

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



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

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Table of contents

Background and Study objectives	1
Methodology	2
Part I: Thematic reports.....	3
Part II: Overall assessment of the proposed EUSAIR.....	3
Main findings and results per pillar.....	4
1 st Pillar: Driving innovative maritime and marine growth.....	4
2 nd Pillar: Connecting the region.....	6
3 rd Pillar: Preserving, protecting and improving the quality of the environment.....	9
4 th Pillar: Increasing regional attractiveness.....	11
Results of the overall assessments.....	13
Assessment of the governance system.....	13
Assessment of the added value for the EU involvement.....	14
Assessment of the expected impacts of EUSAIR on the social, economic, legal and environmental themes.....	15
Conclusions	16

Background and Study objectives

Interactions among countries and regions within the Adriatic-Ionian area, traditionally strong, have intensified since the Balkan countries were all given the prospect of EU accession. These interactions have contributed to raising awareness among major stakeholders of belonging to a common basin and thus sharing common interests, challenges and, possibly, common solutions.

This context was the basis for the formal request presented by Adriatic and Ionian countries to the European Commission, seeking support for officialising the creation of an Adriatic and Ionian macro-region.

In 2012, based on a process of intergovernmental relations, the European Commission adopted the *Maritime Strategy for the Adriatic and Ionian Seas*,¹ – in line with the principles of Europe 2020.² The Strategy highlighted the need for setting the conditions for smart, sustainable and inclusive growth from the sea, according to four pillars: 1) Maximizing the potential of the blue economy, 2) A healthier marine environment, 3) A safer and more secure maritime space, 4) Sustainable and responsible fishing activities.

These four pillars, and their related objectives and challenges were “re-shuffled” in the EU Commission discussion paper: *European Union Strategy for the Adriatic and Ionian Region (EUSAIR)*.³ In few words, the new EUSAIR has integrated the Maritime Strategy into a wider Strategy that extends beyond the maritime dimension also covering the hinterland.

The four pillars⁴ identified in the 2013 EUSAIR discussion paper are:

- 1st Pillar: Driving innovative maritime and marine growth
- 2nd Pillar: Connecting the region
- 3rd Pillar: Preserving, protecting and improving the quality of the environment
- 4th Pillar: Increasing regional attractiveness.

However, at the Athens Stakeholder Conference, held 6-7 February 2014, the four pillars were renamed as:

- 1st Pillar: Blue Growth
- 2nd Pillar: Connecting the region
- 3rd Pillar: Environmental quality
- 4th Pillar: Sustainable tourism.

It should be noted that the present study will maintain the EUSAIR pillar titles, as they are the titles used in the EUSAIR discussion paper.

This study is part of the *Study to support the development of sea basin cooperation in the Mediterranean, the Adriatic-Ionian and the Black Sea* launched by the European Commission in January 2013. It builds on the findings from the *Analysis of Blue Growth needs and potential per country*,⁵ seeking to identify gaps in legislation and implementation of rules, technologies, investments and research, and to propose specific actions to bridge those gaps in order to improve the forthcoming EUSAIR. The European Commission will use this study as a basis upon which to draft the EUSAIR Action Plan.

Although the new EUSAIR covers non-maritime issues, the analyses in this study have been developed only

¹ COM/2012/713 Final

² COM/2010/2020 Final

³ http://ec.europa.eu/regional_policy/consultation/eusair/pdf/discussion_eusair.pdf

⁴ With respect to the Maritime Strategy Pillars:

- EUSAIR's 1st Pillar includes all of the former 4th Pillar (Sustainable and responsible fishing activities) and part of the 1st Pillar (Maximizing the potential of the blue economy), at least as regards topics as aquaculture, maritime clusters, research and innovation, mobility and qualification of the workforce.
- EUSAIR's 2nd Pillar fully integrates the previous 3rd Pillar (A safer and more secure maritime space) and part of the 1st Pillar (Maximizing the potential of the blue economy) as regards transport issues.
- EUSAIR's 3rd Pillar has totally absorbed the 2nd Pillar of the Maritime Strategy (A healthier marine environment) but also part of the 1st Pillar as regards MSP and ICZM aspects.
- EUSAIR's 4th Pillar has embedded part of the former 1st Pillar, as regards coastal and maritime tourism aspects.

⁵ Report 1 of the *Study to support the development of sea-basin cooperation in the Mediterranean, the Adriatic-Ionian and the Black Sea*.

on the maritime component of the EUSAIR. The geographical scope of the study includes EU Member States (Croatia, Greece, Italy and Slovenia), as well as candidate and potential candidate countries (Montenegro, Serbia, Albania and Bosnia Herzegovina).

Methodology

The present study i) adopts a sound methodology based on quantitative and qualitative data and assessments, ii) revolves around the four pillars defined in the EUSAIR discussion paper, and iii) is structured into two main parts: “Thematic reports” and “Overall assessment of the proposed EUSAIR”.

Focus areas. The analyses were carried out based on the 21 focus areas identified within the EUSAIR discussion paper. The following table indicates how each focus area links with the four pillars.

Table 1 – Focus areas by Pillar as identified within the EUSAIR discussion paper

1st Pillar	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)
	Creating new jobs and business opportunities through research and innovation in aquaculture
	Developing tools to properly site aquaculture in waters and the potential co-location with other economic activities
2nd Pillar	Optimising interfaces, procedures and infrastructures to facilitate trade with southern, central and eastern Europe
	Optimising the connections across the region (taking into account islands connectivity)
	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
	Enhancing cooperation between national or regional maritime authorities with the EU to face major oil spills through EMSA
3rd Pillar	Ensuring good marine and coastal environment; developing MSP and ICZM at national and cross-border level
	Strengthening the Natura 2000 network, the MSFD and the Barcelona Convention and its protocols
	Reducing marine litter, better waste management in coastal areas
4th Pillar	Supporting the sustainable development of coastal and maritime tourism through innovation and common marketing strategies and product
	Guaranteeing the environmental sustainability of the sector
	Promoting the sustainable development of cruise tourism
	Enhancing the value and appreciation of cultural heritage

Cross-cutting issues. The EUSAIR discussion paper identified two cross-cutting issues, common to all focus areas, namely: i) research, innovation and SME development, and ii) capacity building. These issues were not treated separately in this report. However, when one appeared particularly relevant to a given pillar, it was “added” as a further focus area and analysed accordingly.

