

STUDY TO SUPPORT THE DEVELOPMENT OF SEA BASIN COOPERATION

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



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TASK 5: MEDITERRANEAN SEA - IDENTIFICATION OF ELEMENTS AND GEOGRAPHICAL SCOPE OF MARITIME COOPERATION

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Disclaimer:

This study reflects the opinions and findings of the consultants and in no way reflects or includes views of the European Union and its Member States or any of the European Union institutions.

Acronyms used:

ACCOBAMS	Agreement on the Conservation of Cetaceans of the Black Sea, Mediterranean Sea & Contiguous Atlantic Area
ARLEM	Assemblée Régionale et Locale Euro-Méditerranéenne (Euro-Mediterranean Regional and Local Assembly)
BG	Blue Growth
CBC	Cross-Border Cooperation
CIESM	Mediterranean Science Commission
COSME	EU Programme for the Competitiveness of Enterprises and Small and Medium-sized Enterprises (SMEs)
CPMR	Conference of Peripheral Maritime Regions of Europe
DG	Directorate-General
EEA	European Economic Area
EEZ	Exclusive Economic Zone
EFF	European Fisheries Fund
EIB	European Investment Bank
EMBLAS	Improving environmental monitoring in the Black Sea
EMFF	European Maritime and Fisheries Fund
EMODnet	European Marine Observation and Data Network
ENI	European Neighbourhood Instrument
ENP	European Neighbourhood Policy
ENPI	European Neighbourhood and Partnership Instrument
ERDF	European Regional Development Fund
ESIF	European Structural and Investment Funds
ETC	European Territorial Cooperation
EU	European Union
EUR	Euro (€)
EUSAIR	EU Strategy for the Adriatic and Ionian Region
FAO	Food and Agriculture Organisation
FARNET	European Fisheries Areas Network
FFEM	French Fund for the Global Environment
FLAG	Fisheries Local Action Group
GEF	Global Environment Facility
GFCM	General Fisheries Council for the Mediterranean
GDP	Gross Domestic Product
GVA	Gross Value Added
ICT	Information and Communication Technologies
ICZM	Integrated Coastal Zone Management
IHO	International Hydrography Organisation
IMO	International Maritime Organisation
IMP	Integrated Maritime Policy
IMP-MED	Project on Integrated Maritime Policy in the Mediterranean
IPA	Instrument for Pre-Accession
IUCN	International Union for Conservation of Nature
LNG	Liquefied Natural Gas
MAP	Mediterranean Action Plan
MEA	Maritime Economic Activity
MedPAN	Network of Marine Protected Area Managers in the Mediterranean
MEET	Mediterranean Experience of Eco-Tourism
MPA	Marine Protected Area
MSFD	Marine Strategy Framework Directive
MSP	Maritime Spatial Planning
NGO	Non-Governmental Organisation
NUTS	Nomenclature of Territorial Units for Statistics
PAP-RAC	Priority Actions Programme / Regional Activity Centre
RAC-MED	Regional Advisory Council for the Mediterranean
RAC-SPA	Regional Activity Centre for Special Protection Areas
REMPEC	Regional Marine Pollution Emergency Response Centre for the Mediterranean Sea

RTAP	Regional Transport Action Plan
SMEs	Small and Medium-sized Enterprises
TA	Technical Assistance
TAIEX	Technical Assistance and Information Exchange
TEN-T	Trans-European Transport Network
TS	Tender Specifications
UfM	Union for the Mediterranean
UNCLOS	United Nations Convention of Law of the Sea
UNDP	United Nations Development Programme
UNEP	United Nations Environment Program
USD	US Dollar
VTMIS	Vessel Traffic Monitoring and Information System
VTS	Vessel Traffic Service
WFD	Water Framework Directive
WWF	World Wildlife Fund

Country codes

AL	Albania
DZ	Algeria
BA	Bosnia and Herzegovina
HR	Croatia
CY	Cyprus
EG	Egypt
FR	France
GR	Greece
IL	Israel
IT	Italy
JO	Jordan
LB	Lebanon
MT	Malta
MA	Morocco
ME	Montenegro
PS	Palestine
SI	Slovenia
ES	Spain
TN	Tunisia
TR	Turkey

1 Purpose of the study and methodology

This report is part of the “Study to support the development of sea basin cooperation in the Mediterranean, the Adriatic and Ionian and the Black Sea”. Specifically it is an output of Task 5 “Mediterranean Sea – Identification of elements and geographical scope of maritime cooperation”.

1.1 Purpose of the study

The overarching objective of the report is to identify elements and to provide a general framework for developing sea basin maritime cooperation in the Mediterranean Sea and to determine the most appropriate geographical scope (sea basin level, regional level) to be used to this purpose.

The geographical scope includes EU Member States: Spain, France, Italy, Slovenia, Croatia, Malta, Greece, Cyprus, as well as candidate and potential candidates in the Mediterranean: Bosnia and Herzegovina, Montenegro, Albania and Turkey. The objective and coverage of the study is essentially about the EU Member States.

The countries participating in the European Neighbourhood Policy are also considered in the light of potential North-South cooperation initiatives and projects, namely Morocco, Tunisia, Algeria, Egypt, Palestine, Israel, Lebanon and Jordan¹.

Figure 1: Map of the Mediterranean Sea Basin Area



¹ Bilateral cooperation programmes with Syria under the European Neighbourhood Policy are currently suspended due to the political situation in the country.

Libya does not actively participate at the ongoing IMP-MED project. Syria and Libya have thus been excluded from the scope of the study.

1.2 Methodology

1.2.1 Organisation of the report

The report is organised in 5 sections:

- **Purpose of the study and methodology:** this section reminds the reader of the overarching objective of the study and describes the methodological steps taken.
- **Background:** the background section presents the state of play of blue economy in the Mediterranean countries.
- **Existing regional and cross-national initiatives and projects:** this section provides the reader with an understanding of the nature of sea basin cooperation to date.
- **Analysis by sector:** the objective of this section is to identify crucial areas of intervention as well as potential synergies directly derived from the analysis of maritime economic activities at sea basin level.
- **Feasibility for a sea basin approach to Blue Growth in the Mediterranean:** this final section goes on to recommend axes of intervention and policy options and identifies possible sub-regional strategies.

The report summarises the outcome of the research work.

Detailed information and analysis can be found in the annexes.

1.2.2 Methodological steps

The **background** analysis (Section 2 of the report) presents the state of play of blue economy in the Mediterranean countries. Its objective is to explain the economic and institutional context in which policy recommendations for sea basin cooperation will be made. The inputs are the country fiches (Task 2 of the Study²) for the 12 EU and candidate or potential candidate countries and the information collected by the IMP-MED project on partner countries for the ENP countries.

Section 3 (**Mapping initiatives and projects**) focuses on the setting-up of a database of regional and cross-national initiatives and projects with a maritime dimension and characterises these projects and initiatives by nature, sectoral focus, intervention focus, beneficiary type and source of funding. The objective of this section is twofold: first a mapping of initiatives and projects, second the determination of the level and nature of existing maritime cooperation. The inputs come from the country fiches, the information available from the EU (interviews, conferences, web-sites) and desk research.

The **analysis by sector** (Section 4 of the report) identifies the challenges that can only be tackled at sea basin/sub-sea basin level and opportunities for cooperation. For each of the most promising and relevant sectors the analysis assesses the current and potential economic importance, identifies the main priorities, determines the relevant geographical scope for addressing these priorities and assesses the existing level of cooperation and governance. A cross-sectoral analysis allows to identify challenges and opportunities that are common to different economic sectors. The analysis is based on inputs from country fiches, sector experts and case studies³ as well as on results of Section 3.

² <https://webgate.ec.europa.eu/maritimeforum/en/community/msexperts-mediterraneanimpwg/articles/3539>

³ As per the terms of reference, the consultants have carried out 5 **case studies** (see Annex 5) based on documentary review and phone interviews with relevant programme/project managers for each case study. These case studies were chosen to cover various sectoral and horizontal issues. They provide insights into on-field achievements (or lack of) that can inform, confirm or add on challenges and opportunities identified through the analysis of country fiches and literature review and they feed policy recommendations.

The final section (Section 5) analyses the **feasibility of a sea basin cooperation approach for maritime cooperation** in the Mediterranean. It aims at providing a strategic framework for developing sea basin/sub-sea basin cooperation. The approach includes a needs analysis, the identification of axes of intervention to be used as the basis of the cooperation framework, the drawing up of policy recommendations and the identification of possible sub-regional strategies (lessons learned, cooperation readiness and added-value of possible sub-regional strategies). The analysis uses the inputs from previous sections, from Baltic and from Adriatic and Ionian strategy documents and from interviews with project managers of the major sea basin level cooperation initiatives (the UfM, Programme MED, ENPI-CBC MED programme and IMP-MED). Reflections and strategy documents of CPMR and ARLEM are also taken into account.

The methodological route and the articulation between the different sections of the report are explained in the flow chart in Annex 1. Additional details on other methodological steps are provided in the corresponding sections of the report.

1.2.3 Limits to the analysis

The main difficulties and limits to the analysis are the following:

- Heterogeneity of data

Thanks to the Task 2 of the study⁴, we have now a good knowledge of the marine and maritime activities that make up the blue economy in the 12 EU and candidate or potential candidate countries.

The level of information is much lower for the ENP Southern partner countries, whose maritime economic activities are, for most of them, quantitatively and qualitatively little known. It had been specified that no visits, direct contacts or analysis were expected in respect to ENP Southern partner countries in this study.

This disparity is a barrier, which prevents from basing policy recommendations involving southern partners on solid socio-economic knowledge.

- Difference of approach in the analysis of Blue Growth needs and potential per country

For 10 out of the 12 EU and candidate or potential candidate countries covered by the study, the analysis of blue growth needs and potential (“country fiches”) has been carried out by EUNETMAR. For the last 2 countries, Spain and France, the work has been conducted by ECORYS and forms part of the Atlantic Arc sea basin study.

If data definitions and template have been developed in common by the two consortia in such a way to make exchange between the two sea basins possible, the goals of the two studies were not totally the same and the analysis of growth scenarios, growth drivers and barriers to growth for the 6 most relevant and promising maritime activities, which is present in the “country fiches”, was not requested in the “country papers” for France and Spain.

As country fiches are, in accordance with the Tender Specifications, a major input to Sub-task 5.2, this has been a limitation.

⁴ <https://webgate.ec.europa.eu/maritimeforum/en/community/msexperts-mediterraneanimpwg/articles/3539>

- Pre-existing sub-regional strategies

The recently adopted Adriatic and Ionian strategy sets this region ahead of other Mediterranean sub-basins in terms of cooperation and may make it more difficult to consider a cooperation framework at a wider level, since there is a part of the Mediterranean sea basin, where a much closer and more formalized cooperation already exists.

A Mediterranean sea basin strategy, subject of the present study⁵, would thus have to serve its own priorities and in the same time the priorities of the EUSAIR as well as those of other programmes⁶.

The existence and the development of sub-regional strategies can therefore appear as a limit for the development of a strategy at the level of the whole Mediterranean sea basin. On the other hand, the development of strategies at sub-regional level is a tangible clue that cooperation has also to serve priorities which may be better identified in smaller areas where littoral countries have common needs and shared growth potential.

- Impossibility of initiative/project exhaustiveness

In the section of the study dedicated to the setting up of a database of initiatives and projects it was not possible to take into account all projects and initiatives. The TS request a mapping of initiatives and projects with a maritime dimension and with specific focus on blue growth and IMP-related initiatives (governance, cross-cutting tools, drivers for growth) and it is quite subjective to decide from when a project meets these characteristics; it may also happen that some projects have a maritime reference in their name but no sea-related content. We included in the database only projects with a significant maritime and coastal dimension. The database is intended to capture all main initiatives and projects but cannot claim to be exhaustive.

⁵ The tender specifications requested to consider elements for “a strategy for the whole sea basin” as well as “sub-regional strategies”.

⁶ We do not ignore that a smaller scale strategy can be the start for something broader. But institutional interviewees have underlined that pre-existing sub-regional strategies may have some limiting effects when considering a wider approach.

2 Background on Blue Growth at national level in the Mediterranean sea basin

This section presents the state of play of blue economy in the Mediterranean countries. Its purpose is to explain the economic and institutional context in which the analysis requested for this Task has been carried out.

2.1 State of play of the blue economy in the 12 EU and candidate or potential candidate countries

The analysis of the Blue Growth potential in the Mediterranean area covers 12 EU and non-EU countries: Albania, Bosnia and Herzegovina, Croatia, Cyprus, France, Greece, Italia, Montenegro, Malta, Slovenia, Spain and Turkey.

2.1.1. Economic importance of coastal Mediterranean areas

There are different country profiles in terms of (1) dependence of the country on the maritime area and more specifically on the Mediterranean Sea and (2) types and development stage of maritime and marine activities.

Table 1 presents indicators on the economic importance of the Mediterranean coastal area and its share in the national activity. In this table the gross value added (GVA) covers all activities in coastal areas and not only the 29 maritime economic activities (MEAs).

The Mediterranean coastal areas have 37% of the total economic activity (measured by GVA) of the 12 countries covered by the study.

Table 1: Economic importance of Mediterranean coastal area in the 12 countries in 2010

	GVA in Mediterranean coastal areas NUTS 3 (million EUR)	% of national GVA	Mediterranean coastline length (km)
IT	727,357	53%	9,136
ES	377,979	39%	3,457
TR ¹	212,148	59%	6,632
GR	181,800	93%	15,021
FR	165,482	10%	1,703
CY	15,719	100%	782
HR	12,399	33%	5,835
AL	5,717	72%	362
MT	5,496	100%	259
SI	1,838	6%	48
BA ²	< 132	< 1%	21
ME	na	na	293

1: GVA in coastal area NUTS 2

2: no data available on GVA, data refers to GDP

na: not available

Sources: country fiches, Eurostat, Turkish Statistical Institute

In absolute terms, five countries have a large economic importance (GVA > EUR 150 billion) in the Mediterranean area: **Italy, Spain, Turkey, Greece** and **France** (for France, Spain and Turkey, only the Mediterranean side is taken into account).

In terms of relative importance of the Mediterranean coastal area in the overall national economy, we can distinguish three groups of countries:

- **High dependence** on the Mediterranean coastal areas (more than 75% of the national GVA generated by all economic activities⁷ is made in the coastal areas): **Cyprus, Malta** and **Greece**.

These countries are islands or mainly surrounded by sea. The large dependence on maritime activities of Greece is due to the fact that the main economic areas are coastal.

The main MEAs in these countries are coastal tourism, fishing, short-sea shipping, passenger ferry services (Greece and Malta), cruise tourism (Cyprus and Greece) and deep-sea shipping (Cyprus and Greece).

- **Significant dependence** on the Mediterranean coastal areas (between 33% and 75% of national GVA generated by all economic activities): **Albania, Turkey, Italy, Spain** and **Croatia**.

Among these countries, two have coastlines on seas other than the Mediterranean (Turkey and Spain), and thus have an extra maritime dependence at national level beyond what is indicated in the table⁸.

The largest MEAs are coastal tourism, fishing, shipbuilding and ship repairs, passenger ferry services, short-sea shipping (Spain, Croatia, Italy, Turkey), deep-sea shipping (Spain, Italy, Turkey), cruise tourism (Italy and Croatia), water project (Spain, Turkey, Croatia).

- **Low dependence** on the Mediterranean coastal areas (10% and less): **France, Slovenia** and **Bosnia and Herzegovina**.

This last group has two countries with very small coastline (Slovenia, Bosnia and Herzegovina). Nevertheless, an important maritime economy has been developed in Slovenia through the port of Koper. In Bosnia and Herzegovina, maritime activities are very limited and concern only coastal tourism, marine aquaculture and fishery.

France has the biggest part of its coastlines on the Atlantic side and an important inland activity, which explains the limited dependence on its Mediterranean coastal area. Main MEAs on the Mediterranean side are short-sea shipping, coastal tourism, fishing, deep-sea shipping and passenger ferry services.

2.1.2. Importance of maritime economic activities in the Mediterranean

The total GVA generated by the 12 countries covered by the study for maritime economic activities exceeds EUR 63 billion in 2010 (the reference year of the country fiches), i.e. more than three times the total GVA generated by all maritime economic activities in the Baltic Sea.

The first three countries - Italy, Greece and Spain - represent 81% of this activity.

⁷ Maritime and non-maritime.

⁸ 17% of the Turkish GVA is generated in the Black Sea and 57% of the Spanish GVA in the Atlantic (source : country fiches).

