

## STUDY TO SUPPORT THE DEVELOPMENT OF SEA BASIN COOPERATION

*IN THE MEDITERRANEAN,  
ADRIATIC AND IONIAN,  
AND THE BLACK SEA*



**CONTRACT NUMBER**

MARE/2012/07 - REF. NO 2

**REPORT 4**

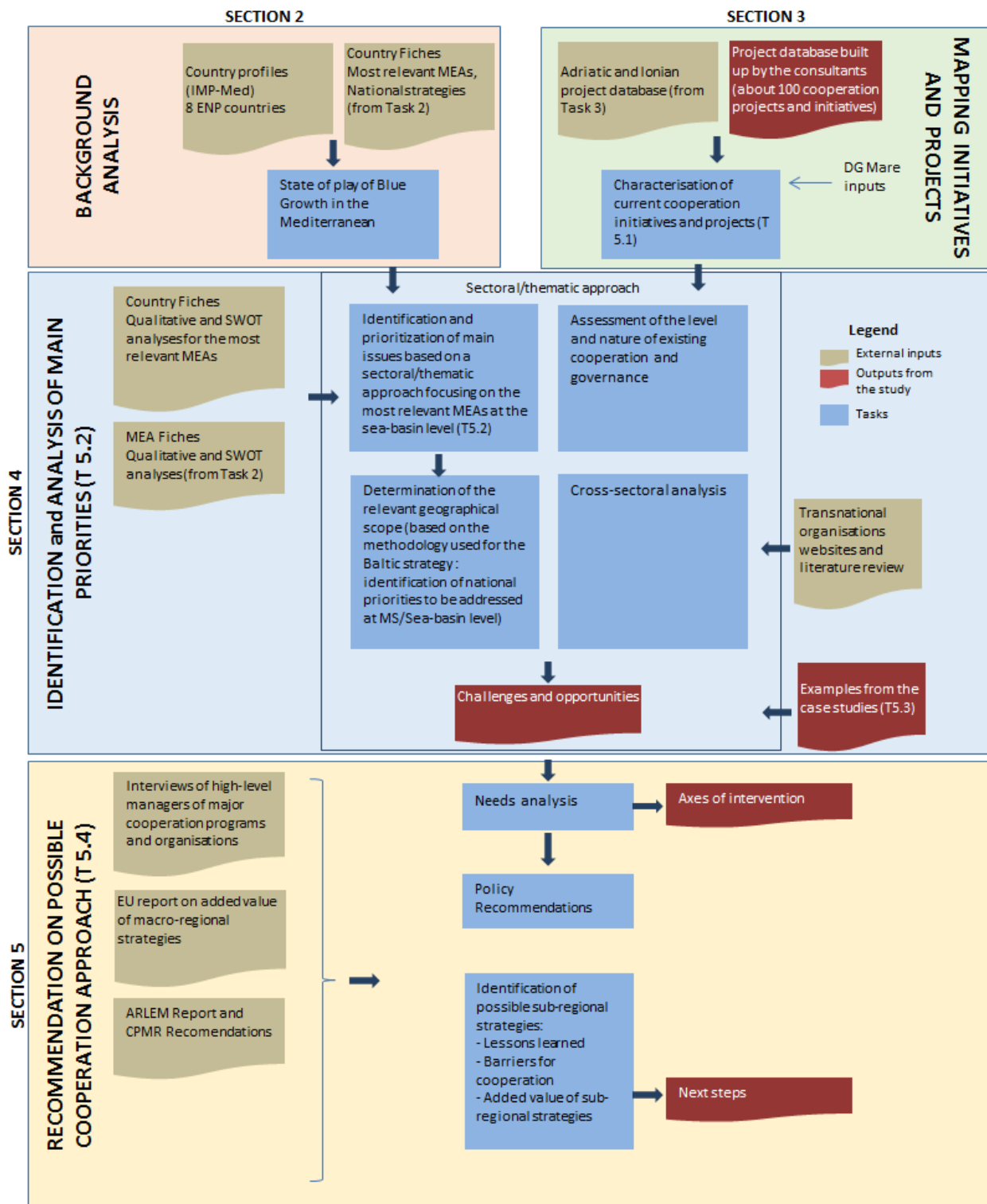
# ANNEXES

**SEPTEMBER 2014**

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## ANNEX 1. Methodological route



## ANNEX 2. List of interviews – Major Mediterranean cooperation programmes and partnerships

- IMP-MED Project

Team leader (25 February 2014)

- MED PROGRAMME

Coordinator Joint technical Secretariat (20 February 2014)

- ENPI CBC MED

Programme expert Joint Managing Authority (20 February 2014)

- Union for Mediterranean

Project manager Water and Environment (5 March 2014)

Project Manager Transport (6 March 2014)

## ANNEX 3. Classification of Maritime Economic Activities

The detailed methodology used to analyse Maritime Economic Activities (MEA) can be found on the Maritime Forum website<sup>1</sup>. The following table presents the complete list of MEAs and their classification by 'function', used in the Blue Growth studies conducted by the European Commission.

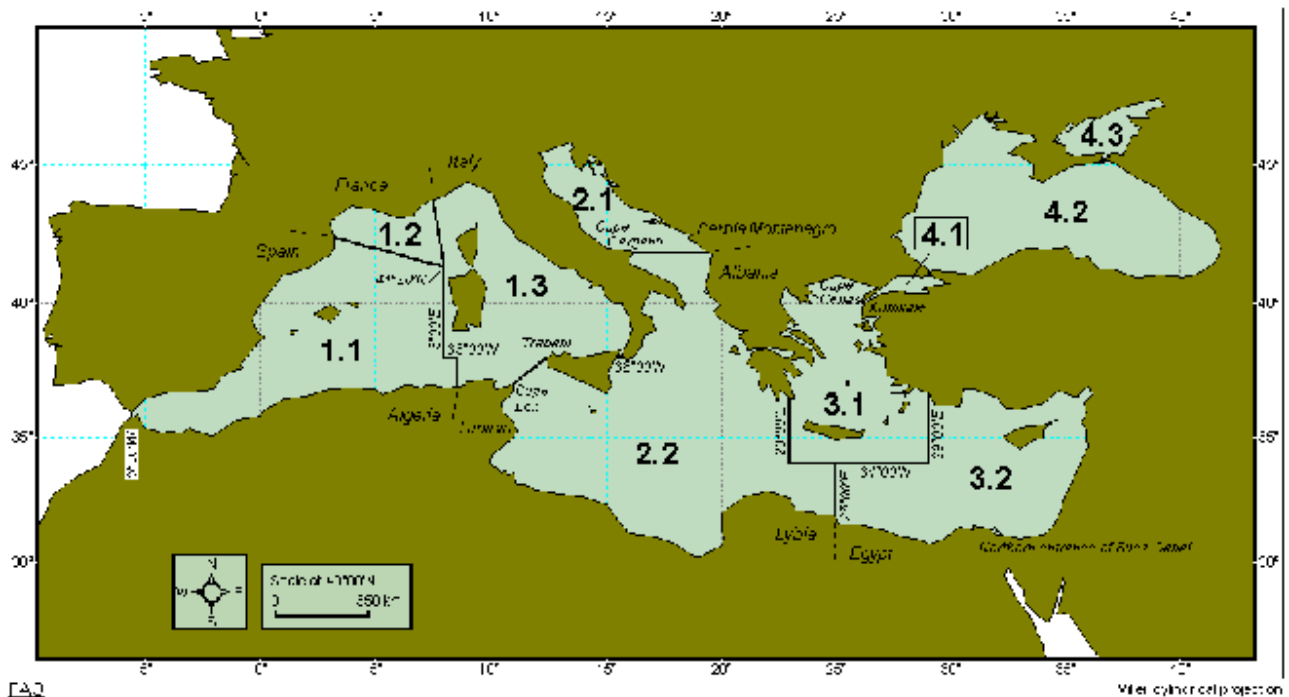
Function	Activity
1. Maritime transport and shipbuilding	1.1 Deep-sea shipping
	1.2 Short-sea shipping (incl. RoRo)
	1.3 Passenger ferry services
	1.4 Inland waterway transport
2. Food, nutrition, health and eco-system services	2.1 Catching fish for human consumption
	2.2 Catching fish for animal feeding
	2.3 Marine aquatic products
	2.4 Blue Biotechnology
	2.5 Agriculture on saline soils
3. Energy and raw materials	3.1 Offshore oil and gas
	3.2 Offshore wind
	3.3 Ocean renewable energy (wave, tidal, OTEC, thermal, biofuels, etc.)
	3.4 Carbon capture and storage
	3.5 Aggregates mining (sand, gravel, etc.)
	3.6 Marine minerals mining
	3.7 Securing fresh water supply (desalination)
4. Leisure, working and living	4.1 Coastal tourism
	4.2 Yachting and marinas
	4.3 Cruise tourism
	4.4 Working
	4.5 Living
5. Coastal protection	5.1 Protection against flooding and erosion
	5.2 Preventing salt water intrusion
	5.3 Protection of habitats
6. Maritime monitoring and surveillance	6.1 Traceability and security of goods supply chains
	6.2 Prevent and protect against illegal movement of people and goods
	6.3 Environmental monitoring

<sup>1</sup> See country fiche guide and related methodology to compile country fiches at:  
<https://webgate.ec.europa.eu/maritimeforum/en/community/msexperts-mediterraneanimpwg/articles/3539>

## ANNEX 4. Map of sub-basins in the Mediterranean

The subdivisions of the Mediterranean used in the study are stemming from FAO major fishing areas, as shown in the map below. This subdivision is commonly used outside the strict fishery context.

Map of FAO major fishing areas in the Mediterranean



The Western Mediterranean corresponds to FAO area 37.1:

- 37.1.1: Balearic area
- 37.1.2: Gulf of Lions
- 37.1.3: Sardinia area

The Central Mediterranean (FAO area 37.2) includes:

- 37.2.1: Adriatic Sea
- 37.2.2: Ionian Sea

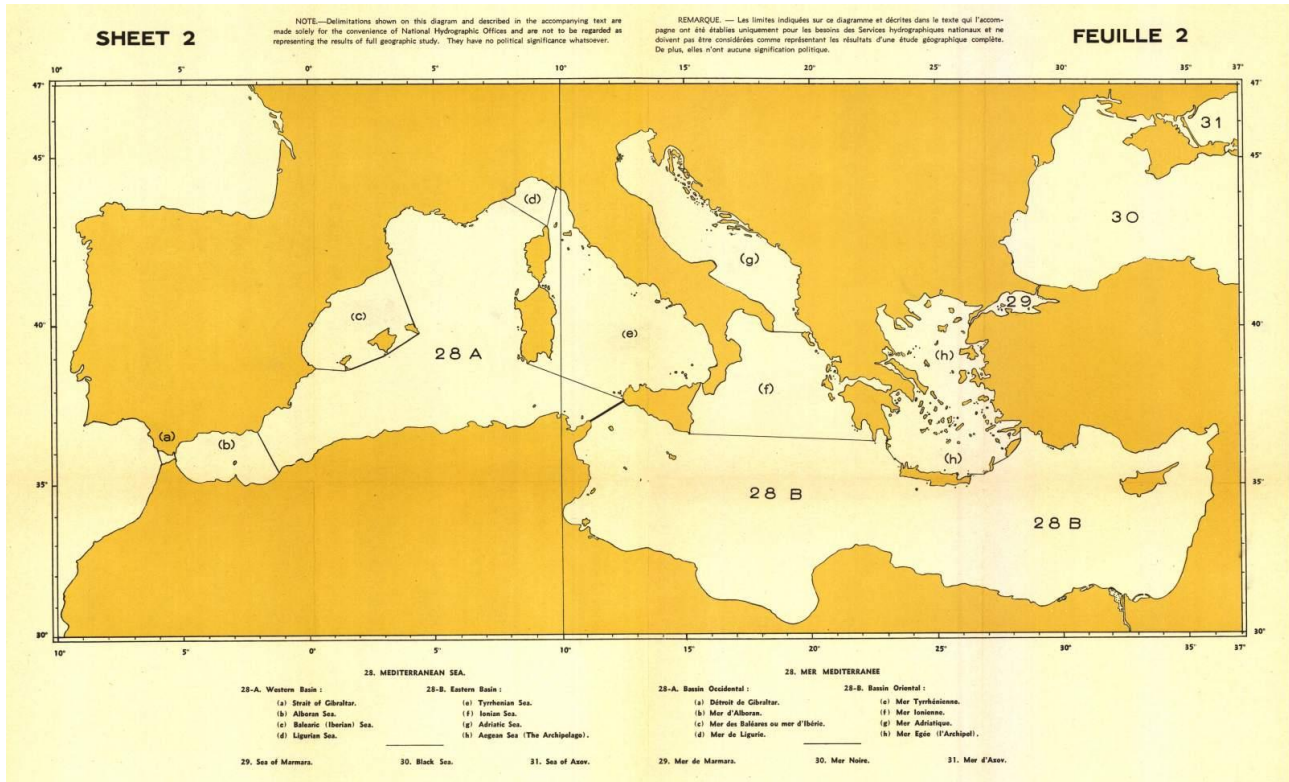
The Eastern Mediterranean corresponds to:

- 37.3.1: Aegean Sea
- 37.3.2: Levant
- 37.4.1: Marmara Sea

Note : The Marmara Sea is included by FAO in the subarea 37.4 "Black Sea" composed of the Marmara Sea (division 4.1 in the map), Black Sea (4.2) and Azov Sea (4.3).

For the Turkish authorities and the International Hydrography Organisation (as shown on the map below), the Marmara Sea is part of the Mediterranean. We thus included the Marmara Sea in the Eastern Mediterranean.

**IHO Map of the Mediterranean Sea**



### Mediterranean macro-regions

(Annex 1 of ARLEM Report on a Cohesion Policy for the Mediterranean)



#### Mediterranean Macro-regional Strategies

Integrated Strategy



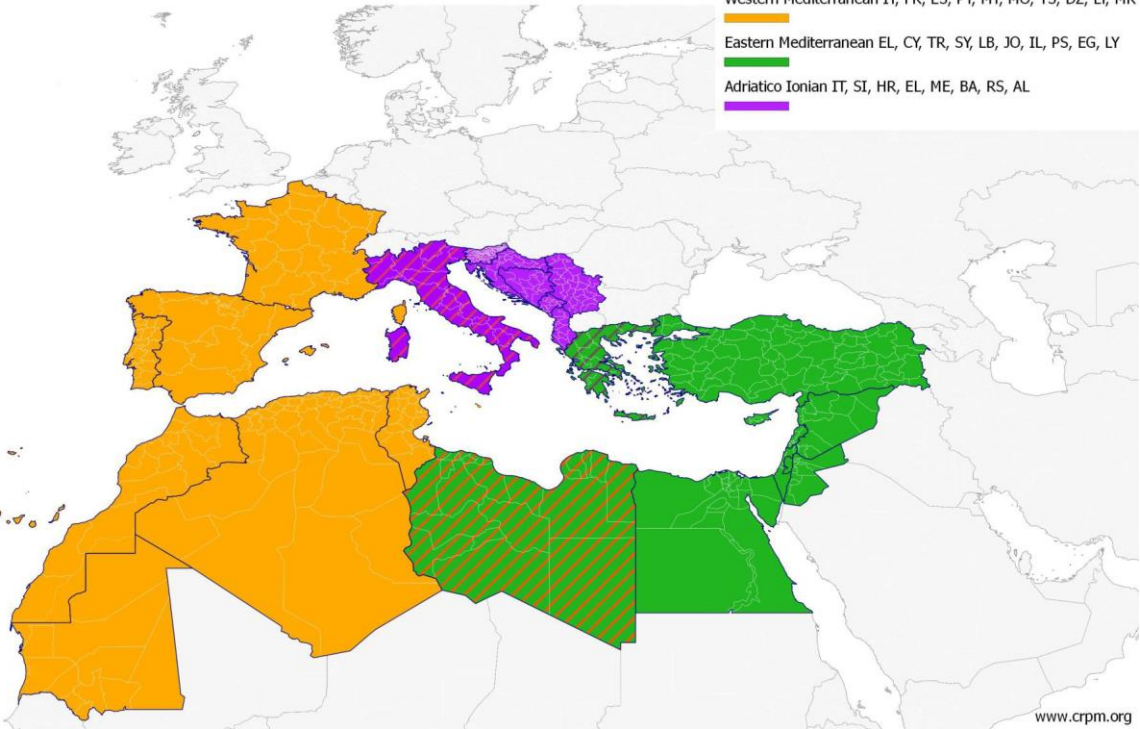
Western Mediterranean IT, FR, ES, PT, MT, MO, TS, DZ, LY, MR



Eastern Mediterranean EL, CY, TR, SY, LB, JO, IL, PS, EG, LY



Adriatico Ionian IT, SI, HR, EL, ME, BA, RS, AL



1:19059493

www.crpm.org



## ANNEX 5. Description of main multilateral commissions and initiatives

### General Fisheries Commission for the Mediterranean (GFCM)<sup>2</sup>

The GFCM was established in 1952 within the framework of the FAO Constitution as well as other regional Fisheries Commissions.

