

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



CONTRACT NUMBER  
MARE/2012/07 - REF. No 2

## REPORT 2

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

MARCH 2014

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## 0 Background and context of this study

This report is part of the ‘Study to support the development of sea basin cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea’ launched by DG MARE in January 2013.

The objectives of this Study are to (i) identify the Blue Growth needs and potential of Mediterranean and Black Sea countries and (ii) assess the potential for policy and project-based cooperation in the Mediterranean and Black Sea regions.

More specifically, as a first step of this Study (Report 1 and related Country fiches), a breakdown of marine and maritime activities of the Mediterranean and Black sea countries has been provided, in order to define the “blue economy” of the area and tracing possible scenarios for growth of each country.

Findings of the Report 1 have been used as background for assessing the potential for policy and cooperation for this Report 2, whose purpose is to accompany the drafting of an Action Plan for the EU Strategy for the Adriatic and Ionian Region (EUSAIR).

This Report 2 will be followed by Report 3 and 4, the first aimed at identifying possible content of a maritime strategy in the Black Sea and the second one aimed at supporting the identification of possible elements of a maritime strategy for the Mediterranean Sea or for possible sub-regional strategies.

As a general premise to Report 2, the overall background of this part of the Study has changed during 2013, due to the wider extent to which the Adriatic and Ionian Strategy is called to act.

The Maritime Strategy for the Adriatic and Ionian Seas, as defined in Communication COM/2012/713, was based on the necessity to put in place the right conditions for a smart, sustainable and inclusive growth from the sea according to 4 pillars:

- Maximize the potential of the blue economy;
- Healthier marine environment;
- A safer and more secure maritime space;
- Sustainable and responsible fishing activities.

Following the meeting of National contact points held in Rome in June 2013, the “Maritime Strategy” has been integrated into a wider European Union Strategy for the Adriatic and Ionian Region (EUSAIR), which also covers the hinterland. The EUSAIR has absorbed the 4 pillars of the Maritime Strategy, re-shuffling objectives and challenges into 4 new pillars, namely:

- **1<sup>st</sup> Pillar:** Driving innovative maritime and marine growth;
- **2<sup>nd</sup> Pillar:** Connecting the Region;
- **3<sup>rd</sup> Pillar:** Preserving, protecting and improving the quality of the environment;
- **4<sup>th</sup> Pillar:** Increasing regional attractiveness.

It is worth mentioning that in the Athens stakeholder conference on the 6-7 February 2014, the four Pillars have been renamed as follows:

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

However, within this Study, the EUSAIR’s four Pillars have been denominated using the titles of the EUSAIR discussion paper.

Furthermore, two cross-cutting issues have been mentioned in the EUSAIR discussion paper, namely (i) Research, innovation and SMEs development and (ii) Capacity building. These issues have thus been considered as common to all focus areas and not treated separately. In case in a

given Pillar, particular emphasis has been given to these issues, they have been analysed as separate focus area and analysed accordingly.

The countries involved are: four EU Member States (Croatia, Greece, Italy and Slovenia), two candidate countries (Montenegro and Serbia), two potential candidate countries (Albania and Bosnia Herzegovina).

The study is thus aimed at **proposing specific actions in terms of “legislation/implementation of rules”, “technologies”, “investments and research” in order to bridge the gaps identified with possible improvements to the forthcoming EUSAIR.**

This Report 2 is made up of **four thematic reports** corresponding to the four Pillars of the EU Strategy for the Adriatic and Ionian Region (EUSAIR), namely:

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

Each thematic report has been structured as follows:

- A. External prospective evaluation: Evaluation Question (EQ) 1 - specificity of Focus Areas to the sea basin, addressing the followings: *“Are the proposed Priorities Areas<sup>1</sup> under each pillar specific to the Adriatic and Ionian geographical area? If yes, which geographical areas are (most) affected per Priority Area?”*
- B. External prospective evaluation: EQ 2 - existing international cooperation addressing the followings: *Which is the level of existing international cooperation per pillar and/or per Priority Area, as appropriate? Include the list of concluded and on-going projects in each pillar and priority area;*
- C. External prospective evaluation: EQ 5 - key investments and research priorities addressing the followings: *Which are the key investment and research priorities related to pillars and priority areas?*
- D. Gap analysis and proposed actions to address these gaps

On the other hand, some sub-tasks of the study address issues transversal to all Pillars, and have thus been developed outside the Thematic Reports. This is the case of:

- the third and fourth question of the external prospective evaluation i.e. (i) an assessment of the governance system in the Adriatic and Ionian Region (addressing the followings: *is the existing governance system effective? If not, identify the gaps and deficiencies, suggest possible solutions. What needs to be done in order to support the AP implementation?*) and (ii) the added value of the EU to be involved (addressing the questions: *is there a clear added value for the EU to be involved? (is there a role from EU or not? If not, is it needed? If yes, can it be improved?). What could be done better from a pillar and priority areas perspective?*),
- the impact assessment of the social, economic, legal and environmental impacts of the actions identified by countries, has been developed separately, since its purpose is to assess the impact of the Strategy as a whole.;

Specific conclusions have been therefore developed for each thematic report and each transversal issues, keeping in mind the overall purpose of Task 2, namely to identify possible suggestions to **maximise “the potential for policy and project-based cooperation” in the Adriatic and Ionian sea-basins.**

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<sup>1</sup> Given the ongoing changes to the structure of the Strategy, we have identified specific groups of objectives/main challenges defined in each Pillar as "Focus Areas", used this term instead of "Priority Area", which has not yet been defined by the EU Commission.

As a separate document, the Annexes contain all detailed analysis carried out for achieving the results included in this Report. Furthermore, a data mapping<sup>2</sup> has been provided in Annex, in order to define what data are available from a common source and at what NUTS level. Each dataset is useful to describe the basic situation per Pillar in the sectors affected by the EUSAIR discussion paper. Possible data gaps have been therefore provided.

The overarching objective of Task 3 remains to support the drafting of the Action Plan of the Adriatic Ionian Strategy. It is worth pointing out that, since the new EUSAIR also covers non-maritime issues, our analysis has been developed only on the maritime component of the EUSAIR.

Finally it should be taken into account that in some instances Country fiches' data and information (Task 2 of the contract, "*Analysis of Blue Growth needs and potential per Country*") have been used for carrying out analyses under this Task. Given that the fiches could be subject to further revisions, some information reported in this Report and/or in its Annex may need to be reviewed accordingly.

## 0.1 Methodology of the analysis

Generally speaking, the development of all sub-tasks of this Report has been influenced by the ongoing process for the definition of the EU strategy for the Adriatic and Ionian Region (EUSAIR).

Focus areas have been used for assessing the "Specificity of the EUSAIR to the Adriatic-Ionian geographical area" as well as for streamlining "potential key investments and research priorities". The following table provides a clear definition of focus areas per Pillar:

1st Pillar	Achieving the sustainable management of fisheries
	Contributing to the profitability of fisheries
	Improving the culture of compliance in fishing activities
	Developing Blue R&D and skills (including clusters)
	Creating new jobs and business opportunities through research and innovation in aquaculture
	Developing tools to properly site aquaculture in waters and the potential co-location with other economic activities
2nd Pillar	Optimising interfaces, procedures and infrastructures to facilitate trade with southern, central and eastern Europe
	Optimising the connections across the region (taking into account islands connectivity)
	Environmental and economic sustainability
	Improving the culture of compliance in flag and port state control, liability and insurance of shipping, ship sanitation and control, accident investigation and port security
	Enhancing cooperation between national or regional maritime authorities on maritime traffic information exchange through SafeSeaNet
	Developing of decision support systems, accident response capacities, and contingency plans
3rd Pillar	Ensuring adequate sources of information and geographical data for crews and navigators
	Enhancing cooperation between national or regional maritime authorities with the EU to face major oil spills
	Ensuring good marine and coastal environment; developing MSP and ICZM at national and cross-border level
	Strengthening the Natura 2000 network, the MSFD and the Barcelona Convention and its protocols
4th Pillar	Reducing marine litter, better waste management in coastal areas through EMSA
	Supporting the sustainable development of coastal and maritime tourism through innovation and common marketing strategies and product
	Guaranteeing the environmental sustainability of the sector
	Promoting the sustainable development of cruise tourism
	Enhancing the value and appreciation of cultural heritage

All Thematic Reports and their related sections have been developed following a common methodology. In order to avoid repetitions, methodologies used for the development of the Thematic are reported below.

<sup>2</sup>Compilation of existing data and information at different levels (EU, cross-national, national and regional) for the four pillars of the strategy (blue economy, marine environment, safer and more secure maritime space and sustainable fisheries)

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

The methodology adopted consists of two main steps. The first step, common to all activities, is a qualitative assessment of the level of information and data availability for the whole Adriatic-Ionian sea-basin, as results from sub-task 3.1. The availability of data and information has been considered as an indicator of the specificity of a given Pillar to the Adriatic and Ionian region.

The second step consists of the geographical contextualization at sea basin level of maritime activities in the Adriatic and Ionian seas based on:

- the main characteristics of the **most promising economic activities**: aquaculture (1st Pillar) transport (2nd Pillar), tourism (4th Pillar), analyzed at country level using both quantitative and qualitative data. These activities resulted as being the most frequent, according to Task 1 of this Study (“Analysis of Blue Growth needs and potential per country”);
- the analysis of **quantitative data** on the 1st Pillar (data on fish stocks) and the 3rd Pillar (environmental expenditure, extension of protected areas);
- the analysis of **qualitative data** on two focus areas (marine litter and oil spills) under the 3rd Pillar: as reported in the conclusions about data availability, no specific and up-to-date statistics on marine litter and oil spills are available. For this reason, the analysis has been based on a UNEP report<sup>3</sup>.
- the level of **international cooperation** on fishery and blue R&D (1st Pillar) and maritime safety/security (2nd Pillar)

As specifically regards the second step, starting from the EUSAIR and cross-checking it with the Maritime Economic Activities (MEAs) analysed in Task 2, we obtained a correspondence table between Pillars, focus areas and MEAs. Each Pillar refers to a certain number of activities, both economic and non-economic, thus establishing a link to the respective focus areas which are going to be developed within the Action Plan:

Some economic activities covered under the 1st Pillar (fishery and aquaculture), 2nd Pillar (maritime transport) and the 4th Pillar (tourism) have been identified as the most promising in almost all countries in the Adriatic and Ionian region. Therefore, the assessment of the relevance of geographical and thematic focus areas of these pillars has been based on data elaborations and information analysed in Task 2 (country fiches).

### 0.1.2 External prospective evaluation: EQ 2 existing international cooperation

In this sub-task, existing maritime cooperation per Pillar has been analysed.

Three main types of information are provided:

1. The list of all cooperation initiatives/structures/organisations identified in the Adriatic Ionian Area, with a brief description of their scope and objectives. To be included in the list, initiatives/structures/organisations need to comply with the following requirements:
  - They need to be constituted on a permanent basis
  - They need to be structured with a well-defined governance
2. The list of all cooperation programmes available in the Adriatic Ionian area, with a brief description of their scopes and objectives.
3. The list of ongoing and concluded cooperation projects carried out in the Adriatic Ionian area under the current financial period, divided by Pillar and Priority Area.

<sup>3</sup> United Nation Environmental Programme, 2009, Marine Litter: A Global Challenge, available at the following [http://www.unep.org/regionalseas/marinelitter/publications/docs/Marine\\_Litter\\_A\\_Global\\_Challenge.pdf](http://www.unep.org/regionalseas/marinelitter/publications/docs/Marine_Litter_A_Global_Challenge.pdf).

An explanation is necessary to understand how the selection of cooperation projects has been carried out.

All cooperation programmes available in the Adriatic-Ionian area have been surveyed. The complete list of programme surveyed is provided in Annex. The geographical scope of these programmes could either be entirely (e.g. IPA Adriatic) or partially (e.g. Programme Med) focused on the Adriatic-Ionian areas. However, in order for a project to be selected, this had to involve at least two partner countries of the Adriatic-Ionian region, regardless of the number of non-Adriatic-Ionian countries. On the other hand, in the specific case of Italy and Greece, , we have considered only project partners located in an Adriatic-Ionian region.

Finally, it should be noted that we have also provided the financial dimension of each cooperation project included in the list. On the one hand we have provided the total budget (including co-funding) of each project. On the other hand, one should also consider that this figure could be misleading in several cases, as large cooperation projects (e.g. those under Programme Med) include many non Adriatic-Ionian countries. For this reason, we have also provided an estimate of the proportion of the budget actually “spent” in the Adriatic-Ionian. This had necessarily to be an estimate because figures at this level of detail could not be retrieved either through evaluation reports or project websites. We have therefore assumed that the budget of each project could be divided up into equal parts between all project partners, and proceeded to attribute to the Adriatic-Ionian only the budget of partners located in Adriatic-Ionian regions.

Findings from this survey have been reported in this Report. The list of cooperation initiatives, programmes and projects have been reported in the Annex.

### 0.1.3 External prospective evaluation: EQ 5 key investments and research priorities

In order to identify key investments and research priorities in the Adriatic-Ionian region, two main analytical approaches have been followed:

- the first one consists of a **desk analysis** of existing documents, background papers and conclusions from the three stakeholders’ workshops (held in Athens, Trieste, Portorož) and the High Level Stakeholders’ conference held in Zagreb. The purpose of this analysis is to link the key investment and research priorities emerged in the workshops over the years with the main focus areas identified for each Pillar;
- the second one consists of the elaboration of **stakeholders’ suggestions** on possible key investments and research priorities. These suggestions derive from direct interviews with different stakeholders (policy makers, national/regional associations, NGOs, Port Authorities and other relevant representatives) and, as far as possible, from the outcomes of the stakeholders’ seminar, held in Brussels on the 14<sup>th</sup> November 2013.

Main findings have been organized by Pillar and related focus areas.

### 0.1.4 Gap analysis

Despite many concluded and ongoing cooperation initiatives in the Region, both at national and regional level, there are still several barriers and problems that risk hampering the implementation of the EUSAIR.

The aim of the gap analysis is to identify actions that could support the EUSAIR to address current gaps hindering socio-economic prosperity in the Adriatic-Ionian Region.

In short, the Gap Analysis will:

1. Highlight **existing barriers/problems** identified in the Impact Assessment, which affect one or more countries in the region; these “problems” derive from the analysis of Country fiches (Task 2 of the present Study);



2. Link the problems with the specific **focus areas** under the four Pillars;
3. Identification of existing gaps between the EUSAIR's objectives and existing problems/barriers in terms of "**legislation/implementation of rules**", "**technologies & innovation**", "**research & education**" and "**socio-economical**" gaps;
4. Starting from stakeholders suggestions and workshop issues, identify possible **actions** (or a mix of actions) through which the EUSAIR can achieve its main objectives and filling possible gaps identified.

The gap analysis has been developed in a Matrix (available in Annex for each Pillar), which includes all details described above. In this Report, for the purpose of readability, only specific gaps and related possible actions per Pillar have been reported.

It has to be taken into account that the Gap analysis developed in this Report 2 refers to challenges/objectives/proposals available at the beginning of November 2013.

Finally as regards the chapter "Overall Assessment of the proposed EUSAIR" (governance assessment, (ii) added value for the EU to be involved) and for the Impact Assessment, specific methodological notes have been included in their respective chapters, namely:

- Added value for the EU to be involved: § 2.1 Methodological remarks;
- Assessment of the governance: § 1.1 Methodological remarks;
- Impact Assessment: § 1.1 Methodology and assumptions;

## 1 General overview on the area: the Blue economy in the Adriatic and Ionian sea-basins

The most frequent "most promising activities" in the Adriatic and Ionian sea-basins derive from the quantitative results of Task 2. For the purposes of Task 3, by adopting a "sea-basin perspective" limited to the Adriatic-Ionian, we observed that (see the table below):

- **Maritime transport:** Short sea shipping is not one of most promising activities only in Bosnia-Herzegovina and Albania due to the lack of infrastructures; deep sea shipping is relevant in Greece and Slovenia; passenger ferry services is one of the most promising activities in all countries except Bosnia-Herzegovina and Greece;
- **Coastal tourism** is one of the most promising activities in all Countries bordering Adriatic and Ionian seas; cruise tourism in EU countries;
- **Marine aquaculture** is listed among the most promising activities in all countries.

Table 1 - Most frequent most promising activities in Adriatic and Ionian countries

	Coastal tourism	Marine aquaculture	Short-sea shipping (incl. Ro-Ro)	Passenger ferry services	Cruise tourism	Yachting and marinas	Deep-sea shipping	Fishing for human consumption	Shipbuilding and ship repair	Blue biotechnology	Protection of habitats
ITALY	*	*	*	*	*						*
GREECE	*	*	*		*	*	*				
CROATIA	*	*	*	*	*	*					
ALBANIA	*	*		*				*			
SLOVENIA	*	*	*		*		*			*	
MONTENEGRO	*	*	*	*		*			*		
BOSNIA / HERZEGOVINA	*	*									
TOTAL	7	7	5	4	4	3	2	1	1	1	1

Results of each of the most promising activities as shown in the table above have been collected and connected with the focus areas of the three economic activities identified in the 1st Pillar (fishery and aquaculture), 2nd Pillar (maritime transport) and 4th Pillar (tourism).

Serbia was excluded from the analysis because, it is landlocked and therefore too few relevant data and information related to the Adriatic and Ionian seas are available.

Despite that the country should receive some benefits within Pillar 2 and 4. Serbia's tourism or trade could take advantage of the development of coastal tourism and ports of neighboring countries and could promote its cultural heritage or commerce by enhancing links with these countries.

According to our elaborations of quantitative data gathered and analyzed in Task 2, at country level the main activities in terms of GVA are: coastal tourism (32,7% of the total GVA), fishing for human consumption (13,3%), short-sea shipping including Ro-Ro (12,7%), offshore oil and gas (10,2%), deep-sea shipping (6,5%), shipbuilding and ship repair (5,6%), passenger ferry services (4,4%) and cruise tourism (3,6%). Also in terms of persons employed, coastal tourism plays a pivotal role in the Adriatic and Ionian sea-basins, occupying 1/3 of all persons employed in the area's blue economy. Important roles in terms of jobs are covered by fishing for human consumption (17,9% employed over the total employed in maritime activities) blue economy) and shipbuilding and ship repair (7,6%). It is worth to mention also the 118.700 (22,2%) employed persons in "agriculture on saline soils", despite often this activity take place far from coastal areas<sup>4</sup>.

<sup>4</sup> "Agriculture on saline soil" has been included in the list of maritime activities because it is assumed that saline soils are located in coastal areas. Actually, in the Mediterranean area and especially in Spain and Greece, saline soils are located in internal areas (see <http://eusoils.jrc.ec.europa.eu/library/themes/salinization/Resources/salinisation.pdf>).

All these activities have therefore a remarkable socio-economic impact on the Blue economy of the area and some of them have been also identified as the “most promising activities” for the Adriatic and Ionian sea-basins.

Marine aquaculture emerged as a “most promising activity” in all countries of the area, although its socio-economic impact has been assessed to be lower than other activities. The key importance of marine aquaculture in area is given by the significant role that the activity could play in terms of both: (i) reducing fishing efforts and (ii) increasing consumption of farmed products.

In order to quantify the role of the blue economy in the Adriatic and Ionian sea-basins, key figures aggregated at sea-basins level are proposed in the table below. However, it has to be taken into account that availability of data is not homogeneous for all the countries in the area, hence these figures should be considered as “indicative” of the maritime dimension of the sea-basins rather than an “exhaustive” definition of the area’s blue economy. Specifically as regards Greece and Italy, specific proxies have been adopted for defining the respective weight of their Adriatic and Ionian maritime areas.

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However, in the Adriatic and Ionian region, agriculture on saline soils occurs totally in coastal NUTS 3 and significantly affects the coastal area employment especially for Italy (around 74.000 employed) and Greece (around 44.000).

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**Table 2 - Indicators of relevant marine and maritime activities in the Adriatic and Ionian sea-basins**

Function/activity			GVA		Employment		Sources and annotations						
			EUR, billion	% on total GVA	*1.000	% on total empl.	Italy	Slovenia	Croatia	Bosnia and Herzegovina	Montenegro	Albania	Greece
<b>0. Other sectors</b>	<b>0.1</b>	Shipbuilding and ship repair	1,21	5,6	40,49	7,6	EUROSTAT (2010)	EUROSTAT (2010)	EUROSTAT (2010)	No activity	n.a	n.a	ELSTAT (2010)
	<b>0.2</b>	Water projects	0,31	1,4	8,12	1,5	EUROSTAT (2010)	EUROSTAT (2010)	EUROSTAT (2010)	No activity	n.a	n.a	ELSTAT (2010)
<b>1. Maritime transport</b>	<b>1.1</b>	Deep-sea shipping	1,41	6,5	10,93	2,0	EUROSTAT (2010)	EUROSTAT (2010)	Croatian Chamber of Commerce	No activity	No activity	n.a	EUROSTAT, 2010; ELSTAT, 2010,
	<b>1.2</b>	Short-sea shipping (incl. Ro-Ro)	2,72	12,7	28,78	5,4	EUROSTAT (2010)	EUROSTAT (2010)	Croatian Chamber of Commerce	No activity	MONSTAT (2011)	n.a	EUROSTAT (2010); ELSTAT (2010)
	<b>1.3</b>	Passenger ferry services	0,95	4,4	13,65	2,6	EUROSTAT (2010)	EUROSTAT (2010)	Croatian Chamber of Commerce	No activity	MONSTAT (2011)	n.a	EUROSTAT (2010); ELSTAT (2010)
	<b>1.4</b>	Inland waterway transport	0,07	0,3	2,50	0,5	EUROSTAT (2010)	n.a.	Croatian Chamber of Commerce	No activity	No activity	n.a	No activity
<b>2. Food, nutrition, health and eco-system services</b>	<b>2.1</b>	Fishing for human consumption	2,85	13,3	95,42	17,9	EUROSTAT (2010)	EUROSTAT (2010)	EUROSTAT (2010)	Minister of Agriculture, Water Management and Forestry (2012)	MONSTAT (2011)	n.a.	EUROSTAT (2010); ELSTAT (2010)
	<b>2.2</b>	Fishing for animal feeding	0,00	0,0	0,00	0,0	No activity						
	<b>2.3</b>	Marine aquaculture	0,25	1,2	4,03	0,8	EUROSTAT (2010)	JRC (2010)	Ministry of Agriculture	FSZ (2012); Technical Directions for fish farming EC LIFE (2008)	Ministry of Agriculture and Rural Development (2010)	n.a.	EUROSTAT (2010); ELSTAT (2010); JRC (2010)
	<b>2.4</b>	Blue biotechnology	0,00	0,0	0,00	0,0	n.a.	n.a.	n.a.	No activity	n.a.	n.a.	n.a.
	<b>2.5</b>	Agriculture on saline soils	0,81	3,8	118,70	22,2	EUROSTAT (2010); JRC (2010)	EUROSTAT (2010); JRC (2010)	No activity	No activity	No activity	n.a.	EUROSTAT (2010); JRC (2010)
<b>3. Energy and raw materials</b>	<b>3.1</b>	Offshore oil and gas	2,18	10,2	5,97	1,1	EUROSTAT (2010); MISE (2012)	No activity	Croatian Chamber of Commerce	No activity	No activity	n.a.	n.a.
	<b>3.2</b>	Offshore wind	0,00	0,0	0,00	0,0	No activity						
	<b>3.3</b>	Ocean renewable energy	0,00	0,0	0,00	0,0	No activity						

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Function/activity			GVA		Employment		Sources and annotations						
			EUR, billion	% on total GVA	*1.000	% on total empl.	Italy	Slovenia	Croatia	Bosnia and Herzegovina	Montenegro	Albania	Greece
	3.4	Carbon capture and storage	0,00	0,0	0,00	0,0	No activity						
	3.5	Aggregates mining (sand, gravel, etc.)	0,00	0,0	0,00	0,0	No activity						
	3.6	Marine minerals mining	0,00	0,0	0,00	0,0	No activity						
	3.7	Securing fresh water supply (desalination)	0,06	0,3	0,67	0,1	EUROSTAT (2010); Global water Market (2010)	No activity	No activity	No activity	No activity	n.a.	ELSTAT (2010); EEE (2010)
4. Leisure, working and living	4.1	Coastal tourism	7,02	32,7	176,41	33,0	EUROSTAT (2010); Unioncamere (2010)	EUROSTAT (2010)	EUROSTAT (2010)	World tourist organisation (2012)	MONSTAT (2009)	INSTAT (2011)	EUROSTAT (2010); ELSTAT (2010)
	4.2	Yachting and marinas	0,21	1,0	7,49	1,4	EUROSTAT (2010); UCINA (2012)	n.a.	n.a.	No activity	n.a.	n.a.	Experts knowlegde
	4.3	Cruise tourism	0,78	3,6	14,86	2,8	EUROSTAT (2010); European Cruise Council (2010)	EUROSTAT (2010)	EUROSTAT (2010)	No activity	n.a.	n.a.	EUROSTAT (2010); ELSTAT (2010); ECC (2010)
5. Coastal protection	5.1	Protection against flooding and erosion	0,12	0,5	1,13	0,2	PRC (2009)	EUROSTAT (2010); PRC (2009)	n.a.	No activity	n.a.	n.a.	EUROSTAT (2010); PRC (2009)
	5.2	Preventing salt water intrusion	0,00	0,0	0,00	0,0	n.a.	n.a.	n.a.	No activity	n.a.	n.a.	n.a.
	5.3	Protection of habitats	0,27	1,3	2,71	0,5	EUROSTAT (2010); EEA (2013)	EUROSTAT (2010); EEA (2013)	n.a.	No activity	n.a.	n.a.	n.a.
6. Maritime monitoring and surveillance	6.1	Traceability and security of goods supply chains	0,09	0,4	0,85	0,2	Italian national accounts (2010)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	6.2	Prevent and protect against illegal movement of people and goods	0,09	0,4	0,85	0,2	Italian national accounts (2010)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
	6.3	Environmental monitoring	0,09	0,4	0,85	0,2	Italian national accounts (2010)	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
<b>Total</b>			21,49	100,0	534,43	100,0	Green cells indicate that the country is contributing to the GVA of the activity at sea-basin level. Red highlighted cells indicate that the activity is not present ("No activity") or data are not available ("n.a."). For more details see country fiches.						

