50020_en.htm

³⁰<http://www.adriaticipacbc.org/>

³¹<http://www.greece-albania.eu/>

³²http://www.si-hr.eu/start_en/

Interreg measures are not only required to demonstrate a positive impact on the development on either side of the border but their design and, possibly, their implementation must be carried out on a common cross-border basis.

The final beneficiaries of Interreg funds are usually public authorities, interest associations and non-profit organisations, such as chambers of commerce, employer organisations, unions or research institutes. Under Interreg IV, private firms are only eligible if they apply through a consortium of several firms; in previous programme periods, they were not eligible at all.

The Interreg Programme is divided into 3 strands:

1) *Interreg IV A – CROSS BORDER COOPERATION*³³

Cross-border cooperation between adjacent regions aims to develop cross-border social and economic centres through common development strategies. The term cross-border region is often used to refer to the resulting entities, provided there is some degree of local activity involved. The term Euroregion is also used to refer to the various types of entities that are used to administer Interreg funds. In many cases, they have established secretariats that are funded via technical assistance: the Interreg funding component aimed at establishing administrative infrastructure for local Interreg deployment.

Interreg IVa is by far the largest strand in terms of budget and number of programmes.

In the framework of this strand, for the purposes of our study, we took into consideration only the following programme:

Italy-Slovenia³⁴

The Programme area, that extends for 30.740 km² and has a population of more than 5.5 million inhabitants includes, on the Slovenian territory, Goriška, Gorenjska, Obalno-kraška and the flexibility areas of Osrednjeslovenska and Notranjsko-kraška; on the Italian territory, the Provinces of Udine, Gorizia, Trieste, Venezia, Padova, Rovigo, Ferrara e Ravenna and the flexibility areas of Pordenone and Treviso.

The general objective of the O.P. Italy-Slovenia 2007-2013 is to: “Enhance the attractiveness and competitiveness of the Programme-area”.

2) *Interreg IV B – TRANSNATIONAL COOPERATION*³⁵

Transnational cooperation involving national, regional and local authorities aim to promote better integration within the Union through the formation of large groups of European regions. Strand B is the intermediate level, where generally non-contiguous regions from several different countries cooperate because they experience joint or comparable problems. There are 13 *Interreg IVb* programmes focusing each onto a specific European macro region. In this case we examine just the ones concerning –even partially- the Adriatic-Ionian euro region:

³³ http://ec.europa.eu/regional_policy/cooperate/cooperation/crossborder/index_en.cfm

³⁴ <http://www.ita-slo.eu>

³⁵ http://ec.europa.eu/regional_policy/cooperate/cooperation/transnational/index_en.cfm

Alpine Space³⁶

The *Alpine Space Programme* is the EU transnational cooperation programme for the Alps. Partners from the seven Alpine countries work together to promote regional development in a sustainable way.

Central Europe³⁷

Central Europe is a European Union transnational cooperation programme that encourages cooperation among regions of nine central European countries: Austria, Czech Republic, Germany, Hungary, Italy, Poland, Slovakia, Slovenia and Ukraine. It aims to improve innovation, accessibility and the environment and to enhance the competitiveness and attractiveness of their cities and regions.

Med Programme³⁸

The *Med programme* is a transnational programme of European territorial cooperation. It is financed by the European Union as an instrument of its regional policy and of its new programming period. The transnational setup allows the programme to tackle territorial challenges beyond national boundaries, such as environmental risk management, international business or transport corridors. So far, 144 projects have been programmed, co-funded by the European Regional Development Fund (ERDF) up to a rate of 85%.

South East Europe³⁹

The *South East Europe Programme* aims to develop transnational partnerships on matters of strategic importance, in order to improve the territorial, economic and social integration process and to contribute to cohesion, stability and competitiveness of the region. For this purpose, the Programme seeks to realize high quality, result oriented projects of strategic character, relevant for the programme area.

In addition, the SEE Transnational Cooperation Programme will actively seek the full participation of non-Member States in the programme area benefitting from the external Pre-Accession Assistance and the European Neighbourhood Policy funding. The programme area is located at the South Eastern edge of the Union, where several accession candidate countries and potential candidate countries as well as third countries engaged in the EU partnership framework are concentrated, thus going far beyond the external borders of the EU. The South East Europe Programme, in fact, helps to promote better integration between the Member States, candidate and potential candidate countries and neighbouring countries. Regional cooperation in South East Europe is essential, regardless of the different stage of integration of the various countries. The stability, prosperity and security of the region are of significant interest to the EU.

3) *Interreg IV C – INTERREGIONAL COOPERATION*⁴⁰

INTERREG IVc provides funding for interregional cooperation across Europe. It is implemented under the European Community's territorial co-operation objective and financed through the European Regional Development Fund (ERDF).

³⁶<http://www.alpine-space.eu/home/>

³⁷<http://www.central2013.eu/>

³⁸<http://www.programmemed.eu>

³⁹<http://www.southeast-europe.net/en/>

⁴⁰<http://www.interreg4c.eu/programme/>

The overall objective of the INTERREG IVc Programme is to improve the effectiveness of regional policies and instruments. A project builds on the exchange of experiences among partners who are ideally responsible for the development of their local and regional policies.

The areas of support are innovation and the knowledge economy, environment and risk prevention. Thus, the programme aims to contribute to the economic modernisation and competitiveness of Europe. INTERREG IVc is linked to the objectives of Lisbon and Gothenburg agendas.