Part I: Thematic reports

The study incorporates four thematic reports that correspond to the four pillars of the EUSAIR. All have been drafted according to a common methodology. In addition, each one focuses on the eight countries bordering the Adriatic and Ionian Seas and analyses the following elements in detail.

- **Specificity⁶ of focus areas to the sea basin.** A qualitative and quantitative analysis was carried out using available information and data on the entire sea basin. Further qualitative and quantitative analyses focused on the most promising activities at sea-basin level,⁷ environmental data and other issues that can affect marine and maritime activities, such as the level of international cooperation at sea-basin level.
- **Existing international cooperation.** In order to assess the level of existing cooperation among Adriatic and Ionian countries, as well as the impact of that cooperation on the development and sustainability of marine and maritime activities, this part of the analysis made use of three types of information: i) a list of cooperation initiatives, entities and organizations currently active, ii) a list of all cooperation programmes available, and iii) a list of ongoing and concluded projects carried out through the EU funding system during the financial period 2007-2013. This called for analysing qualitative as well as quantitative parameters (e.g. financial dimension of projects, number of partners, etc.).
- **Key investments and research priorities.** Investment and research priorities were identified for each pillar through an assessment at sea-basin level based on two main analysis approaches: i) a desk analysis of background papers and conclusions from the stakeholders' workshops (held in Athens, Trieste, Portoroz, Zagreb and Brussels during 2012-2013), and ii) elaboration of suggestions deriving from direct interviews with stakeholders from across the Adriatic-Ionian area.
- **Gap analysis.** The impact assessment (reported below in Part II) highlighted gaps hindering the growth of marine and maritime activities at sea-basin level. These included i) socio-economic gaps, ii) legislation and implementation of rules gaps, iii) research gaps, and iv) technology and innovation gaps. In order to provide support to fill these gaps, an in-depth assessment of links between the EUSAIR's related topics and identified barriers was carried out per pillar and focus area. As a last step of the gap analysis, suggestions deriving from stakeholders' interviews and those that emerged during stakeholder conferences/seminars were linked to the identified gaps, and a matrix was compiled in order to provide a snapshot of problems and possible solutions per pillar.

Part II: Overall assessment of the proposed EUSAIR

This section of the study is structured according to three analyses, each developed at national level.

Assessment of the governance⁸ system. This assessment was undertaken in two steps: benchmark analysis and governance analysis.

- **Benchmark analysis.** The benchmark analysis compared the current governance in the Adriatic-Ionian sea basin with the governance system of the EU Strategy for the Baltic Sea Region (EUSBSR). The latter was considered a benchmark as it is a well-established macro-regional strategy with a strong maritime dimension.
- **Governance analysis.** The analysis, which looked at governance as it related to the process towards the EUSAIR, comprised two main elements: i) effectiveness – how far conclusions of each workshop had been taken into account in the EUSAIR, and ii) participation – the level of involvement of different stakeholders and assessment of the type of stakeholders involved in the decision-making process. All results were then crosschecked with stakeholders' perceptions of the governance system – perceptions

⁶ "Specificity" is defined as "existence, more or less accentuated, of a given focus area and related maritime activities in the area, at macro-regional and national levels."

⁷ Based on results of *Analysis of Blue Growth needs and potential per country*

⁸ "Governance" is defined as "the process towards the definition of the EUSAIR, in which public actors and other economic and social stakeholders interact to optimise the decision making process."

that had been acquired through a series of interviews conducted at national level.

Added value for the EU involvement.⁹ This analysis was limited to the probability (and the extent) of attaining the objectives set out in the Strategy, with or without the hypothesis of involvement of the EU Commission. Therefore it was carried out by i) defining an overview of maritime cooperation initiatives at sea-basin level that addressed the pillars and priority areas of the EUSAIR but were carried out outside the umbrella of the EU, and ii) identifying and reporting on maritime cooperation initiatives carried out at sea-basin level under the umbrella of the EU. Subsequently, stakeholders' opinions gathered via a series of interviews made it possible to substantiate preliminary findings and put them into further context. The conclusions were outlined along with possible suggestions for how to improve, where possible, the added value for the EU.

Impact assessment. The final part of the study assessed the social, economic and environmental impacts of possible actions which will be identified by the countries and included in an Action Plan flowing from the EUSAIR discussion paper. The assessment acts as a pre-cursor to a likely impact assessment of the formal Action Plan which will be developed by the Commission. As the Action Plan is not yet available, it is expected that this assessment should inform both i) the Commission's formal Action Plan, and ii) the Commission's formal Impact Assessment which would then be prepared. This Impact Assessment is therefore necessarily brief, exploratory and qualitative.

Main findings and results per pillar

1st Pillar: Driving innovative maritime and marine growth

The assessment found the 1st Pillar specific to the Adriatic and Ionian region, thus putting into evidence that the focus areas and related topics, namely fisheries, aquaculture and blue R&D, play a remarkable role in the maritime dimension of the macro-region.

- **Fisheries.** Fishing activities in the area are totally aimed to human consumption and have an important role in the area's blue economy. They rank second in terms of total gross value added generated by maritime activities and rank third as regards employment.
- **Aquaculture.** Although aquaculture does not appear among the largest marine and maritime activities of the blue economy, it has been identified as one of the most promising activities in all countries of the area. The growth potential of the activity is mainly influenced by the fact that it could impact on the fishing effort in the area, diversifying the origin of supply of fish products in terms of production methods and introducing new species in the value chain.
- **Blue R&D.** Blue R&D has been identified as a maritime activity, in part because it intersects many sectors of the blue economy. In addition, from a macro-regional perspective, it emerged that a wide number of research institutes and organisations are located in the area, underlining the importance of R&D activities in the Adriatic and Ionian sea basin.