The GFCM's objectives are to promote the development, conservation, rational management and best utilization of living marine resources, as well as the sustainable development of aquaculture in the Mediterranean, Black Sea and connecting waters. Membership is open to both Mediterranean coastal states and regional economic organizations as well as to United Nations member states whose vessels engage in fishing in Mediterranean waters.

The GFCM contributes to the exchange of environmental and socio-economic information related to fisheries and aquaculture in the Mediterranean, provides policy recommendations and can coordinate and promote cooperation projects (Adriamed, Copemed II, MedSudMed, Medfisis, ArtFiMed, EastMed).

Countries involved: EU + 23 countries around the Mediterranean Sea Basin: Albania, Algeria, Bulgaria, Croatia, Cyprus, European Union, Egypt, France, Greece, Israel, Italy, Japan, Lebanon, Libya, Malta, Monaco, Montenegro, Morocco, Romania, Slovenia, Spain, Syrian Arab Republic, Tunisia, Turkey.

The **UNEP-MAP**<sup>3</sup> (United Nations Environment Programme-Mediterranean Action Plan **for the Barcelona Convention**) was adopted in 1975 as the first Regional Seas Programme of the newly created UN Programme. The main initial objective of the MAP was to help governments control marine pollution and develop environmental policies. However experience has shown that socio-economic trends, combined with inadequate development planning and management are the root of most environmental problems. Consequently, the focus of MAP gradually shifted to include integrated coastal zone planning and management as the key tool through which solutions are being sought. The Action Plan for the Protection of the Marine Environment and the Sustainable Development of the Coastal Areas of the Mediterranean (MAP Phase II) was adopted in 1995.

Countries involved: Albania, Algeria, Bosnia and Herzegovina, Croatia, Cyprus, Egypt, European Community, France, Greece, Israel, Italy, Lebanon, Libya, Malta, Monaco, Montenegro, Morocco, Slovenia, Spain, Syria, Tunisia, and Turkey.

**Seven protocols** have been adopted under the Barcelona Convention<sup>4</sup>:

- The Dumping Protocol, covering dumping from ships and aircrafts;
- The Prevention and Emergency Protocol, to prevent pollution from ships and, in cases of Emergency, to combat pollution;
- The LBS Protocol, against pollution from Land-based sources ;
- The SPA and Biodiversity Protocol, for specially protected area and biological diversity in the Mediterranean;
- The Offshore Protocol, covering exploration and exploitation of the continental shelf and the seabed and its subsoil ;
- The Protocol for the Protection of the Mediterranean Sea against Pollution Resulting from Exploration and Exploitation of the Continental Shelf and the Seabed and its Subsoil

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<sup>2</sup> <http://www.gfcm.org/>

<sup>3</sup> <http://www.unepmap.org/>

<sup>4</sup> <http://www.unepmap.org/index.php?module=content2&catid=001001001>

- The Hazardous Wastes Protocol, for transboundary movements of hazardous Wastes and their Disposal
- The ICZM protocol, on Integrated Coastal Zone Management.

The **Union for the Mediterranean (UfM)**<sup>5</sup> was created by 43 Euro-Mediterranean Heads of State and Government (including the 28 EU MS and the EU) in Paris on 13 July 2008, and the Statutes were adopted on the 3<sup>rd</sup> of March 2010. Headquarters are in Barcelona. It is inspired by the goals set out in the **Barcelona Declaration**, namely working towards the creation of an area of peace, stability, security and shared economic prosperity, as well as full respect of democratic principles, human rights and fundamental freedoms and promotion of understanding between cultures and civilizations in the Euro-Mediterranean region. The Union's mission does not specifically focus on maritime issues but its first two priorities have an explicit maritime dimension: de-pollution of the Mediterranean and maritime and land highways. Other cross-cutting priorities such as civil protection, higher education and research and business development may also imply maritime projects.

Countries involved are: the 28 EU MS, Algeria, Bosnia and Herzegovina, Egypt, Monaco, Morocco, Tunisia, Albania, Israel, Jordan, Lebanon, Mauritania, Montenegro, Palestine, Syria, and Turkey.

The **EuroMed Transport Programme**<sup>6</sup> is an outcome of the Barcelona Declaration. It aims to reinforce policy dialogue, information exchange and discussion for the development of the Trans-Mediterranean Transport Network 'RTM-T'. The EuroMed Transport forum will also play a key role in the monitoring of the **Regional Transport Action Plan (RTAP)** and the implementation of regulatory reforms in their respective fields. The RTAP for the Mediterranean Region comprises a set of actions in different transport sectors (maritime, road, railways and civil aviation) and targets mainly regulatory (institutional) reform and infrastructure network planning and implementation. Several of the actions are implemented at the national level but with multilateral monitoring done by the UfM.

The **Intermediterranean Commission under the Conference of Peripheral Maritime Regions of Europe (CPMR)**<sup>7</sup> was established in 1990. Like other geographical commissions of the CPRM, it works to ensure that the needs and interests of its member Regions are taken into account in policies with a high territorial impact. In particular, the CPMR has asked for the delivery of an integrated maritime policy. The Intermediterranean Commission counts about fifty member Regions from 10 countries (Cyprus, France, Greece, Italy, Lebanon, Malta, Morocco, Portugal, Spain, Tunisia).

The **CIESM**<sup>8</sup> (Mediterranean Science Commission) focuses on marine research and relies on a partnership among research institutes from 23 countries around the Mediterranean basin. Specific projects are for the most part beyond the scope of the study as they focus on changes in biodiversity and ecosystem services, hydrology and health in the Mediterranean and Black Seas. However some research projects could be of interest for the IMP as they tackle interactions between human activities and biological and physical changes in the Mediterranean Sea, with an emphasis on issues related to climate change. As an example, the first edition of the CIESM Marine Policy Series in June 2012 focuses on potential research areas and partnerships for Blue Biotechnologies.

The **Dialogue 5+5** is an informal cooperation network between Foreign Affairs Ministers of five Mediterranean EU MS (France, Italy, Malta, Portugal and Spain) and the Arab Maghreb Union (Algeria, Libya, Mauritania, Morocco, Tunisia). The first meeting took place in 1990. The Dialogue itself is mainly a high-level political instance, but it also has sectoral activities, including a specific work group on transports (CETMO) that participates to the Euro-Mediterranean Transport Forum (see below the European Transport Action Plan).

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<sup>5</sup> <http://ufmsecretariat.org/>

<sup>6</sup> <http://www.euromedtransport.eu/>

<sup>7</sup> <http://www.medregions.com/>

<sup>8</sup> <http://www.ciesm.org/>

In March 2011 **the European Commission, the EIB and the IMO** (International Maritime Organisation) agreed on ways to explore stronger cooperation across the three institutions on the development of the marine and maritime sector in the Mediterranean region, and notably Southern Mediterranean partner countries.

The **FEMIP** (Facility for Euro-Mediterranean Investment and Partnership), operational since 2012, brings together the whole range of the European Investment Bank's (EIB) services for promoting the economic development of the Mediterranean partner countries. The **12<sup>th</sup> FEMIP Conference "Mediterranean blue economy: enhancing marine and maritime cooperation"**<sup>9</sup>, was held in April 2013, in collaboration with the European Commission and the IMO. Three flagship initiatives were discussed in this conference:

- Starting-up maritime clusters and promoting networking across training institutes;
- Bridging the gap towards effective safety and surveillance;
- Addressing synergies across projects and opportunities for development and investment.

Finally, the EU Committee of the Regions has set up the **Euro-Mediterranean Regional and Local Assembly (ARLEM)**, which supports the process of decentralisation and regionalisation in the Mediterranean and promotes the "territorialisation" of policies, including maritime policies.

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<sup>9</sup> [http://www.amiando.com/12thFEMIP\\_Conference.html](http://www.amiando.com/12thFEMIP_Conference.html)

## ANNEX 6. Description of relevant territorial cooperation programmes under EU framework

### *EU territorial cooperation programmes*

#### **France-Italy Maritime Cooperation**

The programme France Italy Maritime Cooperation 2007-2013 aims to improve cooperation between the border areas - marine and coastal areas of the North Tyrrhenian-arc - in the fields of accessibility, innovation and enhancement of natural and cultural resources in order to ensure territorial cohesion and promote employment and sustainable development. It is structured around four axes:

- Accessibility and Communication Networks;
- Innovation and competitiveness;
- Natural and cultural resources;
- Resources and services integration.

Countries/regions covered: Corsica (FR), Liguria (IT), Sardinia (IT) and Tuscany (IT).

Concerned MEAs: 11 out of around 50 projects are related to blue growth and IMP issues. They cover transport and tourism, as well as environmental monitoring and maritime surveillance. Other projects concern mainly agricultural and cultural topics.

#### **Italy-Malta programme**

Apart from technical assistance that is dedicated to support the Programme's management, the strategic choices have been directed to two intervention's priorities:

- Competitiveness, research and innovation, sustainable development;
- Environment, energy and risk prevention.

Countries/regions covered: Sicily and specifically coastal areas (IT) and Malta.

MEAs concerned: 10 out of 25 projects have been identified as relevant for the IMP. MEAs covered are tourism-related MEAs, passenger ferry services, fishing for human consumption, marine aquaculture, securing fresh water supply, coastal protection, maritime surveillance and environmental monitoring.

#### **Greece-Cyprus programme**

The overall objective of the Programme is "the emergence of the region as a pole of sustainable development in the wider area of South-eastern Mediterranean towards enhancing competitiveness", through three specific objectives:

- Improving the competitiveness of the cooperation area
- Protect natural and cultural resources
- Enhance the safety and improve accessibility to networks and services.

Countries/regions covered: Crete (GR), the North Aegean region (GR) the Dodecanese Prefecture in the Southern Aegean (GR), and Cyprus.

MEAs concerned: coastal tourism, cruise tourism, yachting and marinas, maritime surveillance and environmental monitoring and water projects.

### **Greece-Italy programme**

The general objective of the O.P. 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 programme sets out three strategic objectives:

- Support for sustainable economic growth by focusing on common comparative advantage (through research, innovation, entrepreneurship and advanced new technologies)
- Improve the accessibility to networks and services in the cooperation area so as to enhance mobility of people and goods
- Improve the quality of life, preserve and effectively manage the environment and increase social and cultural cohesion.

Countries/regions covered: West Greece (GR), Ionian Islands (GR), Epirus (GR) and Apulia (IT).

MEAs concerned: 9 out of the 52 projects cover maritime activities: coastal tourism, short-sea shipping, deep-sea shipping and environmental monitoring.

### **Italy-Slovenia**

The general objective of the O.P. Italy-Slovenia 2007-2013 is “to enhance the attractiveness and competitiveness of the Programme area”. It is implemented through four axes:

- Ensure sustainable territorial integration
- Increase competitiveness and development of a knowledge-based society
- Improve communication, social and cultural cooperation, also in order to remove persisting barriers
- Improve the efficiency and effectiveness of the Programme.

Countries/regions covered: western regions of Slovenia (Goriška, Obalno-Kraška, Osrednjeslovenska, Notranjsko Kraška) and coastal areas in three Northeastern Italian regions (Friuli Venezia Giulia, Veneto, Emilia-Romagna).

MEAs concerned: only 7 out of over 80 projects fall under the scope of IMP in the following MEAs: Marine aquaculture, Coastal tourism, Maritime surveillance and Environmental monitoring.

### **Spain-external borders cooperation**

The operative programme sets out two eligible geographic areas:

- The strait area of cooperation: between Andalusia and Ceuta and Melilla in Spain and Tanger-Tetouan, Taza-Alhomeica Taounate and the Oriental Region on the African side;
- The Atlantic area of cooperation, between the Canary Islands and the regions of Guelmin-Es-Smara, Souss Massa Draa and Laayoune-Boujdour-Sakia El Hamra.

Only the strait area of cooperation is covered here.

This programme tends to focus more on capacity-building, socio-economic development at large - but with focuses on SMEs, agriculture and energy - cultural heritage and migration-related issues due to the particular geopolitical situation around the Strait of Gibraltar.

Countries/regions covered: Andalusia (ES), Tanger-Tetouan (MA), Taza-Alhomeica Taounate (MA), Oriental Region (MA).

MEAs concerned: out of 38 projects, only 5 have an impact on MEAs and maritime issues are rarely the primary focus. These projects cover coastal tourism, environmental monitoring, short-sea and deep-sea shipping and renewable energy.

## **The Med Programme**

The MED programme is a transnational programme of European territorial cooperation. It is structured around four axes:

- Axis 1: Strengthening innovation capacities;
- Axis 2: Environmental protection and promotion of a sustainable territorial development (including prevention of maritime risks and strengthening of maritime safety);
- Axis 3: Territorial accessibility (including maritime accessibility, multimodality and intermodality);
- Axis 4: Promotion of a polycentric and integrated development of the MED space (with a focus on territorial governance).

The Med Programme also includes coordination with the ENPI CBC programme to avoid overlapping.

Countries/regions covered: Albania, Bosnia-Herzegovina, Croatia, Cyprus, France, Greece, Italy, Malta, Montenegro, Portugal, Slovenia, Spain, UK.

MEAs concerned: 19 out of about 100 projects are related to maritime issues, including the MAREMED project, which potentially covers all MEAs since it aims to strengthen the coordination of regional maritime policies. Other projects cover short-sea and deep-sea shipping, inland waterway transport, passenger ferry services, coastal tourism, cruise tourism, offshore wind, coastal protection, maritime surveillance and environmental protection.

### *Instrument for Pre-Accession Programmes*

#### **IPA-Adriatic**

The programme is structured around three priorities besides technical assistance (priority 4):

- Economic, social and institutional cooperation
- Natural and cultural resources and risk prevention
- Accessibility and networks.

Countries/regions: coastal areas of the Adriatic Sea in Italy, Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, Albania and Prefectures of Kerkyra and Thesprotia in Greece.

MEAs concerned: 15 projects out of around 60 have a maritime dimension covering the following MEAs: short-sea shipping, deep-sea shipping, passenger ferries, coastal tourism, environmental monitoring.

#### **IPA Slovenia-Croatia**

The programme focuses on economic activities (especially tourism) and environmental protection, which is reflected in its two main priorities (third priority is technical assistance):

- Economic and social development: tourism and rural development, entrepreneurship, social integration
- Sustainable management of natural resources: environmental protection and preservation of protected areas.

Countries/regions: Slovenia, Croatia (regions along the Slovenian-Croatian borders).

MEAs concerned: Marine aquaculture, short-sea shipping, deep-sea shipping, coastal tourism, environmental monitoring, maritime surveillance.

### *European Neighbouring Policy Instrument Programmes*

#### **ENPI-CBC Tunisia-Italy**

The programme focuses on three priorities on sustainable development, as well as cultural and scientific cooperation.

Countries/regions covered: Sicily (IT), Ariana (TU), Beja (TU), Ben Arous (TU), Bizerte (TU), Nabeul (TU), Jendouba (TU), Manouba (TU), Tunis (TU)

MEAs concerned: the programme focuses first on cultural tourism and agriculture issues but one strategic project is highly relevant for the IMP, covering blue biotechnologies, fishing for human consumption and marine aquaculture and two other maritime-related projects are about to be launched.

#### **ENPI-CBC Med**

The four objectives of the ENPI CBC programme for the Mediterranean Sea-Basin are:

- promotion of socio-economic development and enhancement of territories;
- promotion of environmental sustainability at basin level;
- promotion of better conditions and modalities for ensuring the mobility of persons, goods and capitals;
- promotion of cultural dialogue and local governance.

Countries/regions covered: Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Malta, Palestinian Authority, Portugal, Spain, Syria and Tunisia.

MEAs concerned: Deep-sea shipping, short-sea shipping, Fishing for human consumption, Blue biotechnology, Coastal Tourism, Cruise tourism, Ocean renewable energy, Securing fresh water supply, Coastal protection, Maritime surveillance, Environmental monitoring.





## ANNEX 7. List of projects and initiatives

For readability purposes, the following table does not include all the elements available in the database (e.g. description, detailed MEAs, etc.)

It does not include either the list of projects that are specific to the Adriatic and Ionian region and which was provided in the Report 2 of this contract<sup>10</sup>.

The selection was limited to projects and initiatives initiated between 2007 and 2013, or running through the period.

This does not take into consideration South-South territorial cooperation, for which information is not centralised.

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<sup>10</sup> As mentioned in the methodology, the two databases could not be compiled as the two reports relied on slightly different methodologies for the data collection. In particular, the report 2 focused on pillars from the EUSAIR, which was not relevant here.