Typical tools for exchange of experience are networking activities such as thematic workshops, seminars, conferences, surveys, and study visits. Project partners cooperate to identify and transfer good practices. Possible project outcomes include for example case study collections, policy recommendations, strategic guidelines or action plans. INTERREG IVc also allows light implementation or piloting, but only if these complement the exchange of experience activities.

For the purposes of our study, we analysed only the following bilateral program:

Greece-Italy⁴¹

Territorial cooperation for the eligible regions constitutes both a challenge and an opportunity for the programming period 2007-2013. The general objective of the OP Cross-Border Cooperation «Greece – Italy» for the Programming Period 2007 – 2013 is “To strengthen the competitiveness and territorial cohesion in the programme area towards sustainable development by linking the potential on both sides of the cross-border maritime line”.

The eligible area of the Programme consists of Region of Western Greece (Prefectures of Aitoloakarnania and Achaia), Region of Ionian Islands (Prefectures of Corfu, Lefkada, Cephalonia and Zakynthos) and Region of Epirus (Prefectures of Ioannina, Preveza and Thesportia) in Greece and the Region of Apulia (Provinces of Bari, Brindisi and Lecce) in Italy. The Prefectures of Ilia and Arta in Greece and the Provinces of Taranto and Foggia in Italy have been included as adjacent territories.

Marco Polo II⁴²

Marco Polo aims to ease road congestion and its attendant pollution by promoting a switch to greener transport modes for European freight traffic. Railways, sea-routes and inland waterways have spare capacity. Companies with viable projects for promoting direct modal-shift or traffic avoidance projects and projects providing supporting services which enable freight to switch from road to other modes efficiently and profitably to shift freight from roads to greener modes can turn to Marco Polo for financial support.

Funding is in the form of an outright grant. It is not a loan to be repaid later. Applicants must meet a series of conditions to obtain a grant. Grants cover a share of costs associated with the launch and operation of a new modal-shift project, but must be supported by results.

A grant gives financial support in the crucial start-up phase of a project before it pays its way to viability. Grants last from two to five years. Projects should be commercially viable by the time the funding stops. Successful participation in a Marco Polo project enhances a company's green credentials.

7th Framework Programme⁴³

Research is a component of a knowledge triangle (the other two being education and innovation) meant to boost growth and employment in the European Union (EU) in the context of a global

⁴¹<http://www.interreg.gr/en/programmes/bilateral-cooperation-programmes/greece-italy.html>

⁴²<http://ec.europa.eu/transport/marcopolo/>

⁴³http://ec.europa.eu/research/fp7/index_en.cfm

economy. The 7th Framework Programme for Research, covering the period 2007 to 2013, is an opportunity for the EU to match its research policy to its ambitions in terms of economic and social policy by consolidating the European Research Area (ERA). In order to achieve this objective, the Commission hopes to increase the EU's annual spending on research, thereby generating more national and private investment in this field. When it is implemented, the 7th Framework Programme will also have to respond to the research and knowledge needs of industry and more generally of EU policies. The Framework Programme is organised around four main programmes and has been greatly simplified so as to be more effective and more accessible to researchers.

TEN-T Programme⁴⁴

In view of the growth in traffic between Member States, expected to double by 2020, the investment required to complete and modernise a well-performing trans-European network is substantial. The cost of EU infrastructure development to match the demand for transport has been estimated at over € 1.5 trillion for 2010-2030. The completion of the TEN-T network requires about € 550 billion until 2020 out of which some € 215 billion can be referred to the removal of the main bottlenecks. Given the scale of the investment required, it is necessary to strengthen the coordination dimension of network planning and development at European level, in close collaboration with national governments.

The European Union is supporting the *TEN-T* implementation by several financial instruments - the *TEN-T programme*, the Cohesion Fund, the European Regional Development Fund and European Investment Bank's loans and credit guarantees.

Grants, in particular under the TEN-T budget line and the Cohesion and European Development Funds, play a major role in both project preparation and implementation phases. Grants are allocated to studies (from feasibility studies to comprehensive technical or environmental studies and costly geological explorations), helping to overcome early stage project difficulties, and to the works phase. A key issue for the future in relation to the implementation of the TEN-T policy is to rationalise the allocation of grants and to link it to the projects' European added value so as to ensure the best value for EU money.

⁴⁴<http://tentea.ec.europa.eu/>

7.4 List of cooperation projects identified

The table below shows main characteristics of cooperation projects identified. The analysis has focused on projects dealing with pillars and priority areas defined in the EUSAIR.

Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
A.R.T.E.M.I.S. - Advanced Rational Transport Evaluator and Multi-modal Information System	MARCO POLO II	2	C	Italy	12	3	2344650	586162.5	24	Nethun S.p.A. Marittima Fabbricato 103 IT-30135 Venice Italy Contact: elio.cereghino@nethun.it
				Slovenia						
ACROSSEE - Accessibility improved at border CROSSings for the integration of South East Europe	South-East Europe	2	O	Italy	25	16	3025246	1936157.44	48	Carlo Fortuna – Anna Marconato CENTRAL EUROPEAN INITIATIVE EXECUTIVE SECRETARIAT Via Genova 9, 34121 Trieste Tel: +39 040 7786 777 - Fax: +39 040 360 640 E-mail: europrojects@cei.int Italy
				Greece						
				Slovenia						
				Croatia						
				Montenegro						
				Serbia						
Albania										
ACT - Adapting to Climate change in Time	Life + (2007-2013)	3	C	Greece	5	4	1752258	1401806.4	42	Marco Cardinaletti (Project manager) Comune di Ancona +39.071.222.26.06 marco.cardinaletti@comune.ancona. it mobile: +39 328 9266073 skype: bandigot Sanja Vukorep (Project officer) Settore Politiche Comunitarie Comune di Ancona +39.071.207.27.57 sanja.vukorep@comune.ancona.it
				Italy						