Table 2: Importance of the blue economy in the 12 countries (2010)

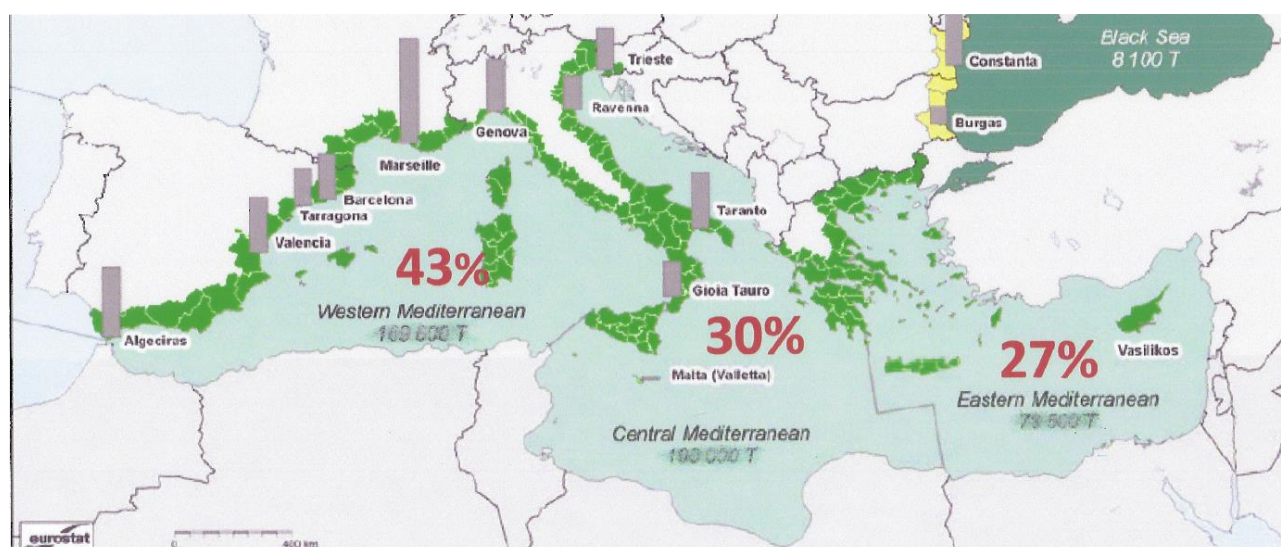
	GVA (billion EUR)	% total
IT	23.6	37%
GR	16.7	26%
ES	11.1	18%
FR	4.4	7%
TR	3.3	5%
HR	1.5	2%
CY	0.8	1%
MT	0.7	1%
AL	0.6	1%
ME	0.5	1%
SI	0.1	0%
BA	0.0	0%
Total	63.3	100%

Source: EUNETMAR and ECORYS country fiches

By MEA, **coastal tourism** (total GVA: EUR 25.3 million) and **shipping**⁹ (EUR 20.9 million) represent 73% of the total GVA of the blue economy.

By sub-region, the **Western Mediterranean** (Spain, France and the Tyrrhenian coast of Italy) accounts for EUR 27.1 billion (in terms of GVA), followed by the **Central Mediterranean** (Adriatic and Ionian, including Malta) with a total of EUR 19.3 billion. The **Eastern Mediterranean** (Aegean coast of Greece, Mediterranean coast of Turkey¹⁰, Cyprus and Malta) totals EUR 16.9 billion, i.e. 27% of the total GVA of the blue economy in the Mediterranean.

Figure 2: Blue GVA – Breakdown by sub-region (in %)



Source: EUNETMAR and ECORYS country fiches

⁹ Both short-sea and deep-sea shipping (as the two MEAs are not separated in all country fiches).

¹⁰ Including Marmaran and Aegean coasts

2.1.3. Identification of the most promising and relevant MEAs at sea basin level

In task 2 (country fiches) an analysis has been performed to identify the seven largest, the seven fastest growing and the seven most promising MEAs in each of the 12 Mediterranean countries covered by the study. This analysis aimed at identifying the six most relevant and promising MEAs^{11;12} in each country.

Table 3: The most promising and relevant MEAs in each country¹³

	AL	BA	CY	ES	FR	GR	HR	IT	ME	MT	SI	TR	Total
Marine aquaculture	X	X	X	X		X	X	X	X	X	X	X	11
Coastal tourism	X	X	X			X	X	X	X	X	X	X	10
Short-sea shipping (incl. Ro-Ro)				X		X	X	X	X		X	X	7
Cruise tourism			X	X		X	X	X			X	X	7
Yachting & marinas					X	X	X		X			X	5
Deep-sea shipping			X	X		X					X		4
Passenger ferry services	X						X	X	X				4
Shipbuilding and ship repair					X				X			X	3
Blue biotechnology				X	X						X		3
Offshore oil and gas			X	X									2
Offshore wind					X					X			2
Maritime surveillance					X					X			2
Ocean renewable energy				X	X								2
Securing fresh water supply			X	X									2
Fishing for human consumption	X												1
Marine minerals mining					X								1
Protection of habitats								X					1

Source: country fiches

Overall, a total of 17 different MEAs have been identified as most promising and relevant in at least one country, as shown in Table 3.

Coastal tourism and **marine aquaculture** are identified as most promising and relevant maritime activities in almost all countries (with the exception of coastal tourism in France and Spain and marine aquaculture in France).

¹¹ The number of 6 most relevant and promising MEAs is a maximum, less MEAs could have been identified as most relevant and promising depending on the analysis (for instance 4 MEAs in Albania and Malta).

¹² As specified in the methodology, the identification of the 6 most relevant and promising activities has not been performed for France and Spain. This is why we considered instead the “most promising”: 7 MEAs in France and 8 MEAs in Spain. Source: ECORYS country papers France (https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/Annex%20IV_FR_country%20paper_final_7Mar14%20.pdf) and Spain (https://webgate.ec.europa.eu/maritimeforum/sites/maritimeforum/files/Annex%20VI_ES_country%20paper_final%20207Mar14_2.pdf).

¹³ The MEAs selected for France and Spain come from analyses at the national level and can be not fully relevant for the Mediterranean basin. Chapter 4 provides more in-depth analysis on this point.

Then come **short-sea shipping** and **cruise tourism**. Short-sea shipping obviously emerged considering the geographical configuration of the basin, with many countries and a lot of exchanges and because of the competitive advantage offered by the flows of deep-sea shipping through the Mediterranean. Cruise tourism emerged because of the extraordinary attractiveness of Mediterranean countries and their coasts.

Three other MEAs are identified as most promising and relevant in at least four countries: **yachting and marinas**, **deep-sea shipping** and **passenger ferry services**.

2.2 Maritime economic activities in the countries covered by the European Neighbouring Policy

The Project on Integrated Maritime Policy in the Mediterranean (IMP-MED), managed by DG DEVCO in cooperation with DG MARE, has been designed to encourage cooperation and provide specific technical assistance and guidance on IMP to the ten partner countries: Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia¹⁴.

In the initial stages of the project (2010-2011), some basic maritime information on partner countries has been gathered by the project team¹⁵.

This section, mainly based on this information, summarises the importance of the different activities in each country covered by the study. The available information allowed to consider six activities: maritime tourism, maritime transport, offshore oil and gas, fishing, aquaculture and desalination.

Algeria

Algeria is the largest country in Africa and also the largest country opening on the Mediterranean Sea. Algeria's coastline stretches over 1,300 km. Maritime challenges are very important for Algeria's economy and general development.

Maritime tourism is not well developed, but real opportunities exist to boost this sector (coastal tourism, cruise tourism, yachting and marinas).

Maritime transport is an important activity, as most imports and exports (oil and gas) are made by sea and Algeria is very close to the main shipping route of the Mediterranean (Suez-Gibraltar).

Extraction is not developed yet but **offshore oil and gas** resources may soon be exploited on the Algerian continental shelf.

Fishing does not constitute an important activity but represents a crucial resource for coastal areas. There are specific plans for the development of fishing and **aquaculture**.

Egypt

Egypt has a relatively large maritime space in the Mediterranean with a Mediterranean coastline which stretches over 1,100 km. Egypt has additionally a coastline in the Red Sea, which is connected to the

¹⁴ Libya and Syria are not covered in the present study (as explained in note 5).

¹⁵ Brief country fiches on each partner (published in the website of the project: <http://www.imp-med.eu/>) focus on:

- Maritime facts;
- Maritime and coastal assets and challenges;
- Maritime and coastal policies;
- Outlook on the development of a national and integrated maritime policy.

Mediterranean Sea via the Suez Canal, resulting in a very intense maritime traffic in Egyptian waters : the Suez Canal carries in excess of 15,000 vessels annually.

If tourism is an important activity for Egypt, **maritime tourism** is not developed yet on the Mediterranean coast. But development opportunities exist for coastal tourism, cruise tourism and yachting and marinas. Egypt has also a valuable underwater cultural heritage.

The existence of the Suez Canal makes Egypt strategically and commercially important for the **maritime transport** sector. Shipping lines across Egyptian waters and the Suez Canal carry substantial maritime traffic, including a quarter of worldwide transported oil.

Offshore oil and gas in Mediterranean coastal waters is increasing every year with the construction of new ports and terminals.

Fishing in Mediterranean coastal waters is an important activity for many coastal communities.

Israel

Israel has a Mediterranean coastline of about 190 km. About 70% of the population and much of the economic activities are concentrated in the coastal area. Israel has a second seafront, a 14 km strip in the Red Sea enclosed within the Gulf of Aqaba.

Tourism is a major industry, although large proportions of tourists visit sites away from the coast (biblical sites, Dead Sea, Red Sea). There is a major growth in cruise tourism, with Haifa being the main cruise port, and in yachting (several marinas).

Maritime transport is Israel's main maritime economic activity. Israel has two main commercial ports in the Mediterranean (Ashdod and Haifa).

Offshore oil and gas extraction may increase in the next years: new natural gas and oil resources have been discovered offshore and these fields have a potential to become the leading energy source of Israel.

Fishing is a small economic activity, which accounts for a very small proportion of Mediterranean catches but which is important to some local communities. Shifting fishermen to mariculture activity is a rising trend.

There is an increasing interest in **aquaculture** in the Mediterranean coast of Israel, in particular since fish farms in the Red Sea have been prohibited for environmental reasons. Mariculture has increased its production in the recent years and future growth is expected in offshore cage farm production.

Desalination is a priority in Israel and the country is technologically advanced. Three plants are currently active, with additional plants being planned (in the short term most of the country's drinking water is to be generated by such facilities).

Jordan

Jordan is almost entirely land-locked and has only a small (27 km) marine coast in the Red Sea, centred on the port of Aqaba. There is no Mediterranean coast. Consequently all maritime activities relate to Aqaba and Red Sea.

Lebanon

Lebanon has a coastline of 210 km.

Tourism is important in the coastal zone. Tourism was a fast-growing sector in the 1990s and the first part of the 2000s but national and regional political situations have then impacted negatively. The tourism industry is now seeking to rebuild Lebanon as a cruise destination but faces strong competition from Greece and Turkey.

Maritime transport is a major component of Lebanon's maritime activity. Although the country has a relatively small merchant fleet, the ports of Beirut and Tripoli remain important in the Eastern Mediterranean.

Offshore oil and gas extraction may develop in the next years: potentially substantial oil and gas fields have been discovered in the zone between Lebanon, Cyprus and Egypt. The extent of these oil fields and jurisdiction over them has not been agreed by all coastal States. The oil fields are as yet not exploited by Lebanon.

The **fishing** sector is traditional and artisanal, and consists of a relatively large number of small boats (5 500). Catches are limited but for some coastal communities dependency on fisheries is quite high.

The **aquaculture** sector is very limited and mainly for local consumption.

Morocco

Morocco has jurisdiction over areas opening up on two maritime fronts: the Mediterranean front and the Atlantic front covering an overall exclusive economic area of about one million km². The Mediterranean coast stretches over 512 km.

Tourism is a strategic sector for Morocco. A sectoral strategy ("Plan Azur") has been designed to promote tourism, while the National tourism strategy (referred to as "Vision 2020") relies on the development of several projects in the maritime and coastal fields (coastal tourism, yachting, creation of marinas, cruise tourism ...).

Maritime transport is a strategic activity for Morocco, which is located at the Gibraltar Strait, one of the world's busiest shipping channels used by commercial vessels. Most Moroccan imports and exports are made by sea.

A potential exists for **offshore oil and gas** but has not developed yet.

Fishing is an important activity for Morocco but mainly in the Atlantic. The Mediterranean provides only 2.9% in volume and 7.3% in value of total Moroccan catches (in 2013).

Aquaculture is an activity currently limited but a good potential exists, especially for seabream, seabass, mussel, oyster and clam. A national strategy has been recently launched.

Palestine

The Occupied Palestinian Territories comprise a short coastline at the Gaza Strip of about 40 km. The Palestinian maritime sector faces many challenges and constraints that have limited the ability to develop resources and industries upon its maritime and coastal assets.

Tourism in Gaza is virtually non-existent, although there are some beaches and recreational activities.

Maritime transport is very limited and frequently restricted due to blockades by Israel. Gaza has one maritime port, which needs infrastructural development.

Offshore oil and gas offers some opportunities. There are substantial oil and gas reserves in the waters off the Gaza coast, but jurisdictional rights over the area are in dispute between Palestine and Israel. In 2009 an agreement was signed between Palestine and British Gas (BG group) and its partners. This agreement includes field development and the construction of a gas pipeline. However since then no action has taken place to begin construction.

Fishing does not appear to be a promising segment. A number of commercially valuable fish species are present off the Gaza coast and have been intensively fished in the past. But out-dated fishing equipment, damaged infrastructure (including destruction of the main fishing port due to hostilities) and a limited fishing area imposed by Israeli naval forces have severely limited the ability of the fishing industry.

Desalination is a crucial issue for Palestine, as the availability of fresh water is one of the lowest in the world. A large-scale desalination plant is an absolute requirement to address the water deficit. A project has been launched by the Secretariat of the Union for the Mediterranean and should be completed by 2016.

Tunisia

Tunisia's coastline is relatively long and stretches over 1,100 km. The Sicily Channel, sea arm located between Tunisia and Sicily, is a mandatory passage crossed by the maritime road connecting Suez to Gibraltar and represents an international maritime space associated with important challenges (islands, maritime safety and security, environment, transport, fishing, etc.).

Tourism in Tunisia is mainly coastal, with many opportunities still offered to further boost this sector (coastal tourism, cruise tourism, pleasure activities).

As Tunisia occupies a major strategic position in the Sicily Channel (longitudinal and cross-sectional traffics, submarine wires and pipelines), **maritime transport** is an important sector. Most imports are made by sea.

There is currently no **offshore oil and gas** extraction. But resources are likely to be explored then exploited at the level of the Tunisian continental shelf.

Fishing represents an important economic activity (coastal economy, export).

Aquaculture is an activity currently limited but there are plans to develop the sector (National Strategy for Aquaculture Development 2007-2016).

Maritime transport and **coastal tourism** are developed in most of the countries covered by the European Neighbouring Policy. **Cruise tourism** and **yachting and marinas** are relevant for the region. Another shared feature among most of these countries is the importance of **maritime cultural heritage**.

Some other activities are developed or have the potential to grow in some of the countries, in particular oil and gas extraction and aquaculture.

3 Existing regional and cross-national initiatives and projects

3.1 Main cooperation frameworks

Overall, 149 cooperation projects and initiatives related to blue growth and integrated maritime policy have been identified¹⁶, about a third of which are specific to the Adriatic and Ionian basin. This list does not pretend to be exhaustive. The extent of transnational cooperation in research, for instance, is probably underestimated considering the importance of informal networking in this field. However, it provides a general overview of the sources of funding, the nature of cooperation and its main focuses.

Research covered all MEAs in order to obtain an accurate image of current fields of cooperation and to be able to assess the coherence with those activities identified as most promising for a potential blue growth strategy in the Mediterranean Sea.

The work was conducted in three steps.

- ✓ The **first step** consisted in identifying relevant multilateral organisations and cooperation frameworks dealing with marine and maritime issues. These organisations should respond to the criteria of being governmental or institutional organisations and outside the EU territorial cooperation framework.
- ✓ The **second step** focused on EU initiatives, in particular EU territorial cooperation programmes. Although maritime issues are usually not the primary focus of these programmes, altogether, these projects represent the largest part of operational cooperation initiatives in the area¹⁷.
- ✓ Finally, the **third step** consisted in identifying other, less formal and/or non-governmental networks and initiatives that contribute to maritime cooperation in the Mediterranean sea basin.

As regards the first group - **governmental or institutional organisations outside the EU** – the following cooperation frameworks have been identified:

- The Barcelona Convention and its seven protocols¹⁸ for the environmental conservation of the Mediterranean Sea;
- The EuroMed Transport Programme¹⁹;
- The Union for Mediterranean²⁰;
- The General Fisheries Commission for the Mediterranean (GFCM)²¹ under the FAO;
- The United Nations Environment Programme – Mediterranean Action Plan for the Barcelona Convention (UNEP-MAP)²²;
- The tripartite initiative launched over 2011-2013 between the European Commission, the International Maritime Organisation (IMO) and the European Investment Bank (EIB);
- The RAMOGE Agreement²³ for the prevention and combat against pollution in the marine environment and the littoral of the PACA Region (France), the Principality of Monaco and Liguria (Italy);

¹⁶ Descriptions of the main multilateral organisations and frameworks and territorial cooperation programmes under EU regulation, as well as two databases for projects and initiatives, are provided in the annex.

¹⁷ This does not take into consideration South-South territorial cooperation, for which information is not centralised.