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

Report 4 - Annexes

Name	Food, nutrition, health	Maritime transport	Tourism	Surveillance and environ. Monitoring	Energy and raw materials	Coastal protection	Shipbuilding and water projects	Mediterranean countries involved	Type of actions	Types of Lead Partner	Funding Programme
MAREMED	x	x		x		x		France, Spain, Greece, Italy, Cyprus	Strategy, networking	Local administration	MED Programme
MEDFISIS	x			x				Albania, Algeria, Bulgaria, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Jordan, Lebanon, Libya, Malta, Monaco, Montenegro, Morocco, Romania, Slovenia, Spain, Syrian Arab Republic, Tunisia, Turkey.	Data collection and dissemination capacity-building	Public agencies	GFCM
Small Islands Initiative and Projects				x				Albania, Algeria, France, Italy, Malta, Morocco, Spain, Tunisia	Data collection and dissemination Strategy, networking	Public agencies	Partners (academic institutions)
RAMOGE	x	x	x	x		x		France, Monaco, Italy	Pilot projects Public awareness and communication	Local administration	
Gaza desalination project					x		x	Algeria, Spain, Italy, Turkey, France, Morocco, Cyprus, Greece	Infrastructure development	Government and public authorities (Palestinian authority)	Arab, European and other potential donor countries and Funds (UfM)
MedPartnership				x		x		Albania, Algeria, Bosnia and Herzegovina, Croatia, Egypt, Lebanon, Libya, Morocco, Montenegro, Syria, Tunisia and Turkey	Strategy, networking Capacity-building		UNEP
PERSEUS	x	x	x	x	x	x		Greece, France, Spain, Italy, Morocco, Tunisia, Israel, Cyprus, Turkey, Croatia, Slovenia	Data collection and dissemination Research and development	Academic and Research institutions	7th Framework program
SAFEMED (Phase I and II)				x				Alegria, Egypt, Israël, Jordania, Lebanon, Morocco, Syria, Palestinian Authority, Tunisia, Turkey	Strategy, networking Business support	REMPEC	EU
CoCoNet								Italy, France, Spain, Greece, Montenegro, Tunisia, Israel, Morocco, Turkey, Malta, Croatia	Strategy, network Pilot projects Research and development	Local administration	EU 7th Framework program

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PEGASO	x	x	x	x	x	x		Spain, France, Croatia, Italy, Greece, Morocco, Algeria, Egypt, Lebanon, Turkey	ICT Data collection and dissemination Capacity building Research and development	Academic and Research institutions	7th Framework program
LOGISMED-TA		x						Morocco, Tunisia, Egypt	Capacity-building	Local administration	EU and Deauville Partnership Transition Fund (UfM)
MEDESS-4MS				x				Cyprus, France, Greece, Italy, Malta, Spain	Data collection and dissemination ICT	Local administration	MED Programme
MedSea				x				Spain, France, Israel, Greece, Italy, Morocco, Egypt, Tunisia	Research and development	Academic and research institutions	EU 7th Framework program
TOURISM PORTS ENVIRONMENT								France, Italy	Strategy, networking capacity-building Infrastructure development	Local administration	France-Italy Maritime CBC
INNAUTIC			x					France, Italy	Strategy, networking	Local administration	France-Italy Maritime CBC
FUTUREMED		x	x					Greece, France, Spain, Italy, Slovenia, Cyprus	Pilot projects	Local administration	MED Programme
S&T MED			x	x				Italy, Tunisia, Jordan, Spain	Strategy, networking Capacity building Infrastructure development	Local administration	ENPI-CBC Med
MEDNET		x						Italy, Greece, Croatia, Albania, Malta, Spain, Cyprus, Portugal, Slovenia, France	Data collection and dissemination	Public agencies	MED Programme
Live your tour	x	x		x		x		Spain, Italy, Lebanon, Tunisia	Strategy, networking	Academic and Research institutions	ENPI-CBC Med

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MEET			x					Italy, France, Spain, Egypt, Jordan, Lebanon	Data collection and dissemination Pilot projects Strategy, networking	Development agencies	ENPI-CBC Med
UMAYYAD			x	x				Spain, Portugal, Italy, Tunisia, Egypt, Lebanon, Jordan	Strategy, networking	Public agencies	ENPI-CBC Med
BLUEMASSMED				x				France, Greece, Italy, Malta, Portugal, Spain	Pilot projects	Public agencies	EU
I AM			x					Italy, Spain, Egypt, Lebanon, Jordan, Palestine, Tunisia	Strategy, networking, Research and Development ICT	Local administration	ENPI-CBC Med
MMMPA				x				Italy, France, Spain, Greece	Capacity building	Academic and Research institutions	7th Framework program
MED-JELLYRISK			x	x				Spain, Malta, Tunisia	Strategy, networking Data collection and dissemination Capacity-building	Academic and Research institutions	ENPI-CBC Med
STREETS		x	x					Malta, Italy	Strategy, networking capacity-building	Local administration	Italy-Malta CBC
EastMed	x							Italy, Greece, Turkey, Cyprus, Syria, Lebanon, Israel, Egypt	Capacity-building Data collection and dissemination Strategy, networking	Public agencies	GFCM
GIONHA				x				France, Italy	Data collection and dissemination Strategy, networking	Local administration	France-Italy Maritime CBC
BIODIVALUE	x			x				Malta, Italy	Data collection and dissemination Research and development	Public Agencies	Italy-Malta CBC
SIMIT				x				Malta, Italy	Strategy, networking Public awareness, communication	Academic and Research institutions	Italy-Malta CBC

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COPEMED II	x							Algeria, France, Italy, Libya, Malta, Morocco, Spain, Tunisia	Strategy, networking Data collection and dissemination Research and development Capacity-building	Public agencies	GFCM
MAPMED			x					Italy, Greece, Egypt, Tunisia	Research and Development Strategy, networking	Academic and Research institutions	ENPI-CBC Med
INTEGRARBIM			x	x				Spain, Morocco	Capacity-building	Local administration	Spain-external borders CBC
MEDSUDMED	x			x				Italy, Libya, Malta, Tunisia	Research and development Data collection and dissemination	Public agencies	GFCM
ANLYPAP				x				Greece, Cyprus	Infrastructure development Business support	Local administration	Greece-Cyprus CBC
PERLA			x					France, Italy	Pilot projects Strategy, networking ICT	Local administration	France-Italy Maritime CBC
MED-ALGAE	x			x				Cyprus, Malta, Italy, Greece, Egypt, Lebanon	Strategy, networking Business support	Academic and Research institutions	ENPI-CBC Med
ShMILE 2			x					France, Egypt, Greece, Italy, Jordan, Tunisia	capacity-building	Public agencies	ENPI-CBC Med
HELAND				x				Malta, Jordan, Spain, Cyprus, Palestine, Lebanon	capacity-building ICT	Academic and Research institutions	ENPI-CBC Med
ODYSSEA SUDOE			x					France, Spain	Strategy, networking capacity-building	Local administration	South West Europe CBC
MED-PCS		x						Greece, Italy, Spain	Pilot projects	Port Authority	MED Programme

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Name	Food, nutrition, health	Maritime transport	Tourism	Surveillance and environ. Monitoring	Energy and raw materials	Coastal protection	Shipbuilding and water projects	Mediterranean countries involved	Type of actions	Types of Lead Partner	Funding Programme
MED.I.T.A.		x						Greece, Italy, Montenegro, Spain	Data collection and dissemination ICT	Private companies	MED Programme
Crossborder Cooperation in Maritime Surveillance Issues (ΘΑΛΑ ΕΠΙΤ)				x				Greece, Cyprus	Business support	Local administration	Greece-Cyprus CBC
P.M.I.B.B.				x				France, Italy	Strategy, networking	Public agencies	France-Italy Maritime CBC
ArciMED			x					France, Italy	Strategy, networking Pilot project Business support	Local administration	France-Italy Maritime CBC
INTE-TRANSIT		x						Greece, Slovenia, Italy, Spain	Pilot projects ICT	Academic and Research institutions	MED Programme
MEDPAN Network			x	x				Spain, France, Greece, Italy, Malta, Slovenia	Capacity-building Strategy, networking	NGOs	MED Programme
COASTANCE	x	x	x	x		x		Greece, Italy, France, Spain, Cyprus, Croatia	Strategy, networking Capacity-building	Local administration	MED Programme
LOSE	x	x	x	x		x		France, Italy	Strategy, networking Pilot projects	Local administration	France-Italy Maritime CBC
TOSCA				x				France, Greece, Italy, Spain	Strategy, networking Capacity-building	Cluster	MED Programme
BioVecQ	x							Italy, Tunisia	Strategy, networking	Academic and Research institutions	ENPI-CBC Italy-Tunisia
MISTRAL			x	x				France, Italy	Strategy, networking Data collection and dissemination Research and development	Local administration	France-Italy Maritime CBC
LASAMEDCHEM		x		x				Greece, Italy, Malta, Slovenia, Spain	Strategy, networking	Local administration	MED Programme

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SECUR MED PLUS				x				Greece, France, Spain, Italy, Slovenia	Strategy, networking	Local administration	MED Programme
CLIMEPORT		x	x	x				Spain, France, Slovenia, Greece, Italy	Capacity-building	Port authority	Med Programme
MED-ROUTE			x					Greece, Italy, Jordan	ICT capacity-building public awareness	Local administration	ENPI-CBC Med
TERCONMED		x						Greece, France, Spain, Italy, Slovenia	capacity-building	Public agencies	MED Programme
SIC		x		x				France, Italy	capacity-building Pilot projects Strategy, networking	Local administration	France-Italy Maritime CBC
SE.RE.NA.					x		x	France, Italy	Capacity-building	Local administration	France-Italy Maritime CBC
FISHINMED	x			x				Italy, Tunisia, Egypt, Lebanon, Greece	Strategy, networking, Capacity-building	Local administration	ENPI-CBC Med
PORTA		x						France, Greece, Italy, Slovenia, Spain	Strategy, networking	Academic and Research institutions	MED Programme
CALYPSO				x				Malta, Italy	Data collection and dissemination Research and development ICT	Academic and Research institutions	Italy-Malta CBC
DEVELOP-MED		x						Italy, Greece, Cyprus, France, Malta, Montenegro, Spain	Strategy, networking	Local administration	MED Programme
MESP				x			x	Jordan, Italy, Lebanon, Greece	Research and Development Strategy, networking Infrastructure development ICT	Academic and Research institutions	ENPI-CBC Med
ARCHAEOTUR			x					Malta, Italy	Infrastructure development	Local administration	Italy-Malta CBC

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									Business support Public awareness, communication		
MEMO				x				Greece, France, Spain, Italy, Slovenia	Strategy, networking	Port Authority	MED Programme
In.Port.O		x						France, Italy	Infrastructure development Business support	Local administration	France-Italy Maritime CBC
SAFEPORT				x				Greece, Cyprus	Strategy, networking Infrastructure development	Port Authority	Greece-Cyprus CBC
PANACEA				x		x		Malta, Italy	Research and development Data collection and dissemination Public awareness, communication	Local administration	Italy-Malta CBC
SHIFT			x					France, Greece, Italy, Spain	capacity-building	Public agencies	MED Programme
Nexotour			x					Spain, Morocco	Strategy, networking Data collection and dissemination Pilot projects ICT	Public agencies	Spain-external borders CBC
OPTIMIZEDMED		x		x				Greece, France, Spain, Italy, Slovenia	Strategy, networking	Public agencies	MED Programme
ENERMED					x			Italy, Slovenia, Greece, France, Spain, Croatia	Strategy, networking Pilot projects	Public agencies	MED Programme
CUSTOM MED		x						Lebanon, Spain, Greece, Jordan	Strategy, networking capacity-building ICT	Academic and Research institutions	ENPI-CBC Med
SIMBIOTIC				x				Malta, Italy	Pilot projects Capacity-building	Academic and Research institutions	Italy-Malta CBC



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Ener-coop					x			Spain, Morocco	Strategy, networking Pilot projects Capacity-building	Local administration	Spain-external borders CBC
PARA - MARE TOURISM			x					Greece, Cyprus	Strategy, networking Data collection and dissemination Business support	Local administration	Greece-Cyprus CBC
ECO-LAGUNES	x			x				France, Spain	Research and development Data collection and dissemination	Local administration	South West Europe CBC
EGMDSS	x	x	x	x	x	x		Greece, Cyprus	Research and development Business support ICT	Local administration	Greece-Cyprus CBC
Aquamed	x							Algeria, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Lebanon, Morocco, Spain, Tunisia, Turkey	Strategy, networking	Academic and Research institutions	EU 7th Framework program
MORISO				x	x			Malta, Italy	Strategy, networking Pilot projects Public awareness, communication	Local administration	Italy-Malta CBC
SHoCMED	x							Albania, Algeria, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Lebanon, Libya, Malta, Monaco, Montenegro, Morocco, Slovenia, Spain, Syrian Arab Republic, Tunisia, Turkey	Capacity-building	Public agencies	GFCM
PREMARPOL	x	x	x	x		x		Greece, Cyprus	Data collection and dissemination capacity-building ICT	Academic and Research institutions	Greece-Cyprus CBC
AQUAGENET	x							France, Spain	Strategy, networking Research and development	Public agencies	South West Europe CBC

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InDAM	x							Albania, Algeria, Croatia, Cyprus, Egypt, France, Greece, Israel, Italy, Lebanon, Libya, Malta, Monaco, Montenegro, Morocco, Slovenia, Spain, Syrian Arab Republic, Tunisia, Turkey	Capacity-building	Public agencies	GFCM
QUALIMED				x				Italia, Tunisia	Research and Development Strategy, networking	Trade organisation	ENPI-CBC Italy-Tunisia
COMPASS	x		x	x				Italia, Tunisia	Strategy, networking Capacity-building Business support	Public agencies	ENPI-CBC Italy-Tunisia
POSEIDON (ΠΟΣΕΙΔΩΝ)				x				Greece, Cyprus	Research and development Business support Strategy, Networking	Academic and research institutions	Greece-Cyprus CBC
Alarmtox				x				France, Spain	Research and development Data collection and dissemination	Academic and Research institutions	South West Europe CBC
DIAFDOR (ΔΙΑΥΔΩΡ)				x			x	Greece, Cyprus	Pilot projects Research and development Strategy, networking	Local administration	Greece-Cyprus CBC
OBIMED		x	x					Malta, Italy	Strategy, networking Infrastructure development Public awareness, communication	Local administration	Italy-Malta CBC
Thinkmed			x					Spain, Morocco	Strategy, networking Pilot projects Capacity-building	Public agencies	Spain-external borders CBC

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Development of aquaculture sector of Albania, Croatia, Montenegro and Turkey	x							Croatia, Albania, Montenegro, Turkey	capacity-building strategy, networking	Public agencies	FAO-TCP
Newper			x					Italy, Cyprus, Israel	capacity-building strategy, networking	Private companies	ENPI-CBC Med
ArtFiMed	x			x				Morocco, Tunisia	Business support capacity-building Public awareness, communication	Public agencies	GFCM
NETPLATBA		x						Spain, Morocco	Strategy, networking Data collection and dissemination Infrastructure development capacity-building	Port Authority	Spain-external borders CBC
WATER FRONT	x	x	x	x		x		Malta, Italy	Strategy, networking capacity-building	Local administration	Italy-Malta CBC
GWP-Med							x	Albania, Jordan, Lebanon, Morocco, Palestine, Tunisia	Strategy, networking Data collection and dissemination	Government and public authorities Private partners Water users	Swedish International Development Agency, EIB, UNEP, MED EUWI (UfM)
Mediterranean FLAG cooperation	x		x					France, Spain, Greece, Cyprus	Networking	Cluster	EU

## ANNEX 8. Economic importance of the different sectors at sea-basin level

### A. Fisheries and aquaculture

#### 1. Marine aquaculture

Marine aquaculture is the 12<sup>th</sup> MEA in terms of GVA at Mediterranean level for EU Member States, EU candidates and potential candidates (EUR 0.8 billion in 2010). Although the activity is well developed in Greece (EUR 450 million GVA in 2010), Italy (EUR 150 million GVA in 2010) and Turkey (EUR 113 million GVA in 2010), it never appears among the 7 largest MEAs (except for Bosnia and Herzegovina, where maritime activities have a very marginal position because of the limited coastline).

In ENP countries, marine aquaculture remains at a very early stage of development. Nevertheless, production is increasing in Israel and Egypt and a few other countries have shown interest in the sector, as shown by development plans for aquaculture in Algeria and Morocco.

Despite its relatively small size, this MEA is considered promising in a large number of countries (nine out of 12), mainly because of its rapid growth (+12% in Greece and Turkey between 2008 and 2010 and among the seven fastest growing MEAs in six countries). Marine aquaculture's future looks positive, given the large potential for research and development and an increasing demand for seafood products at a time of a reduction in fishing opportunities.

Mediterranean countries have natural advantages for the development of marine aquaculture with extensive coastlines, favorable climates and good water quality. The basin also benefits from the leadership of Greece, not only in terms of production, but also research capacity and the presence of a mature and integrated industry with operations worldwide.