EUNETMAR

Study to support the development of sea-basin cooperation in the Mediterranean, Adriatic and Ionian, and Black sea

ANNEXES to REPORT 2 - Analysis to support the elaboration of the Adriatic and Ionian maritime Action Plan

Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
ADB Multiplatform - Adriatic - Danube - Black Sea multimodal platform	South-East Europe	2	O	Italy	40	20	5646970	2823485	39	Massimiliano Angelotti Friuli Venezia Giulia Autonomous Region (FVG) Email: adb.multiplatform@regione.fvg.it Address: Via Giulia 75/1 - 34126 TRIESTE (ITALY) Phone: +39 040 377 4720 Fax: +39 040 377 4733
				Slovenia						
				Croatia						
				Albania						
				Montenegro						
Adria.MOVE IT!	IPA-ADRIATIC CBC	2	O	Croatia	6	6	1796268.7	1796268.7	36	Grad Dubrovnik City of Dubrovnik Biserka Simatović Senior Advisor for EU Funds 00 385 (0)20 351 800 switchboard bsimatovic@dubrovnik.hr
		4		Montenegro						
		Slovenia								
ADRIA.MUSE	IPA-ADRIATIC CBC	4	C	Albania	11	11	1762670.8	1762670.8	38	Province of Rimini Address: Corso d'Augusto 231, IT-47900 Rimini, ITALY Contact: Roberto Righi RRighi@amitie.it, Enzo Finocchiaro e.finocchiaro@provincia.rimini.it Tel: +39.0541716415, +39.0541716307 Web: www.provincia.rimini.it
				Bosnia-Herzegovina						
				Croatia						
				Italy						
				Montenegro						
				Slovenia						
ADRIAMOS - Adriatic Motorways of the Sea	2007-2013 TEN-T Programme	2	O	Italy	3	3	56700000	56700000	48	Antonio Revedin Director of the Strategic Planning and Development Department Venice Port Authority Tel. +30 041 5334284 Email: antonio.revedin@port.venice.it James Orlandi Head of the Projects Research and Development Unit Venice Port Authority Tel.: +39 0415334243 Email: james.orlandi@port.venice.it
				Greece						
AdriaticMos -	IPA-ADRIATIC CBC	2	O	Albania	8	8	1790770	1790770	36	N/A

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
Developing of Motorways of Sea system in Adriatic region		4		Croatia	8	8	1790770	1790770	36	N/A
				Greece	8	8	1790770	1790770	36	N/A
				Italy	8	8	1790770	1790770	36	N/A
				Montenegro	8	8	1790770	1790770	36	N/A
				Slovenia	8	8	1790770	1790770	36	N/A
ADRIAWET 2000 - Adriatic Wetlands for Natura 2000	ETCP - Italy-Slovenia 2007/2013	3	O	Italy	2	2	1062000	3815700	36	Massimiliano Pinat Comune di Staranzano Piazza Alighieri 26, 34079 Staranzano GO Tel: +39 0481 71 69 11 m.pinat@consorzioilmosaico.org
				Slovenia						
ADRIMOB - Sustainable coast MOBility in the ADRIatic area	IPA-ADRIATIC CBC	2	O	Albania	18	18	2881770	2881770	36	Provincia di Ravenna - Servizio Politiche Comunitarie Piazza Caduti per la Libertà, 2 48121 Ravenna (Italy) tel +39 0544 258011 fax +39 0544 258070-71 arebucci@mail.provincia.ra.it www.provincia.ra.it
				Croatia						
				Greece						
		4		Italy						
				Montenegro						
				Slovenia						
ADRI-SEAPLANES - Implementing Seaplanes System in Adriatic Basin	IPA-ADRIATIC CBC	2	C	Albania	9	9	2319000	2319000	24	Assessore: Davide Calcedonio Di Giacinto - Tel 0861 331 762 E-mail: d.digiacinto@provincia.teramo.it Dirigente: Leo Di Liberatore - Tel 0861 331 235, E-mail:
				Croatia						
				Greece						

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
				Italy						I.diliberatore@provincia.teramo.it Coordinatore: Antonio D'Anastasio - Tel 0861 331 575, E-mail: a.danastasio@provincia.teramo.it
				Montenegro						
APC - The Adriatic Port Community	IPA-ADRIATIC CBC	1	C	Croatia	5	5	2557000	2557000	24	N/A
		2		Italy						
				Greece						
APREH - INTERDISCIPLINARY AQUARIA FOR THE PROMOTION OF ENVIRONMENT AND HISTORY	ETCP - Greece-Italy 2007/2013	4	O	Greece	5	5	1145025	1145025	29	Genuario Belmonte, Università del Salento, LECCE (ITALY), email: genuario.belmonte@unisalento.it
				Italy						
ARCHEO.S. - System of the Archaeological Sites of the Adriatic Sea	IPA-ADRIATIC CBC	4	C	Albania	5	5	2995000	2995000	24	Lino Manosperta E-mail progetti@teatropubblicopugliese.it
				Croatia						
				Greece						
				Italy						
BACKGROUNDS - Improving productive clusters accessibility to global market	Med Programme	1	C	Slovenia	6	2	1416677	472225.666 7	33	Antonio GRASSO Function: Dirigente Address: Via Notarbartolo, 9 90141 PALERMO phone: +39 091 707 80 44 fax: +39 091 707 82 11 email: a.grasso.trasporti@regione.sicilia.it mobile: +39 347 682 37 19
		2		Greece						