Thematic Report 1

**Driving innovative  
maritime and marine growth  
(1<sup>st</sup> PILLAR)**

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

## 1.1 Task reminder and methodology

EQ 1 of the external prospective evaluation asks to assess the specificity of Priorities Areas under each pillar in relation to the Adriatic and Ionian, and which geographical areas are (most) affected per Priority Area.

For further details on the methodology adopted for developing this question, please see § 0.1.1 in the chapter “Methodology of the analysis”.

## 1.2 Assessment on the specificity of the 1<sup>st</sup>Pillar to the Adriatic-Ionian sea-basins

In order to assess the “specificity of a given Pillar to the Adriatic and Ionian region”, the availability of data and information has been adopted as a qualitative indicator. This indicator has not been considered as an exhaustive tool for the analysis and therefore needs to be complemented by a second analysis step (reported in the following § 1.3).

Below, main findings for the 1<sup>st</sup>Pillar are reported.

### **Fishery**

According to the findings of the Blue Growth analysis, fishing activities in the Adriatic and Ionian sea-basin are totally aimed to human consumption and cover an important role in the area’s blue economy. As a matter of fact, it is the second most important activity in terms of GVA (13,3% over the total blue GVA in the area), while it is the third activity as regards employment (17,9%).

Several sources of information and data about fishing activities have been found at different levels (international, EU, national), analysing the sector under different perspectives. As a source of information common to all countries of the area, FAO provides figures on catches at national level detailed by fishing area and species. The availability of data by fishing area enables us to avoid the use of regional data sources in order to collect quantitative information on fishing activities at sea-basin level. Other useful and available information concerns the fishing fleet, tonnage, engine power and number of vessels, available only for Italy, Greece and Slovenia at national level.

As regards sustainability of fisheries and the status of fish stocks in European fishing regions, the European Environment Agency provides the proportion of assessed stocks that are overfished and stocks within safe biological limits according to the magnitude of the regional catches.

A detailed analysis on the EU fishing fleet and its profitability is available in the JRC-STEFCF “Annual Economic Report on the EU Fishing Fleet”, focusing only on EU MS.

Another important source of data is the ADRIAMED project (based on FAO’s data), providing interesting albeit outdated (last year available is 2005) country sheets for each country of the Adriatic (Albania, Croatia, Italy, Montenegro and Slovenia)

More-in-depth data about fishing are available through national and regional statistical sources, such as:

- Italy: IREPA research institute (Istituto di Ricerche Economiche per la Pesca e l’Acquacoltura) collects data on the number of vessels, gross tonnage, engine power, crew, production and prices by fleet segment or by species, days at sea by fleet segment, indicators of biological and economic sustainability, both by fleet segment, total intermediate costs by fleet segment, income statement by fleet segment: <http://www.irepa.org/it/dati-sistan/dati-regionali/2011.html>

- Greece: ETANAL<sup>5</sup> provides information on catches in Greece, while EL.STAT<sup>6</sup> (Hellenic Statistics Authority) manages data on fleet and catches.
- Croatia: the Ministry of agriculture (Directorate of Fisheries) collects data on fishing fleet and catches, available on the web<sup>7</sup>
- Slovenia: data on catches and fleet are available in the Statistical Office of Slovenia<sup>8</sup>;
- Bosnia and Herzegovina: not relevant in the country;
- Montenegro: catch of saltwater fish by species, catch of fresh water fish by species, employees in fishing and boats fishing<sup>9</sup>
- Albania: marine fish caught by fishing category (coastal line, costal lagoons or inland waters)<sup>10</sup>

### **Blue R&D**

Within the Task 2 of the present study, R&D has not been identified as a “maritime activity”, given that it has been considered part of the value chain of all activities. Under a macro-regional perspective, it emerged that a wide number of research institutes and organisations are located in the area but in the meantime, a general lack of financial resources is hindering the exploitation of R&D potential of the area.

Useful data (expenditure and persons employed) are however available in EUROSTAT, OECD and UNESCO at NUTS 0 level to describe R&D in the area both for EU and non-EU countries. Although geographic and sector details are missing, the large set of variables (sector of performance, economic activity, source of funds, type of cost, type of R&D, field of science and socio-economic objective) can help to elaborate proxies on those data and indicators related only to the Adriatic-Ionian sea-basin.

Therefore, findings of the Task 2 analysis and the availability of data for Blue Research and development are keen indicators for confirming that Blue R & D is specific in the Adriatic and Ionian sea-basins.

### **Aquaculture**

Despite it does not appear among the largest marine and maritime activities of the area’s Blue economy, marine aquaculture has been identified as one of the most promising activities in all countries of the area and it is considered therefore as specific of the area. The growth potential of the activity is mainly constituted by its “sustainability feature”, which could reduce fishing efforts in the area, diversifying the origin of supply of fishery products in terms of production methods.

Most data useful to describe the base situation both in EU and non-EU Member States are available on EUROSTAT at NUTS 0 level and concern the production value and quantity. Although geographic details are missing, the large set of variables (water environment, methods and species farmed) can help to elaborate proxies on those data and indicators related only to the Adriatic-Ionian sea-basin.

More in-depth data about aquaculture have to be obtained through national and regional statistical sources, such as:

<sup>5</sup> <http://www.etanal.gr>

<sup>6</sup> <http://www.statistics.gr/portal/page/portal/ESYE/PAGE-database>

<sup>7</sup> <http://www.mps.hr/ribarstvo/default.aspx?id=69>

<sup>8</sup> [http://pxweb.stat.si/pxweb/Database/Environment/15\\_agriculture\\_fishing/08\\_15191\\_fishery/08\\_15191\\_fishery.asp](http://pxweb.stat.si/pxweb/Database/Environment/15_agriculture_fishing/08_15191_fishery/08_15191_fishery.asp)

<sup>9</sup> <http://www.monstat.org/eng/page.php?id=1006&pageid=162>

<sup>10</sup> <http://www.instat.gov.al/en/themes/agriculture,-forestry-and-fishery.aspx>



- Albania: Aquaculture production<sup>11</sup>
- Greece: ETANAL and EL.STAT (Hellenic Statistics Authority) provide information on fish farming (production in volume and value, structure of the sector, type of farming, etc.) in Greece;
- Croatia: no figures at national level
- Slovenia: data on aquaculture production are available in the Statistical Office of Slovenia<sup>12</sup>;
- Bosnia and Herzegovina: not relevant in the country;
- Montenegro: Few and confidential data at national level (in charge Ministries)
- Italy: Only spot studies<sup>13</sup>.

The analysis put into evidence that the focus areas identified in the 1st Pillar are covered by multiple sources of information. The significant availability of information is an indication of the relevance of the 1<sup>st</sup> Pillar's focus areas in the Adriatic and Ionian countries. On the other hand, aquaculture (and especially marine farming) resulted to be surveyed at country level only in a few countries (Slovenia, Albania, Greece), while Italy and Croatia do not have any regular reporting system in place at national level. However, EUROSTAT's database fills this gap, since it reports precise and timely data on aquaculture production (volume and value).

As resulting from the assessment and from information and data analysed, the 1<sup>st</sup> Pillar is considered specific to the Adriatic and Ionian region.

### **1.3 Assessment of the geographical areas most affected**

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In this paragraph, only final conclusions of the analysis conducted for each "focus area" of the 1st Pillar are reported. The complete analysis is provided in §1.1 of the Annex.

The methodology adopted for developing this assessment has been described in detail in § 0.1.1.

#### **➤ Results of the assessment of the geographical areas most affected**

Six focus areas have been identified, and grouped into 3 areas: (i) fisheries, (ii) blue R&D and (ii) aquaculture. Below is provided a snapshot with the main findings:

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<sup>11</sup> <http://www.instat.gov.al/en/themes/agriculture.-forestry-and-fishery.aspx>

<sup>12</sup> [http://pxweb.stat.si/pxweb/Database/Environment/15\\_agriculture\\_fishing/08\\_15191\\_fishery/08\\_15191\\_fishery.asp](http://pxweb.stat.si/pxweb/Database/Environment/15_agriculture_fishing/08_15191_fishery/08_15191_fishery.asp)

<sup>13</sup> <http://www.politicheagricole.it/flex/cm/pages/ServeBLOB.php/L/IT/IDPagina/5164>

Table 3 - Summary table: main findings and most affected areas

	Focus area	Main findings	Most affected Adriatic-Ionian areas/countries
Fishery	Achieving the <b>sustainable management of fisheries</b>	Over-exploitation of the Adriatic sea and lack of coordinated management of stocks and fishing activities is one of the most alarming problem in the area	Adriatic Sea
	Contributing to <b>profitability of fisheries</b>	It is needed to promote the improvement of the sea and coastal ecosystems by proposing models for a coordinated fishery management jointly with direct actions for improving fisheries profitability.	Whole sea basin (Adriatic and Ionian seas)
	Improving the <b>culture of compliance in fishing activities</b>	The challenge of protecting and restoring the marine ecosystem can be effectively and efficiently tackled only with choices and interventions coordinated at sea-basin level, within the EUSAIR context, according to a participative approach in which institutions act in coordination with- and with the involvement of- scientific bodies and economic/social actors	Whole sea basin (Adriatic and Ionian seas)
Blue R & D	Developing <b>Blue R&amp;D and skills</b> (including clusters)	Blue R&D projects along with activities toward the improvement of skills and development of clusters in all sectors of maritime economy are mainly under the umbrella of the 7th Framework Programme. A relevant contribution for the sector of fisheries has been done by ADRIAMED initiative. There are also many projects financed through European Territorial Cooperation programmes that involve also other EU countries. Among them, is worth to mention Med Programme which funded a number of projects analysed, especially the ones addressing maritime transport issues.	Whole sea basin (Adriatic and Ionian seas)
Aquaculture	Creating <b>new jobs and business opportunities through research and innovation</b> in aquaculture	Research and innovation is a fundamental priority area for the European aquaculture sector, trying to reduce its dependency of fish from abroad, to develop self-sufficiency and more export orientated production	Fundamental priority area for Italian, Croatian and Greek aquaculture. Potential priority for Albania, Montenegro and Slovenia
	Developing <b>tools to properly site aquaculture</b> in waters and the potential <b>co-location with other economic activities</b>	Developing the potential co-location with other economic activities is very important and the site selection for aquaculture planning in the most suitable zones for aquaculture needs further development	Co-location in Croatia, Italy, Slovenia and Montenegro, site selection in Greece and Albania

As regards fishery:

- As regards the focus area “**sustainable management of fisheries**”, the analysis put into evidence that this topic is specific to both the Adriatic area and the Ionian although with a differentiated level of overexploitation<sup>14</sup>. The Adriatic and Ionian Sea seems to be affected by an inefficient management that causes negative impacts on the environment and fishing economy, such as: over-exploitation of stocks, outdated technologies and inadequate fishing methods and shortcomings in the conservation, transformation and commercialisation systems. It also has negative impacts on food security.
- The sustainable management of fisheries is strongly linked to the focus area “**profitability of fisheries**”, covering the same important role in the area as a whole. Despite the low number of implemented projects focusing on an increase of profitability of fishery activities, all countries in the area (except Bosnia and Herzegovina and Serbia, which is landlocked) have implemented or have been involved in specific projects in this focus area in recent years. Limited to projects analysed, it has been pointed out that a better designed cooperation across the Adriatic-Ionian sea-basin should trigger a virtuous process of

<sup>14</sup> According to the EEA, more than 75% of stocks in the Adriatic are overfished. In the Ionian, this percentage is certainly lower (50%), but it remains however alarming (Source: European Environment Agency, [http://www.eea.europa.eu/data-and-maps/figures/status-of-fish-stocks-in-the-international-council-for-the-exploration-of-the-sea-ices-and-general-fisheries-commission-for-the-mediterranean-gfcm-fishing-regions-of-europe/map\\_5-2\\_proportion-of-stock-final.ep](http://www.eea.europa.eu/data-and-maps/figures/status-of-fish-stocks-in-the-international-council-for-the-exploration-of-the-sea-ices-and-general-fisheries-commission-for-the-mediterranean-gfcm-fishing-regions-of-europe/map_5-2_proportion-of-stock-final.ep)).

increasing the competitiveness of the coastal communities depending from fishery, widening stakeholders' involvement.

- c) The sustainable use of resources and the integrate control of fisheries across the Adriatic-Ionian Sea basin is the main topic underlying the focus area aimed at “**improving the culture of compliance in fishing activities**”. As an obvious consequence of the two focus areas reported above, it has resulted to have a pivotal role in the entire Adriatic-Ionian Region, and extra-EU countries are the main (but not the only) target of this focus area. It implies the execution of strategic choices as well as the implementation of practical actions, shared at cross-border level, allowing to stop the impoverishment of natural resources and the co-related economic and social decline of coastal communities. The involvement of third countries in this focus area is essential for its successful implementation, supporting “building capacity actions” of candidates/potential candidates countries to comply with the EU *acquis* on fisheries.

As regards Blue R & D and skills (including clusters):

- a) Given that it includes activities aimed at supporting other focus areas, it is considered specific to the Adriatic-Ionian sea basins. Projects carried during the last programming period are mainly under the umbrella of the 7th Framework Programme. A relevant contribution for the sector of fisheries has been done by ADRIAMED initiative and other European Territorial Cooperation programmes, such as Med Programme which funded a number of projects especially addressing maritime transport issues. In geographical terms, the focus area affects all the countries in the sea-basin. However, non-EU countries have a great potential in terms of blue R&D, which is still limited by old technologies, lack of support schemes, planning and financial funds. Furthermore it appears that Blue R&D presently addresses mainly maritime transport, while it can be enhanced towards issues concerning fisheries, aquaculture and broadly the protection of marine environment.

As regards aquaculture:

- a) the focus area “**new jobs and business opportunities in aquaculture through research and innovation**” has turned out to be specific to countries (Italy, Croatia and Greece) where marine aquaculture is a key sector in the blue economy. In the remaining countries, marine aquaculture is relatively small<sup>15</sup>, albeit with significant potential in relation with its capacity to reduce EU dependency on imports, and decreasing the pressure on wild stocks. The activity may thus play a pivotal role in the entire area.
- b) The last focus area “**tools to properly site aquaculture in waters and co-location with other activities**” is linked to the overall development of marine aquaculture in close relation with other activities. This focus area is referred both to countries with a large (Croatia, Italy and Greece), and a small production<sup>16</sup>. In both cases, development of new sites needs proper space planning, in coordination with other activities. This already happens in Italy (especially on the North-Adriatic shore), where aquaculture is strictly linked to the conservation of habitats and the ecosystem services, as well as to tourism. Aquaculture production differentiation could boost the development of the activity, but it needs to be coordinated with other marine and maritime activities, in order to optimize the use of spaces available. As highlighted in Task 2 of this Study, MSP and ICZM implementation could represent key tools to an efficient space planning. Especially in Greece, Albania and Montenegro there is a lack of planning in the most suitable zones for aquaculture.

<sup>15</sup> Task 2 of the present Study (“Analysis on the Blue Growth potential per country”) confirmed the small size of farming plants in Slovenia, Albania and Montenegro, characterised by old technologies, lack of support schemes, planning and financial funds.

<sup>16</sup> As emerged from Country fiches, developed in Task 2, Marine aquaculture resulted as “most promising” activity in all Adriatic and Ionian Countries.

## 2 External prospective evaluation: EQ 2 existing international cooperation

### 2.1 Task reminder and methodology

EQ2 of the external prospective evaluation asks to assess existing cooperation in the Adriatic and Ionian region per Pillar or per Priority Area as appropriate, including a list of concluded cooperation projects in the area.

For more details on methodology adopted for developing this question, please see § 0.1.2 in the chapter “Methodology of the analysis”.

### 2.2 Assessment on the level of existing cooperation

A total number of 33 cooperation projects have been identified under the first Pillar, 21 of which are still ongoing. On the overall, a total of EUR 118.453.078,08 have been mobilised, of which only about 42,5% have been spent by partners based in the Adriatic-Ionian.

The first Pillar aims to foster adaptation to a resource efficient seafood production and consumption, as well as boosting blue research, innovation and skills.

In comparison, projects addressing cooperation in the seafood sector (including fisheries and aquaculture) are relatively few. This is probably because cooperation in the area is mainly dealt with through the GFCM<sup>17</sup> and its regional initiatives ADRIAMed and EASTMed (see Annex, § 8.2). Therefore a low number of projects does not necessarily mean that there is a low level of cooperation. Cooperation on fisheries and aquaculture is in fact at an advanced state in the Adriatic-Ionian, thanks to the precious work of the GFCM and the CFP, which is contributing to harmonising standard and approaches between Member States.

On the other hand, the vast majority of projects under this pillar seems to address research, skills, and clusters related to several activities of the blue economy. Indeed, by looking at the list of cooperation projects (please see Annex, § 8.4), one can immediately notice that most of them deal with “traditional sectors” of the blue economy (e.g. maritime transport, monitoring, and environment). Innovative sectors are poorly addressed, partly because of the lack of structural conditions (e.g. as emerged from Country fiches developed in Task 2, excepted for few countries, there is low potential for offshore marine energy in the Mediterranean and especially in the Adriatic-Ionian region, due to physical and natural characteristics<sup>18</sup>), and partly because, generally speaking, Adriatic and Ionian countries are lagging behind in terms of R&D, compared to northern European countries. By way of an example, we could take into consideration the situation of blue biotechnology. During our analysis, it has emerged that a good number of cooperation projects are being carried in this field, especially through the 7<sup>th</sup> Framework Programme. However, it has not been possible to survey a project in which at least two Adriatic and/or Ionian took part. When Adriatic and Ionian institution are involved in such projects, they generally cooperate with countries from other regions of the EU. This may well be due to the fact that blue biotechnology, as many innovation-driven sectors, has an intrinsically international connotation, because of which partners seek cooperation where they can recognise the existence of “best practices”, rather than addressing challenges at a sea-basin level, which in such a case does not seem to offer any particular

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<sup>17</sup> General Fishery Commission for the Mediterranean.

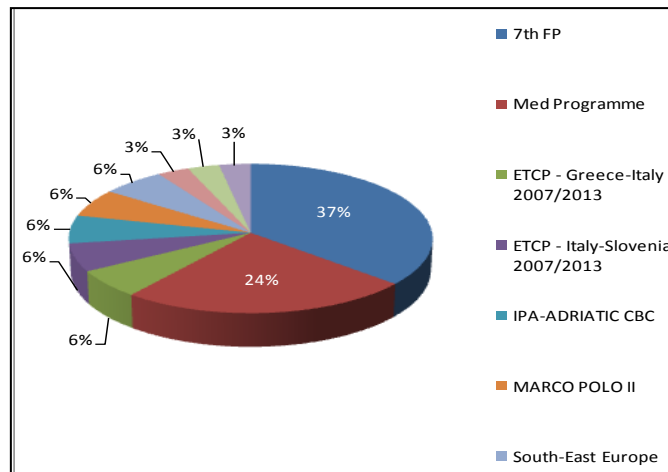
<sup>18</sup> As highlighted by Lavagnini et al., due to challenging wind speed and orographic configuration of the Med, only few locations have resulted to be favourable to offshore wind farms installations. See the following <http://citeseerx.ist.psu.edu/viewdoc/download?rep=rep1&type=pdf&doi=10.1.1.113.9536>.

advantages<sup>19</sup>. But, as said above, this may also be due to a generalised lower inclination towards innovation-based sectors.

Nevertheless, it should also be considered that the blue economy is a relatively new concept, and was not taken into account at the beginning of the current financial framework, when operational programmes priorities were being defined.

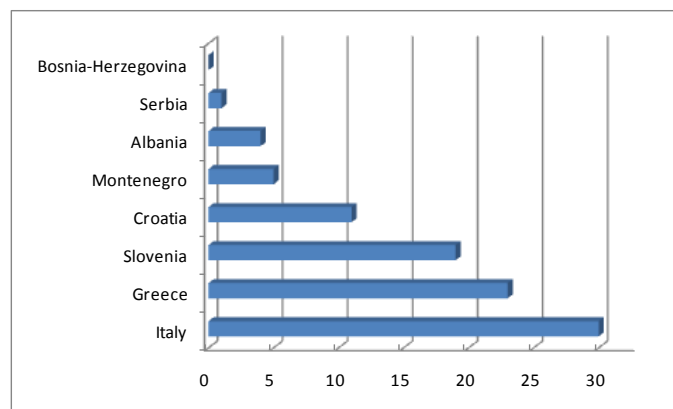
12 out of 33 projects were financed through the 7<sup>th</sup> FP, as one would naturally argue. 8 projects were financed through the Med Programme, while all the others are more or less equally distributed across the other funding programmes. The figure below shows the distribution of Projects by funding source:

**Figure 1 – Percentage of projects by funding source**



When it comes to the participation of countries, one immediately notices that Italy is present in nearly all cooperation projects under this Pillar (30 out of 33).

**Figure 2 – Number of projects by country**



This is not particularly surprising considering Italy’s relevance along the whole sea-basin.

Our analysis seems to suggest that cooperation tends to be more intense between Member States of the EU, since they have access to more cooperation funds and have quite likely developed a natural tendency to cooperate between each other. Finally, it should also be considered that Italy, Greece,

<sup>19</sup> It may be interesting to note the ratio of funds spent by Adriatic-Ionian partners over the total funding for cooperation available for the 1<sup>st</sup> Pillar. This is 42,5%, the lowest compared with the 73,2% of the 2<sup>nd</sup> Pillar, the 48,7% of the 3<sup>rd</sup> Pillar, and the astounding 92,2% of the 4<sup>th</sup> Pillar. Interestingly, in a context as the Adriatic-Ionian, this may be seen as a confirmation that research and innovation-based activities naturally tend to seek cooperation at a broader level than sea basin. As a matter of fact, given the limited critical mass in terms of partners and R&D capacity of the area, cooperation initiatives in this sector encompass partnerships beyond the Adriatic and Ionian borders.

and Croatia are by far the most important countries of the sea basin in terms of fisheries and aquaculture production, and this also affects the final result.

### 3 External prospective evaluation: EQ 5 key investments and research priorities

#### 3.1 Task reminder and methodology

Question 5 of the external prospective evaluation asks to identify key investments and research priorities in the Adriatic and Ionian region per Pillar and priority area.

For more details on methodology adopted for developing this question, please see § 0.1.3 in the “Methodology of the analysis” chapter.

#### 3.2 Key investments and research priorities

According to main findings from the four workshops (Athens, Trieste, Portorož and Zagreb) and as resulting from stakeholders’ opinions, the following key investments and research priorities have been identified. These findings have been presented and discussed with stakeholders and relevant public authorities in the Stakeholders Seminar, held in Brussels on the 14<sup>th</sup> of November 2013.

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
Achieving the sustainable management of fisheries	<i>EU/National/regional authorities,</i>	<b>Database of fisheries resources:</b> establishment of a common database at sea-basin level to monitor the stock levels in the Adriatic and Ionian region
	<i>Research Institutes</i> <i>Sector associations</i>	<b>Fishery management plans:</b> establishing Management plans <sup>20</sup> which, depending on distance from the coast (in or out territorial waters), must be managed at international or national level. Ex-ante studies should be carried out in order to simulate consequences of different management systems.
Contributing to profitability of fisheries	<i>Sectors operators, POs,</i>	<b>Anti-crisis network:</b> creation of a network to quickly respond to crisis situations in the food industry. Crisis situation can be prevented only by increasing the level of knowledge of the market and related trends. The set up of market monitoring tool at sea basin level could support the prevention of crisis, aimed at collecting and elaborating data and information and disseminating them.
	<i>Training institutes,</i> <i>Sector associations</i> <i>Regional authorities</i>	<b>Improvement and diversification of fishing activities:</b> in order to promote a sustainable economic growth and new job opportunities it is important to create specific educational and training programs for fishermen with the main objective of disseminating new fishing techniques, aiming at the strengthening of the safety of workers. There is a need for a renewal of the equipment of fleets for strengthening the security of the employees and for improving storage facilities. Others job opportunities can be created by setting conditions to promote parallel activities between fishermen activities and fishing tourism.
Improving the culture of compliance in fishing activities	<i>Union professional organisation,</i>	No actions identified
	<i>Fishermen,</i> <i>National/Regional authorities,</i> <i>National Coast Guards</i>	<b>Monitoring station:</b> institutional investments should be made in order to create a control system of fishing effort that could help to fix fishing effort-based by the dynamic and type of gear and not based on the horsepower and the tonnage of the vessels. MS should design their own policies based on the national economic and environmental circumstances and specificities, but in a wider context, a monitoring authority at sea-basin level for monitoring fishing activities is supposed to be established. Coastal monitoring stations could be created for all activities impacting the sea and adequate means should be used (example boats and helicopters) for monitoring these activities.

<sup>20</sup> As defined by the Reg. CE 1967/2006 for the Mediterranean Sea, art 18-19.

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
Developing Blue R&D and skills (including clusters)	<i>Research Institutes (national and international), Private operators (fishermen, POs, processors, etc, ) National/Regional authorities</i>	<p><u>From stakeholder's workshops:</u></p> <p>No actions identified</p> <p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li>• <b>Stimulate Clustering:</b> Investments are needed for the creation of aquaculture clusters, as well as for the creation and modernization of the infrastructures in all activities included in the supply chain of the sector. Research for the differentiation of production, the introduction of new species and the increase of quality standards (production and marketing) are some of the key objectives to be pursued by aquaculture clusters. Aquaculture clusters could also attract investments for financing the sector (seed capitals).</li> <li>• <b>Scientific cooperation and Integrated approach:</b> promote research and studies regarding fish stocks, in relation to their movements, in order to determine the fishing capacity of the Adriatic Ionian. These studies will also establish relationships between fisheries and aquaculture (e.g. shipping, tourism, amateur fishing, small-scale fisheries etc) in order to define possible synergies among different maritime activities.</li> <li>• <b>Scientific investigation in fisheries:</b> support countries to increase data collection and scientific capacity, identifying scientific thematic areas of investigation to be jointly explored by national research institutions, e.g.: (i) the ecology of larval and juvenile stages and stock recruitment relationship of small pelagic and demersal fish relevant for fisheries; (ii) stock connectivity at basin level of the most important fishery resources; (iii) the biology and ecology of important coastal resources (e.g. Sparidae) targeted by the small scale fishery.</li> </ul>
		<p><u>From stakeholder's workshops:</u></p> <ul style="list-style-type: none"> <li>• <b>Aquaculture promotion:</b> promotion of aquaculture products from the Adriatic and Ionian region: organisation of regional fairs for aquaculture products</li> </ul> <p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li>• <b>Profitability in aquaculture:</b> big gaps in aquaculture productions are quality schemes, labeling, and marketing application in the market together with building up big and separated markets with necessary standards (sanitary and qualitative) – therefore should be supported investments in the private sector that meet such standards. Supports are needed in order to increase the cage number at the sea, intensify the existing species and introducing a new high commercial value species.</li> </ul>
Developing tools to properly site aquaculture	---	<p><u>From stakeholder's workshops:</u></p> <p>No actions identified</p> <p><u>From interviews:</u></p> <p>No actions identified</p>

## 4 Gap analysis

### 4.1 Task reminder and methodology

The Gap analysis asks to identify actions that could support the EUSAIR to address current gaps that could potentially hinder sustainable economic and social prosperity through growth and jobs creation. It has to be taken into account that the Gap analysis developed in this Report 2 refers to challenges/objectives/proposals available at the beginning of November 2013.