#### 2. Fishing for human consumption

Fishing for human consumption (which includes both the fishing sector and processing) is the third largest MEA in terms of GVA at Mediterranean level and among the seven largest at national level for all EU Member States, EU candidates and potential candidates (EUR 5.8 billion in total in 2010). The activity is among the two largest MEAs in the five larger countries: Italy (EUR 3.5 billion GVA in 2010), Greece (EUR 0.9 billion), Spain (EUR 0.6 billion for the Mediterranean coast), France (EUR 0.4 billion for the Mediterranean coast) and Turkey (EUR 0.2 billion, also for the Mediterranean coast). The well-developed supply-chain (wholesalers, processing industry, specialised retailers), especially in France, Italy and Spain, contributes significantly to both GVA and employment for this activity.

In ENP countries, the fishing sector has a limited economic importance at national level, as far as the Mediterranean Sea is concerned<sup>11</sup>, yet some coastal communities heavily depend on small-scale coastal fisheries.

Despite the fact that this activity only falls under the most promising and relevant MEAs in Albania, it cannot be overlooked in a possible strategy for blue growth in the Mediterranean basin, considering both its economic size and the importance of the issue of fish stock overexploitation.

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<sup>11</sup> Fishing is an important activity in Morocco, but mainly in the Atlantic Ocean; and in Egypt, but mainly on the Nile and in the Black Sea.

## B. Maritime transport

### 1. Short-sea shipping

Short-sea shipping is of significance to EU Member States, candidates and potential candidates; its GVA reaches EUR 9 billion. It is included in the largest MEAs in 10 countries and included in the fastest growing in eight of them. The GVA of short-sea shipping accounts for EUR 3.6 billion in Greece; EUR 3.1 billion in Italy; EUR 1.2 billion in France; EUR 0.5 billion in Spain; EUR 0.5 billion in Turkey and EUR 0.2 billion in Croatia.

This MEA is identified as promising and relevant in six EU Member States, candidates and potential candidates: Greece; Croatia; Italy; Montenegro; Slovenia and Turkey because of its economic importance, its growth in recent years and its potential for development.

Shipping in general is also significant in most ENP countries, for both imports and exports. Furthermore, these countries are located on large maritime routes, an important competitive advantage for the development of the sector in general and short-sea shipping in particular.

By analysing country fiches developed in Task 2, prospects for this MEA are found to be related to external factors (evolution of regional industries and consumption) and to the capacity to increase the attractiveness and competitiveness of short-sea shipping compared to other means of transport. This can be achieved through better interconnectivity, harmonisation of procedures, development of infrastructure and provision of services.

Furthermore, short-sea shipping is highly strategic in each country because of its large spill-over effects (such as port infrastructure and associated logistics) and of its important role in ensuring national connectivity, especially for those countries with a large number of islands.

### 2. Deep-sea shipping

Deep-sea shipping has a great importance in the EU Member States, candidates and potential candidates with EUR 2.4 billion of GVA. However, this remains lower than GVA for short-sea shipping (EUR 9 billion). It is included in the seven largest MEAs in seven countries and its GVA reaches EUR 0.9 billion in Italy, EUR 0.4 billion in Greece, Spain and France, and EUR 0.2 billion in Turkey. Deep-sea shipping is identified as promising and relevant in three Member States, candidates and potential candidates: Cyprus, Greece, and Slovenia.

Shipping in general has a great importance in most ENP countries for imports and exports, but deep-sea shipping in particular has a great importance in Egypt (Port Said) and in Morocco (the Tangier project), whose port development policy has been strongly addressed to enhance port facilities for receiving large container vessels. Furthermore, these countries are located along large maritime routes transiting through the Mediterranean, representing a further significant competitive advantage for attracting this type of traffic.

Deep-sea shipping is a global market in which Mediterranean countries can have different positioning and different strategies. Competitive advantages come from size of fleet, fleet modernisation (fuel efficiency), port infrastructure and strategic location. The growth of this MEA is also linked to the evolution of regional industries and to the attractiveness of facilities (better equipment, higher depths, intermodal links) compared to other areas. The reinforcement of competitiveness of deep-sea shipping in the area can be reached through better interconnectivity (rail/road), harmonisation of procedures, development of infrastructure and provision of services. There is already a high level of trans-border co-operation in shipping activities between public bodies and port authorities; mainly concerning safety, maritime surveillance, IT systems and motorways of the sea projects.

### 3. Passenger ferry services

Passenger ferry services is the fifth largest MEA in the EU Member States, candidates and potential candidates, its GVA accounts for EUR 4.2 billion. It ranks among the largest MEAs in most of these countries (the exceptions are Cyprus, Bosnia and Herzegovina and Slovenia). The GVA reaches EUR 1.7 billion in Greece, EUR 1.5 billion in Italy, EUR 0.4 billion in Turkey, EUR 0.3 billion in Spain and in France and EUR 0.1 billion in Croatia. This activity is also present in ENP countries; however, no data are available.

This MEA is already at a mature stage and did not grow strongly over the 2008-2010 period. Passenger ferry services make part of the fastest growing MEAs in only four countries (Croatia, Montenegro, Turkey and France).

The activity plays an important role in territorial development through the connections with islands, notably in Italy (Sicily, Sardinia), Croatia and Greece. There are important spill-over effects, in particular with tourism (through national and international connections).

This activity has been identified as relevant and promising in four countries (Albania, Croatia, Italy and Montenegro).

## C. Tourism

### 1. Coastal tourism

**Coastal tourism is identified as promising and relevant in 10 Mediterranean countries** and is the largest MEA in the Mediterranean area with EUR 23.1 billion of GVA. It is also the largest MEA in almost all Mediterranean countries, the only exception being Albania - where it ranks second. The GVA of coastal tourism reaches EUR 6.8 billion in Greece, EUR 5.4 billion in Italy, EUR 3.8 billion in Spain, EUR 1.5 billion in France and Turkey. Tourism is significant in the national economies of these countries, for instance it accounts for 30% of Greek GDP. Coastal tourism is historically strategic in these Mediterranean countries naturally oriented toward the sea and benefiting from climatic assets for this activity.

Due to the financial crisis, this MEA did not see large growth between 2008 and 2010; however it emerged to be part of the fastest growing MEAs in 7 countries. General trends for coastal tourism are positive and depend on the global tourist market and on the capacity of countries to increase their competitiveness. This is related to promotion/communication toward clients, the compliance with international demand, the innovativeness of the offer and the capacity to attract clients during off-season.

### 2. Cruise tourism

**Cruise tourism is identified as promising and relevant in seven countries** (Cyprus, Spain, Greece, Croatia, Italy, Slovenia and Turkey). This sector is included in the largest MEAs in five countries and ranks as the fourth largest MEA at the basin level, mainly due to Italy (EUR 2.1 billion of GVA) and Greece (EUR 1.6 billion). Cruise tourism strongly grew over the period 2008-2010 and ranks among the fastest growing activities in 9 countries (it even ranks 1<sup>st</sup> in Montenegro and France and 2<sup>nd</sup> in Greece, Slovenia and Turkey).

**The development of cruise tourism in the Mediterranean area benefits from the same favourable conditions as coastal tourism (climate, cultural heritage and tourist tradition).**

The state of the value chain differs markedly between different countries: cruise tourism is at a mature stage and very well established in Italy, which accounts for 40% of total EU cruise passengers, and in Greece; but it is still at early stage of development in other countries such as Croatia, which has no home port yet.

### 3. Yachting and marinas

**The maritime activity “Yachting and marinas” is identified as most promising and relevant in five countries** (France, Greece, Croatia, Montenegro and Turkey). It is part of the seven largest and seven fastest growing MEAs in only two countries for each case (France and Greece for the largest, Greece and Montenegro for the fastest growing). According to the findings of Task 2 the GVA of this sector reaches EUR 3.5 billion at Mediterranean level including EUR 2.6 billion, EUR 340 million in Italy, EUR 302 million in France and EUR 213 million in Greece.

Future growth is expected through increases in the number of moorings and the development of international boating. The attractiveness of each country for boating is mainly related to three factors: (i) quality and attractiveness of environment, (ii) level of services provided in the marinas and (iii) adequateness of infrastructure. As for other tourist activities, there is a specific Mediterranean image for yachting and marinas.

The expected spill-over effects are important with other tourism-related MEAs. However some issues emerged when it comes to co-location with other activities (tourism, marine aquaculture, ferry passenger services or fishery in the ports), where diverging interests raise for the use of maritime and coastal spaces.

## D. Energy and raw materials

The country fiche analyses and the overview of maritime economic activities in the ENP countries make it clear that in the energy sector two maritime activities are most promising: **offshore oil and gas** and **securing fresh water supply**.

### 1. Offshore oil and gas

Energy-related MEAs currently have limited economic significance at Mediterranean basin level. Total GVA in EU Member States and EU candidates and potential candidates is EUR 2.65 billion in 2010.

Offshore oil and gas (EUR 2.20 billion GVA, according to findings of Task 2) is important only in Italy (EUR 2.10 billion, i.e. 96% of total GVA of the sector in the countries surveyed), where it is the fourth largest MEA. Italy has 114 offshore platforms for gas (mainly in the Adriatic Sea); 16 platforms for oil extraction (in the Strait of Sicily and in the Adriatic) are in operation. Together these produce 94 million barrels oil equivalent (2010, Eurostat). But this sector has not been identified among the most relevant and promising activities in Italy, unlike in Cyprus and Spain.

In the ENP countries, offshore oil and gas extraction activity is usually not very developed but it is increasing. Potentially substantial oil and gas fields have been discovered in the Eastern Mediterranean.

### 2. Securing fresh water supply (desalination)

Spain, one of the world’s leading countries in water desalination, accounts for 61% of the total GVA of this MEA in the countries surveyed (EUR 0.45 billion). Desalination is the fourth largest MEA in Malta and Cyprus, where desalination plays a crucial role in fresh water supply. Securing fresh water supply is considered as a promising sector in two countries (Cyprus and Spain).

Desalination plants are also in operation in the ENP countries in the Eastern Mediterranean, where securing fresh water supply is considered as a national priority (Israel).

## E. Blue biotechnologies

Blue biotechnology is still at a very early stage of development. Data for GVA or employment are not available, even in larger countries like France or Spain. Nevertheless, this activity is highly innovative and carries exceptional prospects for the future, which is why it has been considered to be among the most promising and relevant MEAs in three countries (Spain, France and Slovenia). Marine aquaculture in Malta, considered the most promising activity for the country, partially relies on algae culture for pharmaceutical usage for its future growth. A few other countries, including ENP ones, have also carried out related research projects as shown by the assessment of existing co-operation presented below.

The French cluster Pôle Mer PACA<sup>12</sup> in Southern France already has around 20 projects in this field with applications in cosmetics, nutrition, medicine and energy. The French Mediterranean area benefits from leading laboratories in the area of marine biodiversity and active principles but, unlike on the French Atlantic coast, it still lacks the industrial fabric to develop the economic sector. However, in France, there is a very active and mature industry in the larger field of biotechnology, with a total turnover estimated at EUR261 million in 2011<sup>13</sup> and 36 companies listed in stock exchanges<sup>14</sup>. The cluster Euromed, focusing on medical biotechnologies, consists of 42 members including 20 companies, 14 research institutes and eight other organisations (e.g. local authorities and public administrations). According to the 2013 World Intellectual Property Indicators report<sup>15</sup>, France is the second European country, behind Germany, in terms of patent applications in the field of biotechnology between 2007 and 2011. Altogether, the conjunction of relevant research laboratories, an existing network of SMEs active in this field in the French Atlantic area and the presence of a mature industry relying on biotechnologies are major success factors for the development of blue biotechnologies in France.

In Spain, there is no clearly identifiable industry in this field. However, the country has a longstanding tradition of research on marine resources, both private and public, due to the importance of its coastlines. The Instituto Español de Oceanografía (IEO), with satellites in Malaga, Murcia and Palma; the Mediterranean Institute for Advanced Studies (IMEDEA) and the Coastal Observation and Prediction System of the Balearic Islands (SOCIB) all have specific departments dedicated to marine biology. The private sector has also started to invest in blue biotechnologies in particular in the pharmaceutical field (e.g. the new antitumor drug developed by Pharmamar), but also in cosmetics, food ingredients, biofuels, etc.

Although Slovenia is a small country and does not have the leadership of France or Spain, the fact that a couple of research institutes have devoted projects to this field and that a private company is focusing on commercial applications for blue biotechnology is considered as an indicator of the potential development for the country.

At basin level, the great biodiversity of the Mediterranean Sea<sup>16</sup>, the potential market for blue biotechnologies and the existence around the basin of leading countries in terms of research in marine biology result in a significant opportunity for the area.

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<sup>12</sup> <http://en.polemermediterranee.com/Ressources-biologiques-marines/Biotechnologies-bleues>

<sup>13</sup> <http://www.france-biotech.org/wp-content/uploads/2013/02/facts-and-figures-2013-vf-bb3x.pdf>

<sup>14</sup> <http://fr.scribd.com/doc/145896846/Etude-2012-VInteractive-FranceBiotech>

<sup>15</sup> [http://www.wipo.int/export/sites/www/freepublications/en/intproperty/941/wipo\\_pub\\_941\\_2013.pdf](http://www.wipo.int/export/sites/www/freepublications/en/intproperty/941/wipo_pub_941_2013.pdf)

<sup>16</sup> See the next section on the environment.



## F. Environment

**Preserving natural resources and the integrity of Mediterranean coastal and marine ecosystems is a key challenge** for the future, not only **considering their priceless heritage value, but also because they provide huge economic benefits** (ecosystem services) to population of the region. Besides the well-known economic value of fisheries and aquaculture (direct economic benefit provided by the oceans), there are several other activities generating very important revenues and jobs in coastal and marine areas. In particular, tourism has become one of the world's fastest growing industries, providing a significant proportion of the GDPs of many Mediterranean countries. Small islands are particularly reliant on coastal and marine tourism. However, the very areas that attract tourists are also coming under increasing pressure from the damage and pollution caused by tourist facilities and the supporting infrastructure.

**The most promising MEAs for blue growth in the Mediterranean basin** (aquaculture, tourism ...) **are directly depending of the preservation of healthy ecosystems and renewable marine resources.**

The establishment of **Marine Protected Areas (MPAs) networks, including the Natura 2000 network in the marine environment, supports a wide range of ecosystem services**, which help amongst others to maintain healthy fish stocks and to develop sustainable activities (eco-tourism, recreational fishing).

According to a recent EU Commission study<sup>17</sup>, the benefits that flow from Natura 2000 (inland and marine networks) are of the order of EUR 200 to 300 billion a year. It is estimated that there are between 1.2 to 2.2 billion visitor days to Natura 2000 sites each year, generating recreational benefits worth between EUR 5 and EUR 9 billion per annum.

The value of benefits delivered by the marine area currently protected by the network (equivalent to 4.7% of the EU's marine area) is approximately EUR 1.4– 1.5 billion per year. This would increase up to EUR 3.0– 3.2 billion per year if 10% of the sea area were protected (objective for Natura 2000 in coastal and marine environment), and EUR 6.0–6.5 billion per year for protection of 20% of the sea area.

Therefore, investing in MPAs and Natura 2000 makes sense and is directly relevant to Europe 2020 objectives of growth and employment as it can support the local and regional economy.

The attractiveness of each country is linked to the quality of environment. And each economic activity should include the sustainability feature. Therefore, **environmental monitoring is a pre-requisite to achieve the sustainable growth of almost all the other marine and maritime economic activities.**

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<sup>17</sup> The Economic benefits of the Natura 2000 Network - Synthesis Report – European Commission 2013.  
[http://ec.europa.eu/environment/nature/natura2000/financing/docs/ENV-12-018\\_LR\\_Final1.pdf](http://ec.europa.eu/environment/nature/natura2000/financing/docs/ENV-12-018_LR_Final1.pdf)

## ANNEX 9. Case studies

According to the tender specifications, case studies aim to support policy recommendations that could help fulfil the sustainable growth potential in the blue economy and an integrated maritime policy in the Mediterranean Sea.