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
BE-NATUR BEtter management and implementation of NATURa 2000 sites	South-East Europe	3	O	Italy	14	5	2544900	908892.8571	36	Provincia di Ravenna Agriculture Policies and Rural Development Dept - Parks Unit P.zza Caduti 2/4 48121 RAVENNA - Italy Tel. +39 0544.258506 mcosta@mail.provincia.ra.it Zsuzsa Fidloczky - E-mail fidlozsuzs@hotmail.com
				Greece						
				Serbia						
CLIMEPORT - Mediterranean Ports' Contribution to Climate Change Mitigation	Med Programme	3	C	Greece	9	3	1610454	536818	36	Federico Torres Monfort Function: Address: Nuevo Edificio APV Avda. del Muelle, sin número 46024 Valencia phone: +34 96 393 95 00 fax: +34 96 393 95 51 email: ftorres@valenciaport.com
				Slovenia						
COASTANCE - regional COmmon Action STRategy Against Coastal Erosion and climate change effects for a sustainable coastal planning in the Mediterranean basin	Med Programme	3	C	Italy	8	3	1738324.14	651871.5525	36	Christos Partsiyas Function: Address: 7, D. Tsetine str. 69100 Komotini, Greece phone: 302 531 083 000 fax: 302 531 083 029 email: c.partsias@pta-emth.gr
				Croatia						
COASTGAP - Coastal Governance and Adaptation Policies in the Mediterranean	Med Programme	3	O	Italy	15	3	1360000	272000	18	Lazio Region - Directorate of Environment, Italy
				Croatia						
COCONET - Towards COast to COast NETworks of marine protected areas (from the	7th FP	1	O	Albania	39	9	11382300	2626684.615	48	Ferdinando Boero Professor of Zoology Università del Salento / CoNISMa / CNR-ISMAR Università' del Salento
				Croatia						

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
shore to the high and deep sea), coupled with sea-based wind energy potential		3		Greece						DiTeBA 73100 Lecce Italy email: boero@unisalento.it Cell phone:+39 3332144956 Office: +39 0832 298619 Fax:+39 0832 298702 Home: +39 0832 316758
				Italy						
				Montenegro						
CSP - CROSS-BORDER SUSTAINABLE PORTS	ETCP - Greece-Italy 2007/2013	2	O	Greece	2	2	8250000	8250000	N/A	N/A
				Italy						
DEVELOP-MED	Med Programme	2	C	Greece	10	3	1400372	420111.6	27	Paolo Pasquini Function: Head of Function Address: Via Tiziano, 44 600125 Ancona phone: 390 718 063 443 fax: +39 071.8063013 email: paolo.pasquini@regione.marche.it
Montenegro										
Districts and networks of enterprises for fish-food supply chain development	Law 84/2001 MISE – Italian Ministry of Economic Development	1	O	Croatia	6	6	166723	166723	15	Davide Frulla: davide.frulla@an.camcom.it
				Italy						
				Montenegro						
ECOPORT 8 - ENVIRONMENTAL MANAGEMENT OF TRANSBORDER CORRIDOR PORTS	South-East Europe	2	C	Italy	8	6	2180000	1635000	28	Leonardo Damiani Bari Polytechnic (Italy) Address: Via Amendola 126/B, 70126 BARI, Puglia, Italy e-mail: l.damiani@poliba.it
				Greece						
				Albania						
				Montenegro						
ECOSEA - Protection,	IPA-ADRIATIC CBC	4	O	Albania	9	9	3757555	3757555	36	mario.richieri@regione.veneto.it

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
improvement and integrated management of the sea environment and of cross-border natural resources		2		Croatia						
		1		Italy						
EL-PORT-AL - Enhancement of Joint Environmental Actions at the Ports of the Cross-border Area Corfu-Igoumenitsa-Sarande	ETCP - Greece-Albania 2007/2013	2	O	Greece	3	3	429200	429200	N/A	info@corfuport.gr
		4		Albania						
		3								
EMPIRIC	Central Europe Programme	1	O	Italy	12	4	2937334.98	979111.66	24	Venice Port Authority Mr. James ORLANDI Project, Research and Development Unit , Head of Unit tel . 0039-041-533 4243 James.orlandi@port.venice.it progetticomunitari@port.venice.it
		2		Slovenia						
FUTUREMED - Freight and passengers supporting infomobility systems for a sustainable improvement of the competitiveness of port-hinterland systems of the MED area	Med Programme	1	O	Greece	15	6	5234050	2093620	36	ANDREA CAMPAGNA Coordinator FUTUREMED project Lazio Region Transport Direction Rome, Italy Mob +39.349.8058043 E-mail: coordinator.furmed@regione.lazio.it secretary.furmed@regione.lazio.it
		2		Italy						
		4		Slovenia						
GAIA - Generalized Automatic exchange of port Information Area	ETCP - Greece-Italy 2007/2013	2	O	Greece	4	4	1873000	1873000	24	GAIA OFFICE C.soDe Tullio c/oUfficio Banchina Massi 70122 BARI Tel. +39 080 578 85 90 Fax +39 080