Although cooperation in the area was found to be particularly strong – especially due to the availability of EU grants and the European Fisheries Fund (EFF) – the analysis determined that candidate and potential candidate countries in the sea basin tended to be less involved in cooperation initiatives. It also emerged that cooperation within the fishery sector took place mainly under the umbrella of the General Fisheries Commission for the Mediterranean (GFCM). This would seemingly indicate that the implementation of the EUSAIR and the appropriate involvement of candidate and potential candidate countries could help improve cooperation and spur the growth of the sector, notably by supporting the harmonisation of marketing standards and fighting illegal practices in the fishery sector.

Details on the sea basins/countries most affected by each focus area are provided in Table 2, which indicates their links with the related key investments identified by the study.

⁹ "Added value" is defined as the "value resulting from an EU intervention that is additional to the value which would have been created by Member States alone." Source: Commission staff working paper, "The added value of the EU budget," accompanying the document "Commission Communication A budget for Europe 2020", Brussels 29.6.2011. SEC(2011) 867 final

Table 2 – 1st Pillar: Specificity of focus areas to the sea basin and key investments and research priorities identified

	Focus area	Most affected Adriatic-Ionian areas/countries	Key investments and research priorities	
			From stakeholder's workshops	From interviews
Fishery	Achieving the sustainable management of fisheries	Adriatic Sea	Database of fisheries resources: establish a common database at sea-basin level to monitor stock levels in the Adriatic and Ionian region.	Fishery management plans: establish management plans to be managed at international or national level. Carry out ex-ante studies in order to simulate the consequences of different management systems.
	Contributing to the profitability of fisheries	Entire sea basin (Adriatic and Ionian Seas)	Anti-crisis network: create a network and market-monitoring tool to quickly respond to crises in the food industry at sea-basin level.	Improvement and diversification of fishing activities: promote a sustainable economic growth and new job opportunities by creating specific educational and training programs for fishermen with the main objectives of disseminating new fishing techniques and strengthening workers' safety. Create other opportunities by setting the conditions to promote parallel activities between fishers' activities and fishing tourism.
	Improving the culture of compliance in fishing activities	Entire sea basin (Adriatic and Ionian Seas)	No actions identified	Monitoring station: make institutional investments in order to create a control system of fishing effort. Establish an authority to monitor fishing activities at sea-basin level. Create coastal monitoring stations for all activities impacting the sea and provide adequate means, such as boats and helicopters, for monitoring these activities.
Blue R & D	Developing Blue R&D and skills (including clusters)	Entire sea basin (Adriatic and Ionian Seas)	No actions identified	Stimulate clustering: provide investments to create aquaculture clusters and to modernize infrastructures in all activities included in the supply chain of the sector. Scientific cooperation and integrated approach: undertake research and studies on fish stocks movements and establish relationships between fisheries and aquaculture. Scientific investigation in fisheries: provide support to enable countries to increase data collection and scientific capacity.
	Aquaculture	Creating new jobs and business opportunities through research and innovation in aquaculture	Fundamental priority area for Italian, Croatian and Greek aquaculture. Potential priority for Albania, Montenegro and Slovenia	Aquaculture promotion: promote aquaculture products from the Adriatic and Ionian region.
Developing tools to properly site aquaculture in waters and the potential co-location with other economic activities		Co-location in Croatia, Italy, Slovenia and Montenegro, site selection in Greece and Albania	No actions identified	No actions identified

The gap analysis also revealed gaps between problems/barriers at the macro-regional level and the specific objectives identified within the EUSAIR discussion paper, which are resumed in the table below.

Table 3 – 1st Pillar: Gap analysis and suggestions to fill the gaps

Gaps	Suggested actions to fill the gaps identified
Socio-economic gaps	
Sustainability of fishery is linked to the reduction of fishing efforts, but this may have a negative impact on socio-economic conditions of fishermen.	Support diversification of fishing activities in order to reduce fishing efforts of the fishermen in the Adriatic. For EU countries, Fisheries Local Action Groups (FLAGs) could prove the natural tool to address this gap. IPA could be used to fund initiatives in candidate and potential candidate countries.
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.	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.
Legislation/implementation of rules gaps	
The EUSAIR mentions compliance with the Common Fishery Policy’s (CFP’s) obligations only as regards fishing methods and gears. A wider inclusion of the CFP’s objectives in the EUSAIR could be envisaged.	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.
Legislative measures aimed at reducing administrative procedures and bureaucratic obstacles for farming activities are needed.	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.

2nd Pillar: Connecting the region

The transport and maritime safety issues and activities connected to this pillar have traditionally played a significant role in Adriatic-Ionian countries. The analysis revealed availability of a great deal of data at port level in EU countries, which confirms that this pillar is highly specific to the Adriatic-Ionian region.

Due to their nature, transport and maritime safety issues have a wide geographical scope even though they are generally addressed at regional or macro-regional level. Among all activities, short-sea shipping has been identified as one of the most promising in all countries of the area (except in Albania), thus playing an important role under a macro-regional perspective. Improving passenger ferry service has proven to be a most promising activity in Croatia, Italy, Albania and Montenegro.

Efforts to increase maritime safety and security have had an increasing presence in the region. While there is still a need for optimising infrastructure and connections, the activation of SafeSeaNet data and the European Marine Observation and Data Network (EMODNET)¹⁰ portals, and the increased accuracy of national data bases indicate the importance given to safety of navigation in the Adriatic and Ionian Seas.

The analysis of existing cooperation again revealed a higher level of cooperation among the four EU Member States in the area than among candidate and potential candidate countries. In spite of this, qualitative assessments have shown that the optimisation of infrastructures and connections can achieve better results, both for transport and maritime safety, through organised cooperation across the sea basin.