¹⁸ <http://www.unepmap.org/index.php?module=content2&catid=001001001>

¹⁹ <http://www.euromedtransport.eu>

²⁰ <http://ufmsecretariat.org>

²¹ <http://www.gfcm.org>

²² <http://www.unepmap.org>

²³ <http://www.ramoge.org>

- The Euro-Mediterranean Regional and Local Assembly (ARLEM)²⁴;
- The Intermediterranean Commission under the Conference of Peripheral Maritime Regions of Europe (CPMR)²⁵;
- The ACCOBAMS (Agreement on the Conservation of Cetaceans in the Black Sea Mediterranean Sea and Contiguous Atlantic Area)²⁶;
- The CIESM (Mediterranean Science Commission) with a focus on marine research²⁷;
- The dialogue 5+5, between Western Mediterranean EU Member States (France, Italy, Malta, Portugal and Spain) and the Arab Maghreb Union (Algeria, Libya, Mauritania, Morocco and Tunisia);

As far as EU initiatives are concerned, 84 different projects were identified, most of which (76) are carried out under territorial cooperation programmes. EU financing instruments for territorial cooperation encompass three types of programmes:

1. The EU territorial cooperation (ETC) programmes, with a focus on socio-economic development within EU Member States (e.g. France-Italy Maritime Cross-Border Cooperation (CBC) Programme).
2. Cooperation programmes under the Instrument for Pre-accession Assistance (IPA), which bring together candidate and potential candidates on the one hand and EU Member States on the other hand (e.g. the IPA Adriatic CBC Programme).
3. Cooperation programmes under the European Neighbourhood and Partnership Instrument (ENPI), between non-EU, non-candidate countries and EU Member States, particularly relevant in the Mediterranean context where more than half of the bordering countries are non-EU Member States (e.g. the Mediterranean Sea Basin Programme ENPI-CBC Med).

INTERACT, the communication tool for territorial cooperation programmes, has set up the Mediterranean Lab Group as part of its Knowledge Management and Capitalisation activities. The platform, which is unique to the Mediterranean area, aims to promote good practices and create synergies among the different stakeholders. Four thematic poles have been developed, two of them with maritime dimensions: maritime risks and transport.

DG MARE also organises, on an annual basis, the Meetings of the Working Group for the IMP in the Mediterranean.

Finally, as regards the third group – **non-governmental cooperation frameworks** – the following initiatives have been identified:

- The MedPan Network for Marine Protected Areas²⁸ managers in the Mediterranean;
- The Small Islands initiative²⁹, a network of research and conservation institutions around the Western Mediterranean basin;
- The IUCN-Med Networks³⁰ (The International Union for Conservation of Nature);
- The Mediterranean FLAG (Fisheries Local Action Groups) cooperation³¹.

²⁴ <http://cor.europa.eu/en/activities/arlem/Pages/arlem.aspx#>

²⁵ <http://www.medregions.com>

²⁶ <http://www.accobams.org>

²⁷ <http://www.ciesm.org>

²⁸ <http://www.medpan.org>

²⁹ <http://www.initiative-pim.org>

³⁰ http://www.iucn.org/about/union/secretariat/offices/iucnmed/iucn_med_programme

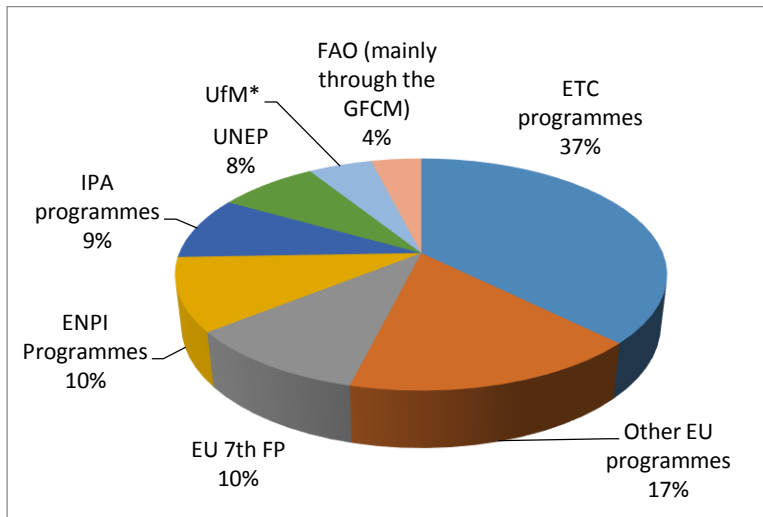
³¹ <https://webgate.ec.europa.eu/fpfis/cms/farnet/charter-mediterranean-flag-cooperation>

3.2 Main sources of funding for identified projects and initiatives

The EU is by far the primary source of funding for identified and budgeted initiatives with a maritime dimension in the Mediterranean Basin, mainly through territorial cooperation instruments³².

In total, these projects amounted to about EUR 451 million invested over the 2007-2013 programming period³³, 37% of which only concern the Adriatic and Ionian area.

Figure 3: Share of budget by type of programme or managing body



*projects labelled but not directly financed by the UfM

Source: EUNETMAR

EU programmes (ETC + IPA + ENPI + 7th FP + other EU) account for 89 % of the projects and 83% of the budgets allocated. The EU Territorial Cooperation programmes (only for EU Member States) represent over a third of the overall budget. ETC projects are mainly funded by the European Regional Development Fund and national contributions. Projects primarily concern environmental monitoring and maritime surveillance, coastal tourism and maritime transport³⁴.

The ENPI programmes account for 10% of the budget, 83% is allocated to the ENPI-CBC Med. ENPI projects are co-funded by ENPI own resources

(EuropeAid), ERDF and national contributions. Coastal tourism is by far the first MEA covered by these programmes with nine projects out of 17.

Other EU sources of funding mainly target maritime transport, maritime surveillance and environmental monitoring projects and include:

- The Adriatic Motorways of the Sea, one of the programmes with the highest budget allocation in the area, (EUR 56.7 million);
- Euromed projects, in particular SAFEMED I to III projects (EUR 9.5 million for the period 2007-2013) funded by the EU and run by REMPEC (Regional Marine Pollution Emergency Response Centre for the Mediterranean Sea), in collaboration with the UNEP and the IMO (International Maritime Organisation);
- Projects under the 7th framework programme, in particular research projects, such as the PERSEUS project (EUR 17 million), for a policy-oriented marine Environmental Research in the Southern European Seas;
- Other DG MARE projects (e.g. Bluemassmed for maritime surveillance – EUR 3.7 million).

UN organisations also support cooperation projects in the Mediterranean Basin (13% of cooperation budgets as regards coastal and maritime issues):

³² This could be somewhat biased by the fact that EU projects are easier to identify.

³³ Budgets were found for 96% of the projects identified. In the case of non-EU projects, budgets in USD have been converted into Euro based on an average conversion rate over the project implementation period. An average yearly cost has also been estimated for MedSudMed to be consistent with the 2007-2013 programming period, since the budget available covered the 2001-2014 period. Whenever possible, total cost was used.

³⁴ Budget per MEA cannot be calculated as most projects cover more than one MEA (e.g. coastal tourism and environmental monitoring). This assessment is based on the number of projects for each MEA.

- FAO for fisheries and aquaculture projects;
- The UNEP for projects focusing on environmental issues, in particular the Medpartnership (EUR 35.4 million).

The Union for the Mediterranean projects represent about 5% of identified budgets. The UfM does not directly finance projects but labels them and looks for donors. Specific sources of funding vary depending on the projects but they mainly include public donors such as the EU, countries and governmental agencies, or transition funds (e.g. the Deauville Partnership), loans from international institutions (e.g. EIB, World Bank) or private donors. The Union has only labelled a few projects but it has the ability to support major projects like the Gaza desalination project (between EUR 300-350 million in total, including loans from the World Bank, the European Investment Bank and the Islamic Development Bank³⁵).

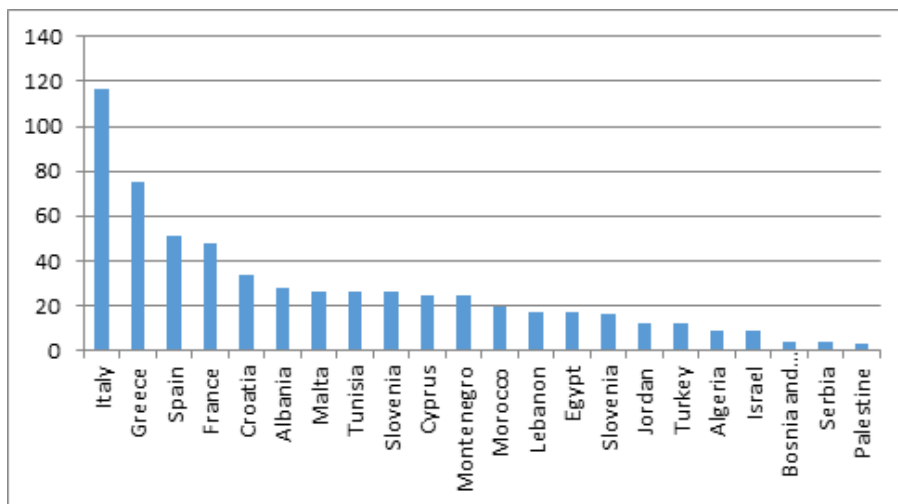
Cooperation projects related to environmental issues also benefit from financial support from NGOs and private foundations such as WWF, FFEM (French Fund for the Global Environment), MAVA, etc., although in most cases they are not the primary donors.

Finally, some cooperation projects do not have a specific budget but rely on the availability of staff and technical means (e.g. information systems) from the different partners. For instance, the Small Islands Initiative and Projects, which focuses on knowledge sharing for biodiversity preservation, relies on a network of Mediterranean experts, researchers, naturalists, guards and managers, employed in different organisations around the sea basin.

3.3 Mapping of projects and initiatives

3.3.1 Degree of involvement of the different countries in cooperation projects or initiatives

Figure 4: Number of projects by country



Source: EUNETMAR

Italy has by far the most cooperation projects related to marine and maritime issues around the Mediterranean basin. Out of 149 projects identified, Italy is involved in 117. Even outside the Adriatic and Ionian region, where cooperation may have been intensified by the EUSAIR, Italy remains involved in 70% of the projects. The three other large EU Member States - Greece, Spain and France - come next with 75, 51 and 48 projects respectively.

Cooperation is particularly significant in the Adriatic and Ionian basin, with 50 projects exclusively in this area. This contributes to the good ranking of Adriatic and Ionian countries in terms of the number of projects implemented, even for small countries.

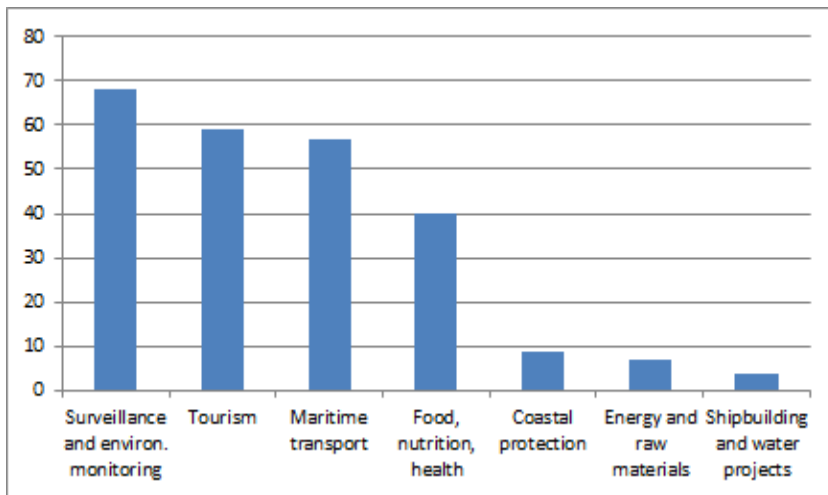
³⁵ For consistency purposes, the cost used for the mapping is the estimated cost for 2012 and 2013 only, considering that the project runs until 2018.

The two island states, Malta and Cyprus, are also involved in a large number of projects, 26 and 25 respectively, mainly through cross-border cooperation with Italy for the former and Greece for the latter.

Among ENP countries, Tunisia stands out with 26 projects and participation in a wide range of programmes (territorial cooperation 7th framework programme, UNEP, GFCM, etc...).

3.3.2 Maritime activities covered by cooperation projects and initiatives

Figure 5: Number of projects by type of maritime activity



Source : EUNETMAR

The classes below refer to the standard classification used across the different reports of this study³⁶. The four most important sectors for cooperation are³⁷:

- Maritime surveillance and environmental monitoring (68 projects);
- Tourism (60 projects): coastal tourism, yachting and marinas, cruise tourism;
- Maritime transport (57 projects): deep-sea shipping, short-sea shipping, passenger ferry services and inland waterway transport;

- Food, nutrition and health (40 projects): fishing for human consumption, fishing for animal feeding, marine aquaculture, blue biotechnology, agriculture on saline soils.

The geographic coverage varies depending on the activities. For instance, half of the projects involving maritime transport take place in the Adriatic and Ionian Region (including the Adriatic Motorways of the Sea). On the contrary, environmental monitoring projects tend to be implemented at the Mediterranean sea basin level (e.g. the MedPartnership).

Analyses on specific MEAs show that projects under **surveillance and environmental monitoring** tend to focus on the latter. Environmental monitoring activities are understood here as the interdisciplinary study of the marine environment (ecosystem approach), integrating networks of observing systems with the implementation and development of physical and biogeochemical numerical models. For about half of them, environmental conservation is the primary objective. This is the case for instance for projects such as the PERSEUS³⁸ project aiming to identify the interacting patterns of natural and human-derived pressures on the Mediterranean and Black Seas, or projects related to the management of Natura 2000 sites (e.g. the ADRIAWET 2000³⁹ project). A few projects combine maritime surveillance and environmental monitoring, such as the MEMO project⁴⁰ (Mediterranean Electronic Marine Highways Observatory). Other projects focus on the sustainable growth of maritime activities. Some of them do focus on environmental monitoring, as for

³⁶ The full list of MEAs and the classification by function is provided in the Annex. Country fiche guide and related methodology to compile country fiches can also be found at :

<https://webgate.ec.europa.eu/maritimeforum/en/community/msexperts-mediterraneanimpwg/articles/3539>

³⁷ Most projects cover more than one sector, especially in the case of maritime surveillance and environmental monitoring.

³⁸ <http://www.perseus-net.eu>

³⁹ <http://www.adriawet2000.eu/>

⁴⁰ <http://www.memo-med.net>

the MEDFISIS project⁴¹ (Fishery Statistics and Information System in the Mediterranean), but for others, environmental monitoring is involved more as a pre-requisite to improve sustainability. Projects related to maritime surveillance mainly concern the monitoring and prevention of maritime risks (e.g. oil spills). With a global budget of EUR 9.5 Million over the period 2006-2012, SAFEMED⁴², which encompasses EU and non-EU countries, is by far the largest project in this field and among the largest ones in general.

Coastal tourism is the second most important MEA in cooperation projects and initiatives, after environmental monitoring. It is worth highlighting that most projects also have an environmental dimension⁴³ (e.g. SALTWORKS⁴⁴ - Eco-touristic valorisation of the Salt-pans between Italy and Slovenia). About a third of the projects focus on both coastal and maritime tourism and include yachting and marinas or cruise tourism activities (e.g. PARA - MARE TOURISM⁴⁵ - Promotion and Digital Support of Maritime Tourism in the South East Mediterranean Sea). The integration of management and information systems is also significant in coastal tourism related projects (e.g. MED-ROUTE⁴⁶, which tends to reinforce an integrated approach for the preservation and promotion of cultural, natural and other resources through the use of information and communication technologies).

Maritime transport projects mainly focus on short-sea shipping and deep-sea shipping. However these activities are commonly associated with passenger ferry services or maritime surveillance since traffic information systems, port sustainability, maritime safety and preventing pollution from ships are major topics in this field. As for tourism, cooperation projects often focus on environmental issues or on integrated approaches (e.g. CUSTOM MED⁴⁷, which aims to develop shared procedures and technologies between the Middle East and the EU or FUTUREMED⁴⁸ in the Adriatic and Ionian).

The projects under the category '**Food, nutrition and health**' focus on fishing for human consumption and marine aquaculture. Projects related to fishing tend to involve a large number of countries, especially those implemented by the GFCM and concern mainly fishery sustainability and small-scale coastal fisheries. Marine aquaculture projects focus on sustainability issues and innovation (e.g. the AQUAMED project for the development of a cross-functional strategy for sustainable aquaculture research).

Other MEAs tend to be covered mostly by cross-sectoral projects and are generally not the primary focus.

⁴¹ <http://www.faomedfisis.org>

⁴² <http://www.safemedproject.org>

⁴³ This includes projects involving environmental monitoring and sustainable tourism

⁴⁴ http://www.ita-slo.eu/projects/projects_2007_2013/2012110811544976

⁴⁵ http://www.greece-cyprus.eu/index.php?option=com_projects&view=item&id=29&Itemid=3

⁴⁶ <http://www.med-route.net>

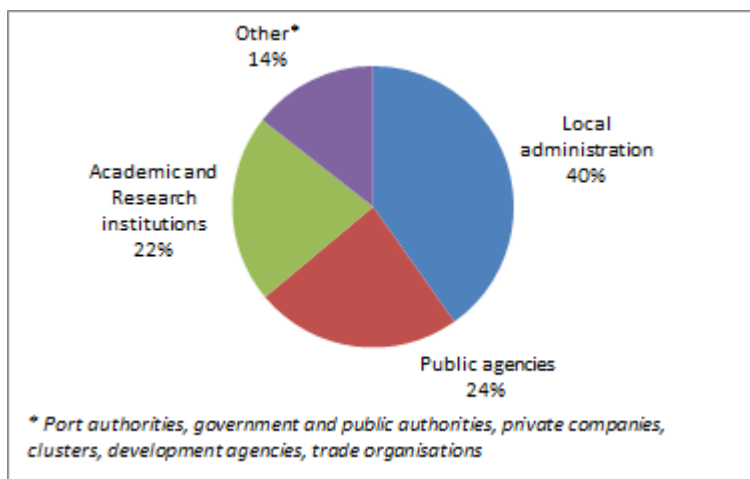
⁴⁷ <http://www.custommed.eu>

⁴⁸ <http://www.futuremedproject.eu/>

3.3.3 Types of lead partners for cooperation projects and initiatives

By definition, cooperation projects involve more than one beneficiary and, in most cases, different types of partners for the implementation (e.g. public agencies and research institutes). The following analysis focuses on lead partners only⁴⁹.