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
				Italy						524 54 49 www.project-gaia.eu info@project-gaia.eu
GIFT - Green Intermodal Freight Transport	South-East Europe	1	O	Italy	25	16	4040493	2585915.52	19	n.a.
				Greece						
		Slovenia								
		Serbia								
		2		Croatia						
Albania										
GREENBERTH Promotion of Port Communities SMEs role in Energy Efficiency and GREEN Technologies for BERTHING Operations	Med Programme	1	O	Croatia	9	3	1616115	538705	30	N/A
		2		Italy						
		3		Slovenia						
HAZADR - Strengthening common reaction capacity to fight sea pollution of oil, toxic and hazardous substances in Adriatic Sea	IPA-ADRIATIC CBC	3	O	Albania	13	13	3291128	3291128	30	Nicola Cassano Function Officer of the Apulia Region - Department of Civil Protection Street, Number via Enzo Ferrari (Dismessa Aerostazione Civile) Postal code 70128 City Bari - Palese Ph. Num. +390805802218 Fax +390805372310 E-mail vn.cassano@regione.puglia.it
				Croatia						
				Italy						
				Montenegro						

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
				Slovenia						
HINTERPORT	MARCO POLO II	1	C	Greece	18	5	2242638	622955	24	Interporto Bologna spa (Italy) Project Coordinator Angelo Aulicino - E-mail aulicino@bo.interporto.it Email: info@hinterport.eu tel. +39.051.2913011
		2		Italy						
				Slovenia						
I MAKE	ETCP - Greece-Italy 2007/2013	1	O	Greece	6	6	1063879.5	1063879.5	N/A	N/A
		4		Italy						
iFreightMED-DC	Med Programme	2	O	Croatia	9	2	1822412	404980.444 4	30	RÉGION DE LA CATALOGNE – MINISTÈRE RÉGIONAL DE TERRITOIRE ET DURABILITÉ
				Slovenia						
INNOVAQUA - Network for Technological Innovation in Aquaculture	ETCP - Italy-Slovenia 2007/2013	1	O	Italy	8	8	1,332,000.00	1,332,000.0 0	36	University of Trieste Prof. Sabina Passamonti - E-mail spassamonti@units.it
				Slovenia						
INTERMODADRIA - Supporting intermodal transport solutions in the Adriatic area	IPA-ADRIATIC CBC	2	O	Albania	11	11	2508000	2508000	29	Roberta Ruggeri E-mail: roberta.ruggeri@regione.marche.it
				Croatia						
				Greece						

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				Italy						
				Montenegro						
INTERMODAL - INTERmodality MModel for the Development of the Adriatic Littoral zone	IPA-ADRIATIC CBC	4	O	Albania	9	9	2000000.01	2000000.01	36	Ing. Alfredo Fratolocchi – Project Manager Add. Via Bocconi, 35 , 60125 (ANCONA) ITALY Tel. +39.071.2837426 Fax +39.071.2837433 Email. a.fratolocchi @conerobus.it
				Croatia						
				Italy						
INTE-TRANSIT: Integrated and Interoperable Maritime Transit Management System	Med Programme	1	O	Greece	8	4	1834201.98	917100.99	30	Institute of Communication and Computer Systems Dr Angelos Amditis (ICCS), Project Coordinator, e-mail: a.amditis@iccs.gr, Phone: +30 210 7722400
		2		Slovenia						
INWAPO - Upgrading of Inland Waterway and Sea Ports	Central Europe Programme	2	O	Italy	13	3	3808299.4	878838.323 1	36	Mr James Orlandi Santa Marta FABB. 13, 30123 Venice, Italia Tel: +39 041 533 4243 Fax: +39 041 533 4254 james.orlandi@port.venice.it
				Slovenia						
IONIO - Ionian Integrated Marine Observatory	ETCP - Greece-Italy 2007/2013	3	O	Greece	3	3	1688734	1688734	24	Centro Euro-Mediterraneo sui Cambiamenti Climatici Via Augusto Imperatore, 16 73100 Lecce Tel: +39 0832288650 info@ionioproject.eu
		2								
		1		Italy						

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
ITS Adriatic multi-port gateway	2007-2013 TEN-T Programme	1	O	Italy	5	5	2885000	2885000	45	Antonio Revedin Director of the Strategic Planning and Development Department Venice Port Authority Tel. +30 041 5334284 Email: antonio.revedin@port.venice.it James Orlandi Head of the Projects Research and Development Unit Venice Port Authority Tel.: +39 0415334243 Email: james.orlandi@port.venice.it
				Croatia						
		2		Slovenia						
LOSAMEDCHEM - How could the logistics and the safety of the transports of chemicals be improved in the Mediterranean area	Med Programme	3	C	Italy	10	3	1668180	500454	36	Silvano Brustia Function: Funzionario Address: Piazza Matteotti n. 1 28100 Novara phone: 3,90321E+11 fax: 3,90321E+11 email: s.brustia@provincia.novara.it mobile: 3,93355E+11
		2		Slovenia						
Magna Grecia Mare - Promotion and Enhancement of Common Maritime Culture	ETCP - Greece-Italy 2007/2013	4	O	Greece	6	6	1063879.5	1063879.5	N/A	A. Salierno, Regione Puglia, Agrifood Resources Department, Hunting and Fishing Service, Address: Via Paolo Lembo, 28 - 70124 BARI (Italy), email: a.salierno@regione.puglia.it
	Italy									
MED.I.T.A. - MEDiterranean Information Traffic Application project	Med Programme	1	N/A	Greece	9	4	1966413	873961.333 3	N/A	N/A
				Montenegro						
		2		Italy						