For more details on methodology adopted for developing this question, please see § 0.1.4 in the “Methodology of the analysis” chapter. The complete gap analysis for Pillar 1 has been reported in Annex, § 1.3. Below gaps and related actions to fill the gaps identified have been reported.

### 4.2 Gap analysis results and possible actions for filling gaps

Table 4 – Gaps identified and proposed actions

Pillar	Gaps	Actions
1	<b>Socio-economic gap:</b> Sustainability of fishery is linked to the reduction of fishing efforts, but this may have a negative impact on socio-economic conditions of fishermen.	Support diversification of fishing activities in order to reduce fishing efforts of the fishermen in the Adriatic. For EU countries, Fisheries Local Action Groups (FLAGs) could prove the natural tool to address this gap. IPA could be used to fund initiatives in candidate and potential candidate countries.
	<b>Legislation/implementation of rules gap:</b> The EUSAIR mentions compliance with the Common Fishery Policy’s (CFP’s) obligations only as regards fishing methods and gears”. A wider inclusion of the CFP’s objectives in the EUSAIR could be envisaged	Include the CFP’s objectives in the EUSAIR, with special mention of CFP’s “social dimension” objectives. The EUSAIR should also include specific support to capacity building in candidate and potential candidate countries to align their fishery policies to CFP objectives.
	<b>Legislation/implementation of rules gap:</b> Legislative measures to reduce administrative procedures and bureaucratic obstacles for farming activities.	Reduce administrative burdens and constraints for the development of the aquaculture sector. Speed up and streamline licensing procedures and permissions for new farming plants. Set up a macro-regional working group to explore the feasibility of standardizing licensing procedures in the area.
	<b>Socio-economic gap:</b> Access to finance, which has proven one of the main challenges for the aquaculture sector in the Adriatic-Ionian, has not been encompassed in the EUSAIR.	Include specific guarantee schemes at the macro-regional level to finance these actions (enabling banks and other lenders to lend to SMEs that do not have the proven track record needed for a commercial loan). The EUSAIR should encompass specific actions to support innovation in the sector. A macro-regional set of guidelines should be adopted for developing and building “sustainable farming plants” that will increase production.

## 5 Specific Conclusions

The results of our perspective evaluation have put into evidence that **cooperation in the focus areas under the 1<sup>st</sup> Pillar** is particularly intense between EU MSs, also benefitting from the large financial resources provided by the EU. On the other hand, non-EU countries have resulted to be less involved in cooperation projects on focus areas under the 1<sup>st</sup> Pillar. Generally speaking, it has emerged that cooperation within the fishery sector takes place mainly under the umbrella of the GFCM (§ 2.2 of this thematic report).

As a logical consequence, and in order to optimise cooperation between countries in the area, the implementation of the EUSAIR and its adequate promotion in candidate and potential candidate countries could foster cooperation in the fishery sector.

As regards the **specificity of the 1<sup>st</sup> Pillar to the Adriatic and Ionian sea-basins**, our analysis (§1.3 of this thematic report) has put into evidence that this Pillar is specific to the area, both as regards fishery and aquaculture.



Indeed **sustainability of fisheries** is one of the key focus areas of the EUSAIR, because of its relevance in terms of economic and ecological implications. From the “ecological” perspective, as highlighted by our analysis, the Adriatic sea has resulted to be more affected by this issue because of the higher level of exploitation of fish stocks (although exploitation in the Ionian sea is considerable as well). In order to deal with this problem, several “key investments” have been identified such as: development of a fisheries resources’ database, renewal of the means of production, implementation of specific education programmes and adoption of specific Fishery management plans shared and respected by all countries in the area (a full list is provided in § 3.2 of this thematic report).

A socio economic gap has been identified in the EUSAIR related to “sustainability of fisheries”. The sustainable management of fishery indirectly generates an increase of profitability of the sector in general, with higher incomes for fishermen and wider availability of the natural resource. On the other hand, sustainability of fishery is also linked to the reduction of fishing efforts and diversification of fishermen activity, which has not been expressly envisaged in the EUSAIR. In order to limit fishing efforts, diversification of fishing activities could represent a key action supporting the sustainable management of resources in order to reduce fishing efforts of the fishermen in the Adriatic Sea. For EU countries, FLAGS could represent the natural tool for addressing this gap. IPA could be used for funding initiatives as such in non-EU countries.

**Fishery profitability** (mainly constituted by small-scale coastal fishery) and the implementation of the “culture of compliance” have also been identified as key priorities in both the Adriatic and the Ionian seas. Especially as regards the culture of compliance, it plays a strategic role in the entire Pillar and within the overall framework of adapting national rules of potential and candidate countries to EU fishery legislation.

On the other hand, a legislation/implementation of rules gap has been identified in the EUSAIR as regards “fishery profitability”. The discussion paper mentions the compliance to CFP obligations only as regards “fishing methods and gears, while the CFP reform gives emphasis to the “social dimension” of fishing activities, reducing fishing costs and increasing incomes. Viability of coastal communities is also prioritised in the CFP. A wider inclusion of the CFP objectives in the EUSAIR could be envisaged”, with special regards to CFP’s “social dimension” objectives. Since the CFP is extended only to EU Member States, as regards non-EU countries, support to capacity building in non-EU countries to align their fishery policies to CFP objectives should be included in the EUSAIR.

As regards **aquaculture**, the sector has turned out to be one of the most promising with remarkable “blue growth potential” in all Adriatic and Ionian countries, and has therefore been identified as a key activity at sea-basin level. The survey carried out among stakeholders has put into evidence the need for campaigns aimed at promoting the quality of products farmed in the Adriatic. Finally, aquaculture potential within the overall framework of the sustainable fishery development should not be underestimated. Barriers which at present limit the development of the sector need to be removed, especially as regards the limited availability of space.

Finally, the “**development of blue R&D and skills (including clusters)**” focus area also emerged as “specific and priority” for the Adriatic and Ionian sea-basins and it has a transversal nature, aimed at supporting all other focus areas and different sectors of the blue economy. In particular, the development of research projects addressing the protection of the environment and the maritime transport sector confirm the specificity of this focus area for the Adriatic-Ionian sea-basins. Also other activities aimed at developing clusters and strengthening skills and knowledge transfer are widely tackled in the area. On the other hand, as regards fishery, the need to develop specific studies and researches on fish stocks emerged as a key priority, in order to clearly define fishing capacity in both sea-basins (Adriatic and Ionian) and plan adequate and sustainable measures for regulating fishing activities. The analysis put into evidence the overall lack of research projects for

tourism, likely due to the fact that tourism has “indefinite” borders, being influenced by several other satellite activities. Therefore, key priorities for the development of tourism in the Adriatic and Ionian region should also encompass the strengthening of tourism clusters and the development of new territorial brands.

Finally, for the focus area “**Creating new jobs and business opportunities through research and innovation in aquaculture**” two gaps have been identified. The first one is a socio-economic gap identified in the EUSAIR with respect to the current needs surveyed in the area. All objectives mentioned in the EUSAIR referring to the aquaculture sector should support the overall development of the sector, thus generating socio-economic benefits. On the other hand, the analysis carried out on all countries (Task 2) has pointed out that all farmers in the area have difficult access to loans and to capital in general. For EU countries, access to finance could be ensured through the forthcoming EMFF, granting access also to SMEs. More in general, taking into account the current economic crisis and the difficult access to finance of operators, the support for the adoption of guarantee schemes within EU financial tools (ESIF and IPA) should be encompassed in the EUSAIR. Furthermore, the EUSAIR should encompass specific measures for supporting innovation of the sector, also for the purpose of increasing productions and developing “sustainable farming plants”, adopting a macro-regional set of guidelines for building up new plants.

The second gap identified is legislative and it regards the lack of measures aimed at reducing administrative burdens for licensing and for achieving farming permission. Reducing administrative burdens and constraints for the development of aquaculture sector should require that licensing procedures and permission for new farming plants are fastened and streamlined. For this purpose, a macro-regional working group could be set for exploring the feasibility of standardizing licensing procedures in the area.

Thematic Report 2

**Connecting the region  
(2<sup>nd</sup> PILLAR)**

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

### 1.1 Task reminder and methodology

EQ 1 of the external perspective evaluation asks to assess the specificity of Priorities Areas under each pillar in relation to the Adriatic and Ionian geographical area and which geographical areas are (most) affected per Priority Area.

More details on methodology adopted for developing this question, please see § 0.1.1.

### 1.2 Assessment on the specificity of the 2<sup>nd</sup> Pillar to the Adriatic Ionian sea-basins

As mentioned in §0.3.2, in order to assess the “specificity of a given Pillar to the Adriatic and Ionian region”, the availability of data and information has been adopted as a qualitative indicator. This indicator has not been considered as an exhaustive tool for the analysis and therefore needs to be complemented by a second analysis’ step (reported in the following § 1.3).

Below, main findings for the 2<sup>nd</sup>Pillar are reported.

#### **Maritime Transport**

By analyzing data reported in Task 2 and summarised at macro-regional level in Table 2, maritime transport of the area (including only transport activities<sup>21</sup>) covers around 1/4 of the total blue economy of the area in terms of GVA, while only 10% of “blue jobs” are bound in maritime transport. Among all activities, short-sea shipping has been identified as “most promising” in all countries of the area (excepted for Albania), covering therefore a relevant role under a macro-regional perspective. Furthermore, it is worth to mention also the key importance of passenger ferry services, which has been identified as “most promising” in Croatia, Italy, Albania and Montenegro.

Since this economic sector has traditionally played a significant role in Adriatic-Ionian countries, our analysis confirms a large availability of time series data at port level for EU countries allows geographical and time. Concerning maritime transport, due to data availability at port level (all ports and main ports) it is possible to assign to the Adriatic-Ionian sea-basin the exact figures of goods and passengers traffic.

As regards non-EU countries, data on maritime transport are spatially and temporally discontinuous. However, by using these data, it is possible to perform some basic analyses, comparisons and aggregations at sea-basin level also for Albania, Montenegro and Bosnia-Herzegovina which have contributed, being Adriatic-only countries, to the traffic of goods and passengers just for the sea-basin of our interest.

The monitoring of performances of both goods and passengers transport is a key activity of international, national and regional bodies, because of the key role covered by maritime transport in the sea-basin, as also pointed out in the Task 2 of the present Study.

#### **Safety and security of maritime space**

Monitoring of maritime space is not an “economic activity” given that it is funded by the public sector. Although there are very few regional and public data available for this sector, this should not mean that safety and security of maritime space are not specific to the Adriatic and Ionian.

The increasing diffusion and enrichment of SafeSeaNet data and in some cases the accuracy of the national sources are an example of the importance of port security in Adriatic and Ionian Seas. For

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<sup>21</sup> Deep-sea shipping, Short-sea shipping, passenger ferry services and inland waterway transport.

the purpose of the 2<sup>nd</sup> Pillar and specifically as regards maritime safety and security, EMODNET<sup>22</sup> is an important source of data and information. The forthcoming portal “human activities” will provide several data useful for monitoring maritime space also in the Adriatic-Ionian sea-basins such as: non commercial and recreational traffic, fisheries zones, status of hydrocarbon extraction, pipelines and cables, protected areas, etc.

Our analysis revealed that also national sources publish useful data on this topic, but these data are not homogeneous. However, it has been noted how maritime accidents are constantly monitored in all countries of the area, therefore constituting a relevant indicator that shows the importance of maritime safety in the area. For example, in Italy, “Conto Nazionale delle Infrastrutture e dei Trasporti” reports the number and causes of accidents occurred in commercial vessels (by type of transport) in both Italian and international waters, according to the geographical breakdown at NUTS 1 level<sup>23</sup>.

As resulted from the assessment and from information and data analysed, the 2<sup>nd</sup> Pillar is considered to be specific to the Adriatic and Ionian region.

### **1.3 Assessment of the geographical areas most affected**

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In this paragraph, only final conclusions of the analysis conducted for each “focus area” of the 2<sup>nd</sup> Pillar are reported. The complete analysis has been attached in §2.1 of the Annex.

Methodology adopted for developing this assessment has been described in detail in § 0.1.1.

#### **➤ Results of the assessment of the geographical areas most affected**

Seven focus areas have been identified for the 2<sup>nd</sup> Pillar, grouped in two main areas: (i) Maritime transport and (ii) Safety and security of maritime space. Below a snapshot of major results of our analysis is provided:

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<sup>22</sup> The European Marine Observation and Data Network (EMODNET) is a EU-driven data collection and dissemination network, acting as source of high quality geographical dataset. It involves partners from all EU countries in the collection, among other topics, also of data about bathymetry, sea-bed mapping and hydro-geological issues. Adriatic and Ionian seas are included in this project.

<sup>23</sup> [http://www.mit.gov.it/mit/mop\\_all.php?p\\_id=15306](http://www.mit.gov.it/mit/mop_all.php?p_id=15306).

Table 5 - Summary table: main findings and most affected areas

	Focus area	Main findings	Most affected Adriatic-Ionian areas/countries
Maritime transport	<b>Optimizing interfaces, procedures and infrastructures</b> to facilitate trade with southern, central and eastern Europe	Relevant investments on innovation and in infrastructures are required for maritime transport sector	Whole sea basin (Adriatic and Ionian seas) but in different ways: innovation in northern Adriatic Sea, infrastructures in southern Adriatic and Ionian
	Optimising <b>connections across the region</b> (taking into account islands connectivity)	Local routes are very important for people and goods mobility and they need to be maintained and renovated	Whole sea basin (Adriatic and Ionian seas)
	<b>Environmental and economic sustainability</b>	Environmental sustainability is an important priority for the entire basin. Main focus is to limit the impact of shipping in congested maritime areas	Northern Adriatic Sea
Safety and security of maritime space	Improving the <b>culture of compliance in flag and port state control</b>	This focus area resulted to have a marginal role in the Adriatic-Ionian Sea region. "Culture of compliance" should be strengthened in extra-EU countries	Whole sea basin, especially non-EU countries
	Enhancing <b>cooperation between national or regional maritime authorities on maritime traffic information</b> exchange through SafeSeaNet	This focus area resulted to be specific in the area and have a relevant role in the Adriatic-Ionian Sea region, as it is focused on the collection and dissemination of data to prevent accident and pollution.	Whole sea basin (Adriatic and Ionian seas)
	Developing of decision <b>support systems, accident response capacities and contingency plans</b>	A remarkable number of cooperation projects have been implemented within the scope of this focus area. EU countries play a central role, while non-EU resulted to be less engaged to develop accident responses capabilities and risk management	Candidate and potential candidate countries are still less engaged in cooperation across the sea basin with respect to what concern maritime security issues
	Ensuring adequate <b>sources of information and geographical data</b> for crews and navigators	Italy, Greece and Slovenia take good effort in ensuring adequate sources of information for crews and navigators	Whole sea basin, especially non-EU countries
	Enhancing <b>cooperation between national or regional maritime authorities with the EU to face major oil spills through EMSA</b>	EMSA's support to Member States, to EU Commission and to regional cooperation, is essential. This role should be strengthened in order to increase responses capabilities to oil spills.	Whole sea basin. Involvement of non-EU countries should be strengthened.

Within the "Maritime transport" area:

- a) As regards maritime transport, as resulting from the analysis of main findings of Task 2 "Analysis of the Blue growth potential per country", infrastructural bottlenecks and procedural constrains in terminal operations resulted to be common to all countries in the Adriatic and Ionian sea-basin. Therefore, the focus area "**Optimising interfaces, procedures and infrastructures**" resulted to be relevant within the overall transport context of the area. However, as emerged from country fiches, the perception of relevance may vary across the different areas. While in northern Adriatic, investments in innovation are required (Northern-Italian and Slovenian ports), in southern Adriatic (Croatia, Albania, Montenegro and Southern-Italy) priority is given to investments in infrastructures, which resulted to be obsolete and inadequate to respond to market demands. As a general bottleneck, procedural constraints and bureaucratic burdens (especially in port operations) need to be reduced in the entire area.
- b) As to the focus area "**Optimising the connections across the region (taking into account islands connectivity)**", as resulted from the Country fiches and summarised in the Annex, local routes in the Adriatic and Ionian seas are strategic under different points of view and for many types of transport (passengers and goods). Therefore the need for optimising connections in the region is specific to the area, especially taking into account the strong insularity of the area (Croatia and Greece, mainly) with the purpose of guaranteeing basic

movement facilities to inhabitants, goods and tourism and a low-carbon maritime transportation network.

- c) The “**Environmental and economic sustainability**” covers a transversal role in the maritime transport area, being a main component of all specific challenges identified in the EUSAIR discussion paper. The optimisation of connections across regions should adopt environment-friendly measures, most of all in maritime transport and especially in short-sea shipping, passenger ferry services and cruise. Transport<sup>24</sup> in the Mediterranean has been growing steadily, with a significant rise of 50 % between 1997 and 2006, mainly due to increased flows of energy products, e.g. transit via the Suez Canal. The environmental sustainability is an important priority in the entire basin as also emerged from Country fiches but it has a particular significance in northern Adriatic, where vessels traffic (cruise and short-sea shipping) is massive. Potential environmental issues in the Adriatic-Ionian sea-basin are: air, noise, water pollution, oil discharges (operational and from accidents), port activities, introduction of alien species, dredging, litter.

Within “Safety and security of maritime space”: this assessment has been based only on the existence of cooperation projects in this specific focus area, given that it represents the only indicator having a macro-regional perspective.

- a) The focus area “**Improving the culture of compliance in flag and port state control**” has resulted to be scarcely reflected in cooperation across the Adriatic-Ionian Sea region (3 projects out of 83). On the other hand, as resulted from the EU efforts to implement the NIR<sup>25</sup> (New Inspection Regime), it has appeared to be relevant at EU and international levels, with the purpose of establishing the common compliance in the area (including candidate/potential candidate countries) with existing rules. It has not been possible to define a specific area as “most affected”, given that the entire region is interested in pursuing these rules.
- b) The focus area “**Enhancing cooperation between national or regional maritime authorities on maritime traffic information exchange through SafeSeaNet**” has been surveyed in 9 out of 83 cooperation projects on maritime issues. Despite this number could appear low, it is an important result considering that it is an activity managed by the public sector. Once again, this concerns the area as a whole, (with limited role for Serbia and Bosnia-Herzegovina due to their small coastlines).
- c) Italy, Greece and Slovenia play the most important role<sup>26</sup> as regards “**Developing of decision support systems, accident response capacities, and contingency plans**”, while, candidate and potential candidate countries are still less engaged in cooperation across the sea basin with respect to what concerns maritime security issues. This focus area is highly specific in the area: 9 cooperation projects (out of 83) encompass the development of accident response capacities and contingency plan.
- d) As regards the last focus area identified, “**Ensuring adequate sources of information and geographical data for crews and navigators**” 6 cooperation projects have been identified,

<sup>24</sup> Cargo handling, deep-sea and short-sea, shipping, ferry services, ocean towage, onshore storage, supply boats.

<sup>25</sup> NIR is based on an advanced IT information system (“THETIS”) managed by the European Maritime Safety Agency (EMSA). It will enable the participating countries to have all merchant ships calling into European ports (more than 70,000 ships movements per year) under continuous control and track the performance of flag states, recognised organisations and individual shipping companies. The NIR will benefit quality shipping, concentrating inspection efforts on risky ships and low performance companies. Good operators will benefit from less frequent inspections.

<sup>26</sup> Out of a total of 83 cooperation projects analysed, 9 deal with the focus area “Developing of decision support systems, accident response capacities, and contingency plans”. Italy, Greece and Slovenia participate respectively to 8, 7 and 7 projects, while non-EU countries (among which Croatia, which was a non-EU country when projects were implemented) registered lower involvement (Croatia to 1 project, Montenegro to 2, Albania to 2 and Bosnia and Herzegovina to 1). For more details, please see the Technical Annex.

mainly implemented by EU MS and only marginally by extra-EU countries<sup>27</sup>. Within this focus area, it is worth mentioning the European Marine Observation and Data Network (EMODNET). This portal is a source of high quality geographical dataset which involve partners from all EU countries in the collection, among other topics, also of data about bathymetry, sea-bed mapping and hydrogeological issues. Adriatic and Ionian seas are fully affected by this project.

- e) For the last focus area identified in the 2<sup>nd</sup> Pillar, “**cooperation to face oil spills**”, the EMSA not only provides operational assistance and information to MS as regards maritime pollution, but also specific services devoted to detecting oil spills and manage the network of “stand-by vessels” which intervene in case of oil spills. As with all the other environmental focus areas, in this case too it is not possible to define a geographical area “most affected”, since it concerns the entire Adriatic and Ionian area.

## 2 External prospective evaluation: EQ 2 existing international cooperation

### 2.1 Task reminder and methodology

Question 2 of the external perspective evaluation asked for assess the existing cooperation in the Adriatic and Ionian region per Pillar or per Priority Area, as appropriate, including a list of concluded cooperation projects in the area.

For more details on methodology adopted for developing this question, please see § 0.1.2 in the “Methodology of the analysis” chapter.

### 2.2 Assessment of the level of existing cooperation

A total of 52 cooperation projects have been identified under the 2nd Pillar “Connecting the Region”. Such a high number testifies how maritime transport plays a pivotal role in the Adriatic-Ionian, to the point that the great majority of cooperation projects carried out in the sea basin is related in one way or another to this Pillar. This is also a consequence of the great political and financial effort put into TEN-T and Motorways of the Seas<sup>28</sup>. A total of EUR 197.839.093,68 was mobilised to cooperate in this field, 144.785.035,96 of which were actually spent by partners based in the Adriatic-Ionian, once again confirming the relevance of maritime transport and regional connectivity.

29% of cooperation projects identified are or were financed through the MED Programme, which of course has a larger geographical scope than the Adriatic-Ionian. This may sound surprising, given that IPA Adriatic, which is entirely focused on the Adriatic, contributed only to 17% of projects, and South East Europe only to 15%, despite both programmes list transport as one of the main priorities.

However, it is the very broad geographical scope of the MED Programme that can offer a good explanation for what is seemingly an anomaly. Albeit fundamental in the context of the region, the challenges of maritime transport and inter-modality also need to be addressed at a higher level. With respect to this, the MED Programme, whose geographical scope embraces the whole

<sup>27</sup> Italy and Slovenia participate in 5 cooperation projects, Greece to 4. Albania, Montenegro and Croatia participate to 2, while Bosnia-Herzegovina to 1. For more details, please see the Technical Annex.

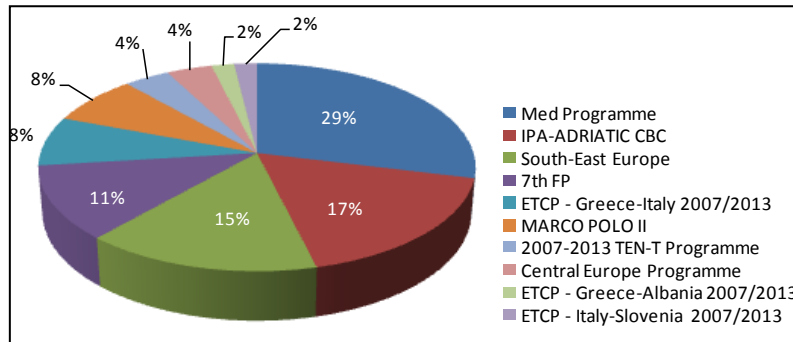
<sup>28</sup> TEN-T (Trans-European Transport Networks) is a set of road, rail, air and water transport networks planned in Europe, promoted by the EU and including also non-EU countries. TEN-T projects are managed by the TEN-T Executive Agency, which was established for this purpose by the European Commission. 30 priority projects have been identified by the Commission, among which “Motorways of Seas”. For more information, please see the following [http://ec.europa.eu/transport/themes/infrastructure/index\\_en.htm](http://ec.europa.eu/transport/themes/infrastructure/index_en.htm).



Mediterranean sea-basin, facilitates cooperation between partners from different areas of the Mediterranean Sea, because it makes it possible to carry out projects with partners from the Adriatic-Ionian as well as from other areas of the Mediterranean.

The figure below shows the distribution of cooperation projects by funding source:

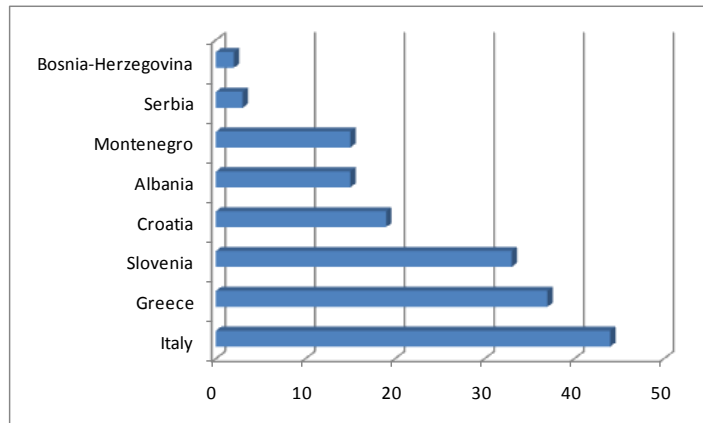
**Figure 3 – Number of projects by funding source**



As can be expected, cross-border cooperation plays a less significant role in the case of transport, compared with other Pillars. This is a consequence of what affirmed above, in that transport challenges are more effectively addressed at macro-regional and sea-basin levels.