Figure 6: Projects by type of lead partner



Source : EUNETMAR

The three main types of lead partners are:

1. local administrations with 41% of the projects (regions, municipalities, union of municipalities);
2. public agencies (24%);
3. academic and research institutions (22%).

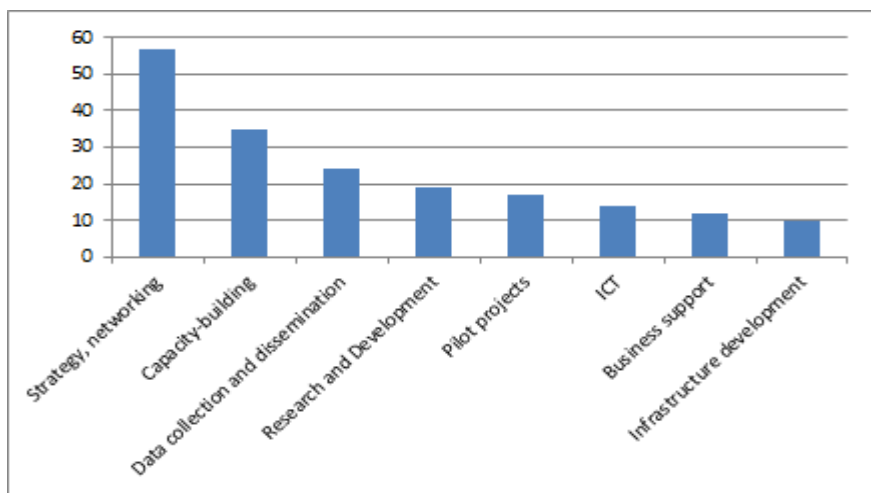
Port authorities come next with 6% of the projects, mainly in relationship with maritime transport.

Academic and research institutions lead 22% of the projects but they represent 31% of the total budget with some major projects under the EU 7th framework programme, in particular on

environmental issues like Perseus⁵⁰ (17 million Euros) or Pegaso⁵¹ (EUR 9 million).

3.3.4 Types of actions carried out under cooperation projects and initiatives

Figure 7: Number of projects by type of action



Source : EUNETMAR

In order to complete this typology, by analysing in detail specific contents of cooperation projects and initiatives⁵², eight types of actions have been identified which have resulted to be common to a certain number of projects. Obviously, most projects combine different types of actions, meaning that in a single project more than one action has been identified.

“**Strategy and networking**”, by far the most common type of activity, aims to increase cooperation and set up common objectives, rules or practices

⁴⁹ Figures do not include projects exclusively implemented in the Adriatic and Ionian areas, for which the inventory was done under the EUSAIR initiative and did not include information on lead partners.

⁵⁰ <http://www.perseus-net.eu>

⁵¹ <http://pegasoproject.eu>

⁵² Idem as note 56.

among countries or stakeholders. The project MAREMED⁵³, for instance, which aims to strengthen the co-ordination of regional maritime policies, is one of the major projects.

“**Capacity-building**” projects encompass a whole range of actions that contribute to enhancing the skills of stakeholders and operators (e.g. through training, establishing guidelines, sharing best practices, etc.). LOGISMED Training Activities⁵⁴ for instance, which relies on increasing the training offer and improving the level of qualifications of logistics platforms' operators and managers in order to improve the performance of the logistic sector in the Mediterranean region, is one of the largest projects in this category. Many large projects involve both “strategy and networking” and “capacity-building” activities.

“**Data collection and dissemination**” activities are particularly relevant for environmental monitoring (over half of the projects). Other projects mainly aim at improving the availability of statistics in different economic activities (mainly ship traffic, fisheries and tourism). For instance the MedFisis project aimed at creating a Mediterranean Fishery Statistics and Information System which contributes to fisheries management. These activities often represent a first step in large projects, especially for research and development activities.

“**Pilot projects**” are used in very different types of projects (research and development, ICTs, capacity-building, strategy). For instance the FUTUREMED project intends to make actors of the freight and logistics sector aware of the influence of accessibility barriers to the competitiveness of ports.

Generally speaking, operational projects involving Information and Communication Technologies (ICT), business support or infrastructure development, remain less frequent.

3.3.5 Main findings

By definition, the mapping does not aim at providing detailed analysis about specific projects but rather to give a general overview of the nature of current cooperation, the geographic concentration and of the types of activities carried out⁵⁵.

A significant number of cooperation organisations, initiatives and frameworks widely encompass maritime topics in the Mediterranean Basin, from political fora such as the Dialogue 5+5, to very concrete projects under territorial cooperation frameworks. Despite this multitude and variety, most concrete projects remain EU-driven initiatives or are at least partially funded by the EU, **which shows the leadership role of the EU in the area to strengthen cooperation on maritime issues.**

Analyses show that **two sub-basins stand out in respect with the intensity of existing cooperation: the North-Western Mediterranean region (France, Italy and Spain) and the Adriatic and Ionian region.** In both cases this results from a longstanding common history, significant involvement in EU cross-border cooperation programmes and common interests on specific issues, such as short sea-shipping in the Adriatic and Ionian or biodiversity preservation in the North-Western Mediterranean Basin. The Adriatic and Ionian area also benefits from the only formal macro-regional strategy in the Basin. Beyond these two regions, not surprisingly **the two country-islands, Malta and Cyprus, show a high level of cooperation in the marine and maritime fields.** These two countries are involved through bilateral cross-border cooperation programmes with their EU neighbours (respectively Italy and Greece), but they also participate in a significant number of projects with Southern Mediterranean countries, **which emphasises their potential role in the dynamics of North-South cooperation in the Mediterranean basin.** At country level, **Italy, centrally located in the basin and at the interface between the two most active sub-basins, clearly stands out.** Finally, it has to be underlined that although cooperation remains stronger among EU Member States, **a growing involvement of non-EU countries can be observed,** especially through the Adriatic and Ionian initiatives.

⁵³ <http://www.maremed.eu/cts>

⁵⁴ <http://ufmsecretariat.org/ufm-labelled-project-logismedta-to-contribute-to-the-creation-of-jobs-in-the-region-2>

⁵⁵ Details on projects are provided in Annex 4.

Existing cooperation focuses on tourism, environmental monitoring and maritime transport, which all play a pivotal role in the Basin. Tourism is a significant and traditional activity in most countries around the Mediterranean because of the favourable climate and the very rich culture and history. Although cooperation in the field of tourism may not be as crucial as it is for the environment, this activity can significantly contribute to networking and capacity building through projects that do not raise much political issues and can be fairly easy to implement. Increasing networking and capacity building among local administrations and public agencies, the most common type of cooperation in the Mediterranean, then constitutes a basis for further cooperation implying more complex projects (research and development, pilot projects, business and infrastructure development...) with different types of stakeholders.

The large number of projects and initiatives with an environmental dimension, whether it be as the primary objective or not, **illustrates the importance of the issue and the necessity to tackle it at transnational level**. There are three main elements to take into account here from a blue growth perspective. The first is the activity generated by environmental monitoring, which is a pre-requisite to sound strategies and which is done mainly by public agencies and research institutes. The second is the conservation and valorisation of the exceptional biodiversity of the region through the development of protected marine areas and the sustainable use of those resources (e.g. fisheries, aquaculture, blue biotechnology). The third one is the sustainability of other blue growth activities, mainly tourism and transport.

Cooperation in the field of maritime transport focuses in particular on short-sea shipping, with a significant concentration of projects in the Adriatic and Ionian area, where the activity is the most critical to the development of local economy and where there is a formal macro-regional strategy that has set maritime transport as one of its four pillars. Besides the Adriatic and Ionian projects, this activity also benefits from structuring actions for the Region such as the Euromed Transport Programme.

Unlike in other sea basins, cooperation as regards maritime activities in the Mediterranean includes a large number of bilateral projects, in particular under cross-border territorial cooperation programmes, but also a significant number of multi-lateral initiatives, with varying geographical scopes. In the Baltic Sea for instance, cooperation is led by a regional strategy at basin level, while on the contrary, in the Black Sea it is largely dominated by bilateral initiatives on specific sectoral topics. The Mediterranean sea basin also includes the Adriatic and Ionian area, which has its own strategy. In summary, the Mediterranean sea basin does not form a clear geographical entity in the way other sea basins do. This diversity contributes to create a rich and dynamic environment economically and culturally, but this sort of multilayer governance also makes it all the more complex to consider a global strategy at sea basin or even delimited sub-sea basin level.

4 Analysis by sector

4.1 Objective of the analysis

As the main information available from the country fiches is sector-based, the objective of this section is to identify crucial areas of intervention as well as potential synergies directly derived from the analysis of maritime activities at sea basin level. Findings from the “Analysis of blue growth needs and potential per country”⁵⁶ constituted the main source of data and information for analysing the maritime dimension of Mediterranean countries and elaborating the sectoral analysis at sea basin level. As regards ENP countries, data collected under the IMP-MED project represented the core source of information.

Based on the maritime economic activities⁵⁷ (MEAs) identified as the most promising and relevant at sea basin level (northern and southern shores of the Mediterranean), sectoral analyses have been carried out for the following sectors: fisheries and aquaculture, maritime transport, tourism, energy, blue biotechnologies and environment.

For each sector, the following points are analysed:

- Current and potential economic importance of the sector (detailed analysis are provided in Annex 8),
- Main priorities identified,
- Determination of the relevant geographical scope for addressing the priorities (country level, sea basin level or sub-sea basin level)
- Assessment of existing level of cooperation and governance,
- Challenges and opportunities for cooperation in the sector, here challenges correspond to critical issues that can only be solved collectively (e.g. preservation of the Mediterranean biodiversity) while opportunities refer to potential synergies in areas that are also dealt with at national or local level (e.g. development of eco-tourism)⁵⁸.

Finally, a cross-sectoral analysis was conducted in order to identify challenges and opportunities that are common to the different economic sectors (e.g. issues related to maritime spatial planning).

Some of the challenges and opportunities identified here may already be covered or partially covered by regional initiatives, but as long as they remain major issues, they need to be taken into account in any potential regional or sub-regional strategy.

An overall gap analysis is presented in the main findings section.

⁵⁶ <https://webgate.ec.europa.eu/maritimeforum/en/community/msexperts-mediterraneanimpwg/articles/3539>

⁵⁷ Most sectors correspond to the standard classification used for Blue Growth Studies (Annex I) but focus mainly on most promising and relevant MEAs. Blue biotechnology has been analysed separately from fisheries and aquaculture to highlight the specificities of this emerging activity. The Environment section encompasses environmental issues at large and not only environmental monitoring.

⁵⁸ This approach is based on definitions provided in “The EU report concerning the added value of macro-regional strategies”, COM (2013) 468.

4.2 Fisheries and aquaculture

Economic importance, main priorities and relevant geographical scope for marine aquaculture

Despite its relatively small size, marine aquaculture is considered a promising economic activity in all the countries analysed but France, mainly because of its rapid growth in those 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 also have natural advantages for the development of marine aquaculture with extensive coastlines, favorable climates and good water quality and the basin 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.

The main priorities for the development of marine aquaculture in the Mediterranean Basin are to promote research and innovation, to improve access to finance and to licences (through the implementation of ICZM and MSP), to support the organisation of the supply-chain (better access to feed and to export markets) and to guarantee the quality and the traceability of aquaculture products.

The aquaculture sector is specific to each country in terms of the marine environment, the regulatory framework or the maturity of the industry and there is intense competition among the leading countries (Greece, Turkey and Italy), which may hamper cooperation efforts in this field. On the other hand, the preservation of water quality is critical for this activity and it requires transnational cooperation. There are also definite synergies to be found for some of the priorities identified, especially for research and capacity-building in the field of ICZM and MSP. Increased cooperation is particularly relevant in the Adriatic and Ionian region, where the activity is considered as most promising in several countries, which share common issues (shared waters, same species, similar level of development, same markets).

Economic importance, main priorities and relevant geographical scope for fishing for human consumption

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.

The upmost priority in the field of fisheries is the preservation of fish stocks, through improved knowledge and improved sustainability of small-scale fisheries, which are particularly significant in the Mediterranean basin. The second priority results from the resource scarcity and consists in finding ways to increase added-value and to diversify outside fisheries.

Although the industry is mainly organised at regional or national level, the preservation of fish stocks can only be tackled at sub-sea basin and sea basin level. In this case, relevant sub-sea basins are those defined by the FAO (the Balearic Area, the Gulf of Lions, the Sardinia area, the Adriatic Sea, the Ionian Sea and the Aegean Sea).

Assessment of the existing level of cooperation and governance

The strategy for fisheries and aquaculture in the Mediterranean basin is defined by the GFCM for the entire area and by sub-basins (Adriamed, Copemed II -Western and Central Mediterranean, MedSudMed - Central Mediterranean and EastMed), with a clear focus on sustainability issues. Those objectives are also supported by the EU Common Fisheries Policy.

However two sub-basins stand out in terms of the number and nature of the projects implemented in this sector. The Adriatic and Ionian show the largest number of projects related to fisheries and aquaculture (Pillar 1 of the EUSAIR) and the Western and Central Mediterranean plays a very active role in cooperation in research and development in the field of marine aquaculture.

Challenges and opportunities

Managing the interactions between fisheries and marine aquaculture and their marine environment represents the main challenge at sea basin level. This encompasses a few main topics including the **sustainable management of fish stocks** and, as a start, improved knowledge of them. This is currently the main focus of the GFCM. Continuing support for **research and development on the sustainability of marine aquaculture** is another major topic that has already been tackled by both EU research programmes such as AQUAMED and by the GFCM.

Other opportunities for cooperation can be grouped into four main topics that are inter-related.

Sustainability of small-scale fisheries: small-scale fisheries represent an important share of the fisheries sector in the Mediterranean and Black Sea (more than 80% of the total fleet and more than 50% of jobs). Sharing good practices could contribute to mitigate the socio-economic impacts of cost increases, price stagnation and decrease of fish resources at local level. This can be done in part by building up on the capitalisation done by FARNET⁵⁹ on the support to diversification outside of fisheries, with for instance the development of pescaturism (which gives rise to legal difficulties in several countries) or local SMEs for the processing and marketing of added-value fish products.

Development and organisation of the supply-chain: priorities in terms of the development and organisation of the supply-chain vary depending on the countries. In countries such as France, Spain and Italy, the industry is well-developed and the interest in cooperation may be rather limited. On the other hand, EU candidate or potential candidate countries, especially smaller countries, can have an interest in combining resources to improve the quality and safety of their products (e.g. traceability, water quality) to EU standards and to add value through processing and marketing. This requires technology transfer, capacity-building and access to finance. At the basin level, the differentiation of Mediterranean seafood products in both local and export markets could generate some interest for cooperation. As mentioned in the case study on the ENPI-CBC programme for Italy-Tunisia (see Annex 9), there are some projects in this direction for food products (QUALIMED or Agromed Quality) and it could be relevant to include seafood products in such projects to capitalise on their experience for similar initiatives.

Integrated Coastal Zone Management and Maritime Spatial Planning: although ICZM and MSP are implemented at national or even regional level, there is a major argument for cooperation in this field, which is critical for the development and sustainability of marine aquaculture. The institutional capacity in this area is still building up around the sea basin and all countries could benefit from shared experiences and best practices.

Improved access to finance: likewise, this is a recurrent topic among all countries where marine aquaculture is considered to be among the most relevant and promising MEAs. In this case, there is an opportunity for cooperation in terms of capacity building in order to reduce red tape to access public funding and to facilitate access to private funding (increase knowledge of marine aquaculture, contribute to better assessment of the risk, financial engineering).

4.3 Maritime transport

Economic importance, main priorities and relevant geographical scope for short-sea shipping

Short-sea shipping is a significant and growing activity both for Northern and Southern countries of the Mediterranean, with large spill-over effects (such as port infrastructure and associated logistics) and an important role in ensuring national connectivity, especially for countries with a large number of islands (e.g. Greece and Croatia), or cross-border connectivity in particular for country-islands (Malta and Cyprus).

The main priorities for the development of short-sea shipping in the Mediterranean Basin are the improvement of port infrastructure (e.g. intermodality, ICT systems), fleet modernisation, improved governance (co-ordination among stakeholders, management of ports, port strategies, rationalisation of

⁵⁹ Cf. Case study 5 in annex.

traffic, harmonisation of tariffs and procedures), the implementation of ICZM and MSP, access to finance and education.

The activity is often considered as strategic at national level, especially for island countries, which can hamper cooperation. Moreover, some priorities are usually addressed at local or national level (e.g. port infrastructure and management or education). However, some aspects of the governance can only be dealt with collectively. The sub-sea basin is a key level in this case for developing co-operation, in connection with the 'Motorways of the Sea'. More specifically, most relevant sub-sea basins for short-sea shipping are the Western Mediterranean (Spain and Italy), the Adriatic and Ionian basin (Italy, Slovenia, Croatia, Montenegro and Greece) and the Eastern Mediterranean (Greece and Turkey).