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
MeDLs - Mediterranean Life Style	ETCP - Greece-Italy 2007/2013	4	O	Greece	7	7	1304250	1304250	22	Project Manager Address: Via Menotti Ciro, 14 73045 Leverano (LE) Italia Phone: Phone: 0832 923412 Email: Email: segretario@comune.leverano.le.it
				Italy						
MEDNET	Med Programme	2	O	Albania	18	10	6155540	3419744.44 4	36	Rete Autostrade Mediterranee Project Lead Partner progettieuroppei@ramspa.it
				Croatia						
				Greece						
				Italy						
				Slovenia						
MEMO - Mediterranean Electronic Marine Highways Observatory	Med Programme	2	C	Italy	9	4	1327741	590107.111 1	36	Yiannis Papayianopoulos Tel.: +30 210 4550 000 - +30 210 4550 100 Fax. : +30 210 4550101 e-mail : ypapagiannopoulos@olp.gr
				Greece						
				Slovenia						
MUSEUMCULTOUR - The Adriatic's museums enrich cultural tourism	IPA-ADRIATIC CBC	4	O	Albania	7	7	2297024	2297024	32	lorella.bovara@provincia.ap.it
				Croatia						
				Italy						
				Montenegro						
				Slovenia						
NEREIDS - New	7th FP	1	O	Italy	16	4	6015352	1503838	36	

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Service Capabilities for Integrated and Advanced Maritime Surveillance		2		Slovenia						CALLE ISAAC NEWTON 11, TRES CANTOS - MADRID, ESPAÑA Tel: +34-918073340 Fax: +34-918072199 Gerard Margarit Martin E-mail: gmargarit@gmv.com
				Greece						
Net.L.A.M - Network of the Lower Adriatic Marinas	ETCP - Greece-Italy 2007/2013	2	O	Greece	9	9	894415	894415	24	N/A
		4		Italy						
NETCET - Network for the Conservation of Cetaceans and Sea Turtles in the Adriatic	IPA-ADRIATIC CBC	3	O	Albania	13	13	2732541.4	2732541.4	36	City of Venice Economic Development, European Policies and Strategic Plan Division San Marco 4299 30124 Venice - Italy Carole Maignan [carole.maignan@comune.venezia.it] chiara tenderini chiara.tenderini@comune.venezia.it Email: info@netcet.eu - See more at: http://www.netcet.eu/#sthash.ZTgaUabX.dpuf
				Croatia						
				Italy						
				Montenegro						
				Slovenia						
OPTIMIZEMED - Optimizing and profiting of best practices in the MED area on foreign trade, intermodal transport and maritime safety	Med Programme	2	A	Greece	11	3	1169300	318900	18	FEPORTS - Port Institute for Studies and Co- operation in the Valencian Region, Spain Pablo Palomo, ppalomo@feports- cv.org
				Slovenia						

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PEGASO - People for Ecosystem-based Governance in Assessing Sustainable development	7th FP	1	O	Croatia	22	3	8970397	1223235.955	36	Dra Françoise Breton Manager and coordinator of the EU FP7 PEGASO project Department of Geography, Universitat Autònoma de Barcelona (UAB) Edifice B, 08193, Campus Bellaterra, Cerdanyola del Valles, Barcelona tel: +34 93 581 3549 mobile: +34 606 347 204 skype francoise.breton123 francoise.breton@uab.cat
				Italy						
		3		Greece						
PRO ACT NATURA 2000 - Protection Actions for Cross-Border and Joint Management of Marine Sites of Community Interest (NATURA 2000)	ETCP - Greece-Italy 2007/2013	3	O	Greece	6	6	1306960.7	1306960.7	N/A	Consorzio di Gestione di Torre Guaceto Via Sant'Anna 6 – 72012 Carovigno (BR) - ITALY Telefono +39/0831990882 – Fax +39/0831994916 e-mail : segreteria@riservaditorreguaceto.it
				Italy						
SAFEPORT - The port and industrial and environmental risk management	ETCP - Italy-Slovenia 2007/2013	3	O	Italy	2	2	2730000	3815700	36	n.a.
		2		Slovenia						
SAIL - ICT System addressed to integrated logistic management and decision support for intermodal port and dry port facilities	7th FP	1	O	Italy	3	3	869655	869655	48	Walter UKOVICH (Professor) - Università degli Studi di Trieste PIAZZALE EUROPA, 000, TRIESTE, ITALIA ukovich@dee.units.it ukovich@units.it [walter.ukovich@di3.units.it] Tel: +39-0405587135 Fax: +39-0405583460
		2		Greece						
SALTWORKS - Eco-touristic valorization of the Salt-pans between Italy and	ETCP - Italy-Slovenia 2007/2013	4	O	Italy	2	2	1260000	1260000	30	Lucilla Previati Ente di gestione per i parchi e la biodiversita' delta del Po +39 0533/314003
		3		Slovenia						