As with the 1st Pillar, also in this case Italy is the country which has been involved in more cooperation projects:

**Figure 4 – Number of projects by country**



Once again, the 4 EU MSs – comprehensibly – result as the ones that cooperates the most. Interestingly, their ranking in terms of number of cooperation projects reflects the order with which they joined the EU. This may suggest that the inclination to cooperate with regional partners increases also thanks to the role of the EU. In addition, in the case of Italy, one should also consider that its geographical shape, which stretches along the whole sea basin, constitutes a natural incentive to cooperate with neighbouring countries.

### 3 External prospective evaluation: EQ 5 key investments and research priorities

#### 3.1 Task reminder and methodology

Question 5 of the external perspective evaluation asked for identifying the key investments and research priorities in the Adriatic and Ionian region per Pillar and priority area,

For more details on methodology adopted for developing this question, please see § 0.1.3 in the “Methodology of the analysis” chapter.

### 3.2 Key investments and research priorities

According to main findings from the four workshops (Athens, Trieste, Portorož and Zagreb) and as resulting from stakeholders’ opinions, the following key investments and research priorities have been identified. These findings have been presented and discussed with stakeholders and relevant public authorities in the Stakeholders Seminar, held in Brussels on the 14th of November 2013.

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
Optimizing interfaces, procedures and infrastructures to facilitate trade with southern, central and eastern Europe	<i>Ports Association as NAPA,</i> <i>National/Regional Authorities</i> <i>Transport companies,</i> <i>Industry associations,</i> <i>Research institutes</i>	<p><u><i>From stakeholder’s workshop:</i></u></p> <ul style="list-style-type: none"> <li>• <b>Motorway of the Seas (MoS):</b> foster the development of MoS in the Adriatic-Ionian region through proper mechanisms able to finance MoS projects for the non-EU countries of the region, improving Public Private Partnerships and private competition in the intermodal transport management, developing transportation infrastructures according to users’ needs.</li> <li>• <b>Multimodal connectivity</b> (see below)</li> </ul> <p><u><i>From interviews:</i></u></p> <ul style="list-style-type: none"> <li>• <b>Multimodal connectivity:</b> in the North Adriatic, one of the main issues at present is the connectivity with railways to set up an “Adriatic-Baltic corridor” There should be an emphasis on the improvement of railway connections as a key investment priority. This is especially true in the case of Italy, as Port authorities only have jurisdiction on inter-port connections. The rest of the railway network is under the jurisdiction of a public company which operates in Italy. This creates several problems when goods leave ports, and is often the reason why some ships may prefer foreign ports in the Adriatic region. Working on the attractiveness of the area and harmonising tariffs, developing promotional actions and lobby can be developed through a common strategy by defining of common issues.:</li> <li>• <b>ICT upgrades:</b> this key investment encompasses several aspects of the transport scenario in the area. The improvement of specific terminal needs to be implemented (mainly aimed at optimizing processes to improve service performance of ports, especially in the North Adriatic). Secondly, ports of the area need a vertical logistic integration needs (to suit customer needs controlling cargo on the transport routes as well as institutional requirements). The creation of an accessible maritime transport database is another relevant priority, which can be used for input from private companies in order to design new itineraries</li> <li>• <b>Efficiency management:</b> it is a research priority, aimed at increasing efficiency of portal nodes by promoting the use of advanced technologies. Cooperation and research among port communities should be promoted in order to continue studies on current emissions of ports and the possibility to reduce them, even in connection to energy efficiency. Since there is a growing pressure on shipping lines, ports should cooperate in research projects to be able to offer suitable technological solutions for energy supply.</li> </ul>

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
<b>Optimizing connections across the region (including islands)</b>	<i>Ports,</i> <i>Shipping Companies</i> <i>Professional associations</i> <i>EU/National actors</i>	<p><b><u>From stakeholder's workshops:</u></b></p> <ul style="list-style-type: none"> <li>• <b>Connecting the islands:</b> development of projects for encouraging the use of maritime transport instead of road transport, based on already implemented projects (ex. ECOBonus project), even for connecting the islands (ex. ESPON project: EUROISLANDS “The development of the islands – European islands and cohesion policy”)</li> </ul> <p><b><u>From interviews:</u></b></p> <ul style="list-style-type: none"> <li>• <b>Connecting the islands:</b> a more careful selection of infrastructures projects is required not only at local level but also on a wider range, by adding financial instruments to support operational connectivity of islands with the mainland as well as flows (commercial and passengers) between islands;</li> <li>• <b>Transport routes:</b> ferry connections between neighboring countries should be further developed in order to (i) limit seasonality and (ii) create new routes. Tourism ports should play a core role in the development of ferry connections, mapping strategic nodes in the area whose connections should be ensured all year long. A strategic approach at macro-regional level should be developed, linking ferry connections to the development of other activities (tourism, both coastal and internal). Ro-ro transport could be supported as a transport mode sustainable from an economic point of view (for shipping companies), given that it can be used also for freight transport purposes when tourist flows decrease. Specific incentives could be envisaged for this aim (see Eco-bonus below)</li> </ul>
<b>Environmental and economic sustainability</b>	<i>Policy makers (EU, National and Regional)</i> <i>Shipping and Transport Companies,</i> <i>Shipping Associations</i> <i>Banks/Investors</i>	<p><b><u>From stakeholder's workshops:</u></b></p> <ul style="list-style-type: none"> <li>• Development or imitation of projects (e.g. ECOBONUS, by using sources as ERDF and IPA) that encourages the use of maritime transport instead of roads transport. At macro-regional level, multiple benefits could derive from this type of incentives, such as: development of new shipping routes and reduction of seasonality (especially through Ro-Ro connections), reduction of road traffic and adoption of more sustainable transport mode.</li> </ul> <p><b><u>From interviews:</u></b></p> <ul style="list-style-type: none"> <li>• <b>Implementation of the new environmental regulations:</b> research priorities regarding the economic impacts of the environmental strategies in the operation of the Shipping Companies. Referring to this topic the extension of the Marco Polo programme and other related programmes in internal coastal shipping have been suggested.</li> <li>• <b>Eco-bonus:</b> A possible action to promote at European level can be the introduction of a European eco-bonus, in line with the Italian best practice, with the final purpose to facilitate the transfer of freight from road to sea. It is a financial instruments which could incentivizing road transport to be moved to the sea (see above).</li> <li>• <b>“Green upgrading” of ships and ports infrastructure</b> it has been suggested to facilitate funding for the “green upgrading” of ships, port infrastructure and related services for the purpose of reducing the environmental impact of shipping in the fragile Adriatic and Ionian marine and coastal environment. As regards shipping, a reduction of emissions from ships should be encouraged at macro-regional level, exploring the feasibility to extend the MARPOL convention (especially as regards Emission control areas) also to the Adriatic Sea. Reduction of emission could be achieved also by introducing incentives at macro-regional level for modernizing ships operating in the area, adopting sustainable and low-emission ships. As regards infrastructures, sustainable approaches should be adopted for the development of Adriatic and Ionian ports. More specifically, ports sustainability should be tackled under the following priority aspects (also in line with ESPO Green Guide): air quality; energy conservation and production; noise management; water management and waste management.</li> </ul>
<b>Improving the culture of compliance in flag and port state control, liability and insurance of shipping, ship sanitation and control, accident investigation and port security</b>	<i>EU/National/Regional authorities,</i> <i>Networks,</i> <i>Sector associations</i>	<p><b><u>From stakeholder's workshops:</u></b></p> <p>No possible actions identified</p> <p><b><u>From interviews:</u></b></p> <ul style="list-style-type: none"> <li>• <b>Information system:</b> there is a role for the EU in the creation of a communication network between countries and partners mostly through the use of common programs and tools (e.g. regulations, funding etc). Solving the problem of limited information and establishing mechanisms of systematic information can bring opportunities to smaller organizations to participate in the consultation procedures. The development of the “culture of compliance” should therefore pass through the development of information system, aimed at exchanging information on maritime safety issues.</li> </ul>

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
Enhancing cooperation between national or regional maritime authorities on maritime traffic information exchange through SafeSeaNet	<i>Transport sector,</i> <i>National authorities</i> <i>Training institutions,</i> <i>Coast guards</i> <i>European Maritime Safety Agency</i>	<p><u>From stakeholder's workshops:</u></p> <ul style="list-style-type: none"> <li>• <b>Amend current ADRIREP:</b> The current ADRIREP is outdated and does not properly serve its objective. It is proposed the other ADRIREP countries to work together and jointly draft a proposal to submit to IMO for amending the current IMO Resolution (MSC 139/76) on ADRIREP. The scope of the amendments should be agreed by the ADRIREP States but the main objective would be to reuse (as much as possible) the information collected by VTMIS infrastructure (including AIS) for a more effective exchange of sharing of information between the participating States and the reduction of the voice, radio communication between ships and the coastal stations.</li> <li>• <b>Implement new ADRIREP:</b> This task includes the technical implementation of the new updated ADRIREP that will defined in the previous point and the exchange of information through SSN (the latter is a legal requirement stemming from the VTMIS directive). To optimise the benefits of the exchange of MRS messages in SSN, the SSN platform could be utilised by the ADRIREP States not only to facilitate the legal obligations enabling the transmission of the MRS messages, but to satisfy user requirements. To this end, a tailor-made MRS message could be defined in cooperation with the interested States, to cover their individual needs at regional level. EMSA should explore the possibility to support the ADRIREP states to address these specificities through developing a flexible message that can fit their individual requirements in addition to their reporting obligations to SSN. The participation of the non-EU countries in the exchange of MRS information via SafeSeaNet should be evaluated in terms of access rights and technical implementations;</li> <li>• <b>Traffic Separation Scheme (TSS):</b> further developing and establishing TSS rules to implement in the congested spaces of the Adriatic Sea; At present, the TSS is only adopted in the North Adriatic. It is proposed to develop it also in other areas of the Adriatic and Ionian. The extension should focus also on separating merchant marine from other activities in the maritime space. In the extension of TSS we should also consider the consolidation of longitudinal and transversal traffic flows, which is the result of current traffic flow in the Adriatic.</li> <li>• <b>Common regional platform to exchange AIS information:</b> related to the implementation of the Directive 2002/59/EC, development and implementation of the specific technical systems, the communication links and the interfaces between the existing systems (e.g. Vessel Traffic Services (VTS), Mandatory Reporting Systems (MRS), port systems) with the national and central SafeSeaNet.</li> <li>• <b>Use of Regional AIS MAREΣ server:</b> several countries in the Mediterranean participate in a regional system called MAREΣ with the objective to share between them and with the rest of the Member States their AIS data. MAREΣ has been developed and is hosted by the Italian Coast Guard. EMSA in cooperation with the participating states monitor the developments and operations of MAREΣ via an Experts Working Group (EWG). It is proposed to enhance this system by involving also those Adriatic and Ionian countries not included yet.</li> </ul> <p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li>• <b>Educational programmes:</b> the predisposition of training and educational programmes and the promotion of a open-minded and homologated approach of cooperation among different Regions are needed in order to develop the Vessels Traffic Monitoring System (VTMS) and facilitate the exchange of information in line with the European directives. The attended benefits will include: safe end security for transports, environmental prevention, development of ports competitiveness, management of ports specialization.</li> </ul>
		<p><u>From stakeholder's workshops:</u></p> <ul style="list-style-type: none"> <li>• <b>Integrated Traffic monitoring system (TMS):</b> establish an Expert Working Group/a task force working towards the establishment of an efficient and integrated Traffic Monitoring System in the Adriatic and Ionian region</li> <li>• <b>Application of IMO-Standards and EU Standards/Directives:</b> joint training for relevant stakeholders in order to support capacity building in safety and security administrations of countries in the region, in particular in non-EU MS/candidates/potential candidates.</li> </ul> <p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li>• <b>Improve coordination/Pilot project:</b> It has been proposed to implement a platform at regional level (Adriatic-Ionian) in order to streamline information exchange on maritime traffic in the area (such as radar images or VMS data). For this objective, the EUSAIR represents the natural environment for cooperating on this topic. It has been proposed to centralise the management of this project in a single organisation, e.g. the European Maritime Safety Agency – EMSA. This organisation will be responsible of the general coordination of the project and will streamline partnerships, while the technical implementation of the project will be demanded to national authority/organization</li> </ul>
Developing of decision support systems, accident response capacities, and contingency plans	<i>European Maritime Safety Agency,</i> <i>Coast guards of littoral states</i>	<p><u>From stakeholder's workshops:</u></p> <p>No possible actions identified</p> <p><u>From interviews:</u></p> <p>No possible actions identified</p>
Enhancing cooperation between national or regional maritime authorities with the EU to face major oil spills through EMSA	-----	<p><u>From stakeholder's workshops:</u></p> <p>No possible actions identified</p> <p><u>From interviews:</u></p> <p>No possible actions identified</p>

## 4 Gap analysis

### 4.1 Task reminder and methodology

The Gap analysis asks to identify actions that could support the EUSAIR to address current gaps that could potentially hinder sustainable economic and social prosperity through growth and jobs creation. It has to be taken into account that the Gap analysis developed in this Report 2 refers to challenges/objectives/proposals available at the beginning of November 2013.

For more details on the methodology adopted to develop this question, please see § 0.1.4 in the “Methodology of the analysis” chapter. The complete gap analysis for Pillar 1 is reported in Annex, § 2.3. Below gaps and related actions to fill the gaps identified have been reported.

### 4.2 Gap analysis results and possible actions for filling gaps

Table 6 – Gaps identified and proposed actions

Pillar	Gaps	Actions
2	<b>Legislation/implementation of rules gap:</b> The EUSAIR has no reference to legislative measures to enhance cooperation to face oil spills.	Strengthen Directive 2005/35/EC “on ship-source pollution and on the introduction of penalties, including criminal penalties, for pollution offences”. Support capacity building in potential candidate/candidate countries in order to align them to Directive 2005/35/EC. Set up a working group at macro-regional level to define a common decision system to enable all countries of the area to work together to prevent/tackle major environmental disasters, and to streamline cooperation among countries.
	<b>Research gap:</b> No specific research initiatives are developed in the EUSAIR to address oil spills	Enhance CleanSeaNet through research programmes at macro-regional level. CleanSeaNet is the satellite-based oil spill and vessel detection and monitoring service covering European waters, working on real time analysis of Synthetic Aperture Radar (SAR).
	<b>Socio-economic gap:</b> In the context of “facing oil spills” and “development of response capacity”, the poor involvement of civil society is a gap the EUSAIR.	Improve governance at macro-regional level by sharing knowledge with citizens and increasing their involvement in consultation processes. Set up citizens' advisory councils to involve civil society in prevention/response to environmental disasters and increase the involvement of population in the review and oversight of resource industry operations that can potentially affect their lives.

## 5 Specific Conclusions

As a characteristic common to all Pillars, also when it comes to “Connecting the region” a more intense cooperation among EU countries has resulted by analysing cooperation projects in the maritime sector, but contrarily to what has been surveyed in other Pillars, in this case transnational cooperation - instead of cross-border- has been preferred. As a matter of fact, because of their nature, transport and maritime safety issues have a wider geographical scope and are preferably undertaken at regional or macro-regional level. Cooperation projects analysed confirmed this trend: 88% of projects have been developed within multilateral cooperation programmes.

Within this context, the forthcoming EUSAIR perfectly integrates as a key tool for enhancing the cooperation level already built.

Under a general point of view, the 2<sup>nd</sup> Pillar has been identified as “specific” to the Adriatic and Ionian sea-basins: transports and exchanges have always been remarkable between the two shores of the Adriatic and between the Ionian countries. However, as also pointed out in the EUSAIR discussion paper, infrastructures and connections in the entire region needs to be optimised.

As regards **infrastructures**, two types of improvements are needed: investments in infrastructural modernisation in northern Adriatic and investments in basic infrastructures in southern Adriatic and in the Ionian. As an overall limit of the entire area, procedural constraints and bureaucratic burdens

(especially in port operations) also resulted to be inadequate to current market trends. On the other hand, to cope with such limits, several investments priorities have been identified by stakeholders and by our analysis as for instance: (i) strengthening of the Motorway of the Seas, (ii) ICT upgrades in the terminals, (iii) structural investments for improving passenger and freight terminals, etc. (for the complete list see chap. 3 above).

In terms of **connections**, because of the high insularity of the region (mainly Greece and Croatia), the improvement of connections across the region and specifically with the islands represent a key measures for the general purpose of removing barriers and bottlenecks in basic transport connection. Also stakeholders interviewed put into evidence the need to enhance connections from/to islands, selecting infrastructural projects not only at the local level but also on a wider context, identifying key nodes to which concentrate efforts.

The strengthening of transport connections across the region and the improvement of infrastructural facilities should be implemented encompassing **sustainable and environment-friendly tools**. Governments should support the increasing long-term environmental and economic sustainability of the maritime transport sector through incentive instrument (e.g. project financing, eco-bonus) able to renew and reduce obsolete and polluting maritime means of transport.

The analysis showed the good level of cooperation in the area as regards **maritime security and safety**, resulted to be “specific” for the entire Adriatic and Ionian area. Furthermore, cooperation in this sector is indeed the key element for the appropriate implementation of EU and international rules in terms of flag states and port state control, liability and insurance of shipping, port security. Cooperation needs to be enhanced also in order to improve maritime traffic information exchange (SafeSeaNet) and supporting the development of response capacities in case of accidents and contingency plans.

Within the objective of enhancing cooperation between national or regional maritime authorities with the EU to **face major oil spills**, no specific proposals have been identified. However, given the high level of traffic in the Adriatic (especially in the northern part), oil spills could represent a potential risk for the area. Therefore, cooperation among countries in the area needs to be strengthened in terms of maritime safety and security as regards prevention and coordinated response to oil spills.

As regards this focus area, the gap analysis put into evidence that the EUSAIR presents “legislative/implementation of rules”, “socio-economic” and “research and education” gaps. Continuing improving sub-regional cooperation and monitoring the existing mechanisms, as regards prevention, preparedness and coordinated response to major oil spills is a key objective of the EUSAIR. Despite that, in the strategy there are no references to legislative measures for enhancing cooperation to face oil spills. The proposed action to fill this gap consists in strengthening the Directive 2005/35/EC “on ship-source pollution and on the introduction of penalties, including criminal penalties, for pollution offences”. As regards non-EU countries, capacity building should be promoted by the EUSAIR in order to align these countries to the above mentioned Directive. Furthermore, a macro-regional approach could be adopted for defining a common decision system among all countries of the area for preventing/tackling major environmental disasters. For this purpose and in order to streamline cooperation between countries, a specific working group at macro-regional level could be set up, with the purpose of increasing response capacity of the area.

As highlighted during the workshops, the region is a high-risk area due to increased traffic of cargo-ships, tankers, speed-boats and leisure-boats but also to the increased traffic of dangerous goods in Adriatic ports. Within the context of “facing oil spills” and “development of response capacity”, the due involvement of civil society resulted to be missing in the EUSAIR. In order to improve governance at macro-regional level, local civil society should be better involved in prevention/response to environment disaster and through the set up of a Adriatic and Ionian

Citizens' Advisory Council, in order to oversight resource industry operations that potentially affect their lives.

A specific objective of the strategy is to minimise pollution from ship traffic, in particular oil, emissions to air and litter, but no specific research initiatives are developed in the EUSAIR to address oil spills. To fill this gap the EUSAIR should envisage the enhancement of CleanSeaNet through specific research programmes.

To conclude, as also highlighted by stakeholders interviewed, the development of maritime transport in the Adriatic and Ionian sea-basin within an overall enhanced framework of safe navigation and maritime security is one of the key priorities of the area and cooperation among littoral states is the minimal requirements for the successful implementation of the EUSAIR objectives in this field.

Thematic Report 3

**Preserving, protecting and improving  
the quality of the environment  
(3<sup>rd</sup> PILLAR)**



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

### 1.1 Task reminder and methodology

EQ 1 of the external prospective evaluation asks to assess the specificity of Priorities Areas under each pillar in relation to the Adriatic and Ionian, and which geographical areas are (most) affected per Priority Area.

For further details on the methodology adopted for developing this question, please see § 0.1.1 in the chapter “Methodology of the analysis”.

### 1.2 Assessment on the specificity of the 3<sup>rd</sup> Pillar to the whole Adriatic-Ionian sea-basin

In order to assess the “specificity of a given Pillar to the Adriatic and Ionian region”, the availability of data and information has been adopted as a qualitative indicator. This indicator has not been considered as an exhaustive tool for the analysis and therefore needs to be complemented by a second analysis step (reported in the following §1.3).

Below the main findings on the 3<sup>rd</sup> Pillar are reported.

#### **Healthier marine environment**

Protection of habitats and marine environment is not an “economic” activity given that it is basically funded by the public sector. However, because of the links with other marine and maritime activities and given the key relevance of coastal tourism in the area (i.e.: it has been identified the most promising activity in all countries of the macro-region), protection of environment resulted to be one of the “pre-requisites” for the development of other marine and maritime activities.

The marine environment the Adriatic and Ionian is monitored by several sources. EUROSTAT and the EEA provide information on maritime pollution, production and disposal of waste, quality of European waters and population density.

Other data related to all the main topics of this pillar are available through EMODnet (DG MARE's portal of geographic data) and include:

- physical habitats;
- chemistry;
- biology;
- physics;
- human activities(in the next months).

As specifically regards environmental protection and protected areas, Task 2 of this Study (“Analysis of Blue Growth potential per Country”) has highlighted that around 6% of total “environment expenditure” in Adriatic and Ionian Countries in 2010 was allocated to coastal regions<sup>29</sup>. Despite this number may appear low, the analysis conducted at country level has revealed how a healthier marine environment is a base condition not only to preserve biodiversity and ecosystems, but also to allow activities of vital importance for coastal areas, fisheries and tourism above all.

From a general perspective, by surveying data and information availability the 3<sup>rd</sup> Pillar emerged to be specific to the area.

<sup>29</sup> More detailed data are reported in the Technical Annex, Thematic Report 3, 3rd Pillar..

### 1.3 Assessment of the geographical areas most affected

In this paragraph, only final conclusions of the analysis conducted for each “focus area” of the 3<sup>rd</sup> Pillar are reported. The complete analysis is provided in § 3.1 of the Annex.

The methodology adopted for developing this assessment has been described in detail in § 0.1.1.

#### ➤ Results of the assessment of the geographical areas most affected

Three focus areas have been identified for this Pillar, namely: (i) Ensuring good environmental and ecological status of the marine and coastal environment, (ii) Strengthening the Natura2000 network, the MSFD and the Barcelona Convention and its protocols and (iii) Reducing marine litter, better waste management in coastal areas. Below is provided a snapshot with the main findings:

Table 7 - Summary table: main findings and most affected areas

	Focus area	Main findings	Most affected Adriatic-Ionian areas/countries
Healthier marine environment	Ensuring good <b>marine and coastal environment</b> ; developing <b>MSP</b> and <b>ICZM</b> at national and cross-border level	Ensuring good environmental and ecological status of the marine and coastal environment. This focus area does not seem to be a priority national central government expenditure	Whole sea basin (Adriatic and Ionian seas); MSP and ICZM especially for the North Adriatic
	Strengthening the <b>Natura 2000 network</b> , the <b>MSFD</b> and the <b>Barcelona Convention</b> and its protocols	Due to the small surface of existing sites on Adriatic and Ionian coasts and waters, enhancing and extending Natura 2000 network and recognising Emerald Network sites are certainly two priority areas for environmental planning in the Adriatic and Ionian basins. Furthermore, the EUSAIR could represent also the natural environment in which regional cooperation can be followed for implementing the MSFD.	New sites selection and new management practices in EU countries, from Emerald Network to Natura 2000 in Croatia and non-EU countries Cooperation for implementing the MSFD should be strengthened especially with non-EU countries
	Reducing <b>marine litter</b> , <b>better waste management</b> in coastal areas	There is insufficient or ineffective coordination (or sometimes no coordination at all) between the various institutions and authorities – both national and regional – involved in waste management. It is thus necessary to ensure the involvement and cooperation of administrative stakeholders at different levels	Whole sea basin (Adriatic and Ionian seas)

Besides the three focus areas mentioned above, a further focus area has been identified in this Pillar with a transversal nature, namely the **improvement of marine knowledge**. This focus area is basically common to the 1<sup>st</sup> and the 3<sup>rd</sup> Pillars but it is worth being mentioned here as all stakeholders interviewed put into evidence the need to improve the knowledge of the of the marine and maritime profile of the Adriatic and Ionian sea-basins, gathering information about facts, activities and resources on and under the sea.

The first focus area “**Ensuring good marine and coastal environment; developing MSP and ICZM at national and cross-border level**” is a key element for the future EUSAIR. The analysis has shown that public effort in protection of marine and coastal areas is not a priority in central government expenditures<sup>30</sup>. From a geo-spatial perspective no specific area of the Adriatic Ionian sea basin can be considered as “more affected”, since the focus area is common to all littoral countries involved in our analysis. As regards the MSP and ICZM, as also emerged in the Country fiches, only few efforts have been made for planning spaces (e.g. Emilia-Romagna region has integrated maritime activities in its ICZM). Actually planning activities are scattered and relegated to local authorities (cities, Regions, etc.) with lack of centralised management and lack of international cooperation. The high concentration of maritime activities in the North Adriatic (ports,

<sup>30</sup> As reported above, only 6% of environmental expenditure of Adriatic and Ionian Countries is spent for coastal protection. For more details, see the Technical Annex, Thematic Report 3, 3rd Pillar.

fishing, extractive activities, tourism, cruise but also effects generated by inland anthropic activities) put the need of MSP and ICZM as a key need to be developed.

Another focus area envisages the “**Strengthening of the Natura 2000 network, the MSFD and the Barcelona Convention and its protocols**”. The analysis has put into evidence in the Adriatic Ionian area Natura 2000 sites are a small part of the total European network (we estimated that around 1,0% of total Natura 2000 network area (in terms of surface) is located in marine or coastal areas of the Adriatic-Ionian). For non-EU countries, another network is present, the Emerald Network, based on the same principles as Natura 2000, representing its extension to non-EU countries. Emerald Network is well developed in these countries, especially in Croatia. As clearly emerged also with other focus areas of this Pillar, the enhancement and extension of Natura 2000 network through new sites selection is paramount for the 3<sup>rd</sup> Pillar, and certainly constitutes a priority. Furthermore, recognising Emerald network sites for environmental planning in the Adriatic and Ionian is also another important priority to focus on. Also in this case, the focus area affects the entire Adriatic-Ionian area.