¹⁰ EMODNET is an EU-driven network that involves partners from all EU countries in the collection and dissemination of high quality geographical data as well as data about bathymetry, seabed mapping and hydro-geological issues. The Adriatic and Ionian Seas are included in this project.

Table 4 – 2nd Pillar: Specificity of focus areas to the sea basin and key investments and research priorities identified

	Focus area	Most affected Adriatic-Ionian areas/countries	Key investments and research priorities	
			From stakeholder's workshop	From interviews
Maritime transport	Optimizing interfaces, procedures and infrastructures to facilitate trade with southern, central and eastern Europe	Entire sea basin (Adriatic and Ionian Seas, but in different ways: innovation in northern Adriatic Sea, infrastructures in southern Adriatic and Ionian)	<p>Motorway of the Seas (MoS): foster proper mechanisms able to finance MoS projects for candidate and potential candidate countries of the region. Improve public-private partnerships and private competition in intermodal transport management.</p> <p>Multimodal connectivity (see first entry, "interviews" column at right)</p>	<p>Multimodal connectivity: improve railway connections, develop promotional actions and lobbying.</p> <p>ICT upgrades: create an accessible maritime transport database, to be used as an input by private companies to design new itineraries.</p> <p>Efficiency management: increase efficiency of portal nodes by promoting the use of advanced technologies.</p>
	Optimising the connections across the region (taking into account islands' connectivity)	Entire sea basin (Adriatic and Ionian Seas)	<p>Connecting the islands: develop projects to encourage the use of maritime transport instead of road transport, based on already implemented projects, even to connect islands</p>	<p>Connecting islands: make more careful selection of infrastructures projects, to support islands' operational connectivity with the mainland.</p> <p>Transport routes: further develop ferry connections between neighbouring countries</p>
	Environmental and economic sustainability	Northern Adriatic Sea	<p>Development or imitation of projects: encourage the use of maritime transport instead of road transport by using sources as ERDF and IPA.</p>	<p>Implementation of the new environmental regulations: extend the Marco Polo programme and other related programmes.</p> <p>Eco-bonus: introduce a European eco-bonus, in line with the Italian best practice.</p> <p>"Green upgrading" of ships and ports infrastructure: facilitate funding for the "green upgrading" of ships, port infrastructure and related services.</p>

	Focus area	Most affected Adriatic-Ionian areas/countries	Key investments and research priorities	
			From stakeholder's workshop	From interviews
Safety and security of maritime space	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	Entire sea basin (especially candidate and potential candidate countries)	No possible actions identified	Information system: create a communication network among countries and partners to participate in the consultation procedures.
	Enhancing cooperation between national or regional maritime authorities on maritime traffic information exchange through SafeSeaNet	Entire sea basin (Adriatic and Ionian Seas)	<p>Adriatic Reporting System (ADRIREP): update and amend the current ADRIREP.</p> <p>Implement updated ADRIREP: undertake technical implementation of the updated ADRIREP and the exchange of information through SafeSeaNet. Evaluate the participation of candidate and potential candidate countries.</p> <p>Traffic Separation Scheme (TSS): further develop and implement TSS rules in the congested spaces of the Adriatic Sea.</p> <p>Common regional platform to exchange Automatic Identification System (AIS) information.</p> <p>Use of regional AIS MARES server, by involving Adriatic and Ionian countries not yet included.</p>	Educational programmes: create training and educational programmes and promote an open-minded and homogeneous approach to cooperation among different regions in order to develop a Vessels Traffic Monitoring System (VTMS) and facilitate the exchange of information in line with European directives.
	Developing of decision support systems, accident response capacities and contingency plans	Candidate and potential candidate countries are still poorly engaged in cooperation across the sea basin with respect to maritime security issues	<p>Integrated traffic monitoring system (TMS): establish an Expert Working Group/ task force to work towards the establishment of an efficient and integrated traffic monitoring system in the Adriatic and Ionian region.</p> <p>Application of IMO-Standards and EU Standards/Directives: provide joint training for relevant stakeholders to support capacity building in safety and security, in particular in candidate and potential candidate countries.</p>	Improve coordination/pilot project: implement a platform at regional level to streamline an information exchange on maritime traffic in the area, and centralise the management of this project in a single organisation, e.g. the European Maritime Safety Agency (EMSA).
	Ensuring adequate sources of information and geographical data for crews and navigators	Entire sea basin (especially candidate and potential candidate countries)	No possible actions identified	No possible actions identified
	Enhancing cooperation between national or regional maritime authorities with the EU, to face major oil spills through EMSA	Entire sea basin (candidate and potential candidate countries' involvement should be strengthened)	No possible actions identified	No possible actions identified

Finally, the gap analysis below has pointed out some gaps that hinder the growth of the sector. A set of actions is suggested to fill these gaps.

Table 5 – 2nd Pillar: Gap analysis and suggestions to fill the gaps

Gaps	Actions
Socio-economic gaps	
In the context of “facing oil spills” and “development of response capacity”, the poor involvement of civil society is a gap in the EUSAIR.	<p>Improve governance at macro-regional level by sharing knowledge with citizens and increasing their involvement in consultation processes.</p> <p>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>
Legislation/implementation of rules gaps	
The EUSAIR has no reference to legislative measures to enhance cooperation to face oil spills.	<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 and 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>
Research gaps	
No specific research initiatives are developed in the EUSAIR to address oil spills	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).

3rd Pillar: Preserving, protecting and improving the quality of the environment

Protection of the environment – a pre-requisite to the development of most marine and maritime activities – plays a paramount role in the Adriatic-Ionian sea basin. However, since it is mainly funded and managed by public authorities, strictly speaking it is not regarded as an economic activity. The analysis of the 3rd Pillar’s specificity to the region pointed out that data on the environment are collected by several sources, such as EUROSTAT and the EEA, providing information on maritime pollution, production and disposal of waste, quality of European waters and population density in coastal areas.