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
Slovenia										lucillapreviati@parcodeltapo.it
Secur Med Plus	Med Programme	1	C	Italy	7	3	1616667	692857.285 7	36	Riccardo Mollo Région Ligurie - Département Infrastructures, Transports, Ports, Travaux Publics et du Bâtiment Liguria (Italie) Function: Dirigeant Address: Via G. d'Annunzio 111 16121 GENOVA phone: +39.010.54.84.157 fax: 010.548.8084 email: riccardo.mollo@regione.liguria.it mobile: +39.335.76.07.885
		2		Greece						
		3		Slovenia						
SEE Mariner	South-East Europe	1	O	Italy	12	6	2188000	1094000	34	Yiannis Papagiannopoulos (Project Manager) Piraeus Port Authority SA (PPA SA) 10, Akti Miaouli Str. 185 38 Piraeus (Greece) Phone: +30 210 4550000 - +30 210 4550100 - +30 210 4060866 Fax: +30 210 4550101 Mobile: +30 6974261089 Email: ypapagiannopoulos@olp.gr
				Slovenia						
		2		Montenegro						
				Albania						
		3		Greece						
SETA - South East Transport Axis	South-East Europe	2	O	Croatia	11	4	2835414	1031059.63 6	39	Andreas Friedwagner (SETA project coordinator on behalf of the Regional Government of Burgenland) Martina.Jauck@b-mobil.info; susanne.belihart@prisma-solutions.at
				Italy						

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				Slovenia						info@seta-project.eu
SHAPE - Shaping an Holistic Approach to Protect the Adriatic Environment: between coast and sea	IPA-ADRIATIC CBC	2	O	Albania	13	13	4139170	4139170	36	Olga Sedioli SERVIZIO DIFESA DEL SUOLO, DELLA COSTA E BONIFICA – REGIONE EMILIA-ROMAGNA Viale della Fiera, 8 - 40127 BOLOGNA telephone: +39 051 5276018e-mail: osedioli@regione.emilia-romagna.it Angelo Piazza E-mail: anpiazza@regione.emilia-romagna.it
				Bosnia-Herzegovina						
		3		Croatia						
				Italy						
		4		Montenegro						
	Slovenia									
SLOWTOURISM - Valorization and promotion of slow turistic routes between Italy and Slovenia	ETCP - Italy-Slovenia 2007/2013	4	O	Italy	2	2	3815700	3815700	42	DELTA 2000 Soc. Cons. a r.l. Strada Mezzano, 10 - 44020 Ostellato, FERRARA ITALY +39 0533 57693 - 57694 deltaduemila@tin.it
	Slovenia									
STARNETREGIO - STARring a trans-regional network of REGIONal research-driven marine clusters	7th FP	1	C	Italy	12	12	981696	981696	18	Gabriele GATTI CONSORZIO PER L'AREA DI RICERCA SCIENTIFICA E TECNOLOGICA DI TRIESTE PADRICIANO, ITALIA Tel: +39-040-3755238 Fax: +39-040-226698
				Croatia						
		2		Slovenia						
SUSTAIN	INTERREG IVC	3	C	Italy	12	2	1797523	299587.166 7	36	Alan Pickaver, Maria Ferreira Phone : +31 71 5122900 Fax : +31 71 5124069

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Project	Funding programme	Pillar	Status	Countries A-I	No of partners	A-I Partners	Funding tot	Funding A-I	Duration (months)	Contact person
				Slovenia						Coastal and Marine Union (EUCC) PO Box 11232 2301 EE, Leiden THE NEDERLANDS
SusTEn Mechanism (Sustainable Tourism Entrepreneurship Mechanism): Approaching Territorial Sustainability through Developing Tourism and Culture based Entrepreneurship	Med Programme	4	C	Greece	10	7	1594800	1116360	36	George Anastassopoulos LABORATOIRE DE RESEARCHE ET COMPTE SATELLITE DE TOURISME - UNIVERSITÉ DE PATRAS Dytiki Ellada (Grèce) Address: Department of Business Administration - University Campus 26500 RIO - PATRAS email: gan@upatras.gr
				Italy						
				Slovenia						
SYNTHESIS - Training on Board – Intermodal Port Terminals in Adriatic Sea and East Mediterranean	MARCO POLO II	2	C	Italy	4	4	792000	792000	24	ANEK LINES sa Leoforos Karamanli phone: +30 698 999 53 80 fax: +30 210 41 97 549 e-mail: synthesis@anek.gr address: 22, Akti Kondili, Piraeus 185 45, Greece
				Greece						
TEN ECOPORT	South-East Europe	2	O	Albania	12	9	2230000	1672500	31	POLYTECHNIC OF BARI Via Orabona, 4 – 70123 Bari (Italy) Tel. +39 080 596 3286 - 080 596 3666 Fax + 39 080 596 3414 Leonardo Damiani e-mail: l.damiani@poliba.it www.poliba.it
				Italy						
		3		Greece						
				Montenegro						
TERCONMED - Container Terminals as a Key Element in	Med Programme	2	C	Italy	7	4	1531834	875333.714 3	36	JULIO MARTÍNEZ ALARCÓN FONDATION INSTITUTE PORTUAIRE D'ETUDES ET DE COOPERATION DE