The following case studies were conducted:

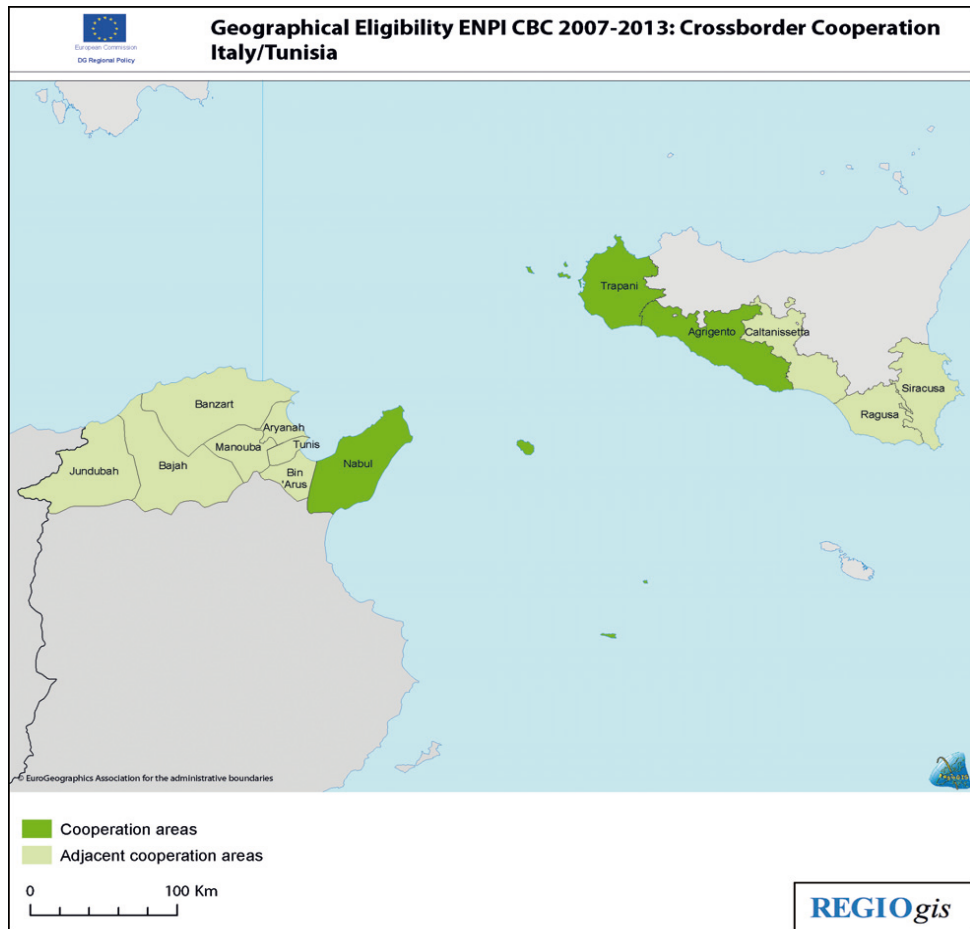
- Case 1 : “ENPI CBC Italy-Tunisia”, with focus on BioVecQ project (marine biotechnology as vector of innovation and quality);
- Case 2 : “Spain-External Borders”, with focus on THINKMED project (innovating initiatives in tourism);
- Case 3 : “Island transport connectivity” in the Central and Eastern Mediterranean;
- Case 4 : “Programme Italy-France Maritime”;
- Case 5 : “FLAG charter for Mediterranean cooperation”.

**Case Study 1: ENPI CBC Italy-Tunisia Programme**

**Introduction**

**Rationale:** The aim of this programme is to promote the economic, institutional and cultural integration between Tunisian and Sicilian regions through a joint sustainable development process in the context of the cross-border cooperation.

Areas involved are coastal regions of Northern Tunisia (Ariana, Beja, Ben Arous, Bizerte, Nabeul, Jendouba, Nadouba and Tunis) and provinces of Southern Sicily (Agrigento, Caltanisseta, Ragusa and Siracusa). These two areas share similar difficulties and characteristics: agriculture, fisheries, tourism and culture are important economic sectors in both territories.



This programme is relevant because great emphasis is given to research, innovation and sustainable development.

The programme promotes economic and institutional integration between regions bordering the Mediterranean sea basin. It is interesting especially because, despite cultural links between the two countries (one EU Member State and one Southern ENP country), there is no real history of cooperation between them.

In relation to the axes of intervention (strategic framework) proposed for Mediterranean cooperation in this Study, the Programme is also of interest as it deals with the 4 horizontal actions identified : “supporting business growth” (through the promotion of research and innovation), “fostering the blue economy”

	(with specific focus on the fishery sector and a strategic project on marine biotechnologies), “securing a healthier environment” (it aims at an efficient management of fishery resources) and “ensuring long-term energy supply” (it promotes sustainable development through development of renewable energy sources).
<b>Context:</b>	<p>The Italy-Tunisia Programme</p> <p>The programme is co-financed by the ERDF and the ENPI (European Neighbourhood and Partnership Instrument).</p> <p>Total budget of the programme for the 2007-2013 period is EUR 27,7 million (90% financed by EU funds).</p>
<b>Sources and information:</b>	<p>Interviews :</p> <ul style="list-style-type: none"> <li>- Anna DORANGRICCHIA, Coordinator of the Programme’s Joint Technical Secretariat,</li> <li>- Professeur Saloua SADOK, INSTM (Institut National des Sciences et Technologies de la Mer), beneficiary and lead of BioVecQ project,</li> <li>- Marouen CHIKHAOUI, GIPP (Groupement Interprofessionnel des Produits de la Pêche), partenaire du projet BioVecQ</li> </ul> <p><a href="http://www.italietunisie.eu/">http://www.italietunisie.eu/</a></p>
<b>Analysis</b>	
<b>General:</b>	<p>The maritime dimension of the programme appears quite limited.</p> <p>Three cooperation priorities and 10 measures have been set:</p> <ol style="list-style-type: none"> <li>1. Priority 1: Development and regional integration (65% of funding) <ul style="list-style-type: none"> <li>- Measure 1.1: Supporting the development and integration of the key sectors of the eligible zone (agriculture and food, fishery and tourism)</li> <li>- Measure 1.2: Promoting the flow of goods which play a primary role in the region’s commercial integration between Tunisia and Sicily</li> <li>- Measure 1.3: Promoting research and innovation</li> <li>- Measure 1.4: Supporting institutional cooperation for local development purposes</li> </ul> </li> <li>2. Priority 2: Promoting sustainable development (25% of funding) <ul style="list-style-type: none"> <li>- Measure 2.1: Supporting the enhancement/conservation and efficient management of natural resources in the key sectors of agriculture and fishery</li> <li>- Measure 2.2: Protecting and enhancing the natural and cultural heritage as a prerequisite for sustainable tourism development</li> <li>- Measure 2.3: Promoting the development of renewable energy sources</li> </ul> </li> <li>3. Priority 3: Cultural and scientific cooperation and support to networking (10% of funding) <ul style="list-style-type: none"> <li>- Measure 3.1: Supporting cooperation at the level of associations</li> <li>- Measure 3.2: Promoting cultural and scientific cooperation</li> <li>- Measure 3.3: Training and exchange of youths and students.</li> </ul> </li> </ol>

<p><b>Coordination:</b></p>	<p>The Management Authority is the Region of Sicily and is in charge of the implementation and the management of the programme. The Management Authority is assisted by a Joint Technical Secretariat, composed of a permanent structure, supervised by a coordinator, and an antenna in Tunis.</p> <p>Two kinds of projects can be financed through the programme:</p> <ul style="list-style-type: none"> <li>- “standard projects” (budget between 700.000 and 800.000 €), which result from initiatives of local actors organized in transboundary partnership and in accordance with the objectives and priorities of the programme,</li> <li>- “strategic projects” (budget between 1,3 and 2 million €), identified by the Joint Monitoring Committee.</li> </ul>
<p><b>MEAs involved</b></p>	<p>The main economic sectors targeted by the programme are the agro-food sector, fisheries and tourism. Major MEAs covered are thus “catching fish for food”, “marine aquaculture”, “blue biotechnology” and “coastal tourism”.</p> <p>Only 1 (strategic) project is directly linked to maritime activities: BioVecQ (see below). Another project recently launched, CULTURAS (Culture et Tourisme Actif et Soutenable) aims at identifying new models for enhancing the archaeological heritage and developing new tourist offers (diving and biking).</p> <p>Two other (standard) projects should be signed shortly: SECURAQUA (security and quality in aquaculture) and MEDCOT (sustainable methodologies for rehabilitation and enhancement of the coastline).</p> <p>It can be observed that maritime transport has not been taken into account in the projects submitted (unlike Programme Italy-France Maritime for instance), probably because there is no direct commercial connection between Tunisia and Sicily and no demand for such services. According to interviewees, Tunisia looks more interested in maritime links with Marseille than with Palermo.</p>
<p><b>Results, impact &amp; lessons learned</b></p>	<p><b>Results and lessons at programme level</b></p> <p>A first monitoring report on the whole programme shows that the degree to which the programme is truly based on cooperation varies: some projects appear truly cooperative while some others have poor internal communication partly due to language issues and partly due to partners not being fully integrated into the project.</p> <p>Italy and Tunisia have requested an enlargement of the eligible territories in future as in Tunisia most of the governorates are within the region of Tunis and in Sicily the request is to include all provinces (the programme is currently managed from the capital Palermo which is not an eligible area). The argument is that this would attract more proposals and create greater competition for funding thus increasing the quality of the applications.</p> <p><b>BioVecQ project</b> (Marine biotechnology vector of innovation and quality) has been selected for further analysis because of its focusing on one of the most promising maritime activities.</p> <p>The project just started on 06/06/2013 for a duration of 30 months and did not bring impacts yet. But, as it was stressed in the ongoing monitoring report of October 2013, the economic activities generated by the practical application of research carried out throughout the research laboratories involved in the project are expected to contribute to the economic development of the bio-marine sector thus contributing to the overall objective of the programme.</p>

	<p>The project's overall budget is EUR 1.722.000 out of which an EC grant of EUR 1.550.000 (90%).</p> <p>The specific objectives to create synergy between research and economic development and to promote transboundary applied research cooperation are relevant to the overall programme objective to promote sustainable socio-economic development of marine resources in Sicily and Tunisia.</p> <p>BioVecQ is based on 5 components :</p> <ul style="list-style-type: none"> <li>- communication (meetings, conferences, web site),</li> <li>- analysis of fish and bioproducts sectors in both Tunisia and Sicily,</li> <li>- harmonization of procedures (post-harvest, traceability, ...),</li> <li>- development of new procedures (innovative processing technologies, extraction, purification, ...),</li> <li>- dissemination of the research results (exchange platform, transfer of pilot projects, ...).</li> </ul> <p>INSTM (Institut National des Sciences et Technologies de la Mer) in Tunisia, who is the project leader, and IZSS (Istituto Zooprofilattico Sperimentale della Sicilia) played a leading role in the project design process. The other partners have proven experience regarding research in biotechnologies applied to marine resources as well as partnerships with the private sector to promote innovations and entrepreneurship.</p> <p>The project is expected to strengthen transboundary cooperation in marine biotechnology and seafood research, to contribute to the economic development of the biomarine sector and to generate a dynamic which could expand beyond the project stakeholders in Tunisia and Sicily and possibly to new partnerships around the Mediterranean Sea. Part of the application based on research topics related to the use of marine products wastes (pet food production, biogas, ...) could also have a positive environmental impact (provided that new markets gained thanks to the project do not result in an intensification of the fishery).</p> <p>A strategic issue will be the maintenance of the website established in the frame of the project to share research among involved laboratories, enterprises and start-ups beyond the project's life cycle.</p> <p>The expected outcomes relate to the reinforcement of trans-border marine biotechnology research cooperation and to the availability and use of research results by SMEs.</p> <p>The research projects include innovative methods of molecular extraction, marine bio products preservation, marine bio products biological characterization methods, transformation activities related to waste reduction, allergens detection, organoleptic tests.</p> <p>The Tunisian fish sector is highly motivated to be included in the project since it establishes close relationships with Italian economic actors specialized in innovative processing. The prospect for Tunisian companies to benefit from research results, especially concerning quality of fishery products, which is a weak point of the Tunisian sector, is also motivating.</p>
<b>Policy Recommendations</b>	
<b>Supporting business growth</b>	<p>The BioVecQ project aims at creating a stable and sustainable synergy in the marine biotechnology sector and improving innovation governance. Planned for 30 months it will need further support at the end of the programme.</p>

<p><b>Fostering the blue economy</b></p>	<p>The BioVecQ project is likely to generate new partnerships around the Mediterranean Sea and dissemination of innovative advances should be made at sea-basin level.</p> <p>As regards the programme, several projects concern agriculture and food but exclude seafood. For the purpose of “fostering the blue economy” it would be relevant to take advantage of already existing and consolidated agricultural projects and include a maritime dimension in these projects. For instance: QUALIMED (label for quality and safety of food products from the Mediterranean Basin), AGROMED QUALITY (Mediterranean platform for quality in the agriculture and food sectors), ESSORENTPREPRISE (access of small enterprises to miniaturization technologies in the food processing sector), C.Q. (quality certification of food products, in particular PDO/PGI products) and VEDER (energy recovery from agricultural residues).</p> <p>Furthermore it would also be relevant to extend the geographical scope of QUALIMED and AGROMED QUALITY to basin scale, for the purpose of increasing quality and safety of seafood products and boosting the competitiveness of Mediterranean products in the international market.</p> <p>As it is highlighted by the Programme’s Joint Technical secretariat, the agri-food sector (including fisheries and aquaculture) and the tourism are the two sectors for which cooperation between Tunisia and Sicily makes the most sense.</p> <p>Concerning tourism, the Programme gives high relevance to internal tourism but does not include major projects focusing on coastal tourism. Coastal tourism should be given more importance in current projects and be considered as a top priority.</p>
<p><b>Ensuring long-term energy supply</b></p>	<p>The relevance of the programme on this is currently quite limited. The use of algae as source of compost could be better tackled in the framework of MEDCOT or VEDER.</p>
<p><b>Securing a healthier environment</b></p>	<p>The risks inherent to projects should be better taken into account (e.g. risk of overfishing as a consequence of full success of BioVecQ project): if the application based on research on the use of marine products wastes was a success and led to the creation of new markets, increased quantities of fish inputs would be necessary and could result in an intensification of the fishery and have a negative influence on the sustainability of marine resources.</p>

<b>Case Study 2: OP “Spain – External Borders” CBC</b>	
<b>Introduction</b>	
<b>Rationale:</b>	<p>The Operational Programme “Spain – External Borders” (POCTEFEX) has been approved in 2009 by the European Commission in the context of the objective of European territorial cooperation between Spain and Morocco.</p> <p>The interest of the case study is thus to examine to what extent cross-border initiatives encouraged by this programme have affected the maritime activities in the Mediterranean, what types of actions have been developed and how they tackled the blue growth issues.</p> <p>The interest of a focus on an innovative project in the tourism sector (THINKMED) is to explore ways and means to promote cooperation in research, innovation and business between two riparian countries of the Mediterranean.</p>
<b>Context:</b>	<p>Spain and Morocco have made significant effort in recent years due to territorial matters<sup>18</sup>, in order to structure and to present two cooperation programmes in the context of the European Neighbourhood and Partnership Policy Framework, without reaching a unique programme, within the intended deadlines:</p> <ol style="list-style-type: none"> <li>1. Mediterranean area of cooperation: it includes the provinces comprising the Autonomous Community of Andalusia (Almería, Granada, Málaga, Cádiz, Huelva, Sevilla, Córdoba and Jaén) and the autonomous cities of Ceuta and Melilla on the Spanish side. On the Moroccan side, it includes the Tanger-Tetouan and Taza-Alhoceima Taounate regions as well as the Eastern Region.</li> <li>2. Atlantic area of cooperation : it includes the Canary Islands and the African regions of Guelmin-Es-Smara, Souss Massa Drâa and Laâyoune-Boujdour-Sakia El Hamra (this part of the programme is not taken into account in this case study).</li> </ol> <p>The POCTEFEX programme is composed of two different and separated cooperation programmes, due to territorial matters. As outermost region the Canary Islands could not join the Spain-Morocco cooperation programme under Interreg IIIA (2000-2006); only from the 2007-2013 period they could be eligible for cross-border cooperation which was in the meantime incorporated in the wider context of neighbourhood policy.</p> <p>The total budget amounts to EUR 125,9 million; ERDF provides 75%.</p>
<b>Sources and information:</b>	<p>PROGRAMA DE COOPERACIÓN TRANSFRONTERIZA ESPAÑA – FRONTERAS EXTERIORES 2008-2013 (2010)</p> <p>Basilisa Pizarro Ranchal, coordinator of programme (Algeciras office) (<a href="http://www.poctefex.eu/index.php?modulo=programa%27coordinacion@poctefex.eu">http://www.poctefex.eu/index.php?modulo=programa'coordinacion@poctefex.eu</a>)</p> <p>Carlos Romero, director for research, development and tourism innovation, SEGITTUR (State Agency for Management of Innovation and Tourism Technologies)</p> <p>Lourdes-Maria de Pedro, SEGITTUR</p>
<b>Analysis</b>	
<b>General:</b>	<p>The ultimate goal of the programme is to promote socio-economic development and to contribute to improving the structuring of cooperation efforts:</p> <ul style="list-style-type: none"> <li>• Improve mobility and accessibility between the territories included in the areas of cross-border cooperation.</li> </ul>

<sup>18</sup> González García, I. 2013. LA COOPERACIÓN TRANSFRONTERIZA ENTRE ESPAÑA Y MARRUECOS MEDIANTE POLÍTICAS Y PROGRAMAS EUROPEOS: LA INCIDENCIA DE LAS CUESTIONES TERRITORIALES Revista de Derecho Comunitario Europeo ISSN 1138-4026, núm. 45, Madrid, mayo/agosto (2013), págs. 535-574