Economic Importance, main priorities and relevant geographical scope for deep-sea shipping

Compared to short-sea shipping, deep-sea shipping is more concentrated in a few countries, often with a long history in maritime transport, such as Greece, Cyprus, Egypt or Morocco. Deep-sea shipping is a global market in which Mediterranean countries can have different positioning and different strategies. Competitive advantages come from fleet size, fleet modernisation (fuel efficiency), port infrastructure (e.g. for international transshipment) and strategic location.

Research and innovation is critical for this activity, in particular as regards fleet efficiency. Otherwise, priorities are the same as for short-sea shipping.

The sector is led by large international companies, which have their own strategies. However, in the Mediterranean there is an important route from Far East Asia to Europe via the Suez Canal and through Gibraltar, going towards North European ports and America. One of the main objectives of Mediterranean logistics is to intercept trade flows from deep sea shipping transiting the Mediterranean and redistribute these flows through intermodal connections. In this case there is an interest in cooperation at sub-sea basin level to draft a port specialisation roadmap, identify the main hub for transshipment and other short-sea shipping destination in each of the three sub-sea basins (Eastern, Central and Western).

Economic Importance, main priorities and relevant geographical scope for passenger ferry services

This activity has been identified as the most promising in only a few countries but it 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).

As for short-sea and deep-sea shipping, main priorities to develop passenger ferry services are research, improved local governance, ICZM and MSP, intermodality and access to finance.

Except in the Adriatic and Ionian basin, where it plays an important role in improving connectivity among countries, passenger ferry services mainly remains a national issue.

Assessment of existing level of co-operation and governance

A Regional Transport Action Plan (RTAP) for the Mediterranean Region was implemented for the period 2007-2013⁶⁰ in the framework of EUROMED (the 28 EU Member States and 9 Southern Mediterranean countries) and the new RTAP for 2014-2020 has been established by the UfM. Actions focus on regulatory and institutional reform, infrastructure and sustainable development of transport (including safety).

The motorways of the sea are implemented under the framework of the TEN-T programme and there is a large number of territorial cooperation projects involving maritime transport, in particular in the Adriatic and Ionian basin, which contribute to improve capacity-building and the harmonisation of procedures in ports through coordinated ICT systems.

Challenges and opportunities

⁶⁰ Link to RTAP for the Mediterranean Region: <http://www.euromedtransport.eu/Fr/image.php?id=77>

The effective development of the **motorways of the sea** (South-East Europe and South-West Europe) is the main challenge for the Mediterranean area as regards maritime transport. The objective is the development of intermodality and connections among Mediterranean countries in order to promote the use of water as a means of transport (especially through short-sea shipping). These projects are significant and, in addition to promoting interconnectivity at port level and harmonisation of procedures between different port authorities, foster consistency between the strategies and the investments of different stakeholders.

The potential impact of maritime transport on the environment, including as regards transportation of hazardous substances or oil pollution, must also be tackled at sea basin or sub-sea basin level, in coordination with the development of cross-border and international routes. There is an entire chapter under the RTAP dedicated to these issues.

Beyond these two main challenges, opportunities for cooperation fall under five main areas.

Adaptation to future markets: the Mediterranean is increasingly crossed by deep-sea shipping routes originating from the Far East and transiting from the Suez Canal to Gibraltar. The current exploration of oil and gas in the Eastern Mediterranean may also lead to the development of new logistic flows. These new trends will require adequate infrastructure and traffic management. Stakeholders shall therefore analyse the potential impacts at sea basin level and adapt their investment strategies. **The development of maritime clusters** could play a critical role in this area.

Research and innovation are necessary to maintain the competitiveness of maritime transport and address issues such as fuel efficiency, interconnectivity, evolution of business model. Research takes place in each of the EU Member States, candidates and potential candidates but is hampered by the decrease in public funding. **Clusters and cooperation among marine research institutes** is also relevant here.

Intermodality is an important opportunity for maritime transport in order to maintain and increase competitiveness of maritime transport compared to rail, road and air transport and compared to Northern Europe. Intermodality is led through coordination between stakeholders at national and sea basin levels and investment in port facilities and other infrastructure. Cooperation between port authorities is already strong in some areas, for instance in the North Adriatic but this kind of cooperation should be expanded and strengthened.

MSP/ICZM is needed to allow co-location with other maritime activities and the establishment of common guidelines at sea basin level would encourage consistent implementation at national and local levels.

Education and training are key issues for the future growth of maritime transport. These are related to national policies and the presence of universities and maritime schools in the different countries. Some examples of cooperation could be shared as a good practice. For instance the Maritime Institute of Eastern Mediterranean based in Cyprus encourages and facilitates dialogue, networking and cooperation among all stakeholders of the maritime sector in the Eastern Mediterranean.

4.4 Tourism

Economic Importance, main priorities and relevant geographical scope for coastal tourism

Coastal tourism is by far the main maritime activity in the Mediterranean sea basin and it has a long-time tradition in most countries due to extensive coastlines, rich cultural heritage and favourable climate conditions. It is considered a promising economic activity in all countries analysed but France and Spain.

The two main priorities to increase competitiveness and boost this activity in Mediterranean countries are to enhance connectivity and transport intermodality and to promote innovation and diversification in the tourist offer, including sustainable tourism, off-peak tourism and high-level quality products and services. Access of SMEs to finance will also be a key factor of success of tourism strategies in the different countries.

Coastal tourism mainly relies on local or national strategies due to the close link with local infrastructure development, the strategic nature of this activity in many Mediterranean countries and the intense

competition among them. Nevertheless, there is a common interest to promote the global attractiveness of the sea basin and to provide a coherent offer.

Economic Importance, main priorities and relevant geographical scope for cruise tourism

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 degree of maturity of the industry differs markedly among the different countries. Cruise tourism is at a mature stage and very well established in some countries (e.g. Italy and Greece) but it is still at an early stage of development in others (e.g. Croatia or Slovenia). However the activity is growing fast and is considered promising in seven countries (Croatia, Cyprus, Greece, Italy, Slovenia, Spain and Turkey).

Cruise tourism is at the crossroad between maritime transport activities and tourism. Main priorities therefore encompass needs related to both sectors: improvement of port infrastructure, connectivity and access to hinterland, local governance and coordination among ports on one hand; innovation and diversification of the tourist offer on the other hand.

The rationale for sea basin cooperation is stronger than for coastal tourism as cruise tourism usually covers several countries and there is an interest in developing a common strategy covering the quality of infrastructure and promotion activities at sea basin level. Sub-sea basin level cooperation is relevant here as sub-basins represent specific market segments (e.g. the Adriatic, the Aegean Sea or North Western Mediterranean). Although cruise tourism has not developed in the Eastern Mediterranean, there are opportunities between Turkey and Eastern Med countries.

Economic Importance, main priorities and relevant geographical scope for yachting and marinas

This activity is more concentrated geographically than coastal and cruise tourism. It is among the most promising activities only in Croatia, France, Greece, Montenegro and Turkey. The activity is growing and can create important spillover effects on other tourism activities, but its development also raises environmental issues and conflicts for the use of maritime and coastal space.

The sustainability of infrastructure as well as the implementation of maritime spatial planning and integrated coastal zone management are critical for the development of this activity. Beyond that, the main priorities are to strengthen the links with coastal tourism and increase the visibility of the Mediterranean at international level.

Common standards and environmental rules are needed at sea basin level to guarantee a level-playing field and a coherent image for the Mediterranean basin. Other than that, this activity remains mainly a national or local issue but increased cooperation would be relevant in the Adriatic and in the North Western Mediterranean.

Assessment of existing level of cooperation and governance

There is no real governance for tourism activities for the Mediterranean. However, the European Commission presented a new European strategy to promote coastal and maritime tourism in February 2014. Although the strategy does not focus specifically on the Mediterranean and does not include non EU countries, the importance of the basin is clearly underlined and the strategy addresses the main priorities identified in this section. In addition, a significant share of existing cooperation projects in the basin focus on tourism activities, mainly to promote networking, support capacity-building and improve infrastructure, which contribute to improve the global image of the region and the coherence of local strategies.

Challenges and opportunities

The main challenge to be tackled at sea basin level is the ability to impose common standards and rules in order to **preserve a healthy environment and ensure the sustainable use of natural capital**. Today, activities are often concentrated in already densely populated areas with a strong environmental pressure (increase in water demand, more waste and emissions from air, road and sea transport, biodiversity degradation from

infrastructure). There is a need for a collective debate and co-ordinated responses to this issue at the basin level.

Beyond that, the main opportunities for cooperation relate to business growth and innovation in the tourist offer (e.g. eco-tourism and off-season activities), better connections between coast and hinterland and infrastructure modernisation.

Business growth and innovation can be supported by:

- Promoting an innovative and high-quality offer: there is a growing public interest in water-based sports, such as recreational fishing, boating, wind surfing and diving, which creates potential growth and contributes to reduce seasonality. Quality service is an essential source of competitive advantage, it is therefore important to ensure that tourists can rely on high-quality services at sea basin level and that this quality is consistently assessed;
- Improving knowledge of the economic situation in order to improve maritime spatial planning and ICZM in the Mediterranean basin;
- Overcoming sector fragmentation: cooperation and synergies are not sufficiently used at sea basin level to help tourism SMEs who have limited access to credit for investments and innovation;
- Promoting education and training;

Improve connectivity: the Mediterranean basin suffers from the handicap of insularity (which in some cases could be considered an important asset) and remoteness of some areas. This poses problems of transport costs and connectivity with the main land and/or surroundings locations and also affects the attractiveness for visitors and the tourism sector in general. A stronger strategy of cooperation, developing global and attractive tourist activities, would ensure mutual benefit for all the countries involved.

Infrastructure modernisation is partially linked to sustainability issues and to connectivity, but cooperation can also contribute to raise the overall quality of tourist infrastructure through the dissemination of quality standards and labels.

4.5 Energy and raw materials⁶¹

Economic Importance, main priorities and relevant geographical scope for offshore oil and gas

Energy-related MEAs currently have limited economic significance at Mediterranean basin level but they are growing in Southern countries.

The main priorities identified for this activity are to continue to support research, to improve the legislative framework, including the delimitation of maritime zones (e.g. Exclusive Economic Zones) and to implement Maritime Spatial Planning to avoid competition with other activities such as aquaculture, fishing or tourism.

Although cooperation may be difficult on such strategic activities, EU Member States with significant production levels and experience are likely to bring know-how to ENP countries. More importantly, offshore oil or gas accidents are likely to have consequences beyond the waters and shores of a single country and would justify a response at sea basin level.

Economic Importance, main priorities and relevant geographical scope for securing fresh water supply (desalination)

Water desalination is a marginal activity at sea basin level but it is significant, if not strategic, where it is developed (Spain and Israel).

⁶¹ We remind that the function “Energy and raw materials” includes the following MEAs: “offshore oil and gas”, “offshore wind”, “ocean renewable energy”, “carbon capture and storage”, “aggregates mining”, “marine minerals mining” and “securing fresh water supply (desalination)”.

The main priorities for this activity are to improve energy efficiency and reduce environmental side effects (greenhouse gas emissions and impact on the marine environment) through innovation such as the development of alternative desalination methods (e.g. solar desalination).

Cooperation is not really relevant at sea basin level, considering the small number of countries concerned. However, fresh water supply through desalination is strategic for the Eastern Mediterranean (in particular in Cyprus, Israel and Palestine), which could benefit from research programmes and knowledge transfer from other EU countries and in particular from Spain.

Assessment of existing level of cooperation and governance

There is no specific governance and no cooperation projects for offshore oil and gas in the Mediterranean basin. The only energy-related project involves sea-based wind energy.

Water supply is one of the priority areas of the Union for the Mediterranean (UfM), which puts great emphasis on the Gaza desalination project. Furthermore the UfM is launching a Mediterranean knowledge platform on water as a prerequisite to the development of sustainable policies for integrated water resources management (involving six countries: Jordan, Lebanon, Monaco, Morocco, Spain and Tunisia).

Challenges and opportunities

The delimitation of maritime zones (e.g. EEZ) in the Mediterranean could contribute to the implementation of Maritime Spatial Planning (MSP). These are key challenges for energy, especially taking into account the presence of diverging interests in limited spaces. This has been surveyed in many instances (e.g. Cyprus, but also Eastern ENP countries) where potential oil and gas fields or desalination plants compete with developed sectors such as aquaculture and tourism at national level.

The likely expansion in offshore oil and gas extraction and desalination activities also makes it necessary to **improve knowledge on potential impacts on the marine environment** and have a better approach to planning and coordination of activities.

Finally, **safety** is a major topic when it comes to offshore energy and the considerable disparities and fragmentation amongst Member States' laws and practices applying to offshore activities (e.g. licensing, liability provisions, equipment safety standards, public transparency and information sharing) needs to be addressed at basin level.

Beyond these three main challenges, opportunities for cooperation mainly relate to **research and technology**:

- Develop **research** to improve environmental performance of desalination activities;
- Develop **research** on blue energy (e.g. floating wind mills);
- Increase the level of staff **expertise** and arrange **technical assistance** to boost regional cooperation on energy, in particular for the purpose of capitalizing the expertise of Spanish companies for desalination and Italian companies for offshore oil and gas;
-
- Develop research on renewable energy: energy is a vital challenge for the sustainable development of the Mediterranean region, especially in the ENP countries, where the exponential growth in energy demand and the great dependence on hydrocarbons for electricity production make it necessary to strengthen research and investments in diversified energy sources, and especially in blue energy.

4.6 Blue biotechnologies

Economic Importance, main priorities and relevant geographical scope

Blue biotechnology is still at a very early stage of development but the activity is highly innovative and carries exceptional prospects for the future. It has been considered to be among the most promising and relevant MEAs in three countries (Spain, France and Slovenia). A few other countries, including ENP ones, have also carried out related research projects. At basin level, the great biodiversity of the Mediterranean Sea, 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.

Research and development is fundamental for this activity. At this stage, only a few research centres have departments with an explicit focus on blue biotechnologies. Other priorities are to provide economic support to develop commercial applications and bring them to market and to develop international networking to reach a minimum level of recognition and attract both public and private funds.

As with any highly innovative sector, competition prevails not only among countries but also, and even primarily, among private companies. However fundamental research in marine biology can be shared at sea basin level even if research for product development is done by private companies under commercial confidentiality practices. There is no specific interest in addressing the priorities at sub-sea basin level per se, but increased cooperation among frontrunner countries (France, Spain, and potentially Slovenia) on topics that are not trade secrets could boost the development of blue biotechnologies in the entire area.

Assessment of existing level of cooperation and governance

There is no specific governance for blue biotechnologies in the Mediterranean basin. Three relevant cooperation projects have been identified. Albeit with applications in different sectors, the three projects share the objective of developing new value chains, with a focus on applied research and technology transfer towards businesses.

Challenges and opportunities

The great biodiversity of the Mediterranean Sea and the existence around the basin of leading countries in marine biology (in particular France and Spain) make it possible for the sea basin to occupy a strategic position in the field of blue biotechnologies in the future. However, further **knowledge of marine life and of the interactions between marine organisms and their environment** is a pre-requisite for the sector to develop. Therefore basic research on marine biodiversity is the main challenge at sea basin level for this activity.

In order to move from a developmental stage to the commercialisation of innovative products, the sector needs major investments in research and **product development**. Although cooperation is difficult in a context of competition for patents, the industry as a whole would certainly benefit from a readable common strategy at sea basin level, including the joint development of marine aquaculture and blue biotechnologies, identified research priorities and common rules for investment in the sector. These priorities should be discussed with stakeholders (e.g. research institutes, private companies operating in the sector, investors).

4.7 Environment

Economic Importance, main priorities and relevant geographical scope

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. The most promising MEAs for blue growth in the Mediterranean basin (aquaculture, tourism ...) are directly dependent on the preservation of healthy ecosystems and renewable marine resources. Each economic activity should therefore include the sustainability feature.

The UNEP-MAP (United Nations Environment Programme-Mediterranean Action Plan for the Barcelona Convention) defines the following key priorities for the basin in the coming decade:

- to bring about a massive reduction in pollution from land-based sources;
- to protect marine and coastal habitats and threatened species;
- to make maritime activities safer and more conscious of the Mediterranean marine environment;
- to intensify integrated planning of coastal areas;
- to monitor the spreading of invasive species;
- to limit and intervene promptly on oil pollution;
- to further promote sustainable development in the Mediterranean region.

The key environmental issues in the Mediterranean are strongly transboundary and the existence of the UNEP-MAP by itself, and its main objectives, are an evidence of the relevance of managing the key environmental issues at sea basin level. The transboundary diagnoses and analyses developed by the GEF MedPartnership⁶² do not clearly identify specific environmental issues at sub-basin level. However, approaches at sub-sea basin level can be justified by the different levels of development in initiatives of the actors.

Assessment of existing level of cooperation and governance

Environmental governance in the Mediterranean is based on international conventions for the strategic framework (Barcelona convention, Ramsar convention on wetlands...) and on the action of networks for the operational implementation of actions (for example MedPAN for MPAs and scientific networks).

A large number of cross-border territorial cooperation projects involve environmental issues. Scientific knowledge and environmental monitoring are the main topics, with 39 projects linked to preservation of the water resource, protection of marine habitats, renewable energy, management of maritime risks, sustainable development, eco-tourism, and sustainable management of fisheries.

Cooperation at sea basin level is also significant, mainly through the UNEP-MAP and the MedPan Network (network of Marine Protected Areas managers in the Mediterranean).