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the Mediterranean Short Sea Shipping				Greece						LA COMMUNAUTE VALENCIENNE Function: Chef Address: La Paz, 2-2 ^e 46003 Valencia phone: +34 96 353 31 00 fax: + 34 96 394 48 98 email: jmartinez@feports-cv.org mobile: +34 686 08 88 29
				Slovenia						
TISAR - Traveller Information System for the Adriatic Region	IPA-ADRIATIC CBC	2	O	Bosnia-Herzegovina	13	13	2301750	2301750	36	roberta.ruggeri@regione.marche.it
				Greece						
		4		Slovenia						
				Croatia						
		Italy								
T-LAB - Laboratory of touristic opportunities in cross-border regions of Slovenia and Italy	ETCP - Italy-Slovenia 2007/2013	4	O	Italy	2	2	1179000	1179000	36	SPIRIT Slovenia, Public Agency Dimičeva 13 1000 Ljubljana t-lab@slovenia.info
				Slovenia						
TOSCA - Tracking Oil Spills and Coastal Awareness Network	Med Programme	1	C	Italy	13	4	2345000	721538.461 5	36	Charlotte Blottière Toulon Var Technologies (CEEI TVT) Function: Directrice de projets européens Address: Maison des Technologies – Place Georges Pompidou – Quartier Mayol 83000 Toulon phone: 0033 4 94 03 89 84 fax: 0033 4 94 03 89 14 email: blottiere@tvt.fr codina@tvt.fr
		2								
		3		Greece						
TRANSit MED - Intermodal Freight Transportation	Med Programme	1	C	Italy	7	5	1299992.62	928566.157 1	35	Eirini PETRAKI Decentralized Administration Authority of Aegean
				Slovenia						

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		2		Greece						Attiki (Greece) Eptanisou Str., 35 84100 Syros phone: 302 131 618 141 email: e.petraki@apdaigaiou.gov.gr
TRECORALA-TREzze e CORalligeno dell'Alto Adriatico: valorizzazione e gestione	ETCP - Italy-Slovenia 2007/2013	1	O	Italy	10	10	1430000	1430000	24	ISTITUTO NAZIONALE DI OCEANOGRAFIA E DI GEOFISICA SPERIMENTALE - OGS Borgo Grotta Gigante 42/C - 34010 - Sgonico (TS) - Italy Tel.+39 040 21401Fax.+39 040 327311
		3		Slovenia						
		4								
WATERMODE - Transnational Network for the Promotion of the Water-Ground Multimodal Transport	South-East Europe	2	C	Italy	13	10	3193500	2456538.46 2	24	Mr James Orlandi Capo Area Ricerca e Sviluppo Progetti Autorità Portuale di Venezia Santa Marta, Edificio 13 IT-30123 Venezia james.orlandi@port.venice.it Ms Mara Pitaccolo WATERMODE Project Manager Autorità Portuale di Venezia Santa Marta, Edificio 13 IT-30123 Venezia mara.pitaccolo@port.venice.it
				Slovenia						
				Greece						
				Albania						
				Montenegro						
				Serbia						
X-Posse - Cross-Training of Port Officers in Sea-Rail and Sea-River operations in Europe	MARCO POLO II	1	C	Greece	10	3	982,966.00	294,889.80	24	Hamburg School of Business Administration - HSBA Alter Wall 38 DE-20457 Hamburg Germany Contact: orestis.schinas@hsba.de
		2		Italy						
MMMPA - Training Network for Monitoring Mediterranean Marine Protected Areas	7th FP	1	O	Italy	7	5	2914070	2081478.57 1	36	Carlo CERRANO (Dr) UNIVERSITA POLITECNICA DELLE MARCHE PIAZZA ROMA, ANCONA, ITALIA Tel: +39-0712204283 c.cerrano@univpm.it
		3		Greece						

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ENRICH - ENRICHMENT OF AQUACULTURE IMPLANTS BY INTRODUCTION OF NEW MARINE SPECIES FROM THE WILD TO BREEDING	7th FP	1	C	Italy	11	6	1560171	851002.3636	30	Stefano IESTER Università degli Studi di Genova VIA BALBI, 16126, GENOVA, ITALIA Tel: +39-010-3538298 Fax: +39-010-3538147 iester@dipteris.unige.it
				Croatia						
MINOAS - Marine INSpection rObotic Assistant System	7th FP	1	C	Italy	10	6	2958170	1774902	36	Alessia VERGINE RINA Services SPA VIA CORSICA 12, GENOVA, ITALIA Tel: +39 0105385320 Fax: +39-010-5351485 alessia.vergine@rina.org
		2		Greece						
KILLSPILL - Integrated Biotechnological Solutions for Combating Marine Oil Spills	7th FP	1	O	Greece	33	9	12483643	3404629.909	36	Nicolas Kalogerakis Technical University of Crete AGIOU MARKOU STR., CHANIA, HELLAS +30 28210 37794
		2		Italy						
		3		Slovenia						
MARLISCO - MARine Litter in Europe Seas: Social Awareness and CO-Responsability	7th FP	1	O	Italy	20	3	4544746	681711.9	36	Doriana CALILLI Provincia di Teramo VIA GIANNINA MILLI 2, TERAMO, ITALIA Tel: +39-0861331407 d.calilli@provincia.teramo.it
		3		Greece						
PERSEUS - Policy-oriented marine Environmental Research in the	7th FP	1	O	Greece	53	13	16994500	4168462.264	36	Evangelos PAPATHANASSIOU Hellenic Centre for Marine Research 46,7Km avenue Athens-Sounio, (Mavro Lithari), 712, ANAVISSOS
				Slovenia						

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Southern European Seas		3								ATTIKI, HELLAS Tel: +30-229-1076452 Fax: +30-229-1076347
				Italy						
UNCOSS - Underwater coastal sea surveyor	7th FP	1	C	Slovenia	10	6	4176938	2506162.8	43	Guillaume SANNIE COMMISSARIAT ENERGIE ATOMIQUE CEA RUE LEBLANC 25, PARIS 15, FRANCE Tel: +33-169085188 Fax: +33-169086030 guillaume.sannie@cea.fr
		2		Montenegro						
				Croatia						