	<ul style="list-style-type: none"> <li>• Develop the sustainable and integrated management of energy resources (terrestrial) and of the environment.</li> <li>• Promote the natural and cultural heritage of the borderlands areas, in order to strengthen the local image and to encourage the development of new economic activities.</li> <li>• Strengthen cross-border business cooperation.</li> <li>• Promote trade, closer links and integration at the social, educational and cultural levels among the population of the border areas.</li> <li>• Strengthen the capacities of local and/or regional institutions and contribute to establishing a framework for common governance.</li> </ul> <p>There is no specific objectives in relation to maritime elements apart from the improvement of connectivity and the development transport infrastructure, only in Atlantic cooperation area and those related to MEAs “coastal tourism”, “coastal protection” and “maritime monitoring and surveillance”. For details, see below.</p>
<b>Coordination:</b>	<p>The Managing Authority is the Ministry of Economy of Spain, assisted by a Joint Technical Secretariat located in Algeciras (with an antenna in Canary islands for the Atlantic part of the programme).</p>
<b>MEAs involved</b>	<p>Approved projects in the context of “Spain – External Borders” Operational Programme encompassed the following MEAs: maritime transport; food, nutrition, health and eco-system services; coastal tourism; coastal protection and maritime monitoring and surveillance</p> <p><b>MEA 1. Maritime transport</b> (but only in the Atlantic area of the programme : TRANSMACA project)</p> <p><b>MEA 2. Food, nutrition, health and eco-system services</b></p> <p>2.1. <u>Catching fish human consumption</u></p> <p><b>TRANSHABITAT:</b> Sustainable development of the border area Natura 2000 and common interest habitats of Andalusia-Morocco. From 01/2013 to 12/2013. In particular action 4 “Agricultural management transhabitat”: Plan for sustainable development of fisheries<sup>19</sup></p> <p>2.3. <u>Marine aquaculture</u> (but only in the Atlantic area of the programme: OMARCOST, AQUATRANS)</p> <p>2.4. Blue biotechnology (but only in the Atlantic area of the programme: TECHMARAT)</p> <p><b>MEA 4. Leisure, working and living</b></p> <p><u>MEA 4.1. Coastal tourism</u></p> <p><b>TURYMAR:</b> Local cooperation to motivate the economic activity through sustainable tourism in the Strait. From 01/2012 to 12/2013. Results: employment generation in the medium term based on the production of higher value added for the revitalization of the tourism industry associated with townships, orienting the sector to new and productive market niches through transnational cooperation synergies .</p> <p><b>ODYSSEA AL ÁNDALUS:</b> Innovative model of sustainable spatial and socio-economic development for a better optimization of port, tourism resources, culture, identity and heritage with a common Euro-Mediterranean reference that offers quality and visibility. From 12/2011 to 07/2013. The main results of the project will strengthen cross-border solidarity through the creation of clearly identified tourism dynamics in a common area and</p>

<sup>19</sup><http://www.juntadeandalucia.es/medioambiente/site/portalweb/menuitem.7e1cf46ddf59bb227a9ebe205510e1ca/?vgnextoid=274348d016057310VgnVCM2000000624e50aRCRD&vgnnextchannel=50a61716c01f4310VgnVCM1000001325e50aRCRD>

	<p>internally in each of the territories, the reduction of imbalances between regions of low and high density in interior locations and in coastline<sup>20</sup>.</p> <p><b>THINKMED:</b> Innovating initiatives in tourism (for details see focus below).</p> <p><b>MEAs 5 and 6. Coastal protection and Maritime monitoring and surveillance</b></p> <p><b>INTEGRARBIM:</b> Integral development (agricultural, rural, environmental, cultural and tourism) in the field of Intercontinental Biosphere Reserve of the Mediterranean (BRM). From 01/2010 to 06/2011. Results: Institutional and operational strengthening of BRM by structuring territory of the BRM through the implementation of actions for socio-economic, environmental and heritage development.</p> <p><b>ALBORÁN:</b> Transboundary Natural Area Management. From 01/2010 to 12/2013. A cooperative model for the effective management of natural resources in the Alboran Sea, unify criteria on sustainable management on both sides and implementing specific measures for transboundary biodiversity management. Results: 1- Border management model and monitoring natural resources in the Alboran Sea; 2- Project management and coordination; 3- Design and implementation of measures for transboundary biodiversity; 4- Unification of criteria and guidelines for natural management in the Alboran Sea.</p> <p><b>JUNTOS:</b> From 02/2010 to 06/2011. The main objective is to strengthen, at local level, the decentralized cooperation between the Province of Cádiz and North Eastern Regions of Morocco (Tánger –Tetuán; Taza-Alhoceima-Taounate), in order to promote sustainable development and to develop the culture of innovation in the SMEs and micro-enterprises in both regions. In relation to maritime activities, the Activity 3 includes: Enhancement of Natural Resources and Environmental Programme. In relation to Coastal Integrative Management, a meeting was carried out in 11/2011.</p> <p>It has to be noted here that several projects very relevant in respect to blue growth issues have been developed in the Atlantic side of the programme, in particular TRANSMACA, PORTVERT, AQUATRANS, TECHMARAT, NAUCAM, SIGMAC, CM-OMARAT, CARTOGRAF MOROCCO, OMARCOST.</p>
<p><b>Results, impact lessons learned (THINKMED)</b></p>	<p>As agreed with DG Mare, a focus is made on <b>THINKMED project: Innovating initiatives in tourism</b><sup>21,22</sup></p> <p><b>Title:</b> Promoting a network of Spanish-Moroccan Tourism Innovation in the Mediterranean area</p> <p><b>Calendar:</b> from 02/2011 to 12/2013</p> <p>This project, promoted by the State Agency for Management of Innovation and Tourism Technologies (SEGITTUR) and also supported by Société Marocaine d'Ingénierie Touristique (SMIT), under the Ministry of Tourism of Morocco.</p> <p><b>Mediterranean area:</b> Spanish geographical area: Autonomous Community of Andalusia: Almería, Granada, Malaga, Cadiz, Huelva (with 65% of the Andalusian population), and Ceuta and Melilla. Moroccan geographical area: the coastal area of Saidia to Asilah (one of the main tourist areas in Morocco included in an ambitious modernization investment plan). There are also significant areas of heritage tourism development (Larache, Tangier), nature and interior (Chefchaouen and Natural Parks) and rural and coastal tourism.</p> <p><b>Context:</b> Tourism in Andalusia (11.0% of the Andalusian GDP) has traditionally been based mainly on the exploitation of the resources of sun and sand in the coastal area and in the</p>

<sup>20</sup>[http://www.poctefex.eu/index.php?modulo=proyectos\\_aprobados&pagina=ver.php&id\\_area=&busqueda=&busqueda\\_socios=&busqueda\\_prioridad=&limite=40&back=proyectos\\_aprobados&id\\_ficha=76](http://www.poctefex.eu/index.php?modulo=proyectos_aprobados&pagina=ver.php&id_area=&busqueda=&busqueda_socios=&busqueda_prioridad=&limite=40&back=proyectos_aprobados&id_ficha=76)

<sup>21</sup> <http://www.think-med.es/>

<sup>22</sup>[http://www.think-med.es/?wysija-page=1&controller=email&action=view&email\\_id=75&wysijap=subscriptions](http://www.think-med.es/?wysija-page=1&controller=email&action=view&email_id=75&wysijap=subscriptions)

cultural heritage located in emblematic cities. This project for Sustainable Tourism includes the promotion of new industries to respond to changing consumer needs and based on the principles of quality, excellence and innovation in products.

The Moroccan case (7% of GDP in the region), with different tourism strategies, as the "Blue Plan" or "Plan et Patrimoine Héritage" for the creation of new resort areas in the country and for the implementation of actions to promote cultural tourism, interior or nature, applies principles of sustainability and public-private partnership.

**Objectives:** to promote a network of innovative clusters to strengthen cross-border business cooperation:

- Improve mutual understanding on economic, social, and environmental reality of tourism in the area and observe the impact of new demands in the tourism sector.
- Define joint to improve the product/service or destination through process innovation or R & D input generated jointly strategies.
- Improve the competitiveness of product/service or tourist destination in the region and ensure that an engine for sustainable economic development to the environment, local cultures and declines towards the playing field between men and women.
- To promote cooperation in research, innovation and business between entities in both regions.
- Promote technology initiatives, R & D and business joint beneficial for the tourism sector of the country.

**Problems:** Seasonality, overload destinations, lack of business competitiveness, employment seasonality, new tourist demands and environmental degradation are challenges posed by the Andalusian government to secure a renewal of its tourist destinations and they are beginning to appear in areas of action in Morocco.

**Activities:**

Workshops generation of joint R & D + I

- Workshop to disseminate new technologies in tourism
- Auto search for partners for the implementation of tourism projects
- Workshop on innovative applications for tourism
- Auto search for financing entrepreneurship in tourism

Training workshops on innovation and R & D + I

- Marketing 2.0 and tourism companies: Facebook, Twitter, YouTube, Flickr
- Positioning your business online. As more and better sell through internet
- Management Programs online reservations
- Management systems (CRM) in tourism SMEs
- Certification of quality applied to tourist accommodation
- Tourism planning and innovative business development.

Meetings (networking) for the development of cross-border initiatives

- Business Meeting on Rural Tourism and Nature Reserves (26-27/06/2013)

OBJECTIVES OF THE MEETING

- Meet business opportunities in tourism in protected natural areas, rural tourism, adventure tourism, etc...
- Promote awareness of the problems of tourism in both regions and the solutions provided by innovation or technological development
- Generate and joint projects between Andalusian and Moroccan institutions.
- Transmission of knowledge on innovation and tourism.

	<p><b>Lessons learned :</b></p> <p>The positive points are :</p> <ul style="list-style-type: none"> <li>• The suitable institutional support reflected in the developed plans, especially in Morocco in the context of the Vision 2020 programme.</li> <li>• The knowledge of the companies of the Spanish tourism sector (Andalusia) has been useful and transferred to the Moroccan companies and in many cases common problems have been identified. The image of the companies of the Spanish tourism has been highly valued by tourism entrepreneurs in Morocco.</li> <li>• Due to the economic crisis, there is a growing interest from the Spanish partners in the Moroccan clients, investors and partners. There has been an improvement of Morocco's image among business, increasing the knowledge about the region.</li> </ul> <p>The main problems or obstacles are:</p> <ul style="list-style-type: none"> <li>• The weak association network in Morocco together with the weak tourism regionalization and delegation has complicated the identification of the potential partners and attractions in Morocco regions.</li> <li>• The weakness of Andalusian companies/institutions has complicated the internationalization of their activities/products/services.</li> <li>• In relation to management issues: the POCTEFEX Spain External Borders programme establishes a limited execution of 10% of the budget in Moroccan territory and considers the Moroccan participants as "partners", which means that they are not able to carry out directly their own activities and organize their budget.</li> </ul>
<p><b>Policy Recommendations</b></p>	
<p><b>Fostering a blue economy and supporting business growth</b></p>	<ul style="list-style-type: none"> <li>• Only some of the programme's projects aim at speeding up cooperation, blue economic growth and innovation in activities such as tourism and aquaculture. In the case of tourism, special effort has been deployed to develop sectoral competitiveness. Projects such as THINKMED address the lack of competitiveness in the touristic sector by enhancing promotion, creation of networks and development of activities to add value to this activity. Further efforts are needed to build awareness and capacity, and scout business opportunities.</li> <li>• In spite of the efforts made in promoting sectoral growth, there is a lack of initiatives aimed at ensuring that economic blue growth would not have a negative impact on the environment and prevent the emergence of conflicts in the use of the marine space. Actions should be undertaken in this direction.</li> <li>• Project initiatives should address strengthening of cooperation among scientific parties in both countries in order to develop a framework for evaluation of impacts of the economic activities on the marine environment.</li> <li>• None of the projects reviewed aims at developing a marine spatial planning that could support the development of a blue economy. There is a need for further cooperation in this respect.</li> <li>• Efforts should also be deployed to implement comprehensive marine spatial planning as a tool required to planning development of marine activities, taking into account preservation of the marine areas and environment. This tool may also be the backbone of maritime governance and cooperation among the parties concerned. Marine spatial planning development could resolve the emerging conflict among economic activities in the marine environment.</li> </ul>

<b>Securing a healthier environment</b>	<ul style="list-style-type: none"><li>• The growth of a marine tourism and aquaculture requires devoting more efforts to evaluate the environmental impact of these activities on marine areas.</li><li>• Some projects (ALBORAN, JUNTOS) aimed to achieve environmental sustainability of coasts in relation to the development of environmental indicators and to the development of sustainable management plans of natural resources (Alboran Sea) and coastal integrative management. These projects seem to be a first stage to establish the base for future impact evaluation of coastal tourism.</li><li>• It is necessary that future initiatives shall build on the knowledge produced by this initiative and establish an analytical framework for the evaluation of such impacts.</li></ul>
<b>Ensuring long-term energy supply</b>	<ul style="list-style-type: none"><li>• One project of the programme was dedicated to sustainable energy cooperation (between the province of Granada and Northern Morocco), but was limited to terrestrial energy. The experience gained in this cooperation on terrestrial energy (transfer of knowledge and skills between Spain and Morocco) could be capitalized to consider cooperation on marine renewable energy.</li></ul>

<b>Case Study 3: Island transport connectivity in the Central &amp; Eastern Med</b>	
<b>Introduction</b>	
<b>Rationale:</b>	<p>The Mediterranean Sea-Basin is characterized by a large number of islands, including a few large islands with a significant population. In total there are 159 islands in the Mediterranean Sea<sup>23</sup>, covering a total surface of over 100,000 km<sup>2</sup> and housing 11.5 million inhabitants, 90% of whom live in the 10 largest islands, including the two country islands: Sicily, Sardinia, Cyprus, Mallorca, Crete, Malta, Corsica, Euboea, Rhodes and Ibiza.</p> <p>Insularity raises a number of issues such as accessibility for inhabitants and for tourists, supply of local population and businesses and access to mainland markets for local products.</p> <p>Western Mediterranean islands (mainly French, Spanish and Italian islands) however, which are large islands (up to 5 million inhabitants in Sicily) benefit from the economic and political leadership of their countries<sup>24</sup> while Central and Eastern Mediterranean islands on the other hand have a more peripheral geographic and economic position in the EU context.</p> <p>This case study focuses on the two island countries (Malta and Cyprus) and the two countries with the largest number of islands (Greece and Croatia), where the connectivity issue is intrinsically more critical.</p>
<b>Context:</b>	<p>Although there is no specific cooperation project for islands transport connectivity in the Central and Eastern Mediterranean Sea area, there are wider initiatives in scope that could address this issue. These projects are mainly related to the Transnational Trans-European Transport Networks (TEN-T) corridors, in particular the following core networks<sup>25</sup> :</p> <ul style="list-style-type: none"> <li>- The Oriental/East Med corridor: through the <u>Motorway of the Sea</u> of South-East Europe (connecting the Adriatic Sea to the Ionian Sea and the Eastern Mediterranean to include the port of Limasol in Cyprus)</li> <li>- The Scandinavian-Mediterranean corridor: through the <u>Motorway of the Sea</u> of South-West Europe (including the port of Valletta in Malta and connecting with the Motorway of the Sea of South-East Europe)</li> </ul>
<b>MEAs</b>	<p>Main MEAs concerned are short-sea shipping, passenger ferry services and cruise tourism. Other MEAs may be considered as being impacted by actions to develop islands transport connectivity, in particular coastal tourism and deep-sea shipping.</p>

<sup>23</sup> 112 inhabited islands.

<sup>24</sup> For the purpose of this Study, economic and political leadership of these countries is given by the fact that the three countries generate by themselves 43% of the GVA from maritime activities in the EU, EU candidates and potential candidates in the Mediterranean basin (see section 1.3 of the report) and they are by far the three countries most involved in cooperation projects (see section 3.3 of the report).