The survey of cooperation projects in the Adriatic-Ionian region confirmed the importance of the 3rd Pillar, which ranked second in terms of number of projects implemented. The analysis has shown that Adriatic-Ionian countries share common environmental and marine protection challenges. Therefore, solutions should be sought in a framework of cooperation involving as many countries as possible. Hence, the forthcoming EUSAIR is considered to be the most appropriate tool for reinforcing multilateral transnational cooperation within the environmental topics.

It is worth mentioning the improvement of marine knowledge issue as horizontal between the 1st and 3rd Pillars. This issue is of the utmost importance when it comes to environmental aspects. This was also confirmed by all interviewed stakeholders, who underlined the need to improve the knowledge and information about facts, activities and resources on and under the Adriatic and Ionian Seas.

Table 6 – 3rd Pillar: Specificity of focus areas to the sea basin and key investments and research priorities identified

Focus area	Most affected Adriatic-Ionian areas/countries	Key investments and research priorities		
		From stakeholder's workshops	From interviews	
Healthier marine environment	Ensuring good marine and coastal environment; developing MSP and ICZM at national and cross-border level	Entire sea basin (Adriatic and Ionian Seas) MSP and ICZM especially for the North Adriatic	<p>Maritime Strategy Framework Directive (MSFD): see gap analysis, in Table 7</p> <p>Web-GIS Observatory Network: develop a region-wide Web-GIS Observatory Network for gathering and processing geographical and statistical data related to sustainable development and the environment.</p> <p>ICZM & MSP: develop a common and comprehensive strategy for the Adriatic and Ionian region including medium- and short-term objectives focusing on: i) common infrastructures, ii) common planning of "green" marine zones & corridors compatible with main sectors' interests, iii) common spatial information system for the region, iv) methodological tools for the efficient coordination of national laws and the ICZM Protocol, and v) international educational programmes in connection with the ICZM protocol.</p>	<p>Marine and coastal environment monitoring system: promote systematic gathering of information and data through macro-regional cooperation.</p> <p>Adriatic network for shared educational and citizen science programmes: link strategies for promoting education for sustainable development to people's active engagement in society.</p> <p>Support study: encourage the participation of research institutions and laboratories of the countries of the region in research programs, the results of which can be used for investments.</p> <p>Fishery environmental impact: increase studies on the impact of fisheries on other species and on the sea bottom.</p>
	Strengthening the Natura 2000 network, the MSFD and the Barcelona Convention and its protocols	Croatia and other candidate and potential candidate countries.	<p>Marine Protect Areas (MPA): develop a transboundary study throughout the Adriatic (habitat mapping, tagging, genetics, etc.), and establish common assessment methodologies and a common plan for regular monitoring.</p>	<p>Governance guidelines: intensify the development and implementation of common principles on EU/regional level, i.e. guidance on: i) measuring and reporting noise in a consistent way, so as to compare results at national/regional levels, ii) interpreting noise data, and iii) assessing what impact is considered acceptable.</p> <p>Training the new generation of managers of Marine Protected Areas (MPA): train the next generation of MPA scientists and managers, equipping them with a flexible set of skills essential for working within a wide range of environments and with professionals representing public administration, local authorities, industry and academia.</p>
	Reducing marine litter better waste management in coastal areas	Entire sea basin (Adriatic and Ionian Seas)	<p>Marine litter: promote and implement extended cleaning programmes that include beach litter, floating litter and litter on the seafloor, raise awareness of links between litter in the regions and derelict fishing gear recycling, undertake a life-cycle analysis of marine litter, increase collaboration among different sectors for the development of new possibilities of recycling marine litter, and prepare a regional strategy to assess, prevent and reduce marine litter pollution in the region.</p>	<p>Sewage management: allocate investments for water treatment, as part of efforts to face the big challenge of sewage, which is a threat to coastal areas of the entire region, especially for candidate and potential candidate countries. Reduce negative impacts on the environment in order to enhance the safeguarding and protection of marine ecosystems.</p> <p>Marine litter information campaign: establish an awareness campaign to educate the public about the difference between marine and coastal litter and about the negative impact of marine litter on the environment and human health.</p>

Table 7 summarises gaps identified between existing needs identified in the area and the EUSAIR's objectives. To fill these gaps, specific "actions" are proposed.

Table 7 – 3rd Pillar: Gap analysis and suggestions to fill the gaps

Gaps	Actions
Legislation/implementation of rules gaps	
Legislative measures to ensure the good environmental and ecological status of the marine and coastal environment	<p>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:</p> <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 (GEoS) 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. <p>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.</p>
Legislative measures for ensuring good waste management and waste reduction	Prepare a regional policy for the assessment, prevention and reduction of marine litter pollution in the region.
Research gaps	
No specific research initiatives address waste pollution in the EUSAIR.	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.

4th Pillar: Increasing regional attractiveness

Tourism is one of the most promising activities for the entire Adriatic-Ionian area, as emerged in the *Analysis of the Blue Growth potential per country*. Tourism covers around one-third of the blue economy in the area, in terms of gross value added (GVA) and employment.

The analysis on the specificity of this pillar found that tourism is monitored in the entire area, not only through common sources such as EUROSTAT, but also by several different public and private actors at national, regional and local levels. However, the availability of data and information across the region is not homogeneous, given that detailed information is not available to the same extent in all countries.

As regards cooperation in the Adriatic-Ionian region, the analysis determined that coastal and maritime tourism issues are better addressed at regional level or through bilateral cooperation rather than multilaterally. In this context, it identified coastal tourism as one of largest maritime activities and one of the most promising in all countries of the area. On the other hand, the analysis also found that this potential is often untapped in some countries (e.g. Albania or Montenegro) or could be strengthened in others (e.g. Croatia, Italy and Greece).