The overarching objective of the MSFD –achieve or maintain Good Environmental Status of the EU's marine waters by 2020 – perfectly meets the needs of the Adriatic and Ionian sea-basin to (i) mitigate the impact of anthropic activities on marine and coastal areas and (ii) protect the quality of the environment. Furthermore, the MSFD can be considered specific for this context given the fact that the Directive strongly supports the adoption of a regional approach for implementing it<sup>31</sup>. Especially art. 6<sup>32</sup> pushes EU MS to seek cooperation with third countries for the implementation of the MSFD in a regional context.

As regards the Barcelona Convention and related protocols, it has to be taken into account that the Mediterranean was the first region to adopt an Action Plan for the protection of the marine environment against pollution. At present, all countries of the Adriatic and Ionian sea-basin have ratified the convention<sup>33</sup>. However, not all Protocols<sup>34</sup> have been signed/ratified by the Adriatic and Ionian countries. The EUSAIR could strengthen the role of the Barcelona Convention within the area, encompassing and aligning to its objectives.

The focus area “**Reducing marine litter, better waste management in coastal areas**” is also relevant for the entire region, given that for all countries (as explained in detail in Annex § 3.1) marine litter and urban and industrial wastewater represent the two main causes of water pollution in the Adriatic Sea and by a minor extent of the Ionian.

For the last focus area identified in the 3<sup>rd</sup> Pillar, “**cooperation to face oil spills**”, the EMSA not only provides operational assistance and information to MS as regards maritime pollution, but also specific services devoted to detecting oil spills and manage the network of “stand-by vessels” which intervene in case of oil spills. As with all the other environmental focus areas, in this case too it is not possible to define a geographical area “most affected”, since it concerns the entire Adriatic and Ionian area.

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<sup>31</sup> See art. 5 and 6 of the MSFD (2008/56/EC)

<sup>32</sup>“For the purpose of establishing and implementing marine strategies, Member States shall, within each marine region or subregion, make every effort, using relevant international forums, including mechanisms and structures of Regional Sea Conventions, to coordinate their actions with third countries having sovereignty or jurisdiction over waters in the same marine region or subregion”.

<sup>33</sup> At the date of 17<sup>th</sup> April 2013, 6/7 contracting parties of the Adriatic and Ionian sea-basin accepted amendments of 1995.

<sup>34</sup>The Barcelona Convention produced seven Protocols [(1) Dumping, (2) Prevention and Emergency, (3) Land-based sources, (4) Specially protected areas and biological diversity, (5) Offshore, (6) Hazardous Wastes, (7) ICZM] addressing specific aspects of Mediterranean environmental conservation.

## 2 External prospective evaluation: EQ 2 existing international cooperation

### 2.1 Task reminder and methodology

Question 2 of the external prospective evaluation asks to assess existing cooperation in the Adriatic and Ionian region per Pillar or per Priority Area as appropriate, including a list of concluded cooperation projects in the area.

For more details on methodology adopted for developing this question, please see § 0.1.2 in the chapter “Methodology of the analysis”.

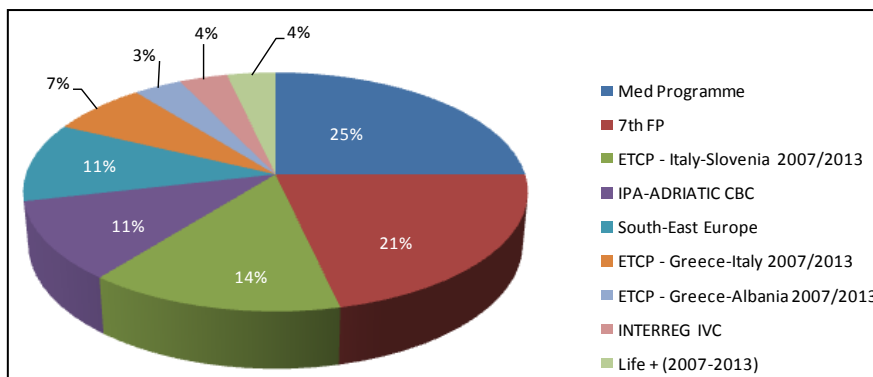
### 2.2 Assessment on the level of existing cooperation

Based on the level of cooperation, protection of the environment seems a very important issue in the Adriatic-Ionian. The 3<sup>rd</sup> Pillar can count on 28 cooperation projects carried out during the current financial period, 7 of which are concluded and 21 still ongoing. A total of EUR 99.826.811,24 was mobilised for these projects, with EUR 48.664.218,04 actually spent by Adriatic-Ionian partners.

Albeit not strictly an economic activity, protection of marine environment is seen as a crucial element in the region. This is essentially because a healthier marine environment has a positive impact on a wide number of economic and non-economic activities. Indeed, it has emerged from our analysis that a good number of cooperation projects identified under this pillar are in fact projects dealing with one or more economic activities, which also take into account the environmental perspective. This feature of environmental cooperation points to the fact that protection of the environment has a “horizontal connotation”, in that it also benefits other Pillars.

In terms of funding sources, it is once again the MED Programme, followed by IPA Adriatic that that finance most projects:

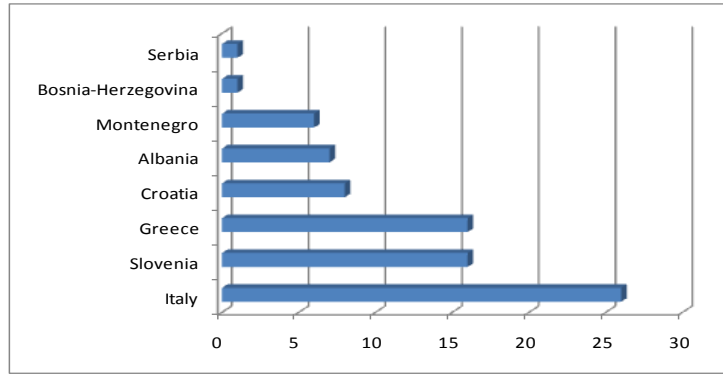
Figure 5 – Number of projects by funding source



Nonetheless, it may be interesting to note that in this case cross-border cooperation on the overall finances an equal number of projects as the MED Programme. Hence, it could be argued that cross-border cooperation represents the majority of projects in the case of environmental protection.

When it comes to most active MSs, the situation remains unchanged compared with other pillars:

Figure 6 – Number of projects by country



The 4 EU MSs stand out in terms of number of projects carried out, with Italy being by far the most involved country in cooperation for environment protections. This is partly due to its geographic shape that stretches along the whole sea-basin, thus increasing the possibility of cooperation with other countries, and partly to the fact that Italy has traditionally been very sensitive to environment protection, as testified by the level of public expenditure surveyed in the Country Fiche Analysis.

### 3 External prospective evaluation: EQ 5 key investments and research priorities

#### 3.1 Task reminder and methodology

Question 5 of the external prospective evaluation asks to identify key investments and research priorities in the Adriatic and Ionian region per Pillar and priority area, For more details on methodology adopted for developing this question, please see § 0.1.3.

#### 3.2 Key investments and research priorities

According to main findings from the four workshops (Athens, Trieste, Portorož and Zagreb) and as resulting from stakeholders’ opinions, the following key investments and research priorities have been identified. These findings have been presented and discussed with stakeholders and relevant public authorities in the Stakeholders Seminar, held in Brussels on the 14th of November 2013.

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
Ensuring good marine and coastal environment; developing MSP and ICZM at national and cross-border level	<i>Research Institutes, Environment Associations/organisations NGOs Port authorities National/Regional authorities, Research Institutes</i>	<p><b>From stakeholder’s workshops:</b></p> <ul style="list-style-type: none"> <li> <b>Maritime Strategy Framework Directive (MSFD) :</b> (i) agree on common approach to monitoring for all descriptors<sup>35</sup>; develop a concrete project proposal for each descriptor; (ii) Determine GEnS (Good Environmental Status indicators) and creation of observatory systems (e.g. GOOS: GLObal Ocean Observing System) within the sub-region based on new and existing mechanism; (iii) Establish a common infrastructure platform in terms of data collection, marine research, lab analysis, etc. through common survey programs, common research vessels, common laboratories, etc.                 </li> <li> <b>Web-GIS Observatory Network:</b> develop a Web-GIS Observatory Network for the A&amp;I region, gathering and processing geographical and statistical data related to the sustainable development and the environment (as it is already running in the Black Sea region)                 </li> <li> <b>ICZM &amp; MSP:</b> development of a common and comprehensive strategy for the Adriatic and Ionian region establishing medium and short term objectives focusing the following features: (i) common used infrastructures; (ii) common planning of "green" marine zones &amp; corridors compatible with main sectors' interests; (iii) common spatial information system for the region in connection with ICZM and MSP practices; (iv) methodological                 </li> </ul>

<sup>35</sup> Eleven descriptors have been identified in the MSFD, useful to monitor the status of marine environment. For more information regarding the monitoring aspects of the MSFD, please see this link: <http://publications.jrc.ec.europa.eu/repository/bitstream/111111111/23169/1/lbna25187enn.pdf>.

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
Strengthening the Natura 2000 network, the MSFD and the Barcelona Convention and its protocols	EU/Regional Authorities, Management body of protected areas Schools / Universities	tools for the efficient coordination of national laws and the ICZM Protocol; (v) international educational programs in connection with the ICZM protocol
		<p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li>• <b>Marine and coastal environment monitoring system:</b> systematic gathering of information and data can be promoted through macro regional cooperation, considering that structural funds alone are not enough. here is a need for major cooperative sharing of information both at local and international level. Monitoring activities are considered important for more reasons: monitoring the state of the environment, checking suitability of activities such as aquaculture or bathing, checking the results of action and policies, etc.</li> <li>• <b>Adriatic network for shared educational and citizen science programmes:</b> the need to involve citizens in decision-making processes relating to all social issues, including those relating to the environment, is now a major political issue. Strategies for promoting education for sustainable development and citizenship should be linked to people's active engagement in society. Science experiences in the classroom should bridge the gap between the practices of science in the real world with students' own interests and experiences. This participatory approach to teaching environmental citizenship is the essence of a programme including a tested methodology on rocky shores that takes into consideration marine organisms living at the intertidal and littoral, on sandy beaches it includes remains of organisms washed ashore and marine debris. The protocol is simple but highly informative regarding both organisms life cycles and the impact of marine litter on the seashore, especially where surveys are performed with continuity. Volunteers can acquire a direct experience putting a conservation ethic into practice.</li> <li>• <b>Implementation of Vessel Traffic Monitoring &amp; Information Systems (VTMIS):</b> the main purpose of this system is to contrast problems related to environment, illegal traffic, marine security, etc., especially for Eastern European Countries. The alignment is a precondition for the effective implementation of maritime policy in the area, especially in combination with ICZ and Integrated Water Resources Management (WFD).</li> <li>• <b>Support study:</b> (i) priority research to contrast the problem of the mucilage, should be better studied as well as anoxia problems, especially in the Northern Adriatic sea; (ii) research on methodologies and their harmonization (e.g. in ICZM ecosystem approach, etc, IWRM) which are used simultaneously and in parallel in the region; (iii) research in filling the gaps on the current state of the area and its special characteristics. It is necessary the Action Plan to favor the participation of research institutions and laboratories of the countries of the region (which have knowledge and expertise for the area) in research programs, the results of which can be used for investments.</li> <li>• <b>Fishery environmental impact:</b> research is essential in all fields, however a priority could be biodiversity and ecological relationships, which are not sufficiently studied and understood in the Adriatic-Ionian seas. The impact of fisheries on these issues should be especially studied. Fisheries research is, as always, too much economy oriented. Research is focused only in considerations on economic species and how to manage these species in order to get maximum profits. The impact of fisheries on other species and on the sea bottom is not sufficiently studied. However, this impact can be important for fisheries too, through the ecological relationship and the food chain. The destruction of fish eggs close to the coasts is an underestimated problem. Bottom trawlers are the most dangerous vessels but not only them. Fishery is to be considered the first cause of ecological problems for the sea together with river pollution.</li> </ul>
		<p><u>From stakeholder's workshops:</u></p> <ul style="list-style-type: none"> <li>• <b>Marine Protect Areas (MPA):</b> develop a study on connectivity throughout the Adriatic (habitat mapping, tagging, genetics, etc.); establish common assessment methodologies and common plan for regular monitoring.</li> </ul>
		<p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li>• <b>Governance guidelines:</b> guidelines for effective governance of large trans-boundary MPA, within the Adriatic Sea, can be considered a good strategy to involve a very wide range of competences. The Adriatic Sea is one of the most impacted eco-regions of the Mediterranean that has often been identified as a priority for improved management. Intensify development and implementation of common principles on EU/regional level, i.e. COM Guidance on: (i) measuring and expressing noise in consistent way for ensuring comparison of the results on national/regional level, (ii) interpreting noise data, (iii) assessment what impact is considered acceptable.</li> <li>• <b>Training the new generation of managers of Marine Protected Areas:</b> one of the main problems related to an effective and sustainable management of Marine Protected Areas is the lack on the market of adequate profiles, with well trained managers, confident and able to communicate both on scientific and administrative issues with stakeholders. There is an urgency to train the next generation of MPA scientists and managers, equipping them with a flexible set of skills essential within a wide range of professional environments, including public administration, local authorities, industry and academia. They must focus on the most important aspects that need adequate conservation. In particular, researchers will mature the experience to: identify species listed in the Barcelona Convention (Protocol ASPIM, Annex II); monitor their</li> </ul>

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
Reducing marine litter, better waste management in coastal areas	<i>Regional Authorities</i>	distribution and health state; follow adequate experimental designs; evidence spill-over effects; develop fishery management at the local level, develop management guidelines, engage with stakeholders and the society at large. These experiences will stem from a highly interdisciplinary network, leading in taxonomy, ecology, biology conservation, bio-cartography, and socio-economy. Furthermore, they will be trained in a range of soft skills including science communication/outreach, as it is essential at the delicate interface between science, the management of natural assets and the public at large. Training and hands-on experiences will be delivered by a strong network of world-class experts in MPA management which will provide a highly focused learning environment.
	<i>Private actors</i>	<p data-bbox="576 495 855 517"><u>From stakeholder's workshops:</u></p> <ul data-bbox="624 528 1447 730" style="list-style-type: none"> <li data-bbox="624 528 1447 730">• <b>Marine litter:</b> (i) promotion and further implementation of cleaning programmes (of beach litter but also floating litter or litter on the seafloor with scuba divers); (ii) Fishing for litter in the regions linked with derelict fishing gear recycling; (iii)- Life-cycle analysis of marine litter (what are the sources, what happens to the particles once they reach the marine environment, etc.); (iv) Collaboration between different sectors for the development of new possibilities of recycling marine litter; (v) Preparation of a Regional Strategy for the assessment, prevention and reduction of marine litter pollution in the region</li> </ul> <p data-bbox="576 730 727 752"><u>From interviews:</u></p> <ul data-bbox="624 763 1447 943" style="list-style-type: none"> <li data-bbox="624 763 1447 864">• <b>Sewage management:</b> sewage is a big challenge and a concrete threat to coastal areas of the entire region, especially for non-EU countries. Investments should be allocated on water treatment. Negative impacts on the environment should be reduced in order to enhance the safeguard and protection of marine ecosystems (eg. Lagoons and wetlands).</li> <li data-bbox="624 875 1447 943">• <b>Marine litter information campaign:</b> marine and coastal litter can be contrasted adopting awareness campaign aimed at informing the civil society about its negative impact on the environment and human health.</li> </ul>
	<i>NGOs</i>	

## 4 Gap analysis

### 4.1 Task reminder and methodology

The Gap analysis asks to identify actions that could support the EUSAIR to address current gaps that could potentially hinder sustainable economic and social prosperity through growth and jobs creation. It has to be taken into account that the Gap analysis developed in this Report 2 refers to challenges/objectives/proposals available at the beginning of November 2013.

For more details on methodology adopted for developing this question, please see § 0.1.4 in the “Methodology of the analysis” chapter. The complete gap analysis for Pillar 1 has been reported in Annexes, § 3.3. Below, gaps and related actions to fill the gaps identified have been reported.

## 4.2 Gap analysis results and possible actions for filling gaps

Table 8 – Gaps identified and proposed actions

Pillar	Gaps	Actions
3	<b>Legislation/implementation of rules gap:</b> Legislative measures to ensure the good environmental and ecological status of the marine and coastal environment	Maritime Strategy Framework Directive (MSFD) implementation: adopt a macro-regional perspective that also involves candidate and potential candidate countries within the context of “implementing the MSFD”. More specifically: <ul style="list-style-type: none"> <li>• agree on a common approach to monitoring for all descriptors and develop a concrete project proposal for each descriptor</li> <li>• determine Good Environmental Status (GEoS) indicators and create observatories in the sub-region, based on existing mechanisms such as the Global Ocean Observing System (GOOS) as well as new mechanisms</li> <li>• establish a common infrastructure platform in terms of data collection, marine research, lab analysis, etc., through, e.g. common survey programs, research vessels and laboratories.</li> </ul> Seek cooperation with candidate and potential candidate countries within the MSFD and the Barcelona Convention contexts in order to ensure the coordination of actions in the same marine region for the same objectives.
	<b>Legislation/implementation of rules gap:</b> Legislative measures for ensuring good waste management and waste reduction	Prepare a regional policy for the assessment, prevention and reduction of marine litter pollution in the region
	<b>Research gap:</b> No specific research initiatives address waste pollution in the EUSAIR.	Undertake a life-cycle analysis of marine litter to examine, e.g. its sources and the impact of the particles on the marine environment. Set up collaboration among different sectors to develop new processes for recycling marine litter.

## 5 Specific Conclusions

The 3<sup>rd</sup> Pillar resulted as the second most important pillar (after “Connecting the region”) in terms of number of projects implemented, showing therefore the great impact of environmental issues in the Adriatic-Ionian sea-basins. Contrarily to expectations, the survey put into evidence that cross-border (often bilateral) cooperation projects have been preferred instead of trans-national (27%). Actually, because of their relevance at sea-basin level, environmental and marine protection issues should be tackled within the context of a wider cooperation, involving the highest number of countries sharing the same problems and needs. Therefore, the Strategy could be the most appropriate tool for reinforcing multilateral trans-national cooperation within the environmental topics (3<sup>rd</sup> Pillar).

As a matter of fact, the successful implementation of all four focus areas identified and related objectives requires a multilateral approach, involving all littoral countries. For instance, the **good ecological status of the marine and coastal areas** could be ensured only through the common efforts of all countries to protect habitats and natural environments, reducing anthropic pressures and adopting sustainable marine and coastal management plans. Stakeholders put forward many key investments for addressing this issue. Some of these, such as educational and training programmes, already implemented at local level, point at reaching long-term results by involving and sensitising civil society about the protection of the marine and coastal areas. Other key investments identified point at achieving<sup>36</sup> short-medium term results such as set up of a monitoring system for collecting data and information on human activities in coastal and marine areas<sup>37</sup>.

Regarding this focus area, a legislative gap has been identified in the EUSAIR. Although specific objectives are dedicated to ensuring good environmental and ecological status of the marine and coastal environment, the EUSAIR does not support the adoption of legislative measures for this purpose. The EUSAIR should develop directives and projects for each MSFD topic, should

<sup>36</sup> The complete list of the key investments and research priorities identified is available in chap 4.

<sup>37</sup> EMODNET could be a potential tool for monitoring these activities. Lot 7 “human activities” will be implemented soon.



envisage the establishment of an observatory systems within the sub-region and develop a macro-regional climate adaptation strategy based on risk and vulnerability assessments.

Specific for the Adriatic Ionian region is also the focus area “**reducing marine litter, better waste water management**”, which represents another topic where littoral countries are requested to cooperate. The remarkable traffic flows (leisure, cruise and freight) in the Adriatic-Ionian seas and the problem of inefficient wastewater management (as surveyed in different countries in the area) are two key pollutants of the marine environment and coastal areas. In order to cope with these problems, possible actions have been proposed by stakeholders, namely: (i) promotion and implementation of cleaning programmes for floating litter or on the coast; (ii) infrastructure investments in sewage management and (iii) marine litter information campaign.

With respect to this focus area, the gap analysis highlighted that two aspects have not been taken into account by the EUSAIR in order to meet the area needs. The first one is a “legislation/implementation of rules gap”. As a matter of fact, supporting waste and waste water management is a specific challenge of the EUASAIR, but there is a lack of international legal instruments to this regard. A preparation of a Regional Policy for the assessment, prevention and reduction of marine litter pollution in the sea-basin could be envisaged in the EUSAIR. The second gap regards “research and education” in this focus area. Research on waste treatment is a key investment sector for the Adriatic and Ionian growth as highlighted by stakeholders. Despite that, no specific research initiatives are developed in the EUSAIR to address waste pollution problems. The EUSAIR could fill this gap through specific actions such as the life-cycle analysis of marine litter (what are the sources, what happens to the particles once they reach the marine environment, etc.) and through more general actions such as the strengthening of collaboration between different sectors for the development of new possibilities of recycling marine litter

Indeed communication and sensitization campaign within the overall purpose of the 3<sup>rd</sup> Pillar could be a strategic tool for the successful achievement of related specific objectives. Also as regards the focus area “**Strengthening the Natura 2000 network, the MSFD and the Barcelona Convention and its protocols**”, the implementation of high level educational programmes could help to widen the Natura 2000 and Emerald<sup>38</sup> networks and create new marine protected areas, joining common efforts of different countries in the area. For this purpose, stakeholders also suggested as a possible key investment in the area the development of specific guidelines for more effective governance of large trans-boundary marine protected areas, within the Adriatic and Ionian Sea.

A macro regional perspective should be adopted within the context of “implementing the MSFD”, also involving non-EU countries. Especially as regards Adriatic and Ionian third countries, the EUSAIR’s context could act as cooperation instrument for undertaking common actions for the protection of the marine environment, also in close synergy with the MSFD and the Barcelona convention Protocols.

MSP and ICZM practices should be spread all over the area, establishing medium and short term objectives focused on common planning of "green" marine zones & corridors and on common spatial information system. Infrastructures in the area should be submitted to a “green upgrading” or to a “green development”, promoting the sustainable infrastructures in the entire Adriatic and Ionian basins.

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<sup>38</sup> The Emerald network is basically the extension of the Natura 2000 to non-EU countries.

Thematic Report 4

# **Increasing regional attractiveness (4<sup>th</sup> PILLAR)**

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

### 1.1 Task reminder and methodology

EQ 1 of the external prospective evaluation asks to assess the specificity of Priorities Areas under each pillar in relation to the Adriatic and Ionian, and which geographical areas are (most) affected per Priority Area.

For further details on the methodology adopted for developing this question, please see § 0.1.1 in the chapter “Methodology of the analysis”.

### 1.2 Assessment on the specificity of the 4<sup>th</sup> Pillar to the Adriatic-Ionian sea-basins

In order to assess the “specificity of a given Pillar to the Adriatic and Ionian region”, the availability of data and information has been adopted as a qualitative indicator. This indicator has not been considered as an exhaustive tool for the analysis and therefore needs to be complemented by a second analysis step (reported in the following § 1.3).

Below, main findings for the 4<sup>th</sup> Pillar are reported.

#### **Coastal and maritime tourism**

Tourism is one of the main and fast-growing activities in the Adriatic-Ionian area. As emerged from Task 2 (“Analysis of the Blue Growth potential per country”) of the present Study, coastal tourism has been identified as one of the most promising activities in all the Adriatic and Ionian countries and in 5 countries it has resulted to be one of the fastest growing. The analysis has pointed out that, when properly developed, tourism strongly benefits the regional economy by creating quality and sustainable jobs, promoting the conservation of its cultural heritage and safeguarding natural and cultural diversity.

In some specific cases, as emerged from Task 2 findings, coastal tourism can be a driver for growth and employment in remote areas (e.g. islands, rural and mountain areas), and areas with otherwise limited economic activities, contributing to promote social inclusion and interesting opportunities for youth employment. However, as reported us by most stakeholders, a proper management of intensive tourism activities is fundamental in order to mitigate possible negative effects on the coastal, marine, and hinterland environment.

At present, as resulted from Task 2 analysis, Coastal tourism covers around 1/3 of total area’s blue economy, both in terms of GVA and employment.

Tourism is widely monitored in the entire area, not only through “common sources” such as EUROSTAT, but also by a several different actors (institutional and private) at different levels (national, regional, sub-regional, etc.). This wide availability of data, analyses and reports is symptomatic of the great relevance of coastal tourism in the area. Nonetheless, data and information availability has not been homogeneously detected in the area in the same way, given that detailed information is not available at the same extent in all countries, especially for candidate and potential candidate countries.

As regards the cruise sector, this has turned out to be one of the most promising maritime activities in 4 countries (Italy, Slovenia, Croatia and Greece). The analysis has highlighted the great potential of these countries, emphasized by the availability of several attractors (historical cities, archeological sites, bathing destinations, etc.) and by the driving force of Venice as one of the most important cruise home ports in the world.

As resulting from the assessment and from information and data analysed, the 4<sup>th</sup> Pillar is considered to be specific to the Adriatic and Ionian region.

### 1.3 Assessment of the geographical areas most affected

In this paragraph, only final conclusions of the analysis conducted for each “focus area” of the 4<sup>th</sup> Pillar are reported. The complete analysis has been attached in § 4.1 of the Annex.

Methodology adopted for developing this assessment has been described in detail in § 0.1.3.