However, although the Barcelona Convention provides a common framework likely to ensure a relative coherence between national policies concerning the reduction of sea pollution and the preservation of biodiversity, environmental governance of the Mediterranean sea is in practice still very fragmented and influenced by national political concerns.

Challenges and opportunities

According to UNEP-MAP, economic forecasts show that the Mediterranean region is on the way to becoming an advanced economy, with potential for large investment inflows in the coming decades. A large part of this growth potential is linked to the existence of renewable marine resources and to the services provided by the high patrimonial value of Mediterranean “blue infrastructures” (coastal and marine ecosystems). The main challenges for the actors of the basin are to restore and maintain healthy ecosystems and to promote sustainable use of marine resources, in order to seize all the opportunities of delivering blue growth benefits to Mediterranean populations.

More specifically, **securing a healthier environment and ensuring a sustainable use of marine natural resources**, requires cooperation at sea basin level in order to:

⁶² UNEP-MAP 2005 – Transboundary diagnostic and analysis, GEF Project “Determination of priority actions for the further elaboration and implementation of the Strategic Action Programme for the Mediterranean Sea”, <http://www.unepmap.org/index.php?module=content2&catid=001015>

- Improve **scientific knowledge** and expand **environmental monitoring**;
- Restore and protect the **integrity of ecosystems and natural resources**;
- Move towards **sustainable and ecosystem based management**;
- Improve **environmental and socio-economic impact assessment** of MEAs,

Beyond these main challenges, there are significant opportunities for cooperation in order to:

- **Support cooperation** between organisations and States **on knowledge sharing** and **transboundary networking** for the implementation of the priorities of UNEP Strategic Action Plans.
- **Improve the management of existing, and favour the creation of new, Marine and Coastal Protected Areas**, in particular through the setting up of the marine Natura 2000 network and the implementation of high sea protected areas. This will afford adequate protection to important ecosystems, such as seagrass meadows, reefs and seamounts, and improve the conservation status of most threatened marine species.
- **Ensure that protected areas give value for money.** A well planned and managed network of marine protected areas, including marine Natura 2000, is likely to enhance important economic services e.g. as fish spawning, nursery or feeding grounds, and contribute to develop new economic activities (eco-tourism, recreational fishing, ...).
- **Develop assessments of the value delivered by ecosystem services and of the costs of damages due to human activities.** This may help decision makers to invest in environment, considering not only short-term costs but the significant mid-term return on investment.

4.8 Cross-sectoral analysis

Assessment of existing level of cooperation and governance

Cross-sectoral cooperation projects and initiatives represent about 40% of all projects and initiatives identified. Most of them actually have a sectoral focus even if they encompass other activities. This is particularly the case with transport related projects in the Adriatic and Ionian area, where maritime transport plays a pivotal role in the economic development. Only 11 projects focus on cross-cutting issues without relying on specific sectors. These projects mainly focus on environmental issues, spatial planning and the implementation of maritime policies.

There is no formal cross-sectoral maritime governance in the Mediterranean. Not all the Mediterranean states have ratified the 1982 United Nations Convention of Law of the Sea (UNCLOS) and very few have claimed Exclusive Economic Zones (EEZ) rights. The consequence is that a large part of the Mediterranean remains under High Seas status where effective management of sea-related activities and protection of the marine environment would require multilateral cooperation. Stakeholders deplore that “the lack of clear jurisdiction hampers cooperation and that the lack of cooperation hampers setting up a clear jurisdiction”.

That is why the “EU strategy to improve maritime governance in the Mediterranean Sea”⁶³ promotes the ratification and the implementation of the UNCLOS, including EEZ claims when it allows implementing coordinated actions (e.g. for the setting up of marine protected areas in the high seas, or for sustainable management of fisheries).

Despite this complexity, some organisations are working to establish governance in the Mediterranean Seas. In particular the Centre for Mediterranean Cooperation of IUCN has put in place a working group composed of high-level experts to discuss important topics of maritime governance. The group provides conclusions and recommendations to the ministries of the Mediterranean countries.

⁶³ http://europa.eu/rapid/press-release_IP-09-1305_en.htm?locale=FR

Improving maritime governance is thus clearly a key issue for the implementation of IMP in the Mediterranean Sea. The step by step approach proposed in the EU strategy appears fully relevant given the complexity of the situation at the basin level and the lack of regional references in best practices.

Challenges and opportunities

The main challenge identified across sectors relates to **securing a healthier environment** (through protected areas and preventing pollution from maritime activities, and especially from maritime transport) **and ensuring a sustainable use of marine natural resources** (in particular for fishing, marine aquaculture and blue biotechnologies). Despite the existence of the Barcelona Convention and the UNEP-MAP as well as the large number of cooperation initiatives in this field, there is still a need to reinforce partnerships to strengthen environmental governance and ensure a sufficient level of investment in environment knowledge and in “smart infrastructures”.

Connectivity is also a key factor for blue growth and economic growth in general in the Mediterranean basin, which can be partially improved through **the consolidation of the “Motorways of the seas”** at basin level.

In addition, sectoral analyses have shown that opportunities for further cooperation exist in the following areas, across the different economic activities:

- **ICZM/MSP:** although ICZM and MSP are implemented at national or even regional level, there is a major argument for co-operation in this field, which is critical for the co-development of the different maritime activities in the long run. The institutional capacity in this area is still building up around the sea basin and all countries could benefit from shared experiences and best practices.
- **Research and innovation:** research and innovation are critical in some sectors such as marine aquaculture, blue biotechnologies or renewable energies, as well as for the protection of the environment. Again, although there could be different strategies at national level, there would definitely be an interest in networking, sharing knowledge, and defining common priorities in relevant fields.
- **Access to finance** has become increasingly difficult in many countries following the financial crisis. This hampers future growth by limiting investment capacity and innovation. In this case, there is clearly an opportunity for co-operation in terms of capacity building in order to reduce red tape to access public funding and to facilitate access to private funding.
- **Education, training and skills:** this opportunity is particularly highlighted for maritime transport, tourism and energy in order to maintain and develop competitiveness. The main issue is the availability of skilled people for companies, however, the high degree of seasonality of some activities (notably tourism) remains a barrier. Projects are implemented, such as EURES portal (the European Job Mobility Portal) which aims at connecting job seekers and providers, but only covers EU member states.
- **Processing, marketing and communication:** some economic sectors such as the seafood industry and tourism could benefit both from capacity-building to strengthen the supply-chain and increase the share of added-value products and from common strategies in terms of marketing and communication.

The **development of maritime clusters** and the **networking of marine and maritime institutes** could contribute to increase cooperation in these fields, especially for the last three topics, which tend to be under-represented in current cooperation initiatives.

4.9 Main findings

The main challenges are already partially addressed by existing cooperation initiatives implemented by regional organisations, such as the UNEP-MAP for environmental issues, the RTAP and the Motorways of the Sea for maritime transport and the GFCM programmes for the fisheries and aquaculture sector. However

some strategic sectors such as tourism, energy or blue biotechnologies still lack a global vision at sea basin level and governance, in particular as regards environmental issues, is still difficult to implement in practice for institutional and political reasons.

The implementation of MSP and ICZM, which is critical for the preservation of biodiversity and the co-location of the different maritime activities, has been pushed forward by the EU and by regional organisations such as the Centre for Mediterranean Cooperation of IUCN but further cooperation will be needed to progress in this area. This may require the delimitation of maritime zones, for instance through EEZ, which needs to be debated at sea basin level.

Despite the large number of cross-border and transnational cooperation projects involving maritime activities, some of the main priorities identified across sectors and which could benefit from further cooperation remain scarcely addressed or are covered but lack coordination at basin or sub-basin level. This is particularly the case for priorities relating to business growth, such as access to finance especially for marine aquaculture and tourism, education and training across all sectors, processing for activities related to the use of marine resources (fisheries, marine aquaculture and biotechnologies), marketing and communication for fish and seafood products and for innovative high-quality tourist offer, or technology transfer (e.g. traceability in the food industry, fuel efficiency, eco-tourism, desalination, etc.).

5 Feasibility for a sea basin approach to Blue Growth in the Mediterranean Sea

Following the analyses carried out in the previous sections, which have allowed to achieve a mapping of the existing cooperation initiatives (and in particular to emphasize the sub-basins most involved in the cooperation processes and the major focuses of the related projects) and to highlight the main challenges and opportunities for maritime cooperation at sectoral and cross-sectoral level, the purpose of this final step of the analysis is to issue recommendations on the feasibility of a sea basin approach for maritime cooperation in the Mediterranean Sea.

This analysis encompasses four tasks:

- a needs analysis,
- the identification of axes of intervention to be used as the basis of the cooperation development framework,
- the drawing up of policy recommendations,
- the identification of possible sub-regional strategies.

5.1 Needs analysis

The needs analysis determines what steps need to be taken to move from the existing development state of maritime activities and cross-sectoral tools to a future state likely to favour sustainable growth in the marine and maritime sectors.

The table below presents the needs identified through:

- the analysis of maritime economic activities in the EU and candidate and potential candidate countries as well as in the ENP Mediterranean countries,
- the work carried out in the previous sections on the identification of main issues and needs in all EU and candidate and potential candidate countries⁶⁴.

Following a logical analysis, these needs have been structured in priority areas, with the aim of reaching a developmental framework that allows the structuring and focusing of IMP actions (see Section 5.2).

Based (i) on the MEAs identified to be of most promise and relevance, (ii) on the results of the cross-sectoral analysis carried out in section 4, (iii) on the flagship ideas agreed during the 12th FEMIP conference and (iiii) on the examination of the IMP framework provided for the Adriatic and Ionian Seas in the Communication COM/2012/713 (as it was requested in the TS), we have identified 9 priority areas:

- research and development,
- access to finance,
- adapting to a resource efficient marine products processing and marketing,
- connecting the region,
- increasing regional attractiveness,
- renewable energies,
- oil and gas,
- maritime spatial planning,
- technical assistance for IMP.

⁶⁴ The identification of needs mainly concerns the EU and candidate and potential candidate countries, as “the objective and coverage of Task 5 is essentially about the EU Member States” (DG MARE).

These priority areas have in turn been grouped in 5 horizontal themes presented in the next sub-section (“axes of intervention”), identified on the basis of the previous experience (Baltic, Adriatic and Ionian, Black Sea) and of previous analyses.

Need	Priority area	Horizontal theme
<ul style="list-style-type: none"> • Knowledge on marine resources (stock assessments, exploitability, ...) needs to be deepened • Research and product development is fundamental in Blue biotechnologies, research networks need to be strengthen and have greater country coverage • The development of maritime clusters is necessary to improve sector competitiveness • Networking across maritime training institutes needs to be promoted • Improving fuel efficiency of fishing vessels needs to be further considered as a priority need, which has to be tackled in collaboration with other sea basins. • Ocean renewable energies currently play a minor role in the global energy supply of the region and need stronger R&D efforts 	<p>Research and development</p>	<p>SUPPORTING BUSINESS GROWTH</p>
<ul style="list-style-type: none"> • Access to finance is a real issue in the Mediterranean basin both in terms of private financing for small business development and public funding for R&D and infrastructure development • Need to prioritise available financial resources (especially during the on-going economic crisis) • Need to attract private lenders on financing marine and maritime-related infrastructures 	<p>Access to finance</p>	<p>SUPPORTING BUSINESS GROWTH</p>
<ul style="list-style-type: none"> • Farmed species are generally marketed in unprocessed state, a higher added value can be reached through processing and packaging • Sustainability of fish farms needs to be improved • Shorter and lighter licensing and administrative procedures are also needed in the aquaculture industry • Training facilities for skilled workers are insufficient • Promotion and communication actions on farmed species are needed • Sustainability of fisheries has to be ensured • Public awareness and communication on sustainable fisheries need to be increased • The development of pescatourism gives rise to legal difficulties which need to be overcome 	<p>Adapting to a resource efficient marine products processing and marketing</p>	<p>FOSTERING THE BLUE ECONOMY</p>

Need	Priority area	Horizontal theme
<ul style="list-style-type: none"> • Further efforts towards sustainability of port infrastructure are needed • Interoperability and consistency between Member States and transport operators need to be improved • Interoperability with rail and road requires specific attention: integration in a global transport strategy in close connection with the Adriatic and Ionian strategy to facilitate trade and island connectivity while minimising congestion and carbon footprint • There is a need to put more emphasis and devote more funds to the development of hinterland connections 	Connecting the region	<p>FOSTERING THE BLUE ECONOMY</p>
<ul style="list-style-type: none"> • A shared vision is lacking on what tourism on the Mediterranean coasts should look like in the future and how to optimize competitive advantages of the different areas (low-cost, eco-tourism, cultural, high-end...) • The interconnection coast/hinterland is to strengthen • Ecotourism should be more developed in coastal areas • The potential of off peak tourism, currently little developed, needs to be valorized • Competitiveness of coastal and maritime destinations, in particular islands needs to be improved • Skills and education/training need to be developed to support innovation in the tourist offer 	Increasing regional attractiveness	
<ul style="list-style-type: none"> • A shared vision on energy supply at sea-basin level in the future (EU targets + national plans) is lacking: potential contribution of offshore energies and East-West/South-North relationships (should be done in close coordination with Black Sea policies) • The ongoing research for the discovery of new oil and gas fields needs to be continued • Territorial governance is needed 	Oil and gas	<p>ENSURING LONG-TERM ENERGY SUPPLY</p>
<ul style="list-style-type: none"> • Infrastructure needs to be further developed • Long-term environmental impacts of the different energy sources have to be better assessed and monitored • Need to adapt education to new maritime activities 	Renewable energies	

Need	Priority area	Horizontal theme
<ul style="list-style-type: none"> • The Marine Protected Area Network has to be strengthened and expanded • Transition towards eco-system based management has to be speeded up • Prevention of pollution and coordination of actions against pollution (oil spills, marine litter, ...) need to be improved • Environmental impacts of most MEAs are insufficiently and inadequately monitored • Legislative measures likely to ensure good ecological status of marine and coastal environment are insufficient • Resilience to climate change needs to be built through coordinated harmonized actions • Ratification and implementation of international and regional regulations (including EU regulations such as MSFD) need to be speeded up 		<p>SECURING A HEALTHIER ENVIRONMENT</p>
<ul style="list-style-type: none"> • MSP is a crucial to avoid potential conflicts between users, ensure smooth development of activities and enable synergies • Sea-basin level coordination is stil lacking 	<p>Maritime Spatial Planning</p>	<p>STRENGTHENING CROSS-SECTORAL GOVERNANCE</p>
<ul style="list-style-type: none"> • Capacity building is still a key need • Need for continuation of support to national IMPs (governance, stakeholder involvement, design of sectoral policies) • Need for strengthening contacts between IMP stakeholders at regional level 	<p>Technical assistance on IMP</p>	

5.2 Axes of intervention

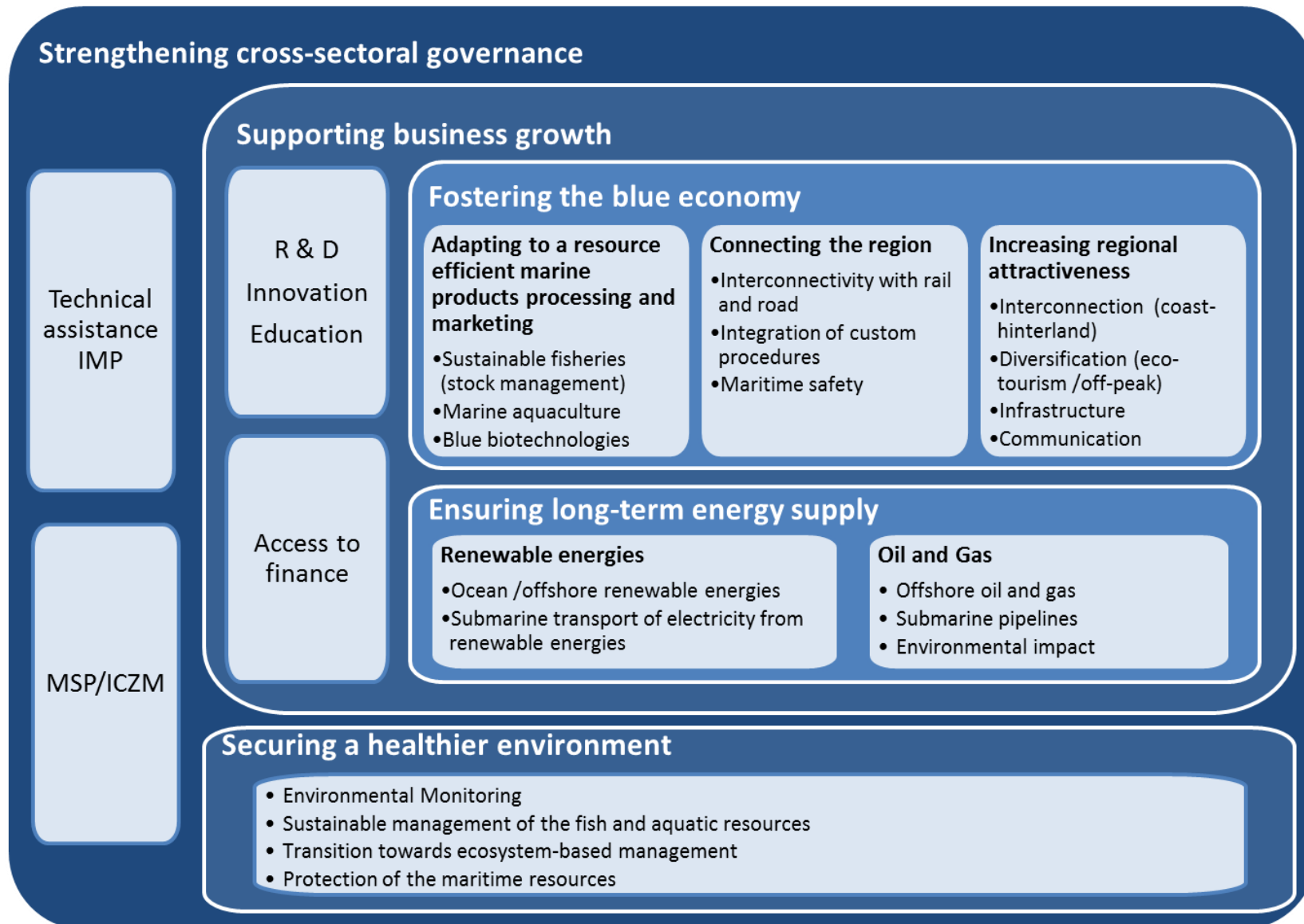
Based on the identification and analysis of main sectoral and cross-sectoral issues, five horizontal themes (HT) have been identified to be used as the basis of cooperation development framework for the Mediterranean sea basin:

- HT 1: Supporting business growth;
- HT 2: Fostering the blue economy;
- HT 3: Securing a healthier environment;
- HT 4: Ensuring long-term energy supply;
- HT 5: Strengthening transversal governance.