Table 8 – 4th Pillar: Specificity of focus areas to the sea basin and key investments and research priorities identified

Focus area	Most affected Adriatic-Ionian areas/countries	Key investments and research priorities	
		From stakeholder's workshops	From interviews
Supporting the sustainable development of coastal and maritime tourism through innovation and common marketing strategies and product	Entire sea basin (Adriatic and Ionian Seas)	<p>Knowledge, Innovation and Entrepreneurship Zones (KIEZs): promote and establish KIEZs to enhance and enforce collaboration and cooperation for scientific research in key sectors, and create synergies between Member States and candidate and potential candidate countries.</p> <p>Tourism spatial planning: develop a harmonised tourism spatial plan that accounts for touristic activities at cross-country level in order to ensure active coordination and joint management of tourist destinations.</p>	<p>Marketing strategies: Support initiatives to improve information on business opportunities and to facilitate exchanges inside the area. Develop a region-wide common tourism strategy in order to facilitate promotion of the area abroad, that calls for common accommodation standards, and an integrated tourist circuit. Highlight differences in order to meet the needs of different kinds of visitors, but incorporate a common “brand” approach which is more efficient as well as more easily recognized.</p>
Guaranteeing the environmental sustainability of the sector	Entire sea basin (Adriatic and Ionian Seas)	<p>Ensure tourism sustainability: establish proper monitoring mechanisms and legislation for the protection of the Adriatic-Ionian ecosystem in order to minimize negative externalities of tourism</p>	<p>Limit environmental footprint of tourism: aim to protect the physical environment by orienting investments to the mainland when coastal areas present signs of congestion.</p>
Promoting the sustainable development of cruise tourism	Italy has several concerns as to the impact on the territory and resources depletion. Greece faces congestion issues at more popular destinations. Attractiveness of candidate and potential candidate countries should be reinforced	No possible actions identified	<p>Cross border projects: introduce more intensive and concrete cooperation in the region among public and private stakeholders. The purpose is to give concrete inputs for the elaboration of specific cross-border projects based on a more efficient use of natural and cultural resources.</p> <p>Reinforce regulation for sewage treatment on board: the impact of discharging raw sewage of cruise and yachting has to be tackled. Therefore, cooperation efforts in the area should be strengthened in order to implement international and EU rules in the area.</p>
Enhancing the value and appreciation of cultural heritage	Entire sea basin at different levels: candidate and potential candidate countries need to promote their respective heritages, EU countries should reinforce their positions	<p>Tourism promotion: implement an integrated scheme for the strategic planning and funding of cultural tourism through developing: i) innovative marketing and promotion strategies, ii) integrated tourism packages involving a number of touristic activities, iii) permanent structures and institutions to collectively promote cultural tourism in the region, iv) thematic cruises and navigational routes between Adriatic and Ionian countries and ports and/or cultural navigational routes with modern maritime routes, v) complementary services to connect cultural heritage tourism and protect natural sites, vi) a database to collect, elaborate and disseminate cultural heritage-related information, vii) brochures and promotional materials to correlate cultural heritage with various types of tourism.</p>	<p>Common trademark: promote ADRION, the common trademark of the area which was launched to reinforce the Adriatic and Ionian territory as a tourist brand. ADRION, as well as other similar or new initiatives in the international market highlight a variety of tourist products and cultural heritage.</p> <p>Reduce seasonality of demand: orient investments to the mainland as way to highlight the cultural heritage of these areas and enrich the offer of tourist products which could also help relieve congestion in the coastal areas.</p>

Table 9 summarises gaps identified between existing needs identified in the area and the EUSAIR’s objectives. To fill these gaps, specific actions are proposed.

Table 9 – 4th Pillar: Gap analysis and suggestions to fill the gaps

Gaps	Actions
Legislation/implementation of rules gaps	
The EUSAIR discussion paper does not make reference to legislative measures to enhance the management of intensive tourism activities.	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.
The EUSAIR discussion paper does not make reference to legislative measures that could enhance cruise tourism while mitigating negative effects of massive but transient tourists arrivals.	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. 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.
Technologies and innovation gaps	
The EUSAIR discussion paper does not make reference to technological instruments and innovative tools that could enhance cruise tourism while mitigating negative effects of massive but transient tourists arrivals.	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 sustainability of tourism activities.

Results of the overall assessments

Assessment of the governance system

The assessment found the governance system to be: i) effective, ii) in line with Europe 2020 objectives, and that it iii) encompasses an adequate involvement of stakeholders. At the same time, the assessment also identified important elements which should be taken into account in the fine-tuning of the EUSAIR.

As emerged in the benchmark analysis, the EUSAIR could, in principle, replicate the governance system of the EU Strategy for the Baltic Sea Region (EUSBSR), taking into account not only the specificities of the Adriatic-Ionian context but also lessons learned from the EUSBSR. As a first step, as opposed to the Baltic geo-political scenario, the Adriatic-Ionian region also includes candidate and potential candidate countries, which could have difficulty complying with EU rules and procedures. Moreover, as emerged from the analysis, a governance system that calls for a wide scenario of actors in charge of too many tasks that are often not clearly defined could weaken: i) the responsibility of the actors involved in the implementation of single actions and ii) the focus of the Strategy.

Lessons learned from the EUSBSR show that there is need for strengthening the role of National Contact Points and Priority Coordinators. At the same time, it is also advisable to reinforce country commitment, in order to promote the EUSAIR and support stakeholders’ participation.

As derived from the analysis on effectiveness, and further to the gaps identified, the governance system

proposed for the EUSAIR should take the following recommendations into account.