#### ➤ Results of the assessment of the geographical areas most affected

Four focus areas have been identified, all involving coastal and maritime tourism activity. Below is a snapshot of major results from our analysis:

Table 9 - Summary table: main findings and most affected areas

	Focus area	Main findings	Most affected Adriatic-Ionian areas/countries
Coastal and maritime tourism	Supporting the <b>sustainable development of coastal and maritime tourism through innovation and common marketing strategies and product</b>	The diversification of the tourism offer through innovation and common marketing strategies (e.g.: development of common brands) is crucial to the economic and environmental sustainability of the sector, as well as to enhance the position of regional tourism in the world market	Whole sea basin (Adriatic and Ionian seas)
	Guaranteeing the <b>environmental sustainability of the sector</b>	Coastal tourism is directly linked to the quality of the environment, as a significant parameter which improves the attractiveness of a destination and affects the experience of tourists	Whole sea basin (Adriatic and Ionian seas)
	Promoting the <b>sustainable development of cruise tourism</b>	The sustainability of cruise tourism is an issue debated in EU member states, but at different levels of intensity. It is one of the leading maritime sectors in the area and has a remarkable potential also in non-EU countries	In Italy there are still several concerns as to the impact on the territory and resources depletion. In Greece larger destinations are facing congestion issues. Attractiveness of non-EU countries should be reinforced
	Enhancing the value and <b>appreciation of cultural heritage</b>	The enhancement of the value and appreciation of cultural heritage is a fundamental priority to avoid the seasonality of coastal tourism in the Adriatic and Ionian sea-basin and increase its tourism attractiveness	Whole sea basin, with different levels: non-EU countries need to promote their respective heritages, EU countries should reinforce their positions

The first focus area “**sustainable development of the sector through innovation and common marketing strategies and product**” aims to increase the economic and environmental sustainability of the sector. The need to diversify the tourist offer, especially by developing green tourism and focusing on niche markets has emerged as a key priority in this Pillar. Through innovation and common marketing strategies, this is aimed at strengthening traditional tourist destinations (Italy and Greece), and relatively newer destinations (Slovenia Croatia and Montenegro), as well as Albania and Bosnia-Herzegovina, which are still out from international mass-tourism but have significant growth potential.

As regards the focus area “**Environmental sustainability of the sector**”, coastal tourism is directly linked to the quality of the environment, as a significant parameter which improves the attractiveness of a destination and affects the experience of tourists. Tourism can affect the full range of environmental parameters and thus its efficient management and the protection of resources, as reported by all interviewed stakeholders, is crucial for the whole Adriatic and Ionian region.

The “**Sustainability of cruise tourism**” is an issue debated in EU member states, but at different levels of intensity. In Italy, there are still several concerns as to the impact on the territory and resources depletion<sup>39</sup>. In Greece, major destinations are facing congestion issues and requiring quotas and measures for mitigating any kind of negative externalities<sup>40</sup>. The eastern coast of the Adriatic seems therefore less affected by this topic. However, as also reported in the analysis of Blue Growth potential for each country of the Mediterranean, cruise tourism has significant relevance in the whole region, especially considering the size of the activity in the main “home countries” (Italy and Greece), and the potential of other countries in the area as “port of call”.

The last focus area identified “**Enhancing the value and appreciation of cultural heritage**” is a key priority common to all countries of the area. Coastal cultural heritage in the Adriatic-Ionian is world-renowned, especially as far as Italy and Greece are concerned, but it has a considerable potential also in Croatia, Slovenia, Montenegro and Albania (although mainly hinterland). The focus area is indeed relevant for the entire Adriatic and Ionian area. It is not possible to define a geographical area “most affected” since cultural heritage is a common characteristic to all Adriatic and Ionian countries.

## 2 External prospective evaluation: EQ 2 existing international cooperation

### 2.1 Task reminder and methodology

Question 2 of the external prospective evaluation asks to assess existing cooperation in the Adriatic and Ionian region per Pillar or per Priority Area as appropriate, including a list of concluded cooperation projects in the area.

For more details on methodology adopted for developing this question, please see § 0.1.2 in the chapter “Methodology of the analysis”.

### 2.2 Assessment on the level of existing cooperation

Increasing regional attractiveness is another pivotal issue in the Adriatic-Ionian, with countries especially cooperating in the field of tourism. Overall, 22 projects have been detected (19 ongoing, and 3 concluded), for a total amount of EUR 46.136.177,51 and a wide part of these (almost EUR 42.517.307,51) have been spent by partners based in the Adriatic-Ionian<sup>41</sup>. All projects identified under this Pillar deal with coastal tourism, with a special focus on environmental sustainability as well as natural and cultural heritage. Tourism is by far the first economic activity in the area in terms of value added and employment. For this reason, the existence of a certain degree of cooperation in the area should be seen as a positive factor, because it contributes to aligning an important economic activity to the objectives of environmental sustainability, as well as to promoting inner and less-known areas, and integrating them in the context of the macro-region.

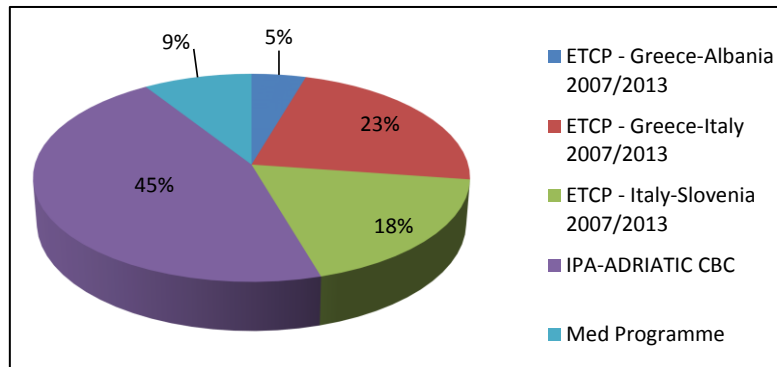
If we analyse the funding sources, the main results by far IPA Adriatic. This can be explained by the fact that, differently from other sectors, the challenges of coastal tourism tend to be better addressed at regional level. However, cross-border cooperation too registers an important contribution to cooperation in the field, through its different European Territorial Cooperation Programme.

<sup>39</sup> Country fiche, Italy, August 2013.

<sup>40</sup> Country fiche, Greece, August 2013.

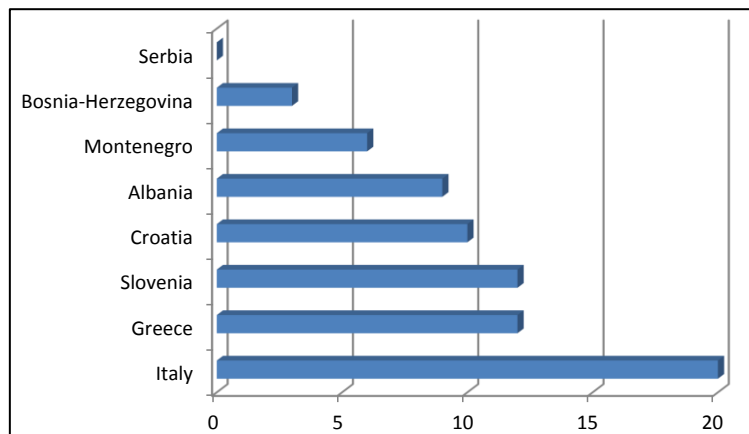
<sup>41</sup> We have provided an estimate of the proportion of the budget actually “spent” in the Adriatic-Ionian. This had necessarily to be an estimate because figures at this level of detail could not be retrieved either through evaluation reports or project websites. For more details on methodology used, please see 0.1.2.

Figure 7 – Number of projects by funding source



Italy is once again the most involved country in cooperation. This should not come as a surprise either, since Italy is by far the most popular tourist destination in the area:

Figure 8 – Number of projects by country



The fact that Italy seeks cooperation with other partners in the region, rather than simply relying on its several famous tourist destinations, should be evaluated positively. Of notable importance is the number of projects (12) in which Slovenia is involved: despite having a very small coastline, this country has the same number of projects as Greece, showing therefore the remarkable effort of Slovenia in this sector. Slovenia is adopting a credible strategy to promote its coastal tourism, by taking advantage of its close proximity with famous tourist destination, as well as of the synergies that can be established with other partners in the region.

### 3 External prospective evaluation: EQ 5 key investments and research priorities

#### 3.1 Task reminder and methodology

Question 5 of the external perspective evaluation asked for identifying the key investments and research priorities in the Adriatic and Ionian region per Pillar and priority area,

For more details on methodology adopted for developing this question, please see § 0.1.3 in the “Methodology of the analysis” chapter.

#### 3.2 Key investments and research priorities

According to main findings from the four workshops (Athens, Trieste, Portorož and Zagreb) and as resulting from stakeholders’ opinions, the following key investments and research priorities have

been identified. These findings have been presented and discussed with stakeholders and relevant public authorities in the Stakeholders Seminar, held in Brussels on the 14th of November 2013.

Table 10 - 4th Pillar: key investments and research priorities

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
Supporting the sustainable development of coastal and maritime tourism through innovation and common marketing strategies and product	Chambers of Commerce, Sector operators and private actors	<p><u>From stakeholder's workshops:</u></p> <ul style="list-style-type: none"> <li><b>Knowledge, Innovation and Entrepreneurship Zones (KIEZ):</b> promotion and establishment of KIEZ to enhance and enforce collaboration and cooperation for scientific research in key sectors (such as tourism and traditional manufacturing) and create synergies between Member States and non-EU countries;</li> <li><b>Tourism spatial planning:</b> development of harmonised touristic spatial plan taking into account various touristic activities at a cross-country level ensuring the active coordination and joint management of tourist destinations. Such projects will have the following characteristics: transnational itineraries; benchmarking tourism performance at cross-border level; tourism activities based on the added value for the local and national economies; connection of coastal and hinterland tourism</li> </ul> <p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li><b>Marketing strategies:</b> Initiatives to improve information on business opportunities and to facilitate exchanges inside the area must be supported. The Adriatic-Ionian nations should develop a common tourist strategy in order to facilitate promotion of the area abroad, developing common accommodation standards (e.g. four stars hotels should provide the same services in all countries), and developing an integrated tourist circuit (e.g. tourists spend 3 days in Rimini, than 3 in Bari and then 3 in Dubrovnik). Differences should be highlighted in order to meet the needs of different kind of visitors, but a common approach (using a brand) would be more efficient and would call more attention.</li> </ul>
		<p><u>From stakeholder's workshops:</u></p> <ul style="list-style-type: none"> <li><b>Ensure tourism sustainability:</b> establishment of proper monitoring mechanisms and legislation for the protection of the Adrian-Ionian ecosystem in order to minimize negative externalities of tourism in terms of waste management, energy and water consumption and biological diversity</li> </ul> <p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li><b>Limit environmental footprint of tourism:</b> coastal areas present signs of congestion and thus investments must be oriented to the mainland, aiming to protect physical environment</li> </ul>
Guaranteeing the environmental sustainability of the sector	EU/Regional authorities Sector operators and private actors	<p><u>From stakeholder's workshops:</u></p> <p>No possible actions identified</p> <p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li><b>Cross border projects:</b> more intensive and concrete cooperation in the Region between tourist associations Chambers of Commerce, cities, and universities (public and private sector). The purpose is to give concrete inputs for the elaboration of specific cross-border projects based on a more efficient use of natural and cultural resources. Sustainable development of cruise tourism need to take into consideration interests of local population and needs of tourists. .</li> <li><b>Reinforcing regulation for sewage treatment on board:</b> the impact of discharging raw sewage of cruise and yachting has to be tackled since it can create a health hazard, leading to oxygen reduction in the sea and pollution in coastal areas. Therefore, cooperation efforts in the area (especially between public authorities) should be strengthened in order to implement international and EU rules in the area.</li> </ul>
Promoting the sustainable development of cruise tourism	Chambers of Commerce, Port authorities and port associations Universities National/Regional authorities, Cruise companies	<p><u>From stakeholder's workshops:</u></p> <p>No possible actions identified</p> <p><u>From interviews:</u></p> <ul style="list-style-type: none"> <li><b>Tourism promotion:</b> development of an integrated scheme for the strategic planning and funding of cultural tourism through: innovative marketing and promotion strategies; integrated Tourism Packages involving a number of touristic activities; establishment of (permanent) structures and institutions to collectively promote cultural tourism in the region (through events, policies, educational material and visits, exhibitions, websites); development of thematic cruises and navigational routes between Adriatic and Ionian countries and ports and/or effectively combine cultural navigational routes with modern maritime routes; development of complementary services to connect cultural heritage tourism and protection of natural sites; development of a database to collect, elaborate and disseminate cultural heritage related information; development of brochures and promotional material to correlate cultural heritage with various types of tourism</li> </ul>
Enhancing the value and appreciation of cultural heritage	Private actors Chambers of Commerce, Regional authorities	

Focus area	Possible beneficiaries and key stakeholders	Key investments and research priorities
		<p><i>From interviews:</i></p> <ul style="list-style-type: none"> <li>• <b>Common trademark:</b> it is worth mentioning the ADRION project (or other similar/new initiatives) as the common trade mark of the area that has been launched to reinforce the Adriatic and Ionian territory as a tourist brand. This possible brand should be promoted in the international market, highlighting a variety of tourist products and cultural heritage;</li> <li>• <b>Reduce seasonality of demand:</b> coastal areas present signs of congestion and thus investments must be oriented to the mainland highlighting the cultural heritage of these areas and enriching the offer of touristic products.</li> </ul>

## 4 Gap analysis

### 4.1 Task reminder and methodology

The Gap analysis asks to identify actions that could support the EUSAIR to address current gaps that could potentially hinder sustainable economic and social prosperity through growth and jobs creation. It has to be taken into account that the Gap analysis developed in this Report 2 refers to challenges/objectives/proposals available at the beginning of November 2013.

For more details on methodology adopted for developing this question, please see § 0.1.4 in the “Methodology of the analysis” chapter. The complete gap analysis for Pillar 1 has been reported in Annex, § 4.3. Below gaps and related actions to fill the gaps identified have been reported.

### 4.2 Gap analysis results and possible actions for filling gaps

Table 11 – Gaps identified and proposed actions

Pillar	Gaps	Actions
4	<p><b>Legislation/implementation of rules gap:</b> The EUSAIR discussion paper does not reference legislative measures to enhance the management of intensive tourism activities</p>	<p>Limit the impact of intensive tourism flows in the Adriatic-Ionian region by establishing proper monitoring mechanisms and legislation, especially in candidate and potential candidate countries. Collect data on coastal tourism in order to set monitoring mechanisms, and also duly plan strategic interventions in the sector, especially as regards candidates and potential candidate countries. The collected data should also be harmonised at sea-basin level.</p>
	<p><b>Legislation/implementation of rules gap:</b> The EUSAIR discussion paper does not reference legislative measures that could enhance cruise tourism while mitigating negative effects of massive but transient tourists arrivals</p>	<p>Develop a management plan for cruise tourism destinations that calls for more intensive and concrete cooperation in the region. Reinforce regulations for on-board sewage treatment.. Further, analyse the possibility of developing cruise tourism management plans at national level, recognizing that only at local level it is possible to balance and coordinate the needs of local population, tourists and shipping companies. Develop macro-regional tourism governance in order to define an integrated cruise offer in the Adriatic-Ionian sea basin and optimize the use of resources and cultural heritage..</p>
	<p><b>Technologies and innovation gap:</b> The EUSAIR discussion paper does not reference technological instruments and innovative tools that could enhance cruise tourism while mitigating negative effects of massive but transient tourists arrivals</p>	<p>Take advantage of existing technologies developed for the tourism sector in general. The EUSAIR largely promotes the use of technologies and innovation in tourism, especially to ensure better management of destinations and sustainability of tourism activities</p>

## 5 Specific conclusions

The analysis on the 4th Pillar put into evidence the fact that coastal and maritime tourism is an issue better addressed at regional and bilateral levels rather than multilateral. From a certain perspective, this is due to the obvious geographical characterization of tourism and related offer: a cooperation



project aimed at increasing the attractiveness of the tourism offer could not put together different contexts that are too heterogeneous from the geographic and socio-economic point of view.

In this context, the forthcoming Strategy points to reinforce cooperation in the area for the purpose of introducing **common marketing standards and develop common tourism offer** in the Adriatic and Ionian sea-basins. To this regards, coastal tourism has been identified as one of biggest maritime activities and one of the most promising in all countries of the area. On the other hand, the analysis put also into evidence that this potential is widely unexpressed (for countries as Albania or Montenegro) or could be strengthened (Croatia, Italy and Greece). The creation of a common tourism offer under a common brand or the development of harmonized touristic spatial plan taking into account various touristic activities at a cross-country level are only two of the possible key investments to undertake within this focus area (for the full list, see chap. 4). Considering the overall potential of the macro-region and its rich natural and cultural endowment, cultural heritage should act as a main attractor of the area. In this sense, tourism offer should integrate elements of natural and mainly cultural assets, either material and immaterial.

However, the enhancement of the tourism offer should not disregard the **adoption of sustainable measures**, given the strong link between tourism and quality of environment. As safe, clean, not-polluted environment is the main element attracting tourist flows. On the other hand, mass tourism could also have an impact on the quality of coastal areas and marine environment. Our analysis identified as a key investment the establishment of proper monitoring mechanisms and legislation for the protection of the Adrian-Ionian ecosystem in order to minimize negative externalities.

A socio-economic gap has been identified in the EUSAIR for this specific focus area. The EUSAIR tackles this issue through a specific objective that guarantees the environmental sustainability of the sector by limiting its environmental footprint and taking into consideration the impacts of a changing climate. Despite that, in the EUSAIR there are no references to social measures to enhance tourism management. Establishing a common framework to promote the collaboration of youth and ageing population in the management of tourist destination (e.g. on the model of the European Voluntary Service) could be a possible action to fill this gap.

The analysis put also into evidence that negative externalities could derive also by **cruise tourism** another growing sector in the Adriatic and Ionian sea-basins. Each country is facing different problems basically related to over-congested terminals and inadequate infrastructures. But on the other hand, the growth potential of this sector has emerged in different countries. In order to mitigate negative impacts of cruise tourism, as also highlighted by stakeholders, the adoption of specific management plans needs to be adopted at national level, in order to balance interests of local population, needs of tourists and shipping companies and protection of sites with a cultural relevance. However, a management plan at macro-regional level should be also developed in order to define an integrate cruise offer in the Adriatic-Ionian sea-basin and optimize the use of resources and cultural heritage.

Specifically for this focus area, the gap analysis identified two needs which have been perceived not to be tackled by the EUSAIR. As for the first one, in the EUSAIR there are no references to socio-economic issues to enhance cruise tourism while mitigating negative effects of short massive tourists arrivals. To fill this gap the strategy could take advantage from the action proposed to fill the “legislation/implementation of rules gap” mentioned above. More in details, the adoption of a cruise tourism management plan should also entail socio-economic benefits specifically resulting from potential links of this sector to other forms of tourism or to the overall regional economic development.

As for the second one, in the EUSAIR there are no references to technological instruments and innovative tools to enhance cruise tourism while mitigating negative effects of short massive tourists arrivals. To fill this gap the EUSAIR could take advantage of technologies developed for the tourism sector as a general issue

As a matter of fact, given the infinite wealth of cultural attractors of the Adriatic and Ionian countries, **cultural heritage** should act as a main attractor of the area and not as a limit for the development of maritime economic activities. Cultural heritage - as protection of environment – should be enhanced and protected as an asset transversal to all possible activities (with or without a maritime dimension) but, more specifically, it will benefit costal tourism first.

A significant issue that could be considered is to enhance the connections between the niche and small destinations and well known ones, as well as encourage the use of local agricultural and fishing resources and local handicrafts products by local tourism enterprises.

# **Overall assessment on the proposed EUSAIR**

## 1 External prospective evaluation: EQ 3 Governance system

For the purpose of our analysis, the governance has been intended as the act of governing in which public actors and other economic and social stakeholders interact to optimise the decision making process. In light of this, the presence of multiple stakeholders at different levels is a pre-requisite for an effective governance system, as also confirmed by the SWD(2013) 233 final<sup>42</sup>.

In this Working Document, the “governance systems for drafting and implementing macro-regional strategies” are defined as “complex” and “involve a wide range of stakeholders”. Because of the number and types of stakeholders involved, the main challenge for a macro-regional strategy is to keep all players “motivated in the long-run”.

The objective of a governance system in a macro-regional context is to formulate “coordinated response to issues better handled together than separately”<sup>43</sup>. Indeed, this definition represents the most appropriate way to delineate the process that has been governing and continues to govern the Adriatic-Ionian region, throughout different steps, initiatives and tools which have contributed to raising awareness of being part of a basin with common interests, problems and aims.

Further to the EU sub-regional cooperation approach, in December 2011 the Council of the European Union expressed its support to the “ongoing work of Adriatic and Ionian Member States to enhance maritime cooperation with non-EU neighbours in the area within the framework of a macro regional strategy”. Since then, as clearly affirmed by the Council, the path towards a future macro-regional strategy has been grounded on a strong cooperation between stakeholders, including both public and private actors. All littoral states, coastal regional authorities, thematic networks started a work aimed at raising awareness on the necessity of establishing a Macro-Region for the Adriatic Ionian basin.

Under these impulses, the European Commission adopted the Maritime Strategy for the Adriatic and Ionian Seas (COM(2012)713), based on 4 pillars: a stronger blue economy, a healthier marine environment, a safer maritime space, and responsible fishing activities. Within this framework, the road has hitherto encountered increasing interest from relevant stakeholders to set up a Regional Strategy in the area, supported by national and regional authorities, fora, initiatives and led by the EU Commission, whose objective is to submit to the Council the EU Strategy for the Adriatic and Ionian Region and related Action Plan.

Following and the extensive consultations with stakeholders held in Athens, Trieste, Portorož and Zagreb<sup>44</sup> constituted a solid basis to widen the strategy beyond its maritime borders for the development of a wider EU Strategy for the Adriatic and Ionian Region (EUSAIR), in which the “maritime component” represents the core part of it.

A Strategy and an Action Plan have not yet been drafted. For this reason, for the purpose of our analysis, we have defined the “governance system” as the act of governing the process which is leading towards the adoption of the EUSAIR.

### 1.1 Methodological remarks

Therefore, in order to assess the effectiveness of the governance system, the assessment proposed has been based on 2 steps:

<sup>42</sup> Commission Staff Working Document “Report from the Commission to the European Parliament, the Council, the European economic and social Committee and the Committee of the regions concerning the added value of macro-regional strategies, [http://ec.europa.eu/regional\\_policy/sources/docoffic/official/communic/baltic/swd\\_added\\_value\\_macro\\_region\\_strategy\\_en.pdf](http://ec.europa.eu/regional_policy/sources/docoffic/official/communic/baltic/swd_added_value_macro_region_strategy_en.pdf).

<sup>43</sup> COM (2013) 468 final.

<sup>44</sup> In November 2013, also a Stakeholders Seminar was held in Brussels with all relevant stakeholders of the area. Results of this Study were presented in that event.

- Benchmark analysis, comparing the current governance in the Adriatic-Ionian sea-basin (EUSAIR) with the governance existing within the EU Strategy for the Baltic Sea Region (EUSBSR). The selection of the EUSBSR as benchmark is based on few elements, namely (i) it is the first macro-regional strategy adopted in the EU, with a longer background (with respect to the EUSDR<sup>45</sup>) allowing therefore a wider analysis of the governance system, taking advantage of lessons learnt from the past; (ii) with respect to the EUSDR, the EUSBSR has a maritime dimension, meaning that governance system which should be set up is requested to operate in a similar context.
- Analysis of the governance in Adriatic-Ionian sea-basin, focusing on the process towards the EUSAIR. To this regards, three main elements have been assessed:
  - **EFFECTIVENESS:** capability to achieve results in line with objectives defined. Our analysis focuses on the effectiveness of the major steps taken towards the definition of the Strategy, namely: (a.) Athens workshop; (b.) Trieste workshop; (c.) Portorož workshop; (d.) Zagreb high level stakeholders' conference<sup>46</sup>. For each meeting, a set of objectives derived from the conclusions has been cross-checked with Pillars and Priority Areas defined in the discussion paper of the EUSAIR, to assessing how far conclusions of each workshop have been taken into account in the EUSAIR;
  - **PARTICIPATION:** level of involvement of different stakeholders in the decision-making process. This assessment consists in the quantitative analysis on the types of stakeholders in the different workshops/conferences, cross-checking with disposals of COM(2012) 713 (Maritime Strategy for the Adriatic and Ionian seas).
  - The results of this analysis (both benchmark and governance) have been cross-checked with **stakeholders' perception on the governance system**, expressed in the interviews conducted in the area.

Below are reported the main results of these analyses. Detailed analyses are provided in § 5.1 of the Annex.

## 1.2 Benchmark analysis results

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Albeit with some limits<sup>47</sup>, the results of the benchmark analysis between the EUSBSR and the EUSAIR have been reported (for more details, please refer to Annex, § 5.1).

A quick snapshot of the lessons learned on the EUSBSR governance, allows to identify weaknesses emerged in the Baltic context, which should be carefully taken into account in the elaboration of the EUSAIR governance, considering that each sea basin has its own characteristics and structures. This means that governance systems, despite having been experienced successfully in other contexts, need to meet the specificities of a given sea-basin. On the other hand, it is important that all systems comply with the “Three No’s” principle: no new rules, no new funds, no new institutions, as specified in COM (2013) 468final. This should encourage the use of existing cooperation structures at an interregional or intergovernmental level for duly implementing a successful governance system within the EUSAIR.

A Strategy is not replicable *tout-court* in other contexts, since different objectives and needs should be addressed. At the same level, being the functional tool aimed at implementing a Strategy, a governance system cannot be strictly reproduced in different contexts in the same way. As

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<sup>45</sup> EU Strategy for the Danube Region

<sup>46</sup> In November 2013, a Stakeholders Seminar was held in Brussels with all relevant stakeholders of the area. Results of this Study were presented during that event

<sup>47</sup> The benchmark analysis has been limited to the comparison of subjects (and related roles) involved in the EU Strategy for the Baltic Sea Region (EUSBSR) and in the process leading towards the EUSAIR. Of course, due to different contexts and different roles of subjects, the only useful result regards the “lessons learnt” from the EUSBSR, which should be taken into consideration for elaborating the EUSAIR governance.

mentioned above, the purpose of a Strategy is to formulate a coordinated response to issues better handled together than separately. Consequently, a governance system should take into account:

- The intense cooperation developed in the area. Many cooperation initiatives and projects have been launched in the Adriatic-Ionian region, and the EU accession process of Balkan countries has made these relations even stronger;
- The balance between EU and non-EU countries, or in other words, the involvement of 4 non-EU countries in the Strategy. As pointed out in Report 2011/2179(INI)<sup>48</sup> to the European Parliament, this type of territorial cooperation is considered useful, particularly when these territories have historically been divided by borders, and can boost the integration of new Member States and their regions in the EU.