HT 2 and HT 4 refer to sectoral themes, while HT 1, HT 3 and HT 5 are more horizontally-focused. For instance “Supporting business growth” is a cross-cutting theme encompassing both HT 2 and HT 4; it has also for objective to build on tools existing in areas not limited to blue economy (e.g. priority area “business development” of UfM or areas “better access to finance for SMEs” or “more favourable conditions for business creation and growth” of the COSME programme).

The two types of horizontal themes are consolidated in the cooperation development framework proposed in the following page. They provide the focus for developing basin or sub-basin cooperation and the policy recommendations presented in this study.

Figure 8: Cooperation development framework



5.3 Policy recommendations

Using the outputs from the country analyses, the needs analysis, the analysis by sector and the case studies (see Annex 9), a series of policy recommendations are proposed below that could help to fulfil the sustainable growth potential in the blue economy. These recommendations also take into account the conclusions of the 12th FEMIP Conference (“Mediterranean blue economy: enhancing marine and maritime cooperation”) and the reflections and recommendations of the Intermediterranean Commission of the CPMR (“A road map for Macro-regional strategies in the Mediterranean”) and ARLEM (“Report on a Cohesion Policy for the Mediterranean”).

The policy recommendations are structured around the horizontal themes discussed earlier:

1. **Supporting business growth**⁶⁵: the development of a blue economy needs to be underpinned by research and innovation in different dimensions (scientific knowledge, new products and services, process, market, organization, financial instruments ...):
 - Encourage stakeholders to define integrated research and innovation strategies for blue growth in the Mediterranean basin or sub-basin;
 - Enhance effectiveness of cooperation projects through concentration on a few priority sectors agreed with stakeholders;
 - Target financial and non-financial support to research and innovation on the most promising activities for achieving the potential of blue growth;
 - Capitalize previous projects and initiatives in the Mediterranean and identify best practices;
 - Disseminate innovative advances of cross-border initiatives at sea basin level⁶⁶ and extend the geographical scope of relevant projects to basin scale⁶⁷;
 - Support cooperation and networking among research and development bodies, particularly in the emerging sectors (blue biotechnologies, energy efficient equipment) and growing maritime business (aquaculture, renewable energies);
 - Get existing maritime clusters involved in networking and catalyzing initiatives, give assistance to emerging clusters and encourage the creation of new clusters when relevant, so as to improve multi-stakeholder involvement in maritime policy-making;
 - Support skills development and adapt education and training in new maritime activities;
 - Encourage the young generation both in the EU and non-EU countries in the Eastern Mediterranean to follow the maritime profession;
 - Improve the image of the maritime sector and communicate on the diversity of maritime activities and career opportunities;
 - Introduce flexibility mechanisms in cross-border programmes to facilitate participation of southern stakeholders in projects;

⁶⁵ “Business growth” has been used rather than other possible expressions (e.g. “smart blue growth”) to ensure overall consistency of the various reports of the study.

⁶⁶ The BioVecQ project (Marine Biotechnology Vector of Innovation and Quality) of the ENPI CBC Italy-Tunisia Programme, for instance, is likely to generate new partnerships around the Mediterranean and to deliver innovative solutions which could be of interest for stakeholders beyond the Sicily-Tunisia area (see case study n°1 in the Annex).

⁶⁷ In the same CBC Italy-Tunisia Programme the geographical scope of QUALIMED and AGROMED QUALITY could be extended so as to increase quality and safety of seafood products at basin level and boost the competitiveness of Mediterranean products in the international market (see case study n°1 in the Annex).

- Continue to support the process for the development of a Virtual Knowledge Centre (VKC) providing data on marine and maritime affairs in the Mediterranean;
 - Support initiatives to attract private lenders on financing marine and maritime-related infrastructure;
 - Facilitate access to finance through supporting cooperation initiatives for capacity-building in order to reduce red tape to access public funding and to facilitate access to private funding.
2. **Fostering the blue economy:** particularly by supporting sustainable and resource-efficient activities, by ensuring the connection of the region and by increasing regional attractiveness:
- To support sustainable and resource-efficient activities⁶⁸:
 - Enhance the sustainability of Mediterranean fisheries, in collaboration with the GFCM;
 - Promote good purchasing practices in the fish industry (processing and marketing industry) in respect to the sustainability of fisheries. Increase public awareness on sustainable fisheries;
 - Support initiatives aiming to generate greater added value to local resources⁶⁹;
 - Include a maritime dimension in existing projects and programmes dedicated to processing, marketing and quality of food products and promote the differentiation of Mediterranean seafood products;
 - Support diversification outside of fisheries, e.g. pescaturism, in collaboration with FARNET;
 - Support the application of innovative technologies (aquaculture, blue biotechnology);
 - Develop knowledge on marine life and on interactions between marine organisms and their environment;
 - Enhance investments in Southern countries' aquaculture to make it commercially viable and competitive on the international market;
 - Increase support to R&D on the sustainability of marine aquaculture;
 - Consult stakeholders about the opportunity and feasibility of a Development Plan for Mediterranean aquaculture, including inter alia promotion and communication, increasing added-value through processing, training, sustainability of fish farms, promotion of good practices for the simplification of licensing and administrative procedures for fish farm installation;
 - Strengthen cooperation and clustering in the blue biotechnology so as to make Western Med a leading place within this sector;
 - Support networking among marine and maritime training institutes and academies;
 - To ensure the connection of the region:
 - Reinforce the position of the Mediterranean Sea as a key hub for North-South and East-West connections and enhance the interoperability with rail and road;
 - Prepare the adaptation of infrastructure and traffic management to the future market conditions linked to coming development of oil and gas exploitation and resulting logistic flows;

⁶⁸ "Resource-efficient activities" include fisheries, marine aquaculture and blue biotechnology.

⁶⁹ The case study "FLAG charter for cooperation in the Mediterranean" highlights the role of the charter for developing cooperation in promotion of local fisheries and coastal tourism (see case study n°5 in the Annex).

- Achieve better integration of small islands (e.g. Greek and Croatian islands) in EU programmes focusing on maritime transport⁷⁰;
- Reinforce the position of Malta and Cyprus as key transport hubs in the Mediterranean Sea through the TEN-T programme⁷¹;
- Put more emphasis and devote more funds to the development of hinterland connections;
- Improve information on traffic patterns and on nature and density of shipping traffic in the Mediterranean;
- Promote e-navigation systems to enhance safety and monitoring;
- Work towards the establishment of a Mediterranean VTMS system;
- Improve efficiency of logistics centres;
- To increase regional attractiveness:
 - Consult stakeholders about how to implement the new European strategy to promote coastal and maritime tourism and adapt it to the specificities of the Mediterranean context (e.g. importance of natural and cultural heritage, development of yachting and marinas ...);
 - Promote an innovative and high-quality offer of tourist services so as to generate growth and reduce seasonality;
 - Promote the global attractiveness of the Mediterranean basin and ensure coherence of the tourist offer around the basin;
 - Contribute to the preservation of ecosystems, landscapes and geomorphology.

3. Ensuring long term water and energy supply

- Encourage stakeholders to set up a shared vision and develop a regional strategy on energy supply (including exploration of new resources, renewable energy, energy transport and the assessment of environmental impacts);
- Coordinate and improve national and regional policies of support for the renewable energies;
- Raise awareness of the possibilities of development of the renewable energies;
- Develop staff expertise and technical assistance to boost regional cooperation on energy (capitalize expertise of Spanish companies for desalination and Italian companies for offshore oil and gas);
- Improve knowledge on potential impacts of new energy production activities on the marine environment;
- Improve management of water resources (e.g. desalination).

4. Securing a healthier marine environment: healthy environment and renewable natural resources are the bedrock of blue growth. IMP has thus to pay particular attention that environment degradation does not hamper the achievement of socio-economic objectives:

- Facilitate the adoption of common standards and rules in order to preserve a healthy environment and ensure the sustainable use of natural resources;

⁷⁰ This is one of the major recommendations of the case study "Island transport connectivity in the Central & Eastern Med" (see case study n°3 in the Annex).

⁷¹ Idem

- Encourage regional cooperation between organisations and states on knowledge sharing and networking for sound implementation of Maritime Spatial Planning and of the priorities of UNEP Strategic Action Plans (pollution reduction, biodiversity, ICZM)⁷²;
 - Extend the areas of training courses in maritime education institutes to MSP, ICZM and protection of the environment;
 - Support initiatives/stakeholders aiming to improve the management of existing Marine Protected Areas, and favor the creation of new ones, in particular through the setting up of the marine Natura 2000 network and the implementation of high sea protected areas. Ensure that protected areas give value for money and contribute to develop new economic activities (eco-tourism, recreational fishing ...);
 - Develop assessment capacity of the value delivered by ecosystem services and of the costs of damages due to human activities.
5. **Strengthening cross-sectoral governance:** considering the lack of effective governance at cross-sectoral level in the Mediterranean Sea, policy options have to be realistic and take into consideration that developing governance capacity in the sea basin will take time and need adapted support (some sector-based governance systems already exist, e.g. GFCM, but there is a need for cross-sectoral governance).
- Build institutional capacity and increase civil society capacity by providing technical assistance for supporting the design of integrated maritime regional strategies and the stakeholder involvement;
 - Support existing stakeholder networks promoting regional governance, in particular environmental networks involved in the implementation of marine protected areas;
 - Raise awareness of the numerous projects currently developed in the Mediterranean region among the true beneficiaries (private sector).
 - Promote initiatives at sea basin or sub-sea basin level to develop integrated approaches and maritime spatial planning for organising the different activities contributing to blue growth.

In the short to mid-term, the policy should aim to support one or several local initiatives (Adriatic – Ionian, North-western ...) constituting references for other areas and the basin as a whole, demonstrating the effectiveness of integrated strategies for delivering blue growth benefits.

5.4 Identification of possible sub-regional strategies

To identify possible regional strategies, we relied on the lessons learned from existing regional programmes (in respect to geographical scope, thematic scope and governance level) and on the views of CPMR and ARLEM on macro-regional strategies, we considered the possible existence of barriers likely to make cooperation difficult and we assessed the potential added-value of macro-regional strategies. We conclude on the next steps to be taken and the time horizons to be considered for developing a sea basin approach to improve maritime cooperation in the Mediterranean.

5.4.1 Lessons learned from existing cooperation initiatives in the Region

Interviews conducted with managers of some major programmes and partnerships regarding the Mediterranean Basin (MED Programme, ENPI-CBC-MED, IMP-MED, Union for the Mediterranean) provide

⁷² The case study OP “Spain – External Borders” CBC led to the conclusion that there is a lack of initiatives aimed at ensuring that economic blue growth would not have a negative impact on the environment and to the recommendation that efforts should be deployed to implement comprehensive maritime spatial planning as a tool for planning marine activities (see case study n°2 in the Annex).

useful indications on good practices and main difficulties met in cooperation initiatives which involve both EU Member States and ENP partners in the Mediterranean.

➤ *Concerning the geographical scope*

Interviews show that the link between North and South is relatively weak. In the IMP-MED project the South-South dynamics seems to function quite well while the communication between Northern and Southern partners, generally limited to the IMP-Med Project meetings and to the Annual Meeting of the Working Group on IMP in the Mediterranean, appears weaker and certainly justifies further EU involvement.

Interviews also put in evidence that a bigger cooperation capacity and willingness is noted in the Western Mediterranean. In its Northern part as well as in its Southern side, the Western Med shows more institutional maturity and greater capacity of collaboration than the Eastern Med. Spain, France and Italy have long tradition and strong institutional capacity for cooperation. Maghreb countries have also national state logics which make cooperation with Northern partners easier to consider.

The situation is more complex in the Eastern Mediterranean Basin. The axis Greece-Cyprus-Turkey could play a pivotal role and boost cooperation in this area. However the political tensions between Cyprus and Turkey as well as Turkey's special status among its Southern neighbours as an "EU candidate country" have hampered the development of cooperation in some instances⁷³.

At this stage, well-structured and really operational governance exists only in the Adriatic and Ionian sea basin.

➤ *Concerning the thematic scope*

Sectoral projects are more mobilizing than cross-cutting initiatives because they are more concrete and answer practical questions : IMP-MED partner countries are for instance interested in sectoral aspects of fisheries, maritime transport, coastal management, sand management and VTS infrastructure. Sectoral projects also tend to be more operational while cross-sectoral projects tend to focus more on networking.

Yet, cross-cutting projects are emerging both in the North and in the South, mainly when involving environmental issues, and the idea of integrated policies is catching on. The UfM in particular is working actively on building on cross-sectoral aspects.

➤ *Concerning the governance level*

Coordination seems difficult between political initiatives and operational fund-providing mechanisms. Bilateral cooperation also works better than multilateral. That is why, for instance, the focus of SAFEMED III project will turn more towards bilateral activities targeting each of the beneficiary countries on an individual basis⁷⁴.

The EU plays a significant role, in particular through the IMP-MED project, promoting dialogue, networking and sharing of knowledge and best practices. TAIEX, the Technical Assistance and Information Exchange instrument managed by DG Enlargement, provides partner countries with assistance and advice on the transposition of EU legislation into the national legislation of beneficiary countries. Twinning, joint implementation tool between Public Administrations of an EU Member State and of a beneficiary country, also supports the efforts of ENP countries to harmonize their regulations with EU legislation.

Other bodies (GFCM) are also helping to increase the efficiency of the governance in the area, contributing to create the idea of being part of the same sea basin, with common problems to tackle.

⁷³ Being a country in pre-accession phase to the EU, Turkey has requested not to be included anymore in the list of eligible territories for the ENPI-CBC-Programme.

⁷⁴ SAFEMED III Bulletin n°2 – September 2014

➤ *Views on “macro-regional strategy” and “sub-regional strategy”*

Literature review (CPMR, ARLEM) and interviews conducted with high-level managers of the main regional initiatives⁷⁵ stressed the importance to take account of the wide range of institutional situations, governance systems, and above all policy integration in the partner States concerned.

The Intermediterranean Commission of the CPMR recently proposed⁷⁶ to apply and adapt to the Mediterranean basin the Macro-Regional approach that the EU has been testing during the last years in the Baltic and Danube areas on a tailored and gradual basis, starting from the capitalization of the European experience and from the countries and territories of the EU Mediterranean Shore of the Basin and stressed the necessity to apply a gradual step-by-step approach concerning cooperation with the southern countries and territories.

The Euro-Mediterranean Regional and Local Assembly (ARLEM) also calls for the introduction of a macro-regional approach for the Mediterranean⁷⁷, on the basis of gradual variable geometry, with three macro-regional integrated areas : the first one is already in place in the Adriatic-Ionian region since the adoption of the EUSAIR Strategy and Action Plan in June 2014, the second would cover the western Mediterranean macro-region and the third the eastern Mediterranean macro-region. In the medium term each of these macro-regions could be more cohesive and more dynamic than a single uniform region for the whole of the Mediterranean.

Some interviews indicated that macro-regional strategy sometimes appears to be a European concept, which is not always considered as fully relevant for Southern countries or which, at best, is seen as premature and needs to be further explained. They put into evidence the need to focus on sub-sea basin cooperation and to look to sub-regions where cooperation is more mature, instead of considering a basin-wide strategy.

A Maritime Strategy for the Mediterranean appears to be too early at this stage but sub-sea basin cooperation should be developed following the example of the Adriatic and Ionian sea basin.

➤ *Lessons learned*

From these observations it can be concluded that, with a view to setting up new bases for maritime cooperation involving both EU Member States and ENP partners, it would be relevant to take into account the following elements:

- Consider the different level of maturity of the countries and understanding of IMP
- Better explain to ENP partners the potential concrete benefits of a sub-regional strategy
- Take into account the role of sectoral issues in the consolidation of cooperation processes
- In case of a sub-regional cooperation framework, a differentiated approach should be considered, between the Western Med, where a medium-term approach could be envisaged and the Eastern Med, where a longer term approach with greater focus on political dialogue, awareness-raising and governance assistance would have to be considered⁷⁸.