- **Concentrate responsibility.** The entire structure of the governance system – based on the EUSBSR model – needs to be optimised by concentrating more responsibilities on a small number of actors governing the Strategy. The overall interactions among all involved actors should be rationalised to a few clear objectives, concentrating coordination activities in National Contact Points and Pillar Coordinators.
- **Strengthen role of National Contact Points and Pillar Coordinators.** The National Contact Points should improve the role of political coordinators in relation to other National Contact Points and stakeholders but, at the same time, it is suggested to reinforce their communication and dissemination efforts for promoting the EUSAIR. Also, the involvement of Pillar Coordinators should be strengthened, especially as concerns their roles of: i) selecting operational actions, ii) harmonising and aligning projects to priorities, iii) consolidating a cross-country perspective by reinforcing their role of cooperating with different stakeholders from the entire area, iv) revising the Strategy objectives, for which they should act more promptly to review and adapt priority objectives to emerging needs, and v) supporting policy-makers and all relevant stakeholders to develop appropriate communication actions.
- **Involve stakeholders.** Stakeholder involvement needs to be institutionalised in order to ensure subsidiarity to the Strategy. The creation of a permanent forum, either virtual or physical, should be taken into account. This forum will serve as a collector of civil society needs and bring them to the attention of the decision-makers.
- **Bolster communication.** Communication actions need to be improved and made a strong component of the overall governance. Good communication will increase the level of involvement of stakeholders but also will duly promote the Strategy as a useful cooperation tool, especially for candidate and potential candidate countries.
- **Coordinate all strategies.** From a general perspective and outside the scope of the EUSAIR governance, coordination among all strategies (especially macro-regional) should be envisaged. This task, which should take place at a higher level (EU), will be indispensable for avoiding overlapping or asymmetries of roles.

Assessment of the added value for the EU involvement

The Adriatic-Ionian region already has established bottom-up and non-EU-driven cooperation, similar to what was experienced in the Baltic Sea Region. In addition to guaranteeing the necessary financial support, the use of EU funding has been able to align bottom-up cooperation initiatives to EU policy objectives for the macro-region. Furthermore, the analysis pointed out that the EUSAIR discussion paper is perfectly in line with Europe 2020, which would certainly contribute to achieving its objectives.

In light of the above, as well as of stakeholders' perception of how the involvement of the EU could contribute to the development of the Adriatic and Ionian macro-region, it can reasonably be argued that there is a clear added value for the EU to be involved. In other words, a strategy strongly supported and coordinated by the EU is quite likely to create a value which is additional to the value that would result from spontaneous cooperation among public authorities, international organisations, NGOs and the private sector.

Pillar perspective. When it comes to the Pillar perspective, the added value for the EU to be involved is more variable.

- **1st Pillar: Spurring research in the blue economy.** In this case, acting under the EU umbrella could be essential since “Blue Growth” is a relatively recent strategy and many of the sectors it addresses in the Adriatic-Ionian are not fully developed and would benefit from further cooperation. On the other hand, as regards the promotion of sustainable and responsible fishing activities, forms of cooperation are already in place thanks to existing regional organisms, e.g. the GFCM and its projects AdriaMED and

EastMED, and of course, the CFP.

- **2nd and 3rd Pillars: Connecting the region and Preserving, protecting and improving the quality of the environment.** An even greater EU added value could be generated as regards these two pillars by ensuring a safer and more secure maritime space, given that there are not many bottom-down initiatives addressing this issue in the Adriatic-Ionian, even though cooperation in the field is actively promoted by Member States. The coordination of the EU would certainly lend improved coherence to current actions.
- **4th Pillar: Increasing regional attractiveness.** Finally, EU involvement would be needed for tourism, especially coastal tourism in the Adriatic and Ionian region, even though it is already one of the largest and fastest-growing economic activities in the area. Of course, “regional attractiveness” could probably be increased spontaneously through profitable and financially safe forms of mass tourism, but the EU could put the spotlight on the sustainability aspect, thus achieving results that would normally be more difficult to achieve.

EU integration perspective. Apart from pillar-related issues, one of the most important arguments in favour of strong EU involvement in the macro-regional Strategy is the spill-over effects that better cooperation may have on the EU integration process, especially related to the Balkan area. The analysis on maritime cooperation in the Adriatic-Ionian has demonstrated that cooperation among countries facilitates the EU integration process.

Assessment of the expected impacts of EUSAIR on the social, economic, legal and environmental themes

The impact assessment considered two basic options, one with and one without a Strategy or Action Plan.

- **Option 1** calls for a no change/base case scenario, under which no Strategy or Action Plan will be implemented.

In general it emerged that, given existing policies, coordination and strategies ongoing in the sea basin, the base case scenario would be expected to result in some improvements in economic, social and environmental variables in the future. However, without the Action Plan, countries in the region might be driven to focus more strongly on the economic pillar of development rather than on a more “balanced” development of all topics encompassed in the EUSAIR discussion paper. This supposition is supported by the strong concentration of economic-type priority areas and actions suggested by countries in Report 1 of this study – *Analysis of the Blue Growth needs and potential per country*.

- **Option 2** calls for having a Strategy and Action Plan.

An important assumption, with respect to social impacts, is that actions would be common among more than one country. This, and the nature of the priority actions themselves, means that social benefits can be expected to flow from the concept of the macro-regional strategy itself to the overall area in general, strengthening cooperation efforts and optimising the use of resources for more targeted uses. As highlighted above, an added value of establishing the Adriatic-Ionian macro-region under the EU umbrella is that it can be a powerful tool to spur EU integration towards the east, to enhance political convergence, and to ensure continued regional cooperation which, under Option 1, might otherwise reduce over time.

Importantly, the analysis confirmed that the adoption of the Strategy and the implementation of an Action Plan are expected to generate social, economic and environmental impacts, which will vary according to pillar.

1st Pillar. The implementation of the Strategy is expected to have an economic impact through overall improvement of gross value added of seafood business, and an environmental impact by conserving stocks and habitats. The fact that the Strategy might also create new jobs means it could have a remarkable social

impact as well.

2nd Pillar. Focus areas related to transport issues are expected to have a social and economic impact, given that they should improve inter-regional connectivity and increase competitiveness, trade movements and investment flows of businesses. On the other hand, focus areas related to “maritime safety and security” should mainly have an environmental impact, reducing pollution and risks of disasters.