The involvement of non-EU countries is a great opportunity for the EU in order to strengthen cooperation in the area. On the other hand, for this reason a significant effort in establishing an efficient governance system could be required, adopting a “lighter”, more flexible, and less structured system.

As emerged in past experiences (EUSBSR), a manifold governance system encompassing numerous actors could have a negative impact on the strategy, losing (i) the responsibility of the actors involved in the implementation of single action and (ii) the focus of the strategy, which both decline the stakeholders’ commitment in the strategy. .

In order to tackle this issue, the role of key actors as National Contact Points and Priority Areas should be strengthened, but in the meantime the commitment of Countries should be reinforced too, with the special objective of promoting the Strategy and supporting stakeholders’ participation.

Finally, on a general level, **coordination between all strategies** (regional, thematic and others) should be envisaged and is indispensable to avoid overlapping or possible roles’ asymmetries. Up to now, it has never happened that two regional strategies have overlapped in the same geographical areas, but with the launch of the EUSAIR several countries (Slovenia, Croatia, Bosnia and Herzegovina, Serbia, Montenegro) will participate contemporaneously in two strategies, the EUSDR and the EUSAIR (and potentially also Alpine Space). It could happen for example, that a Country is the coordinator of thematic area, while in another strategy the same country coordinates another thematic area. This asymmetry could be considered “encouraging” from the perspective of the country – which could diversify its fields of intervention – but could also be deconstructive for the overall success of both Strategies, since it could generate heterogeneous interventions in the same activity.

To this regard, if these asymmetries are kept, it is suggested to adopt a “inter-macroregional” coordination point supported and managed by the countries, aimed at avoiding juxtaposition of strategies, and to harmonise interventions envisaged in the same thematic area but through different strategies.

Therefore, taking advantages of the “lessons learned” from other regional strategies (i.e. EUSBSR, see Annex, § 5.1 for more details), it is recommended to:

- strengthen stakeholders’ involvement within the Strategy through a dedicated tool; it is not needed to create a new actor, but rather an exchange platform or a forum. Among those actors to be involved, there are universities, NGOs and private companies.
- Increase communication activities (especially by Countries), in order to keep stakeholders’ interest in participating in the strategy high;
- Create a “Strategies coordination point” managed by the countries, in order to coordinate activities and roles between all different strategies (regional, thematic, others).

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<sup>48</sup><http://www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP//NONSGML+COMPARL+PE-488.006+01+DOC+PDF+V0//EN&language=EN>;

- Adopt a more flexible governance system, less structured and with easy functioning schemes. The roles of the National contact points and Priority coordinators should be strengthened if compared to the EUSBSR. As mentioned in Annex (“Assessment of the governance”), the multiplicity of actors involved in the governance and the thriving abundance of responsibilities bring the risk that a strategy could lose (a) focus and (b) the ownership and responsibility felt by the single stakeholders. Specifically as regards the roles of National contact points and Priority coordinators the following recommendations are therefore suggested:
  - **National contact points** should take care of the involvement and participation of their respective countries to the strategy. They should promote the Strategy in their countries, facilitating/incentivising stakeholders’ interest. In a few words, they should act as the interface between the Strategy and the countries.
  - **Priority coordinators** should be the sole players responsible for all elements of a priority area: implementation, monitoring, communication, amendments, etc. They are the technical advisors for their area and should maintain a dialogue with funding programmes on an alignment of funding for the flagship projects under their Priority Area.

### 1.3 Analysis of the governance system in the Adriatic-Ionian: effectiveness

As a general definition, the effectiveness is measured as “achieved results with respect to the original objectives”. We have thus cross-checked objectives derived from conclusions of each of the three workshops (Athens, Trieste and Portorož) and the high level stakeholders conference with Pillars and objectives defined in the EUSAIR discussion paper.

Each workshop/conference has been analysed according to “round tables”, reporting if and how conclusions of each round table have been translated into the current EUSAIR pillars/objectives.

From a general point of view, the analysis of each workshop from Athens to Portorož has put into evidence the effective capitalisation of results of each step undertaken, whose findings were discussed in the Zagreb high level stakeholders’ conference.

While Zagreb conclusions defined the launch of the Adriatic and Ionian Maritime Strategy, they also underlined the need for extending the coverage of the strategy to the hinterland of the Region, as also pointed out by the European Council<sup>49</sup>. The EU Commission and relevant stakeholders promptly accepted the Council address, widening the scope of the Strategy but without reducing the governance effectiveness. As a matter of fact, the “Maritime Strategy” and all steps previously undertaken have been included in the EUSAIR discussion paper as main components, and the 4 Pillars and related Priority Areas defined in the COM(2012) 713 have basically been “reshuffled” in the EUSAIR’s 4 Pillars. Therefore, all steps previously undertaken have been included in the new Strategy proposal.

Looking in detail to each workshop’s conclusions, the analysis has shown that all steps previously (workshops/conferences) undertaken have been taken into account in the EUSAIR discussion paper. Furthermore, by analysing all workshops’ conclusions and matching them with EUSAIR main challenges, it has been possible to find a direct correspondence between the two.

To sum up main findings of this analysis, the act of governing this process until the definition of the 4 Pillars of the EUSAIR has been managed effectively at all steps, given that:

- An effective management of all workshop has been detected, given that conclusions of each meeting have been capitalised step-by-step in the following meetings, until the final definition of the EUSAIR discussion paper;

<sup>49</sup> European Council conclusions of 13-14 December 2012,  
[http://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/en/ec/134353.pdf](http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/ec/134353.pdf).

- Conclusions of all workshops/conferences have been concretely included in the EUSAIR discussion paper;
- As reported above, the EU Commission and all stakeholders involved in the governance system have been able to promptly receive Council addresses and, at the latest stage, to widen the scope of the Adriatic Ionian Strategy.

Therefore, the governance system of the process leading towards the EUSAIR has resulted to be effective in terms of objectives achieved.

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

The assessment of the governance system also needs to include important variables which make it possible to define the level of involvement of stakeholders. In this sense, stakeholders' participation in the different workshops/conferences is an important indicator of the effectiveness of the governance. But, how to define stakeholders categories, which should be taken as "reference parameter"?

COM(2012) 713 (Maritime Strategy for the Adriatic and Ionian seas) traced a roadmap to follow for defining the future Action Plan of the former Maritime Strategy for the Adriatic and Ionian seas. In this roadmap, the Communication defined a set of subjects "with whom the Commission will work" which will undertake all actions identified in the future Action Plan. This reference parameter is highly representative of "stakeholders' involvement" in the governance: we are comparing subjects identified in the Communication as addressee of the Action Plan with those actually involved in the governance system of the EUSAIR and in the process of building up the Strategy.

For the specific purpose of assessing the effectiveness of the governance in terms of stakeholders' involvement, we have developed an analysis on the lists of stakeholders' invited to the three 2012 workshops, and to the High Level stakeholders' conference held in Zagreb<sup>50</sup>. These lists of attendees have been matched with the stakeholders' categories identified in the Communication mentioned above.

The first workshop in Athens and the last conference in Zagreb were conceived in a different way with respect to the workshops in Trieste and Portorož. Athens was organised as a great event with the aim of making the commencement of works on the EUSAIR's process public, with more than four hundred people invited from all over Europe. The high level stakeholder's conference of Zagreb, similarly, has been conceived in the same way, as a wide event involving the whole European territory with a different purpose, i.e. to give visibility to the Maritime strategy for the Adriatic and Ionian Seas that had been drafted thanks to the works carried on during the previous three stakeholder's workshops.

On the contrary, the workshops hosted in Trieste and Portorož, although the stakeholders composition reflected the same categories of subjects, registered a minor number of invited persons (around a hundred persons).

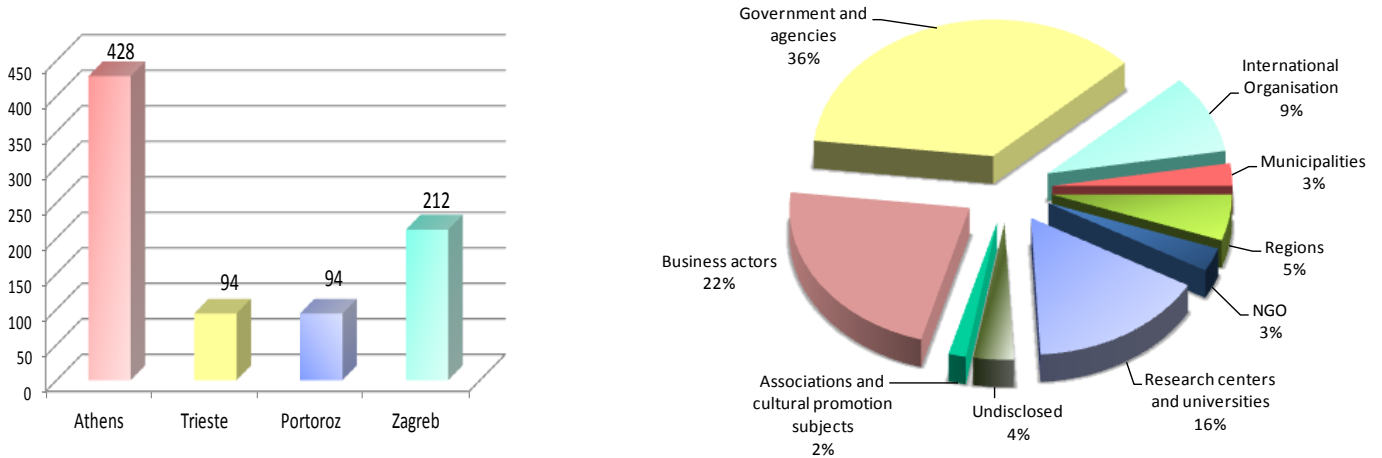
Moreover, we have pointed out that the great majority of stakeholders invited to each conference/workshop came respectively from the country hosting the event. This is probably due to the possibility for stakeholders to attend the event thanks to their proximity to the venue and/or due to hosting country's contacts.

As a final conclusion, it is possible to state that, albeit with different coverage and distributions, all four meetings have met COM(2012) 713 requests.

<sup>50</sup> It is worth mentioning also the Brussels seminar, held on 14<sup>th</sup> of November 2013: 156 participants from 8 countries participated to the event.



Figure 9 - Number of stakeholders involved in each workshop and by typology



## 1.5 Stakeholders' perception

An array of different stakeholders from all countries of the Adriatic-Ionian sea-basin have been interviewed in order to collect their point of view (i) on possible improvements of the governance in the process of building the strategy for the Adriatic and Ionians Seas and (ii) on the possible gaps and deficiencies.

As regards the effectiveness of the governance system, the interviewees who participated in the different conferences/workshops considered the governance system “effective”, in the sense that all necessary steps have been taken. Many stakeholders considered this governance system as “essential” since it consolidates and increases cooperation in the area, especially with non-EU countries and their relations with the EU. On the other hand, some interviewees did not express a position about the governance, since they were not aware of the existing governance in the region.

When it comes to the possible gaps identified, conflicting answers have been surveyed deriving from different stakeholders typologies. Many have lamented that their weight in the process was limited compared with other actors. The heterogeneity of answers may lead one to think that it has not been a question of stakeholders' involvement, but rather a lack of adequate communication.

Indeed, as also highlighted by 8 out of 48 stakeholders interviewed, the **inadequate communication actions** to disseminate the objectives of the forthcoming strategy, and to inform stakeholders' about their involvement in the process is the main gap identified in this governance system.

An adequate communication should be aimed at increasing stakeholders' participation in the strategy, and also to enlarge the bottom-up approach and widen the consultation process as much as possible.

From an institutional point of view, some stakeholders have underlined the need to create a formal institutional framework able to ensure the definition and implementation of each pillar's objectives, to work in close synergy with Priority Areas coordinators and focal points. The creation of a **committee for each pillar**, composed by representatives of each countries and relevant stakeholders, has been proposed, in order to consolidate the consultation process and make it more effective. The creation of 4 committees as such could also support the achievement of one of the main objective of the Strategy, i.e. to ensure the **subsidiarity**. It is indeed an essential requirement of the Strategy, since it can support the identification of needs of the civil society and translate into concrete projects.

All interviews have underlined the need to structure the governance of the Strategy by adopting a **multilevel approach**<sup>51</sup>, and the involvement of relevant stakeholders is the basic requirement for the success of the Strategy. Most likely, the creation of a “stakeholders committee” for each pillar could represent a valid tool for achieving this result.

Finally, some interviewees (3 out of 48) have also noted that there is an overall lack of **coordination between macroregional strategies** developed under the EU umbrella. It would be wise to harmonise this framework by creating an intermediate coordination point able to concentrate and optimise efforts and objectives.

The following elements sum up the analysis of stakeholders’ interviews:

- According to subjects interviewed, the governance of the process leading towards the EUSAIR is effective.
- Communication and dissemination activities have been perceived as weak, and prospected solution focus on:
  - Increasing the involvement of stakeholders;
  - Disseminating the purposes of the Strategy;
  - Informing stakeholders about the functioning of the Strategy

A “stakeholders’ committee” (one for each Pillar) is perceived as a possible solution to achieve these objectives;

- Increase the role of the Marine Strategy Framework Directive in the EUSAIR, which could be directly mentioned as one of the thematic objectives of the 3<sup>rd</sup> Pillar;
- Increase coordination between all regional strategies in the EU by creating a coordination point between all strategies.

## 1.6 Specific Conclusions

It is possible to conclude that the governance system has so far resulted to be (i) effective, (ii) in line with Europe 2020 objectives and (iii) with an adequate involvement of stakeholders. The effectiveness of the governance system has also been confirmed by stakeholders, at least those involved in the consultation process, who have pointed out that all necessary steps have been taken.

However some important hints have emerged, which could be taken into account in the next steps for the fine tuning of the Strategy.

### ▪ Why the EUSBSR could not be replicated tout court?

First of all, the governance of the EU Strategy for the Baltic Sea Region (EUSBSR) is an important reference, since in principle the same governance system could be replicated with the EUSAIR. Nevertheless, as emerged in the benchmark conclusions, a governance system encompassing numerous actors could have a negative impact on the strategy. Indeed, too many actors with too many and differentiated (but often also not clearly defined) tasks could weaken (i) the responsibility of the actors involved in the implementation of single action, and (ii) the focus of the strategy.

This situation could be worsened by the, differently from the Baltic, there are also non-EU countries in the Adriatic-Ionian Strategy. Non-EU countries could meet some difficulties in complying with EU rules and procedures. Moreover, numerous actors engaged in manifold and unclear tasks could lead both EU and especially non-EU countries to ineffective governance and unsuccessful implementation of the Strategy’s objectives.

Lessons learned from the EUSBSR put emphasis to the need of strengthening the role of National Contact points and Priority coordinators (see § 1.2), but at the same time also the commitment of

<sup>51</sup> A multilevel governance implies the interaction of different subjects from different levels (institutional, civil society, economic players, associations, NGOs, sector organisations) concurring in the decision-making process.

Countries should be reinforced with the special objective of promoting the Strategy and supporting the stakeholders' participation.

▪ **Possible governance system to be implemented for the EUSAIR**

As derived from the analysis on effectiveness, and further to the gaps identified by stakeholders, the governance system proposed for the EUSAIR should take into account the following recommendations:

- The entire structure of the governance system - based on the EUSBSR model – needs to be optimised, concentrating **more responsibilities to a small number subjects**. The overall interactions between all involved actors should be rationalised to few and clear objectives, concentrating coordination activities in National contact points and Pillar coordinators (instead of more numerous Priority area coordinators);
- The role of **National contact points** and **Pillar coordinators** should be strengthened; The first should improve the role of political coordinators in relation with other National contact points and stakeholders, but at the same time it is suggested to reinforce their communication and dissemination efforts for promoting the EUSAIR. Also, the involvement of Pillar coordinators should be strengthened, especially as concerns their roles of: i) selecting operational actions, ii) harmonising and aligning projects to priorities, iii) consolidating a cross-country perspective by reinforcing their role ability to cooperate with different stakeholders from the entire area, iv) revising the Strategy objectives, for which they should act more promptly to review/adapt priority objectives to emerging needs, and v) supporting policy-makers and all relevant subjects to develop appropriate communication actions. .
- The **involvement of stakeholders** needs to be institutionalised in order to ensure subsidiarity to the Strategy. The creation of a permanent forum (virtual or physical) should be taken into account. This forum will serve as a collector of civil society needs and will put them to the attention of the decision-makers;
- **Communication actions** need to be strengthened and should be a clear part of the overall governance. Each actor should have a fair involvement in this task and define objectives and targets. Communication should be addressed to increase the level of involvement of different all stakeholders, but also to duly promote the Strategy as a useful cooperation tool. Specific communication actions should be envisaged for third countries, in order to support their active participation in cooperation projects and in planning activities.

Finally, from a general perspective and outside the scope of the EUSAIR governance, a **coordination between all strategies** (especially macro-regional) should be envisaged. This task should take place at a higher level (EU), and it is indispensable to avoiding overlapping or possible roles' asymmetries. It is suggested therefore to adopt a high level coordination point to avoid that strategies may overlap, and to harmonise interventions envisaged in the same thematic area but through different strategies.

▪ **Ongoing consultation process**

In order to identify specific needs which could be addressed within the strategy, the EU Commission organised specific actions. As a first step, a seminar was organised in November 2013 in order to put together different stakeholders from the area and presenting possible proposal to be included in the EUSAIR Action Plan.

A second action has been launched at the end of November 2013 aimed at collecting, through an online consultation process, ideas from the relevant stakeholders (public authorities, organizations, NGOs, sector associations) and the entire civil society in order to make sure that “the Strategy is realistic in its starting point, appropriate in its objectives and responsive to the real needs of inhabitants of the Region”. These results, however, will not be included in this analysis.

## 2 External prospective evaluation: EQ 4 Added value for the EU involvement

The aim of this task is to assess whether there can be a clear added value for the EU to be involved in the Strategy for the Adriatic and Ionian Region (EUSAIR) – specifically in its maritime component – and, if yes, to provide suggestions as to how to maximise it, also from a pillar perspective.

The analysis has been carried out in 4 steps:

1. First of all, an overview of maritime cooperation initiatives carried out at sea basin level outside the umbrella of the EU, and addressing the pillars/priority areas of the EUSAIR is provided
2. Secondly an overview of maritime cooperation initiatives carried out at sea basin level under the umbrella of the EU is provided
3. Stakeholders' opinions, gathered via a set of interviews, allowed us to substantiate and put the preliminary findings from the two steps above into further context
4. Finally conclusions have been outlined along with possible suggestions on how to improve, if any, the added value for the EU.

### 2.1 Methodological remarks

The main challenge with this type of analysis consists of the definition of “added value”. Although the concept has now been used in policy documents at EU level as a pivotal element to justify EU intervention (also in relation with art. 5(3) of the Treaty on European Union) for quite some time, a single and clear definition of it has not yet emerged, nor has it been possible to establish common criteria for its quantification. Several authors and institutions have provided different points of view of what European added value could (or should) mean<sup>52</sup>, and for the purposes of this Study we have adopted a definition used by the EU Commission, where added value is “**the value resulting from an EU intervention which is additional to the value that would have been created by Member States alone**”<sup>53</sup>.

This leads us to the main problem related to European value added: when the concept is applied to a policy option to be implemented in the future, it is very difficult and arbitrary to quantify it.

For this reason we have limited our analysis only to the probability (and the extent) of attaining the objectives set out in the Strategy respectively with or without the involvement of the EU. Depending on whether each Pillar can be better addressed with or without the EU (in accordance with the principle of subsidiarity), we have established whether there is a European added value, and how it can be improved. Moreover, further considerations have been made as to cross-border benefit spill-overs which can result from EU intervention, even if not directly related to the objectives of the Strategy.

Finally, since our work is focused on the macro-regional dimension inherent to the Strategy, when analysing initiatives not carried out at EU level, we have only taken into consideration actions which could have a potential cooperation effect on the whole Adriatic-Ionian area. This means that maritime initiatives carried out by single countries which are exclusively focused on their territory

<sup>52</sup> See “Identifying the constituent elements of the European Added Value (EAV) of the EU RTD programmes: conceptual analysis based on practical experience”, Yellow Window Management Consultants SA/NV et al., 2000, and “The European Added Value of EU Spending: Can the EU Help its Member States to Save Money?”, Bertlesmann Stiftung, 2013.

<sup>53</sup> COMMISSION STAFF WORKING PAPER, “The added value of the EU budget” Accompanying the document “Commission Communication A budget for Europe 2020”, Brussels 29.6.2011. SEC(2011) 867 final.

have been excluded from the scope of our analysis, despite being in line with the objectives of the Maritime Strategy, because they do not have a macro-regional perspective.

## 2.2 Prospective evaluation

### 2.2.1 Non-EU cooperation

By “non-EU cooperation”, we mean all cooperation initiatives carried out on a permanent basis, which were conceived and promoted by bodies, institutions, and organisations not directly linked with the EU. This in principle does not exclude that the EU may have had some kind of involvement in these initiative at a given point. However, to be considered as such, non-EU cooperation must not be EU-driven.

The Adriatic-Ionian area has been characterised by a relatively intense maritime and non maritime non EU-driven cooperation for a few years. An overview of cooperation initiatives and structures active in the area has been carried out in § 8.1.2 of the Annex. The table below presents the existing cooperation initiatives by Pillar of the EUSAIR. The attribution of each initiative to one or more Pillars has been based on main issues they address according to their mission.

**Table 12 - Cooperation initiatives by Pillars of the Maritime Strategy for the Adriatic and Ionian Seas**

Initiative	1st Pillar	2nd Pillar	3rd Pillar	4th Pillar
Adriatic Ionian Euroregion	✓	✓	✓	✓
Adriatic Ionian Initiative	✓	✓	✓	✓
Adri-sea Partnership			✓	
AdriaMED	✓		✓	
ADRIAPAN			✓	
Central Europe Initiative	✓	✓	✓	✓
EastMED	✓		✓	
Forum of Adriatic and Ionian Chambers of Commerce	✓	✓	✓	✓
Forum of Adriatic and Ionian Cities	✓	✓	✓	✓
North Adriatic Port Association		✓		
Regional Cooperation Council	✓		✓	
Trilateral Commission for the Protection of the Adriatic	✓		✓	

As can be seen, there are several initiatives that aim to cooperate on issues related to the pillars of the EUSAIR. Nearly all initiatives deal with the 3rd Pillar “Preserving and improving the quality of the environment”. Besides testifying that the environment is a very sensitive topic in the Adriatic-Ionian, this would also seem to be a natural consequence of the fact that its protection is definitely a “horizontal issue”, and most initiatives need to deal with it in one way or another. The 1<sup>st</sup> Pillar too is addressed by many initiatives, although this may be explained by its scope being very broad, and thus covering the mission of many of them.

What is interesting about these initiatives, however, is that none of them is EU-driven<sup>54</sup>. Whether they were instituted under the umbrella of another international organisation (e.g. FAO’s AdriaMED and EastMED, or the Trilateral Commission for the Protection of the Adriatic, sponsored by the Council of Europe), or they simply represent spontaneous initiatives deriving from stakeholders’ and governments needs, the forms of cooperation they gave rise was not promoted by the EU in the first place.

Naturally, apart from FAO’s projects which specifically address cooperation on fisheries management, none of these initiatives is strictly speaking “maritime”. Indeed they are aimed at spurring cooperation between Adriatic-Ionian countries at different levels. Nonetheless, they all end up addressing one or more issues also related to the maritime component of the EUSAIR.

<sup>54</sup> By “EU-driven” we mean initiatives that are carried out under the umbrella of the EU.

The number of existing initiatives is quite important to properly frame our analysis of European added value, in that it suggests that the need for cooperation in the Adriatic-Ionian emerged as an autonomous process that did not need to be driven or fostered by the EU. This is partly confirmed by the fact that the very idea of an Adriatic-Ionian macro-region is in fact something that has been on the political agenda of countries and regions for quite some time. The Adriatic Ionian Euroregion, for instance, was founded in 2006 by regional and local governments of Italy, Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, and Albania with the involvement of international, EU and national institutions, to better address common challenges.

### 2.2.2 EU cooperation

By EU cooperation, we mean all cooperation initiatives that can be considered EU-driven, i.e. that would have not existed without a direct involvement and support of the EU.

Over the past few years, and before the direct involvement of the EU in the process of building the macro-regional strategy, EU-driven maritime cooperation initiatives in the area mainly took place through transnational and cross-border (including IPA) cooperation. A comprehensive analysis of ongoing and concluded maritime cooperation projects financed under this framework has been provided through EQ 2 “Existing international cooperation”. Please refer to the list provided in § 8.1.4 of the Annex.

Through transnational and cross-border cooperation, the EU has financed directly or indirectly an enormous amount of maritime projects over the years. This however should not suggest that the role of the EU has been limited to a mere “financial backer” of projects carried out by third parties. EU policies have shaped cooperation basics that have contributed to aligning projects to what now are well-established principles, such as the ones laid out in Europe 2020.

Of particular importance is the Instrument for Pre-Accession Assistance, which, formally dedicated to assisting candidate and potential candidate countries in the progressive alignment with the *acquis communautaire*, it strengthened the sustainable development capacity of the Adriatic Region through an agreed strategy of actions among the partners of the eligible territories.

Furthermore, EU-driven cooperation has greatly influenced non-EU cooperation, with the latter aligning or converging with EU policies. This is the case, for instance, of FAO’s projects AdriaMED and EastMED whose approaches towards fisheries management share many a similarity with the Common Fisheries Policy of the EU, and with which the EU cooperates on a regular basis. But this is also the case of the Adriatic Ionian Initiative and the Adriatic Ionian Euroregion, which could be regarded as the first steps towards the process that has led to the Macro-regional strategy coordinated by the EU.

A confirmation of this mutual influence between EU- and non EU-driven cooperation can be found in the fact that most cooperation projects carried out by non-EU organisations are actually funded by EU cooperation programmes. The financial contribute that the EU gives to third subjects to carry out cooperation in the Adriatic-Ionian is not a secondary aspect, since, as a matter of fact, all projects surveyed in § 8.1.4 of the Annex are financed by the EU, albeit to different extents. This means, on the one hand, that without EU funding it would be very difficult to translate Adriatic-Ionian cooperation into concrete projects that can have an impact on the territories involved, while, on the other hand, it should also suggest that through its funding system the EU eventually turns out to at least partially “orient” cooperation carried out by third subject towards its policy objectives.