⁷⁵ See Annex 2

⁷⁶ “A road map for Macro-regional strategies in the Mediterranean” (Intermediterranean Commission of the CPMR, March 2014)

⁷⁷ “Report on a Cohesion Policy for the Mediterranean” (ARLEM, February 2014)

⁷⁸ No specific statement on Central Mediterranean in the interviews made, the interviewees considering that Central Med is already covered by the Adriatic/Ionian strategy.

5.4.2 Cooperation readiness

The present section analyses the level of cooperation readiness in sub-regions. It examines which drivers are conducive to cooperation development or, in the contrary, which barriers make cooperation difficult, at least in short/medium term.

Three kinds of barriers are considered:

- political: political stability of the sub-region, political willingness to cooperate;
- technical: countries' institutional capacity, stakeholders' willingness and readiness;
- financial: capacity of the sub-region to attract national/international funding.

Scores are given to each sub-region for each criterion, based on information from the country fiches and from the interviews with high-level managers of major sea basin level cooperation initiatives (see list in Annex 2). The results of the analysis are presented in Annex 10.

Like most notation-based systems, this way to qualify readiness to cooperation is obviously reductive. However, some conclusions are quite clear and allow approaching the most adequate geographical scope for maritime cooperation:

- two sub-regions stand out as particularly favourable for such a process : Western Mediterranean-North (Spain, France, Italy, Malta) and Central Mediterranean⁷⁹ (the latter being already largely covered by the EUSAIR) receive the highest rating,
- the Western Mediterranean sub-basin (the four EU MS + the three ENP partners⁸⁰) obtains a lower but positive score and seems likely to provide fertile ground for future cooperation,
- cooperation in the Eastern Mediterranean, which is less favourably rated, should be considered at longer term (see strategic timeframes below) but could emerge faster among some countries for specific issues (e.g. maritime clusters, MSP, oil and gas exploration, etc.),
- the Mediterranean basin as a whole, also lower ranked, suffers from the lack of political readiness of a few partners which can influence the whole area but can be considered for some cooperation purposes, e.g. coastal management, transport (VTS infrastructure), ...

As one region of the Mediterranean (Adriatic and Ionian) now has a strategy (EUSAIR) and an action plan (adopted in June 2014), it seems relevant, before considering any basin-wide cooperation, to strengthen the existing cooperation practices and consecrate them through setting up specific cooperation frameworks. The rating exercise indicates that one region meets the conditions for this: the Western Mediterranean – North.

As already mentioned, the Central Med sub-basin is widely covered by the EUSAIR and there is no clear scope demonstrated by the study for working at Central Med level. It can thus be considered to work within the Western Med by including as well Italy and Malta in this area.

⁷⁹ Malta is usually included in the Eastern Med (e.g. East Mediterranean Motorways of the sea) or in the Central Med (and even in the Ionian Sea for FAO – see Annex 1). To take into account existing intergovernmental cooperation (Malta is in the Dialogue 5+5) and the ARLEM approach, Malta is here included in the Western Mediterranean.

⁸⁰ According to the commonly used subdivisions of the Mediterranean (IHO, FAO – see Annex 1) the Tunisian coastline is divided into two parts: the Northern coast (from the Algerian border to Cap Bon) is part of the Western Mediterranean and the Eastern-Southern coast is part of the Central Mediterranean. To avoid complex governance we suggest that Tunisia be fully part of the Western Mediterranean. This is, in addition, justified by the cultural and geographical proximity with the other two Maghreb countries and by the longstanding relations with the Northern partners of the region, especially France and Italy.

5.4.3 Added value of sub-regional strategies

Although the Mediterranean basin and sub-basins have their own socio-economic, environmental and political context, the Commission's report "concerning the added-value of macro-regional strategies", COM(2013) 468 final, Brussels, 27.6.2013, provides a useful basis to assess the potential added-value of sub-regional maritime strategies in the region.

As highlighted in the abovementioned report, macro-regional strategies heavily rely on bottom-up processes, which require a minimum institutional capacity to handle project coordination and monitoring, multi-level governance and transnational cooperation issues. The potential added-value of sub-regional strategies is therefore assessed on the basis of the current level of cooperation and institutional capacity within each sub-basin.

The analysis does not include Central Med, which is already covered by the EUSAIR, but provides a specific focus on Western Med-North (France, Italy Spain and Malta), considering that the existing level of cooperation and the current institutional capacity in this area give grounds for a potentially higher added-value in the short to medium term⁸¹.

Western Med-North

Cross-border cooperation in this area is facilitated by the long history of cooperation among the four countries, good institutional capacities and the absence of major governance issues. The four countries benefit from the same EU financing instruments and have gained experience in multi-level governance over time through the different EU regional policies.

The added-value of a possible maritime strategy in this sub-basin would mainly come from the promotion of blue growth related activities within territorial cooperation programmes and from a better coordination of the different projects and initiatives through setting up shared mid-term and long-term objectives for the area. Currently, Maritime projects and initiatives are important between France and Italy (e.g. RAMOGE agreement) and the four countries are involved together in a large number of initiatives even if they do not necessarily focus specifically on the Western Med-North. The visibility of maritime issues in current territorial cooperation programmes could also be strengthened, especially between France and Spain.

A formal strategy would allow to set priorities for the area (e.g. preservation of biodiversity through support to MPAs, research and development in blue biotechnology, marketing of sustainable and high-quality fish products, yachting and marinas, cruise tourism, short-sea shipping) and improve efficiency of actions carried out, which would in turn result in more job creation in maritime activities. Priorities for such a strategy should be set by stakeholders, including economic operators.

Starting such a strategy with a limited number of countries with the sufficient institutional capacity could also contribute to foster cooperation with neighbouring countries on blue growth related issues, in particular in Western Med-South.

Western Med

The Western Med as a whole (Western Med North + the three ENP countries) also benefits from a large number of initiatives and projects, mainly through Dialogue 5+5, COPEMED II for fisheries, the Spanish-external borders CBC programme, the ENPI-CBC Italy-Tunisia programme and the Italy-Malta CBC programme. However, there is a strong asymmetry between Northern and Southern countries in terms of participation to current cooperation programmes, institutional capacity and experience in multi-level governance, and the willingness of the Southern countries to participate in a formal strategy needs to be further explored. In coherence with other organisations involved in the development of regional strategies

⁸¹ This statement is based on the assessment of existing level of cooperation and on the interviews carried out with representatives of some of the main programmes and organisations in the Mediterranean Basin (Programme Med and UfM)

in the Mediterranean basin (e.g. CPMR and ARLEM), the Western Med constitutes an adequate sub-region for developing a sub-sea basin approach.

In this case, the added-value of a possible maritime strategy or roadmap would be to improve the visibility of maritime issues within existing programmes and organisations (e.g. ENPI-CBC, UfM, Dialogue 5+5), to benefit from blue growth to foster socio-economic development in the area (e.g. through support to small-scale coastal fisheries, promotion of fish products, support to sustainable tourism, etc.) and to promote multi-governance and bottom-up processes on both sides of the Western Mediterranean shores through networking and capacity-building.

Finally strengthening dialogue among countries on practical blue growth issues could contribute to long-term solutions as regards marine environmental preservation and connectivity.

Eastern Med

Cyprus and Greece play a leading role in cooperation on maritime issues in this sub-basin, mainly through the Greece-Cyprus CBC programme and their involvement in a few projects focusing on the Eastern Med under the ENPI-CBC Med programme. These projects tend to focus on maritime surveillance and security, improving procedures for maritime transport and data collection in various sectors (e.g. marine pollution, tourism activities). Nevertheless, major political and institutional barriers in this area hamper cooperation at the sub-basin level and besides the GFCM programme for the area (EastMed) and a few projects under the ENPI-CBC Med programme, Eastern Med countries tend to be more involved in whole Med projects than in projects specifically focusing on the sub-sea basin.

The establishment of a sub-regional strategy at the sub-basin level seems premature. However, increasing cooperation on specific topics (e.g. cruise tourism, development of ICT systems in ports) and on research and development, which can be done under current frameworks (GFCM, UfM, ENPI-CBC Med, Research programs, etc.) would contribute to promote political dialogue in the area, to improve institutional capacity around the sub-sea basin and to foster socio-economic development.

Whole Med

Despite the various barriers for cooperation presented earlier, the Mediterranean Basin benefits from the existence of several regional organisations that can play an active role in dealing with maritime issues at basin level (e.g. the GFCM, the UfM, the CPMR, the CIESM, etc.), from the Barcelona Convention Protocols for the environment and from the existence of specific multi-annual plans for the environment (UNEP-MAP) and for transport (the Regional Transport Action Plan for the Mediterranean Region), as well as from a variety of territorial cooperation projects related to maritime activities.

The added-value of a possible maritime strategy would mainly come from the clarification of common objectives as regards blue growth and the sustainability of blue growth activities. This would contribute to the streamlining of blue growth priorities in cross-sectoral organisations and programmes (e.g. in territorial cooperation programmes).

5.4.4 Steps and geographical scope for sea basin approach

As shown in the previous section, the Mediterranean basin is a complex mosaic with very different stages of development and advancement regarding IMP and blue growth. A “one size fits all” strategy will therefore not work; a step-by-step and sub-basin-specific approach should be taken.

Table 4 suggests cooperation actions to put in place for each sub-basin and the timeframe.

It would be important to be able to implement a few quick-impact actions in a selected sub-basin and in a relatively short time, demonstrating the benefits of blue growth and which could be used as models for the other sub-basins and boost them.

In the section 5.4.2 we showed that two sub-basins are the most appropriate to develop maritime cooperation in the short term: Western Med and Adriatic and Ionian. As the Adriatic and Ionian is already covered by the EUSAIR and has its own priorities, we suggest choosing the Western Med for these “showcase” actions.

The timetable⁸² for the **Western Med** (Spain, France, Italy, Malta, Morocco, Algeria, Tunisia)⁸³ would be:

- 2015-2016:
 - Communicating with relevant organisations to encourage projects related to maritime issues under current cross-sectoral cooperation initiatives (UfM, Dialogue 5+5, EU territorial cooperation programmes...);
 - Organizing a stakeholder conference to set common priorities for the area as regards blue growth. Although a sectoral approach is necessary to facilitate the emergence of concrete proposals, some cross-sectoral issues should be emphasized, in particular sustainability issues and the establishment of common rules and standards. Other relevant topics for cooperation include access to finance, training, promotion and marketing or technology transfer ;
 - Establishing a research programme in cooperation with relevant regional organisations and research institutes to support the sustainable development of maritime activities in the Med, including topics such as marine biology and biodiversity, blue biotechnologies, fuel efficiency for vessels, etc.
 - Improving support to SMEs by encouraging networking, in particular through maritime clusters and by facilitating their access to existing cross-sectoral tools and projects (e.g. cross-sectoral UfM projects for business development, EU COSME, etc.)
 - Setting up a maritime strategy defining specific objectives to be achieved by 2020: this step could be implemented at least (as a first step) in Western Med-North where barriers for cooperation are lower and potential added-value is higher in the short to mid-term, with a possibility for Southern countries to join on specific issues of their choice;
 - Considering that there are big differences between the Northern and Southern partners of the Western Med both in terms of knowledge of the blue economies and intensity of participation to cooperation programmes, it appears necessary to improve the knowledge of the strengths and weaknesses of the blue economy and of blue growth potential in the countries of the southern part of the Western Mediterranean basin (Morocco, Algeria, Tunisia), in order to better focus the possible cooperation axes. To bring the knowledge of the blue growth potential of Morocco, Algeria and Tunisia in line with Spain, France, Italy and Malta, it is suggested to carry out “country fiches” and needs analyses in the three ENP partner countries;
- 2017-2020:
 - Implementing actions likely to have a quick impact (e.g. implementing MPAs in high seas, setting up and implementing ICZM and MSP, developing a sub-basin aquaculture plan, ...);
 - Implementing actions to support mid-term to long-term strategies, such as encouraging stakeholders to define integrated research and innovation strategies for blue growth or

⁸² The timetable and related steps are proposed following an analysis on steps and timetables of the sea basin strategies already implemented (Adriatic and Ionian, Baltic, Danube) and of other cooperation initiatives. Findings of this analysis on already existing strategies have been therefore tailored to the possible needed steps envisaged for the related Mediterranean basin or sub-basin.

⁸³ We have been reported by stakeholders that there would be an interest to include also Libya, within a mid-term perspective, in the geographical scope of a possible Western Med Maritime Strategy.

encouraging business to business networking through the development of maritime clusters, etc.

- beyond 2020:
 - Revising the strategy on the basis of the results of the previous steps and of the success stories of other sea basin strategies and of the EUSAIR.

In the **Eastern Med** (Greece, Cyprus, Turkey, Lebanon, Israel, Palestine, Jordan, Egypt) section 5.4.2 highlighted that cooperation frameworks should be considered in the longer run and that cooperation should focus on concrete projects likely to emerge among some countries on specific issues. The following timetable can be proposed:

- 2015-2016:
 - Searching for and/or consolidating political commitment to sea basin level development;
 - Identifying areas of mutual interest, possibly through a stakeholder conference, where concrete projects among some countries could emerge (e.g. promotion of cruise tourism in the Levant Sea, , development of training in maritime spatial planning and integrated coastal zone management, increase of exchanges and partnering across maritime training institutes and centres ...);
 - Reinforcing cooperation between Greece, Turkey and Cyprus (e.g. support the Greek, Cypriot and Turkish chambers of commerce in their attempts to implement confidence-building measures, especially in shipping, tourism and energy).
 - Bringing the knowledge of the blue growth potential of Lebanon, Israel, Palestine, Jordan and Egypt in line with Greece, Cyprus and Turkey, it is suggested to carry out “country fiches” on the blue economies and needs analyses of the five ENP partner countries concerned.
 - 2017-2020: Developing maritime safety and surveillance through increasing cooperation between states, port authorities and stakeholders of the shipping sector, Using the elements of success of EUSAIR to convince the sub-basin countries of the merits of a cooperation framework at sub-basin level.
 - Establishing good cooperation experiences upon to build trust and interest for establishing a strategy.
- beyond 2020:
 - Depending on the results of the previous steps (particularly at political level), capacity-building should be developed and the potential for cooperation on issues of common interest (e.g. water supply or MPAs) should be investigated.

The level of the **whole Mediterranean** basin could be used, depending on the progress achieved and the difficulties met in the strategies of Western and Eastern sub-basins, with some specific purposes compatible with steps taken in these different sub-sea basins:

- 2015-2016:
 - Continue to support current cooperation initiatives that address sea basin level challenges (e.g. GFCM, UNEP-MAP, UfM projects and actions, Euromed),
 - Intensify dialogue with non-EU partners (perpetuate and strengthen the Working Group on IMP in the Mediterranean after completion of the IMP-MED project⁸⁴),
 - Enhance networking among maritime training institutes and academies,

⁸⁴ The EC will continue financing the regional IMP dialogue between the Southern Partner Countries for the years 2015-2016. In parallel, the IMP Working Group in the Med will continue organising a meeting per year.

- Identify common objectives as regards blue growth and the sustainability of blue growth activities;
- Identify priorities in terms of data collection and knowledge sharing in particular as regards the interaction between human activities and the marine environment;
- 2017-2020: in case political difficulties persist locally in some parts of the basin, the whole Mediterranean could be the appropriate cooperation level to make some cooperation initiatives possible, allowing the dilution of bilateral or local conflicts.

Table 4: Steps and geographical scope for developing a sea basin approach in the Mediterranean

Geographical scope	Country coverage	Cooperation development timeframes		
		2015-2016	2017-2020	beyond 2020
Western Med	ES, FR, IT, MT MA, DZ, TN	<ul style="list-style-type: none"> - Organize a stakeholder conference to set common priorities - Improve support to SMEs through maritime clusters - Set up a cooperation framework including some specific objectives to be achieved within 2020 - Increase knowledge of blue growth in Southern partner countries ("Country fiches"/needs analysis MA-DZ-TN) 	<ul style="list-style-type: none"> - Implement actions likely to have a quick impact - Consider cooperation strategy 	<ul style="list-style-type: none"> - Revise the strategy on the basis of the results of the previous steps
Central Med	IT, SI, HR, EL ME, BA, AL	Sub-region covered by EUSAIR (EU Strategy for the Adriatic and Ionian Region)		
Eastern Med	EL, CY TR LB, IL, PS, JO, EG	<ul style="list-style-type: none"> - Consolidate political commitment to sea basin level development - Identify areas of mutual interest for concrete projects - Reinforce cooperation between GR, TR and CY - Increase knowledge of blue growth ("Country fiches"/needs analysis LB-IL-PS-JO-EG) 	<ul style="list-style-type: none"> - Develop maritime safety and surveillance - Establish good cooperation experiences to build trust and interest for establishing a strategy 	<ul style="list-style-type: none"> - Depending on results of previous steps, develop capacity building and investigate potential for cooperation on issues of common interest
Whole Med	All countries	<ul style="list-style-type: none"> - Continue to support cooperation initiatives that address sea-basin level challenges - Intensify dialogue with non-EU partners (perpetuate and strengthen the basin-wide working group on IMP) - Identify common objectives and priorities 	<ul style="list-style-type: none"> - Cooperation framework to be considered on some actions of mutual interest in case political difficulties persist in some parts of the basin 	<ul style="list-style-type: none"> - Depending on previous steps at whole Med level and on progress of Western Med and Eastern Med strategies