3rd Pillar. Due to its environmental focus, this pillar would obviously be expected to have an environmental impact, increasing water quality, protecting biodiversity and reducing litter.

4th Pillar. Increasing the tourism attractiveness of the area will mainly have economic and social impact, benefitting not only the tourism businesses, but also local economies. Furthermore, as an indirect effect, it should improve the overall level of employment in the area, especially in coastal areas where tourism represents one of the most promising activities in the macro-region.

Of these expected impacts, implementing Option 2 would result in economic, social and environmental impacts that would be greater than the no change/base case option. Furthermore, the fact that no additional funds are required for the Action Plan indicates that the efficiency (i.e. value for money) of the funds already available would be enhanced by ensuring a better matching of funds to needs. Countries would be incentivised to identify additional funding sources and find ways to allow available resources to be more fruitful.

Conclusions

The forthcoming *EU Strategy for the Adriatic and Ionian Region* should support stakeholders in the area in further efforts to achieve the objective of having “coordinated response to issues better handled together than separately”. Indeed the present study confirmed that:

- a) the proposed EUSAIR discussion paper of August 2013, as drafted by the European Commission, with its four Pillars and its focus areas, is specific to the Adriatic and Ionian geographical area under quantitative and qualitative points of view, given that all focus areas and related marine and maritime activities are present and play a remarkable role in the macro-regional blue economy
- b) existing cooperation in the area has proven to be particularly intense between EU Member States while candidate and potential candidate countries tend to be less involved in cooperation projects
- c) the governance system, which is intended to actually govern the process leading to the drafting of the Strategy, has proven effective and has involved a good number of relevant stakeholders
- d) there is a clear EU value added, given that the EUSAIR clearly creates a value beyond the value that would result from spontaneous cooperation among stakeholders
- e) social benefits, especially new jobs, improvement of public health and increase of skills, are expected to flow from the macro-regional approach strategy through strengthening cooperation efforts and optimising more targeted use of resources, as clearly shown in the impact assessment
- f) gaps between existing problems/barriers at a macro-regional level and the specific objectives defined within the EUSAIR discussion paper have been identified, with concrete actions derived directly from key proposals put forward by stakeholders of the area proposed to fill the gaps.

The analysis on the specificity of the EUSAIR to the sea basin has identified a large body of existing data, documents, studies, and national and international projects for each focus area, covering all the topics and issues encompassed by the EUSAIR discussion paper. This indicates that all these focus areas are specific to the Adriatic and Ionian sea basin. However, the analysis also found that, while some focus areas have an impact on the macro-region as a whole, some geographical areas of the macro-region are affected in different ways.

In this context, cooperation was found to be generally strong within all pillars, although it tends to be more

intense among EU Member States. This is probably because of the wider availability of EU funds compared with candidate/potential candidate countries, especially when it comes to the 1st and 2nd Pillars. It also emerged that candidate and potential candidate countries tend to be involved in projects which require “less capacity”. Therefore, in order to fill this gap, the EUSAIR should focus on capacity building in the early implementing phase, supporting a major involvement of candidate and potential candidate countries.

As to the governance system, its effectiveness was confirmed by the analysis, which benefitted from the input of the wide consultation process launched with COM (2012) 713 “A Maritime Strategy for the Adriatic and Ionian Seas” and the related workshops held in Athens, Trieste, Portoroz, Zagreb and Brussels – all of which reported remarkable stakeholder participation. With the forthcoming establishment of the EUSAIR, a specific governance model should be adopted that takes into account the peculiarity of the area and avoids replicating other models which would not be effective for the macro region.

The EU has been acknowledged – by our analysis and also by interviewed stakeholders – to have a pivotal role in supporting cooperation in the area and in streamlining consultation processes led by the countries of the Adriatic and Ionian. This would not have taken place to the same extent without the EU.

Indeed, the EU has financed directly or indirectly a significant number of maritime projects over the years, both at transnational and cross-border levels. However, this does not imply that the EU’s role has been limited to a mere “financial backer” of projects carried out by third parties. As a matter of fact, EU policies have shaped cooperation basics that have contributed to aligning projects to what now are well-established principles, such as the ones laid out in Europe 2020.

One of the most important reasons for supporting the EU’s involvement in the macro-regional strategy is the spill-over effect that this may have on the EU integration process, especially in the Balkan area. In other words, considering the new political situation in the area, the Strategy can be a powerful tool to define and launch a new cooperation model under the EU umbrella in the region.

Finally, the analysis has confirmed that the adoption of the Strategy and the implementation of an Action Plan are expected to generate social, economic and environmental impacts. The social benefits especially are expected to flow from the concept of the macro-regional strategy itself to the overall area. In this regard, the analysis highlighted that no additional funds are required for the Action Plan. Given the “3 nos rule” (no new legislation, no new funds, no new organizations), this means that the efficiency (i.e. value for money) of the funds already available would be enhanced if the Strategy were adopted, especially by ensuring that there is a better matching of funds to needs.

The gap analysis has revealed the existence of some gaps between problems/barriers at a macro-regional level and the EUSAIR specific objectives. However, the analysis has shown that existing gaps can be bridged completely, and feasible proposals can be implemented. This is mainly due to the fact that i) the EUSAIR discussion paper is based on a bottom-up approach of collecting needs from the territory and integrating them in a macro-regional perspective, and ii) the entire process leading towards the EUSAIR discussion paper has been coordinated effectively by the EU and managed by countries.

In the big picture, it has emerged that the four Pillars of the EUSAIR seem to focus more on innovation, technology and research objectives than on legislative/implementation of rules and socio-economic aspects, where concrete actions have been proposed to fill the gaps. It should be taken into account that these proposals are based on concrete needs expressed by local stakeholders, and thus contribute to implementing the bottom-up approach needed for the successful implementation of the Strategy and its Action Plan.