<sup>25</sup> See map in annex

<p><b>Sources and information:</b></p>	<ul style="list-style-type: none"> <li>- Review of potentially relevant programs/projects (e.g. Marco Polo, ESPON, ETC programs covering the Central and Eastern Mediterranean area);</li> <li>- TEN-T projects (<a href="http://tentea.ec.europa.eu/">http://tentea.ec.europa.eu/</a>; <a href="http://www.developmed.eu/">http://www.developmed.eu/</a>);</li> <li>- DG MOVE and DG REGIO documentation;</li> <li>- Country fiches.</li> </ul> <p>Interviews:</p> <ul style="list-style-type: none"> <li>- Cyprus: Mr. Zacharias Siokouros, President of Maritime Institute of Eastern Mediterranean</li> <li>- Croatia: Dr. sc. Antun Asic, Capt., General manager of the Port Authority of Dubrovnik</li> </ul>
<p><b>Analysis</b></p>	
<p><b>Assessment of existing connections</b></p>	<p><b>Existing lines and existing infrastructures in the region</b></p> <p>Malta and Cyprus have only a few ports but the main ones are significant hubs for international freight transport (both short-sea and deep-sea shipping) in part thanks to their container transshipment facilities.</p> <p>The two main ports in Malta are the Malta Freeport (Marsaxlokk), situated at the southern tip of Malta, for container transshipment centre (1.6 million tons of goods in 2011<sup>26</sup>), and Valletta, Malta's main port (1.4 million tons in 2011<sup>27</sup>), which handles Ro-Ro ships and bulk cargos.</p> <p>Cyprus is an international transshipment centre for Europe-Far East trade due to its strategic location. The main ports are the multipurpose ports of Limassol (for containers) and Larnaca (with the oil terminal), with respectively 3 million and 1.9 million tons of goods handled in 2011<sup>28</sup>.</p> <p>Thanks to their large number of connections around the Mediterranean Sea, with Northern-Europe (e.g. London and Rotterdam) and globally (e.g. Shanghai), the two country-islands play a pivotal role in the North-South and East-West connections in the Mediterranean but also in connecting the Mediterranean basin with other international ports.</p> <p>On the contrary, in countries like Greece and Croatia, the main port facilities are located in the mainland and connections to and from the islands are primarily domestic ones<sup>29</sup>. In Croatia, there are no regular shipping lines for the islands and freight is directed mostly via Ro-Ro ferry lines.</p> <p>Patterns for passenger traffic and cruise are quite different.</p> <p>Cruise services are well-developed in Cyprus but there are no ferry lines any more, although passengers may embark on Ro-ro ships between Greece and Cyprus.</p> <p>In Malta, maritime transport for passengers consists of internal inter-island passenger transport between the Malta and Gozo, ferry lines between Malta and Sicily, mini cruise lines for tourists visiting Malta, and international passenger cruise between countries.</p> <p>Maritime passenger transport to, from and between the islands represents a major economic activity for Greece and Croatia and it represents the main access to most islands. In Croatia for instance 22 mainland ports are connected with 73 island ports.</p>

<sup>26</sup> Eurostat

<sup>27</sup> Eurostat

<sup>28</sup> Eurostat

<sup>29</sup> The port of Heraklion is the 5<sup>th</sup> port in Greece for freight but still handles over 3 million tons of goods annually.

There are 50 regular lines (ferry, catamaran or classic vessels) either direct or calling more than one island. Cruises are also important touristic activities for the islands, with about 600,000 passengers for Greece and 12,000 for Croatia.

### **Level of adequacy between transport services and islands needs**

#### Freight transport

In the past decade, there have been important investments in port facilities in both Malta and Cyprus in order to increase their competitiveness as transit centers in particular in the two growing market segments of large containers and Ro-Ro shipping. However in Cyprus Ro-Ro ships traffic remains low (3% of transported goods compared to 13% in Malta and 15% in Greece<sup>30</sup>) mainly because of a lack of investment from ship owners due to the uncertain economic context and political instability in the Eastern Mediterranean. In both cases, the short-sea shipping activity is highly dependent on one main connection within the EU (Sicily for Malta and Piraeus for Cyprus).

Freight transport is also an important activity in Crete, but for most Greek and Croatian islands the only freight transport is for resident needs. The interviews carried out did not point out to any specific need in the sector, neither did The Study on Strategic Evaluation on Transport Investment Priorities under Structural and Cohesion funds for the Programming Period 2007-2013<sup>31</sup>.

#### Passenger ferry services

The President of the Maritime Institute of Eastern Mediterranean, the main problem regarding passenger ferry services is the absence of service to and from Cyprus, which implies a total dependency on air transport. The Cypriot government has been trying to encourage ship owners to establish a line since 2001. However, these attempts face both economic and political problems. A Greece-Cyprus line is not considered viable by the industry. Such a ferry line would therefore need to call also in Southern countries (e.g. Israel and/or Egypt) but this is difficult in the current political context.

In Croatia and Greece passenger ferry services to and from the islands seem to be mostly adequate and in Greece competition has increased for most touristic destination. Main issues or risks come from:

- the difficulty to deal with the drastic increase of traffic during the touristic peak season, even with governmental regulation over the frequency in the case of Croatia. In this country the risk of congestion, should new large touristic projects come out in the islands, is significant.
- the length of transport time for some residents and the difficulty to accommodate schedules (work/school) when there are a few ports of call before reaching the mainland.

Interestingly, Croatian island residents also point out<sup>32</sup> that the main problem is not connectivity itself but the lack of local infrastructure (medical, educational, social, cultural, ...) and local economic development outside tourism and that it is what makes connectivity become a critical issue. In other words, with a different approach to local development, islands needs in terms of connectivity would most likely also evolve.

<sup>30</sup> Eurostat, 2011

<sup>31</sup> [http://ec.europa.eu/regional\\_policy/sources/docgener/evaluation/pdf/evaslrat\\_tran/latvia.pdf](http://ec.europa.eu/regional_policy/sources/docgener/evaluation/pdf/evaslrat_tran/latvia.pdf)

<sup>32</sup> Reported by the manager of the Dubrovnik Port Authority



	<p><u>Cruise tourism</u></p> <p>There are still opportunities for cruise tourism development in the East Mediterranean area (only 15% of the Mediterranean Cruise tourism according to DG MARE), but stakeholders (industry, governments, etc.) have not found a way to cooperate to build a common offer with ports of call in various countries, especially in the South-East Med. Cyprus could play a central role in such an offer in geographical and political terms as it benefits from good relationships with all its neighbors except Turkey, but even in this case, there is an exception to the embargo for cruise ships.</p>
<p><b>Level of integration of islands in maritime transport projects and initiatives</b></p>	<p>The level of integration of small islands in maritime transport projects and initiatives is very low according to the interviews carried out.</p> <p>The two country-islands however have been involved in several projects.</p> <p>Over the 2007-2013 period, the following TEN-T projects were implemented:</p> <ul style="list-style-type: none"> <li>- Malta Freeport Terminals – Development project (2006) and Expansion Project (2007): the key objective was to increase the efficiency of the Malta Freeport Terminals' port operations by allowing its two terminals to accommodate larger container vessels offering faster turnaround times. The total cost of the two project amounted to about 45 million €, with 90% national funding and 10% EU funding.</li> <li>- MOS 24 (Italy, France, Belgium, Malta – still in progress): aiming to create a “unique ICT multimodal Corridor between northern and southern Europe”. The total cost amounts to close to 5 million €, 50% funded by the EU.</li> <li>- Preliminary studies for the construction of a passenger terminal at Limassol Port (2004). The total declared cost of the project was 1.2 million € and the EU contributed for 98 k€.</li> <li>- Master Plan for the port of Cyprus (still in progress): The project includes several feasibility studies (expansion for Limassol, possibility of handling dangerous cargo in the industrial port of Vassiliko, optimization of the use of resources). The total cost reached 0.9 million € with a 50% co-funding from the EU.</li> <li>- The ANNA project- Advanced National Networks for Administrations</li> </ul> <p>According to the interviews carried out, the EU also contributed to the connectivity of the country-islands through projects focusing on interoperability systems, intermodality (e.g. inter-city links between airports, ports and major tourist destinations, and port-hinterland connections for freight transport) and the harmonisation of port and customs procedures.</p>
<p><b>Results, impact &amp; lessons learned</b></p>	<p>Lessons learned cannot be analysed for Greek and Croatian Islands considering their level of integration in the relevant EU programmes.</p> <p>The information available from the interviews and the TEN-T documentation does not provide evidence of tangible impacts at this stage.</p> <p>None of the 30 success stories identified in the TEN-T program<sup>33</sup> involves maritime transport in the Central and Eastern Mediterranean Islands.</p>

<sup>33</sup> [http://inea.ec.europa.eu/en/ten-t/ten-t\\_implementation\\_successes/](http://inea.ec.europa.eu/en/ten-t/ten-t_implementation_successes/)

The Malta Freeport Terminal increased the amount of goods processed from large containers by 66% between 2007 and 2011, which can be perceived as a success. However, this compensated a significant reduction of activity in the port of Valetta (-28% over the same period), mainly from a decrease in the bulk cargo segment. Overall Maltese ports activity increased by 6% (in tonnage of goods) between 2007 and 2011. It is possible that the investments contributed to keep Maltese ports system competitive in the growing market of large containers at a time when the growth of intermodality tends to provide a competitive advantage to the mainland ports, but without an evaluation it is not possible to clearly state on the success or failure of the projects.

In Cyprus, the studies performed have not resulted in any project or increased activity at this stage and passenger lines are still lacking despite the 2004 study. Problems come from the lack of public co-funding capacity needed for physical investments and the lack of private co-funding, including from ship owners (to increase Ro-Ro ships capacity for instance), and from political issues in neighbouring countries, which hinder the development of transnational passenger or cruise lines.

#### Policy Recommendations

This case study does not focus on a specific programme and its implementation but on a general issue that can be covered by cooperation programmes. Therefore policy recommendations cannot be approached the same way as in other case studies.


Three main general policy recommendations can be drawn from the above analyses:

- Assess the need for a better integration of small islands (e.g. Greek and Croatian islands) in EU programmes focusing on maritime transport;
- Reinforce the position of Malta and Cyprus as key transport hubs in the Mediterranean Sea through the TEN-T programme;
- Contribute to the political dialogue in the Eastern Mediterranean to improve Cyprus interconnectivity with its neighbours and interconnectivity in the region as a whole.

**Case Study 4: Programme Italy - France Maritime**

**Introduction**

**Rationale:** This programme involves coastal areas in two Mediterranean Member States, Italy and France. The area is composed of two geographical zones, the high Tyrrhenian-Liguria-Toscana Arch and the Corsica-Sardinia Axis.



The interest of this case study is that these areas, and thus the programme, have a large maritime orientation. The programme also tackles the island connectivity issue (from island to island and from island to mainland).

**Context:** The programme covers 18 coastal NUTS 3 included in five NUTS 2 regions: three in Italia (Sardinia, Toscana, Liguria) and one in France (Corsica).

The programme is financed through the objective “Territorial Cooperation” of ERDF. Regional cooperation is implemented on the long term in the area: this cooperation programme follows a previous programme in the framework of Interreg III (2000-2006) and another cooperation programme for the period 2014-2020 is under preparation. The area covered by the cooperation is frequently expanded, Liguria joined the programme for the period 2007-2013 and new French areas (two départements of the Provence-Alpes-Côte d’Azur region: Alpes-Maritimes and Var) should join the programme for the 2014-2020 period.

	<p>The programme area covers 49,269 km<sup>2</sup> and the population is 5 million inhabitants. Continental and island areas face different issues<sup>34</sup>:</p> <ul style="list-style-type: none"> <li>• density of population lower in the islands than in continental areas (less than 70 inhabitants/km<sup>2</sup> in Corsica and Sardinia compared to 174 inhabitants/km<sup>2</sup> in Toscana and 297 in Liguria);</li> <li>• GDP/inhabitant in Sardinia and Corsica under 90% of EU25 average (while it reaches 112% in Toscana and 119% in Liguria);</li> <li>• low importance of research and development in the islands (1.6 employed in R&amp;D among 1000 jobs in Sardinia and Corsica compared to more than 3 in Liguria and Toscana);</li> <li>• importance of maritime freight in continental areas (106 000 t transported in Liguria and Toscana and 23 800 t in Sardinia and Corsica);</li> <li>• importance of maritime passenger transport in islands compared to air transport (31% of passenger arrivals by sea in islands and 23% in coastal continental areas);</li> <li>• unemployment higher in Sardinia and Corsica than in continental areas (between 6.0 and 6.2% in Liguria and Toscana, 10.1% in Corsica and 16.9% in Sardinia).</li> </ul> <p>Thus, even if all areas included in the programme have a large maritime orientation, islands face specific situation due to remoteness.</p> <p>Total funding is EUR 162 million (75% financed by EU funds).</p> <p>Five priorities have been defined:</p> <ol style="list-style-type: none"> <li>1. Accessibility and communication networks (22% of funding)</li> <li>2. Innovation and competitiveness (22% of funding)</li> <li>3. Natural and cultural resources (34% of funding)</li> <li>4. Integration of resources and services (16% of funding)</li> <li>5. Technical assistance (16% of funding)</li> </ol>
<p><b>Sources and information:</b></p>	<p><a href="http://www.maritimeit-fr.net">http://www.maritimeit-fr.net</a></p> <p>Monia SANNA – Head of Department International Affairs – Direction of European and International Affairs - Collectivité Territoriale de Corse</p> <p>Lesia SARGENTINI – In charge of the communication of the programme – Regione Toscana</p>
<p><b>Analysis</b></p>	
<p><b>General:</b></p>	<p>All the areas covered by the programme are coastal.</p> <p>However all projects financed by the programme are not maritime. Among the 53 projects financed, 28 cover at least one MEA and 25 have no direct link with maritime and marine activities.</p>
<p><b>Coordination:</b></p>	<p>The management authority is the Toscana Region, assisted by the joint technical secretariat. It is in charge of implementation and management of the project.</p>

<sup>34</sup> Source : Cross-border cooperation programme « France-Italy Maritime 2007-2013 » (version : 27th of September 2011); the figures refer to the situation at the time of definition of the programme.

	<p>Corsica is the only French region involved in the programme, thus a stakeholder from Corsica must be involved in each project financed.</p> <p>Two kinds of projects can be financed through the programme: “simple projects” and “strategic projects”. The main difference between the two types of projects is the maximum budget allowed : EUR 2.5 million for a simple project and EUR 6.0 million for a strategic project.</p> <p>8 strategic projects have been implemented; all of them have a maritime dimension, they cover marine environment, coastal tourism, yachting and marinas, ferry passenger services, water projects and fishing for human consumption.</p>
<b>MEAs</b>	<p>All MEAs are potentially covered by at least one objective of the programme, at the exceptions of “Traceability and security of goods supply chains” and “Prevent and protect against illegal movement of people and goods”.</p> <p>The analysis of the projects financed by the programme shows that in reality 9 MEAs are covered: ferry passenger services (9 projects), protection of habitats (8 projects), coastal tourism (7 projects), environmental monitoring (5 projects), yachting and marinas (5 projects), short-sea shipping (3 projects), water projects (2 projects), inland waterway transport (1 project) and fishing for human consumption (1 project).</p>
<b>Results, impact &amp; lessons learned</b>	<p><b>Lessons learned</b></p> <p>Stakeholder awareness on maritime cooperation, good practices of management (for instance Maritime Park of the “Bouches de Bonifacio”), large involvement of public institutions and political commitments (all regional councils are involved) are identified as drivers for the implementation of the programme.</p> <p>Some barriers have been identified:</p> <ul style="list-style-type: none"> <li>• The difficulty to implement relevant partnerships due to the lack of involvement of private stakeholders and, in some cases, the lack of skilled partners on specific issues. According to the interviews led in the framework of the case study, the lack of involvement of private stakeholders is due to the administrative burden and the length of payment. This is partly linked to the management rules of the programme and shall be improved for the 2014-2020 period.</li> <li>• The lack of common methodology in the development of projects.</li> <li>• The difficulty to implement a common monitoring system for the whole programme area.</li> </ul> <p>The procedure of calls for tender with precise focus on partners and content aimed at reducing the impact of these barriers.</p> <p>Some impacts of the programme have been identified by the managing authority: valorisation of jobs and development of job opportunities in the yachting sector; improvement of cross-border monitoring of marine pollution; implementation of cross-border networks between port authorities and between marinas.</p> <p><b>Analysis of leverage effect on regional economy</b></p> <p>According to the analysis led in the framework of the programme (2010), the financing of all projects had a leverage effect of EUR 109 million of GDP in the different regions. The global ratio between the financing and the GDP is between 118% and 126% for each axis, this is particularly high because the projects focus on services which are less impacted by imports from other regions than goods. This means that the programme has a positive impact on the economy. In particular the competitiveness of SMEs in the tourism sector has been increased.</p>

Due to the nature of the projects financed in the framework of the programme, the activities which are the most economically impacted are ICT and services companies, public administration.

**Two projects of this programme with particular maritime relevance are detailed below:**

**IN.PORTO. project** aims at developing maritime connections between Corsica and Sardinia (budget: EUR 1,3 million). The partners are Porto Torres municipality, Collectivité Territoriale de Corse and Provincia di Sassari. The project includes analysis of the needs in the passenger and cargo transport, feasibility studies, reinforcement of connections, creation of new services, implementation of territorial marketing activities, promotion of trade and institutional animation.

The project allowed creating network between the different stakeholders on maritime transport between Sardinia, Corsica and mainland. It also allowed performing feasibility studies. However, it is only one step to tackle the issue of remoteness of the islands (which shall be addressed with larger funding to sustain ferry connections) but provides important input for policy makers. The networking shall be sustained through a European grouping of territorial cooperation (EGTC) in order to further develop connections between the different territories.

**LOSE Project** (logistic and safety of good transport) aims at reducing the risk linked to goods and hazardous substances transportation and the impacts of traffic (budget: EUR 1,8 million). This project covers maritime, inland water and road transports. The partners are Provincia di Lucca, Collectivité Territoriale de Corse, Provincia di Pisa, Provincia di Livorno, Provincia di Sassari and Genova Municipality. Three types of actions are financed: study and flow analysis, management and communication systems testing, exchanges, governance and adjustment of policies.

The outputs of the project are:

- testing of several systems using ICT for traffic monitoring and marking, emergency management, interconnectivity port/cities and port/inland waters;
- networking of stakeholders: collaboration on emergency procedures, share of experience on existing policies and initiatives.

### Policy Recommendations

The case study shows the interest of territorial cooperation projects to develop networking among institutional stakeholders (implementation of governance, exchange of experience, harmonisation of policies and procedures), the implementation of pilot projects and research & development activities. Some weaknesses have been pointed out, notably the difficulties to involve private companies in the projects. Furthermore the budgetary level does not allow leading large structural changes, notably considering island remoteness, but pilot projects allow providing inputs for decision makers, public or private. Monitoring and implementation of common methodologies have also been pointed out as difficult by the managing authority.

The recommendations based on this case study are:

- **Give greater importance to the valorisation of territorial resources** and thus to maritime-related projects (the island and coastal dimension of the programme area is currently underexploited), in particular in the yachting, tourism and blue biotechnology sectors. Specific sectoral analysis on the main MEAs could be performed to assess the local characteristics of the value chains, the shared features among the different parts of the cooperation area and the potential of development.
- **Focus on the most relevant maritime issues and target achievable issues:**
  - identification of the maritime issues in the cooperation area in order to focus on the weaknesses (connectivity for goods and passengers for instance, environment,...) and to take advantage of the strengths (attractiveness for tourism, yachting & marinas sectors, ...);
  - analysis of the potential leverage effects of cooperation projects in order to select the ones with the largest potential impacts;
  - target achievable results with the available sources of funding (avoid fragmentation of resources) in order to lead to effective results;
  - definition of common indicators to assess the impacts of the projects on MEAs in the whole cooperation territory.
- **Correct the territorial imbalance between Italy and France**, which currently makes some projects inefficient (this should be done in the next programming period), the inclusion of the “Côte-d’Azur” in the area will also bring high research and innovation capacities;
- **Improve the management system.** According to the interviews led in the framework of this case study, the lack of involvement of private companies is partly due to the management system. Thus, the organisation of the programme must limit the administrative burden and the delay of payments for each kind of partners.
- **Improve guidelines for partners.** According to the interviews led, the guidelines defined for the management of each project do not allow accurate monitoring of the programme. More precise guidelines for project implementation and development should be implemented to improve monitoring, coordination and evaluation of the programme.

<b>Case Study 5: FLAG charter for cooperation in the Mediterranean</b>	
<b>Introduction</b>	
<b>Rationale:</b>	<p>The charter for Mediterranean cooperation was formalised through a declaration signed by 18 FLAGs (Fishing Local Action Groups) of France, Spain, Greece and Cyprus in December 2011. The charter aims to bring together different actors involved in the development of coastal Mediterranean areas highly dependent on fisheries in a working group in order to increase their visibility around the Mediterranean. The objectives of the charter are:</p> <ul style="list-style-type: none"> <li>• Provide an organizational framework to cooperation and define common actions, working methods and promotion</li> <li>• Strengthen the local development strategies</li> <li>• Strengthen fisheries/maritime identity of the Mediterranean area</li> <li>• Promote fisheries products and fishing activities</li> <li>• Work together around common projects</li> <li>• Share resources, tools and good practices.</li> </ul> <p>More specific actions include:</p> <ul style="list-style-type: none"> <li>• Support the development of direct sales of local fisheries products</li> <li>• Develop educational activities related to local fisheries</li> <li>• Develop fisheries-related tourism and eco-tourism activities</li> <li>• Develop environmental actions in conjunction with the fisheries sector</li> <li>• Put in place common communication actions</li> <li>• Study the possibility of developing a « Mediterranean quality brand ».</li> </ul> <p>The interest of the present case study is to discuss how the Mediterranean FLAG charter can play a role in cooperation at the level of the sea basin in a blue growth perspective. Although this initiative is in its early stages, it is worth discussing what the experience has been to date in order to identify limitations and discuss the potential of a charter focusing on cooperation.</p>
<b>Context:</b>	<p>The charter is built on previous initiatives to trigger cooperation in the Mediterranean area. In fact, discussions started in the European Fisheries Areas Network (FARNET) diversification meeting held in Gdynia in July 2011. The FLAG declaration was proposed in the Mediterranean cooperation meeting held in Saint-Raphaël, France, in September 2011. The writing of the declaration was led by the Groupe FEP Varois (also known as Var FLAG) and was contributed to by the other FLAGs. FARNET played a role in the revision of the text of the declaration and in the facilitation of the process, e.g. by gathering the signatures of the FLAG presidents.</p> <p>The charter network, MEDNETPESCA, comprises 18 signing partners distributed among France, Spain, Greece and Cyprus:</p> <ol style="list-style-type: none"> <li>1. French FLAGs: Var FLAG, Etang de Thau et son Lido, Pyrénées Méditerranée and Corsica.</li> <li>2. Spanish FLAGs: Grupo de Desarrollo Pesquero (GDP) Litoral Costa del Ebro, GDP Málaga, GDP Granada-Motril, GDP Almería Occidental, GDP Levante Almeriense.</li> <li>3. Greek FLAGs: Thessaloniki, Kavala, Aitoloki, Cyclades, Haldidiki, Amvrakikoy, Lesvos, Dodecanese.</li> <li>4. Cypriot FLAG: Larnaca</li> </ol> <p>At the time of writing this case study, two Italian FLAGs have signed the declaration and two others are in the process of signing it.</p>



<p><b>Sources and information:</b></p>	<p><i>Interviews:</i> Inmaculada Torres of GDP de Levante Almeriense. <a href="http://www.levantealmeriense.es/">http://www.levantealmeriense.es/</a> Monica Burch of FARNET. <a href="https://webgate.ec.europa.eu/fpfis/cms/farnet/node">https://webgate.ec.europa.eu/fpfis/cms/farnet/node</a> Carmen Guillen of Groupe FEP Varois. <a href="http://groupefepvarois.e-monsite.com/pages/le-groupe-fep-varois/">http://groupefepvarois.e-monsite.com/pages/le-groupe-fep-varois/</a></p> <p><i>Documents:</i> Anon. 2011. <a href="#">Mediterranean cooperation meeting.</a> Anon. 2011. <a href="#">Charter for Mediterranean cooperation.</a> Van de Walle (2012). <a href="#">The role of the FLAGS: examples and ideas from other EU fisheries areas.</a> Van de Walle (2013). <a href="#">FLAG and small scale fisheries value chains in the Mediterranean.</a></p>
<p><b>Analysis</b></p>	
<p><b>General:</b></p>	<p>The signatory FLAGS are committed by the declaration on promoting the network, developing promotional tools, working on common projects and sharing best practices; participating in the charter network meetings; promoting the work of the network through their respective communication channels, among others.</p> <p>Hence, the role of the charter network is basically promotion, visibility and sharing of best practices. These activities are more related to non-productive projects, which are initiatives of public interest that do not imply the start of a given private business. Through non-productive projects the charter network can support the economic activity of a given coastal area through promotion of economic activities, hence yielding social wealth. Examples of no-productive projects can be seen in several maritime areas of the EU<sup>35</sup>.</p>
<p><b>Coordination:</b></p>	<p>Twelve of these FLAGS are currently working on a non-productive project, which consists on developing a Web page aimed to promote the fishing character of areas with a touristic focus. The idea of the Web page was born as an initiative of Var FLAG, and it was initially named “<i>Le portail de la mer</i>”. The coordination of this Web page is led by the Var FLAG. The importance of this page is that it structures future cooperation within the network. The Web page provides information on a variety of economic sectors such as coastal tourism, fishing tourism, adventure tourism, cultural tourism, mussel farming and fishing.</p> <p>The Greek FLAG of Thessaloniki proposed to create a recipe book (not being developed yet), which will contain traditional seafood recipes of each of the regions represented in the charter. The partners of this initiative have finally decided to create a section in the above mentioned Web page containing the recipes, so the book, at this stage, will not be necessary.</p> <p>There is another initiative aiming at creating a label to promote local fish (“<i>Pescado de Lonja</i>”).</p> <p>Financing of the projects is made by contributions by each of the partners. Financial contribution is made according to the requirements of the project being executed. In the case of the Web page project, each of the partners contributes to with 3.000 €. Partners rely on the resources allocated to cooperation in their respective budget. The work to be carried out is usually organized by e-mail, video conferences and phone calls, being face-to-face meetings usually carried out in the context of FARNET events. These events take place twice a year. The last event where they meet physically was the meeting on tourism and fishing sector in Sardinia<sup>36</sup>.</p>

<sup>35</sup> An example of non-productive project is the creation of a museum that recovers the historical memory of fishing in a given coastal area. Promotion of tourism and gastronomy in a given region through videos or books is another example of this type of project. A detailed list of non-productive and productive projects can be consulted in the Web page of FARNET. Link: <https://webgate.ec.europa.eu/fpfis/cms/farnet/tools/flags>

<sup>36</sup> “Linking Fisheries with the Tourism Economy” organized by FARNET on the 22-24 of October 2013 in Sardinia (Italy).

	At national level, it is one of the national FLAGs who coordinate the remaining national FLAGs to participate in the charter network. In addition to their contribution to projects, the partners invest an additional amount of money to improve their national input to the Web page. For example, the Levante Almeriense FLAG has hired the services of a translator to provide their input to the Web page in English. They have also devoted resources to the creation of a promotional video that will be uploaded to the Web page. There is interest by other signatory parties to the charter to join the project. Given that the Web page is almost ready, the contribution of the new partners of the project will be devoted to hire translation services to translate the information of each FLAG's partner into several languages.
<b>MEAs</b>	MEAs 2.1 Catching fish for human consumption, and 4.1 Coastal tourism
<b>Results, impact &amp; lessons learned</b>	<p>Although they are able to devote a share of the budget to cooperation, FLAGs have to subject eligibility of their expenses to the decision of their respective "intermediate body"<sup>37</sup>. In the case of the FLAG of the Levante Almeriense, for example the expenses of the development of the Web page were evaluated by the government of the autonomous community of Andalusia to determine their eligibility. This can be seen as a factor that may retard or impede the execution of the projects. One interviewee has suggested that a separate EFF call should be issued for Mediterranean cooperation. This seems unfeasible at this stage since calls are only launched for the development of local strategies (i.e. a local strategy is the pre-requisite for the creation of a FLAG) and not for strategies at sea basin level.</p> <p>FLAGs receive important support by FARNET, which is considered essential for cooperation. FARNET is always keen to strengthening the links by facilitating meetings among the charter members in the context of FARNET events. FARNET also provides its institutional capacity to provide technical support, visibility and has played a key role in the development of the charter, including the revision of the declaration.</p> <p>The charter network is still in its early stage. Coordination of initiatives is done at project level, being the project promoter who coordinates the action. This is seen in the case of the Web page project. For future initiatives, it would be necessary to count on a central coordinator with multilingual abilities to coordinate the network activities and to represent it in meetings with associations and entities in order to identify synergies. As pointed out before, funds for carrying out the Web page project are devoted by each FLAG. This limits coordination actions since budget may be insufficient for organizing meetings to exchange ideas, prioritize and plan actions. Additional funding for these activities may facilitate the coordination process. Coordination actions are also challenging due to the diversity of partners and agreement and fine tuning of the message the network wants to transmit.</p> <p>According to one interviewee the most useful lesson learnt is related to the day-to-day activities of the Web page coordinating project. Even though some other forms of cooperation and experience exchanges have been in place since the beginning of the FLAG approach in 2007, it is the first time the FLAGs concerned work together to achieve commonly agreed objectives.</p>
<b>Policy Recommendations</b>	
<b>Supporting business growth</b>	FLAGs in general are effective at promoting business growth at local level. There are 300 FLAGs in 21 Member States in the EU. In the Mediterranean and Black seas there are 87 FLAGs, which have carried out more than 500 projects. FLAGs address the needs of coastal communities through the development of their local strategies and establishing a

<sup>37</sup> The "intermediate body" is the authority who implements the Axis 4's operating program at regional level within a given Member State. In turn, the central authority in charge of the national implementation is the ministry in charge of fisheries, aka the "management authority". In the case of Spain, for example, the "intermediate body" is the government of the autonomous community of Andalusia, while the "management authority" is the Ministry of Agriculture, Food and Environment.

	<p>framework within which associations and entrepreneurs access to the resources of the Axis 4 of the European Fisheries Fund (EFF) for their projects. In contrast, the Mediterranean charter builds on some principles and intentions highlighted in the declaration, lacking an ad hoc strategy. It is worth recalling that, in the framework of the EFF's Axis 4, strategies focus on individual FLAG operation; there are no strategies for cooperation at sea basin level operation.</p> <p>In addition, the charter network does not have its own funding, financing its activities with the budget for cooperation of its members, which in turn is subjected to an eligibility filter. Thus, provided the above mentioned constraints, the charter's scope is limited to visibility and promotion of non-productive activities at least in this early stage. Even though these activities are necessary for the development of business in the sea basin (e.g. coastal tourism), they are not <i>per se</i> able to provide more active support to business growth in the sea basin. Private productive projects, for example, will continue being promoted at the FLAG level at least at this stage.</p> <p>Thus creation of business activities by the charter network at the level of the Mediterranean sea basin is not feasible in the context of the current Axis 4 rules and in the context of the Community Led Local Development approach of the new European Maritime and Fisheries Fund (EMFF). Such a change may imply a modification of the scope of the approach, which may imply a call for a sea basin strategy, providing rules and budget to develop transboundary business activities or more ambitious non-productive projects at sea basin level. But at this stage, no further modifications of the new EMFF are possible to introduce such a change.</p> <p>Budget limitations for the activities of the charter network could be solved by exploring the possibilities of other EU programs e.g. MED, LIFE. A study on mapping of available complementary funding opportunities will be of great help for FLAGs, and for the charter network, to identify which of them suits better their needs. This will allow building capacity on existing instruments instead of introducing new ones. It is worth highlighting that each country imposes bureaucratic challenges which need to be properly understood. Harmonization of administrative procedures in the diverse member states concerned (e.g. eligibility and payment process) will help in smoothing the project process.</p>
<p><b>Fostering the blue economy</b></p>	<p>In general FLAGs play a key role in fostering the blue economy in relation to fisheries, aquaculture and activities linked to the fishing and coastal community (e.g. coastal tourism) by providing diversification of economic activities and creating jobs. The charter for Mediterranean FLAG cooperation is a step forward, broadening the geographic scope from the local and regional level to the sea basin level. However, this initiative is not able to fostering the blue economy in the whole Mediterranean sea basin, comprising diverse maritime sectors and conservation issues. The scope of the charter for Mediterranean FLAG cooperation is limited to a handful of activities for which added-value is intended: cooperation in promotion of local fisheries and coastal tourism are basically the focus of the charter. Environmental actions are envisaged in connection to the fishing activity. Other realms of the blue economy such as marine energy or maritime transport are outside the charter's scope. Efforts should be devoted to the identification of maritime opportunities and the establishment of plans to achieve objectives previously agreed by the charter members. The Mediterranean charter network should also have access to the strategic debates of the Mediterranean sea basin. They have considerable experience on diversification of marine activities and coastal development. Thus they are able to provide a substantial contribution.</p>

<b>Securing a healthier environment</b>	<p>The charter declaration contains some elements linked to promotion of healthier environment. However, there are no projects related to environmental issues. In the beginning of the cooperation there was an initiative to collaborate with MEDPAN<sup>38</sup> on the topic of Marine Protected Areas (MPA) but this initiative has not materialized. The creation of MPAs is not in the scope of the charter. Work on promotion of tourism, for example, may take place in areas where MPAs already exist.</p> <p>The charter network has a broad geographical coverage and its members possess knowledge of the coastal areas and the marine environment. This constitutes an advantage for projects with environmental focus but these initiatives might be costly. As an initiative to solve this gap, information on funding EU sources shall be provided to FLAGS in the form of mapping of financial opportunities compatible with the aims and nature of FLAGS.</p>
<b>Ensuring long term energy supply</b>	No energy aims are considered by the charter network.

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<sup>38</sup> [http://mediterranean.panda.org/about/marine/marine\\_protected\\_area/marine\\_protected\\_areas/](http://mediterranean.panda.org/about/marine/marine_protected_area/marine_protected_areas/)

## ANNEX 10. Analysis of cooperation readiness

The scores given to each sub-region for each criterion are based on country fiches and on interviews with high-level managers of major sea-basin level cooperation initiatives.

Geographical scope	Country coverage	Barriers to cooperation			Score
		Political	Technical	Financial	
Western Med - North	ES, FR, IT, MT	+	+	+	+++
Western Med	ES, FR, IT, MT MA, DZ, TN	0	0	+	+
Central Med	Adriatic/Ionian TN	+	+	+	+++
Eastern Med - North	GR, CY, TR	-	0	0	-
Eastern Med	GR, CY, TR LB, IL, PS, JO, EG	-	-	0	--
Whole Med		-	-	0	--

Explanation of scores :

“+” means that, at the level of the basin/sub-basin considered, the context is favourable to cooperation between the countries concerned,

“0” means that there is no major barrier to cooperation, even if no particular supportive environment exists,

“-“ means that significant barriers may jeopardize cooperation Initiatives.

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