### 2.2.3 Stakeholders’ opinions

A very important contribution to the assessment on the added value for the EU comes from the interviews conducted with stakeholders<sup>55</sup>. Indeed, they offer an interesting point of view to identify

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<sup>55</sup> Governmental agencies, Ministries, NGO, associations, private companies

what results can be achieved through bottom-up cooperation, and what challenges need to be addressed and shared within cooperation initiatives.

The interviews carried out have offered a wide array of answers – whose differences often reflect the different categories of stakeholders interviewed – from entirely positive judgements, to utterly negative criticisms as to the involvement of the EU in Strategy so far. However, it is remarkable that the vast majority of interviewees have come to agree that the EU has had a pivotal role in fostering maritime cooperation in the Adriatic-Ionian, and the current level of cooperation could not have been reached without the support of the EU. According to stakeholders, this remains true both from the financial and the political perspective. Even more importantly, has made it possible to set up common and agreed sets of norms and rules that have further facilitated cooperation and development policies.

The element to which stakeholders seem to attach most added value is the success that an EU approach can achieve in limiting potentially diverging national interests that risk hindering the macro-regional dimension of cooperation. This is because “national governments tend to be short-sighted because of relatively short electoral cycles. By contrast, policy-making and hence public-spending decisions at European level are partially decoupled from national electoral cycles”<sup>56</sup>.

Moreover, an involvement at EU level is believed to create added value especially when it comes to involve smaller countries in the institution of the macro-region. Small countries could indeed be at a disadvantage in cooperating with major players in the area. The involvement of the EU, however, gives them more visibility, and enables them to actively contribute to the constitution of the macro-region.

Stakeholders have expressed contradictory opinions as to the role and involvement of the EU in the macro-regional strategy: while some believe that the idea of an Adriatic-Ionian Macro-region was conceived “bottom-up”, and then endorsed by the EU at a later stage, some others remain convinced that it was the EU to start the process in the first place. However, despite diverging opinions, several stakeholders pointed out similar conclusions as to how to maximise the added value for the EU:

- First of all, most stakeholders agreed that the macro-regional strategy will actually work only if a strong and clear coordination is provided at EU level. This is because, as mentioned above, there are often diverging national interests, and only a strong centralised coordination can ensure the necessary coherence to the process. Some stakeholders have lamented that sometimes the EU tends to delegate too much to countries, without expressing a strong political direction.
- At the same time, according to stakeholders, the added value will be maximised only if the EU leaves the choice of priorities, flagship projects, and horizontal actions of the Action Plan up to Countries and sector stakeholders. The role of the EU is seen as an added value here, provided that it is limited to the definition of general objectives, procedures, and norms of behaviour, while lower levels of implementation are believed to be dealt with more effectively at the local level.
- The EU should also make sure that non-state actors are actively engaged in the definition of the Action Plan, as well as in its implementation.
- A dedicate cooperation fund should be set in place, whose priorities perfectly match the goals and pillars of the EUSAIR. Similarly, the EU should facilitate dialogue between managing authorities, in such a way that national operational programmes of European Structural and Investment Funds can duly take into account the objectives of the Strategy.
- The EU should act as a strong coordinator and provider of technical support platforms.

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<sup>56</sup> “The European Added Value of EU Spending: Can the EU Help its Member States to Save Money?”, Bertelsmann Stiftung, 2013.

## 2.3 Value added: the EUSAIR as a tool for achieving the Europe 2020 priorities

The purpose of the last step of our analysis is to compare the four Pillars identified in the EUSAIR discussion paper with Europe 2020 Priorities and Flagship initiatives, in order to assess whether and how the EUSAIR can contribute to addressing Europe 2020 specific challenges. This has been done by matching analyses between the two strategies, where logical links have been considered as well as their main focus and general purposes.

Europe 2020 strategy has followed the Lisbon strategy as a long-term approach to dealing with structural weaknesses in the EU economy. Indeed, it has been designed to enhance the EU's growth potential and deliver high levels of employment, productivity and social cohesion. Within this framework, the strategy has been made up of three main priorities (*Smart Growth, Sustainable Growth, Inclusive Growth*) that should be pursued through a number of flagship projects, as can be seen below:

Figure 10 - EUROPE 2020: priorities, topics, flagship projects and objectives



With the aim of highlighting the contribute of EUSAIR to Europe 2020 our analysis reports the following results:

- EUSAIR's 1<sup>st</sup> Pillar** is focused on marine and maritime innovative growth. Hence, at several levels it mainly encompasses the first two priorities of Europe 2020: *Smart Growth* and *Sustainable Growth*. As a main strategic element, the 1st Pillar gives a dominant relevance to Blue R&D, affecting all sectors of maritime economy, and the innovative management of resources, with a special focus on fisheries and aquaculture. In particular, a pivotal role is given to collaborative processes in the field of research and innovation with two principal aims: adapting fishery methods to the new obligations deriving from the CFP reform and improve tools enabling efficient controls. The 1st Pillar also pushes in terms of *Inclusive growth*, with special focus to the growth of candidate and potential candidate countries. A specific objective is dedicated to the purpose (*"Ensuring full compliance to EU fisheries legislation in candidate/potential candidate countries"*).
- The 2<sup>nd</sup> Pillar** shows a situation completely similar to the 1<sup>st</sup> Pillar. It perfectly covers *Smart growth* and *Sustainable growth*. The hearth of the 2nd Pillar is to improve maritime transports and maritime security also by strengthening cooperation across the Adriatic-



Ionian Sea with candidate and potential candidate countries. In this framework, while ICT, research and innovation in environment protection appears to play an important role, as a general rule of the EUSAIR (and of the Strategy), the same importance has been given to *Inclusive growth*. Indeed cooperation is the leitmotiv of the entire Strategy, but in the EUSAIR a specific objective has been dedicated to inclusive growth: *reducing isolation of islands and remote areas by improving their access to transport and energy services*. However the latter appears to be also connected to competitiveness, to be attributable to the second priority of Europe 2020 strategy.

- (c) The impact of the crisis and the shifting balance of economic weights in the global economy are particularly important in the field of climate change. Due to its strong connection to environment, energy and climate change, *Sustainable Growth* seems to be well addressed by the specific challenges of EUSAIR within the **3<sup>rd</sup>Pillar**. At the same time, the 3<sup>rd</sup> Pillar matches both the two flagship initiatives of *Smart Growth* (*Innovation Union* and *Youth on the move*) and the two flagship initiatives of *Inclusive growth* (*An Agenda for new skills and jobs* and *European Platform against Poverty*).
- (d) The first three pillars, thus, cover Europe 2020 priorities *Smart growth* and *Sustainable growth* in different ways, while the **4<sup>th</sup>Pillar** succeeds in covering all the flagship initiatives connected to the three priorities of Europe 2020 strategy. This wide conformity is mainly due to the manifold activities relating to *Increasing regional attractiveness growth* such as tourism, which even alone can involve the great majority of economic sectors, directly or indirectly.

As a conclusion, since Europe 2020 is the first formal agenda for the competitiveness of the European system, employment, and the development of a model of social market economy, it could also have an impact on the definition of European regional policies. This is proved in our analysis of EUSAIR compliance with Europe 2020, where it seems clear that the former is highly influenced by the objectives and targets of the latter. Indeed, we have pointed out that all Europe 2020 priorities have been fully encompassed in the EUSAIR and that the Strategy could support the achievement of Europe 2020 objective. More in detail, “Innovation”, “Education”, “Climate, energy and mobility” and “Competitiveness” are the objectives of the Europe 2020 strategy best addressed by the EUSAIR. Inclusive growth appears as the overall basis of the EUSAIR, as well as support to capacity building of third countries is basically present in all Pillars. This strong engagement is thus reflected in the EUSAIR

## 2.4 Specific Conclusions

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The elements outlined above enable us to draw some conclusions as to the possible added value for the EU to be involved in the macro-regional Strategy.

It is sufficiently clear that, similarly to what happened in the Baltic Sea Region, there is already-existing bottom-up and not-EU-driven cooperation potential in the Adriatic-Ionian. Nonetheless, it has clearly emerged how it is widely acknowledged that most cooperation projects with a macro-regional dimension have concretely been implemented under the umbrella of EU programmes. Besides guaranteeing the necessary financial support, the use of EU funding has had the effect of aligning bottom-up cooperation initiatives to EU policy objectives for the macro-region.

Furthermore, as shown in the paragraph above, the EUSAIR is perfectly in line with Europe 2020, and thus would certainly contribute to achieving its objectives.

In light of the above, as well as of stakeholders’ perception of how the involvement of the EU can contribute to the Adriatic and Ionian macro-region, we can reasonably argue that there is a clear added value for the EU to be involved, i.e. that a strategy strongly supported by the EU is quite likely to create a value which is additional to the value that would result from spontaneous

cooperation between public authorities, international organisations, NGOs, and the private sector if not coordinated by the EU.

When it comes to the Pillar perspective, it could be argued that the added value for the EU to be involved may be subjects to variations.

As regards **the 1st Pillar** “Driving innovative maritime and marine growth” the situation is more complex. When it comes to spurring research in the blue economy, acting under the EU umbrella could be essential since “Blue Growth” is a relatively recent strategy which addresses many sectors not fully developed in the Adriatic-Ionian and would benefit from further cooperation. When it comes to promoting sustainable and responsible fishing activities, on the other hand, forms of cooperation are already in place via existing regional organisms (e.g. the GFCM and its projects *AdriaMED* and *EastMED*), and of course the CFP, although the latter does not specifically address cooperation. However this should not be used as an argument to sustain a weaker involvement of the EU in this Pillar, since cooperation on this issue is far from being considered from satisfactory.

It seems quite clear for instance – also based on the analysis on cooperation carried out in EQ 2 – that a clear added value has been generated in the past with relation to **the 2nd Pillar** “Connecting the region”, and **the 3rd Pillar** “Preserving, protecting, and improving the quality of the environment”. There is every reason to believe that further added value can be generated through EU support on these pillars. An even greater EU added value could be generated as regards the 2nd Pillar by ensuring a safer and more secure maritime space, given that there are not many bottom-down initiatives addressing this issue in the Adriatic-Ionian, despite cooperation in the field is actively promoted by Member States. Coordination by the EU would certainly lend improved coherence to current actions.

There could be added value for the EU also in **the 4th Pillar** “Increasing regional attractiveness”. Tourism (which is mainly coastal in the Adriatic and Ionian region) is one of the largest and fastest-growing economic activities in the area. This may suggest that a role of the EU could be not necessary for its development. Nonetheless, this would not be completely true, since the involvement of the EU could bring an invaluable contribution to making the sector environmentally and culturally sustainable. While the sector would probably be naturally driven to relatively profitable and financially safe forms of mass tourism, the EU could put the spotlight on the sustainability aspect, and thus achieving results that would normally be more difficult to achieve. Even more importantly, with its intervention the EU may succeed in establishing cooperation between stakeholders and operators that have traditionally been competing with each other.

Moreover, apart from pillar-related issue, one of the most important arguments in favour of a strong involvement of the EU in the macro-regional strategy should be found in the spill-over effects that the latter may have on the EU integration process, especially with relation to the Balkan area. The analysis on maritime cooperation in the Adriatic-Ionian has demonstrated that EU Member States have a marked tendency to cooperate between them, and so do acceding countries. The EU integration process, in other words, facilitates cooperation between countries. While this conclusion may sound rather obvious, it should be noted that it is not possible to determine whether it is the fact of being part of the EU that facilitates cooperation, or it is cooperation itself that makes the EU integration process easier. This is to say that an even greater added value of the EU being part in the Adriatic-Ionian macro-region is that it can be a powerful tool to spur EU integration towards East.

Finally, an improved understanding of macro-regional added value for the EU is also needed by programmes’ administrators if they are to maximise the probability of attaining it. The desire for added value has to be translated into programme goals and work plans, and project selection criteria need to reflect the goal of added value if resultant project portfolios are to have any chances of delivering outcomes in line with this goal.

## **Impact assessment**

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## 1 Assessment of the social, economic, legal and environmental impacts

This sub-task assesses the social, economic, and environmental impacts of the possible actions which will be identified by the countries, and included in an Action Plan flowing from the Maritime Strategy, as suggested and provided for in both the Maritime Strategy for the Adriatic and Ionian Seas basin, and more recently the “Discussion-Paper” on a EU Strategy for the Adriatic and Ionian Region (EUSAIR), August 2013. The assessment acts as a pre-cursor to a likely impact assessment of the formal Action Plan which will be prepared by the Commission. As the Action Plan is not yet available, it is expected that this assessment should inform both a) the Commission’s formal Action Plan, and b) the formal Commission impact assessment which would then be prepared.

### 1.1 Methodology and assumptions

Some important methodological statements must be made before presenting the assessment of impacts.

**First** is that this report provides an assessment of impacts, based on the Commission Impact Assessment Guidelines<sup>57</sup>. As noted in the Guidelines themselves, impact assessment is a key tool to ensure that Commission initiatives and EU legislation are prepared on the basis of transparent, comprehensive and balanced evidence. The Guidelines require certain section headings to be included in an impact assessment, and so those headings are used in this report. Completion of these headings, rather than just a description of the social, economic, legal and environmental impacts, is deemed essential in informing the description of the impacts i.e. providing text on the impacts alone would make little sense.

**Second** is that the Maritime Strategy for the Adriatic and Ionian Seas adopted by the Commission on 30 November 2012<sup>58</sup>, will be one of the (main) components of the broader EUSAIR macro-regional strategy, which will cover also the hinterland, as laid out in the Discussion Paper of August 2013. In the Maritime Strategy for the Adriatic and Ionian Seas basin four pillars are proposed:

- Maximize the potential of the blue economy;
- Healthier marine environment;
- A safer and more secure maritime space;
- Sustainable and responsible fishing activities.

In the EUSAIR, a different set of pillars is proposed as follows:

- Driving innovative maritime and marine growth;
- Connecting the region;
- Preserving, protecting and improving the quality of the environment;
- Increasing regional attractiveness

Two other cross issues are proposed, namely: research, innovation and small-and-medium-size enterprises (SME) development; and capacity building.

The 2013 Discussion Paper highlights that the maritime activities and related priority areas in the 2012 Communication are shuffled around in the EUSAIR, and housed within the pillars proposed in the EUSAIR. However, critically for this impact assessment is the statement in the EUSAIR Discussion Paper that this ‘*will not pre-empt to widen and extend the scope of the Action Plan beyond the coastal line, without disregarding it, as far as the works and consultations will progress*’<sup>7</sup>. This means that for the purpose of this impact assessment the re-shuffling into the new EUSAIR pillars has no material impact on this assessment given that this impact assessment examines the impacts of the Action Plan as part of the Marine Strategy. The more recent 2013

<sup>57</sup> [http://ec.europa.eu/governance/impact/commission\\_guidelines/commission\\_guidelines\\_en.htm](http://ec.europa.eu/governance/impact/commission_guidelines/commission_guidelines_en.htm)

<sup>58</sup> COM(2012) 713

Discussion Paper, does however mean that the problem definition provided in this report, can be based on the problem statements in both the Communication and the Discussion Paper (as well as the findings of this study as presented in the country fiches).

**Third**, and of special importance, is that the Action Plan that is the subject of this assessment has not yet been proposed/agreed or seen in any form by the contractors. This impact assessment is therefore necessarily brief, exploratory, and qualitative.

**Fourth**, is that it is assumed that the Action Plan will provide for no new funding, no new institutions, and no new regulatory environment.

Additional text on issues three and four above, is provided later in this section when describing the option to have a Strategy/Action Plan.

## 1.2 Findings

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### 1.2.1 Problem definition

#### 1.2.1.1 Description and underlying drivers of the main problems

It should be noted that there is already extensive cooperation between the coastal states of the Adriatic and Ionian Seas, and a number of regional initiatives in recent years at both national and regional level which can be commended, as highlighted in the outputs of this study. Nevertheless it is also the case that:

- countries don't always have the right conditions in place for innovation and competitiveness, to concentrate on areas of comparative advantage, and to support economic growth based on maritime potential;
- environmental performance requires improvement; and
- the social benefits created by maritime activities are in many cases precarious, and located in areas with few other economic activities.

There therefore remains considerable work still to be done in ensuring that the foundations are in place in the region for sustainable growth based on: innovative maritime and marine growth; connecting the region; preserving, protecting and improving the quality of the environment; increasing regional attractiveness; research, innovation and small-and-medium-size enterprises (SME) development; and capacity building.

A brief and summarized analysis of the key barriers for priority MEAs identified in Report 1 of this study is provided in the table below. The table demonstrates, and supports the text of the Maritime Strategy for the Adriatic and Ionian Seas basin, which highlights that needs which are often common and shared by countries/regions bordering the Adriatic and Ionian Seas include: administrative simplification and harmonisation, skills development and a qualified and mobile workforce, research, development and innovation, maritime clusters, and smart and climate-proofed infrastructure. Indeed these sorts of actions are highlighted in Report 1 of this study in the recommendations of solutions to address key barriers.

The table also highlights potential conflicts between countries and between MEAs in the region e.g. competition between MEAs in different countries, and competition by MEAs for space in individual countries. On the other hand, the outputs of this study have highlighted that many MEAs can be mutually supporting e.g. developments in coastal tourism can support passenger ferries, which in turn can result in benefits in shipping and shipbuilding. This means that common/shared actions to mitigate conflicts, are both necessary, and could have considerable benefits.

The inter-connectedness of the three spheres of economic, environmental and social sustainability should also be stressed, such that poor environmental performance can, and does have, significant negative impacts on both economic and social performance. Again, this highlights that there is thus a clear need (and potential) for improvements in these three spheres to be mutually reinforcing.

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

**Table 13 - Key barriers/problems identified for MEAs in Report 1, by country, and Communication and Discussion Paper Pillar**

Country / Sector	Marine aquaculture	Coastal tourism	Passenger ferries	Yachting	Cruise tourism	Short sea shipping	Deep sea shipping	Protection of habitats	Fishing
COM/2012/713Pillar	1	1	1	1	1	1	1	2	4
EUSAIR Pillar	1	4	2	4	2	2	2	3	1
Albania	Food safety, quality control assurance, training, legal regulation	No clear strategy or clusters	Economic crisis, competition with other countries, weak strategy						Infrastructure, credit, age of fleet
Bosnia and Herzegovina	Competing for coastal space with tourism and other uses	Competition with Croatia, access, not well organised							
Croatia	Conflict with other MEA especially tourism, credit	Conflict of interest with other MEAs, credit, seasonality,	Conflict of interest with other MEAs, credit, seasonality,	Conflict with other MEAs, demand	Conflict of interest with other MEAs, credit, seasonality,	Conflict of interest with other MEAs, credit, connections with road network			
Greece	Credit, obtaining licenses, bureaucracy	Lack of funds for research, poor training, debate about environmental impacts		Bureaucracy and red tape	Lack of funds for research, poor training, debate about environmental impacts	Credit, financial crisis, attracting labour, poor research	Companies in debt, no cluster		
Italy	Small operators, credit availability, lack of sector organisations, bureaucracy	Poor international connections in south of country	Poor infrastructure for dealing with passengers in areas of high demand		Concerns over environmental impacts	Infrastructure delays, poor intermodal connections, too many nodes		Economic activities in protected areas	
Montenegro	Competition for space, credit, high start up costs	Lack of skilled workers, potential over-crowding	Economic crisis especially in Italy	Lack of skilled workers, potential over-crowding		Competition from other countries	Competition for space		
Serbia		Competition from Italy and Croatia			Competition from Italy and Croatia	Economic crisis, competition with other countries, speed of infrastructure developments			

As can be seen from the table above, for marine mariculture (competition for space, access to finance for new enterprises, legislation and bureaucracy hindering development), and coastal tourism (competition with between countries) there are some obvious common problems as identifiable from the table and the country fiches (which focus on different MEAs). For other MEAs, there are no obvious common problems, but all issues identified may be faced by countries to some extent or another.

In addition to the country-specific problems as identified in this study as presented above in terms of the barriers for MEAs, this study and the 2013 Discussion Paper and the Maritime Strategy for the Adriatic and Ionian Seas basin, highlight a number of problems that are typically shared by many/most countries in the region. These problems are presented in the table below.

**Table 14 - Key regional barriers/problems**

Economic barriers and problems	Social barriers and problems	Environmental barriers and problems
<ul style="list-style-type: none"> <li>• Low financial resources for research, planning</li> <li>• Low levels of business clustering</li> <li>• Resource inefficient business culture, leading to sub-optimal use of assets</li> <li>• Poor access to finance, especially for SMEs</li> <li>• Poor interoperability of transport modes, and uncompetitive ports</li> <li>• Regional and local disparities in economic opportunities</li> <li>• Lack of transparent pricing mechanisms, and of market information</li> <li>• Insufficient development of business activities/sectors with potential</li> <li>• Seasonality of many economic activities</li> </ul>	<ul style="list-style-type: none"> <li>• Poor and/or inadequate levels and quality of research</li> <li>• Weak human capacity for governance by public sector, and development by private sector</li> <li>• Low levels of participatory involvement in planning for growth</li> <li>• Competition for coastal space</li> <li>• Poorly defined and/or inadequate legislation</li> <li>• High levels of bureaucracy and costly administrative procedures</li> <li>• Low levels of labour mobility/flexibility given skills levels</li> <li>• Weak culture of compliance with rules, and an un-level playing field</li> <li>• Regional and local disparities in connectedness, jobs, and service provision</li> <li>• Erosion of cultural heritage of the region</li> <li>• Low levels of cross-sectoral planning and coordination</li> <li>• Seasonality of many economic activities and their resulting social benefits</li> <li>• Quality, safety, and security of jobs</li> </ul>	<ul style="list-style-type: none"> <li>• Insufficient recognition of the importance of environmental sustainability under-pinning economic and social sustainability</li> <li>• Over-exploitation of fish stocks and failure to adequately protect marine ecosystems and biodiversity</li> <li>• Land-based activities negatively impacting on marine environment e.g. river run-off and eutrophication, marine litter</li> <li>• Marine activities negatively impacting on marine environment e.g. marine litter, oil discharge/pollution, invasion of alien species, impacts of noise pollution on aquatic organisms</li> <li>• Low levels of adaptation to climate change</li> <li>• Low levels of mitigation of climate change impacts resulting from economic activities</li> </ul>

**1.2.1.2 Who is affected by the problems?**

Identification of stakeholders and how they are affected by the problems is an important step in understanding the impacts that would result from the Action Plan.

The Adriatic and Ionian Seas link the territories of seven countries: three EU Member States (Greece, Italy, Slovenia and Croatia), one candidate country (Montenegro) and two potential candidate countries (Albania and Bosnia and Herzegovina). Serbia, also a candidate country, is one of the eight members of the Adriatic and Ionian Initiative.

Within each country, governments and private sector stakeholders involved with each of the maritime activities profiled in the country fiche’s prepared by this study, are affected by current problems, and would potentially benefit from the solutions that can be expected in the Action Plan. It can therefore be expected that stakeholders in the NUTS3 coastal areas will be most impacted. However, up- and downstream-linkages will mean that stakeholders outside of these NUTS3 areas may also be affected.

Other countries in the area may also have a political and economic interest in maritime activities in the Adriatic and Ionian Seas, and could thus be involved in the Strategy, and also be impacted.

The inter-relationship between different MEAs, and of the economic, social, and economic dimensions, as referred to in the short section on methodology and assumptions provided above for this sub-task, mean that some problems (and potential solutions/actions) in one MEA or pillar have impacts on other MEAs, and problems (and solutions) in for example the environmental dimension, can have a significant impact in both economic and social dimensions.

### 1.2.1.3 How would the problem evolve, all things being equal?

If the current situation does not change i.e. if there is no Strategy and Action Plan, it can be expected that many of the problems stated above would continue into the future. While some small and gradual improvements might be envisaged through the existing levels of cooperation between countries in the region, it can be expected that many of the conflicts and weaknesses exhibited in the region, would continue.

### 1.2.2 Should the Union be involved

The proposed Strategy and Action Plan would be directly linked to a number objectives of the Treaties of the EU, such as: an internal market where competition is free and undistorted; sustainable development; a competitive social market economy, aiming at full employment and social progress, and a high level of protection and improvement of the quality of the environment; the promotion of scientific and technological advance; and promotion of economic, social and territorial cohesion, and solidarity among Member States. It would also link with the common fisheries policy (CFP), and the integrated maritime policy (IMP).

While the EU would not have exclusive competence over an Action Plan, and competence would be shared with Member States, the subsidiarity principle would be respected given:

- there are transnational aspects and a shared nature of many of the problems identified and discussed above;
- While countries of the area are responsible for the development and implementation of the EUSAIR with the Commission acting as a facilitator of the initiative, the EU is well placed to lead the entire process, and as surveyed, without the EU no strategy would have been developed; and
- action at Community level can be expected to result in clear benefits compared to action at an individual level by Member States, with regard to both economies of scale and effectiveness.

It is not envisaged that the proposed Strategy and Action Plan would over-step the EU Charter of Fundamental Rights (which places legal limits on the Union's right to act). Additional information on the impact on human rights is contained within the description of economic, environmental, and social impacts, as required by the Commission Impact Assessment Guidelines.

Action would also respect the proportionality principle, in that action in the form of the Action Plan can be expected to be relatively simple in the sense that it is focused on coordination and communication to address problems, building on existing national and intra-regional coordination, policies and legal systems. As noted earlier, there is not expected to be any new finance, any new regulations, or any new institutions resulting from the Action Plan. It can also be observed that the Action Plan can be expected to include only those issues for which action at the Union level would be better than any action at Member State level, and there will remain considerable scope for national decisions within the definition of the Action Plan and its modification and implementation over time.

For all of the above reasons, it is therefore appropriate for the Union to act, and to be involved in the Strategy and Action Plan.



### 1.2.3 The strategy and action plan objectives

#### 1.2.3.1 General objectives

The general objective of the Strategy and Action Plan can be ascertained from the Discussion Paper of August 2013, as follows:

‘To promote sustainable economic and social prosperity of the Adriatic and Ionian region through growth and jobs creation, by improving its attractiveness, competitiveness and connectivity while at the same time preserving the environment and ensuring healthy and balanced marine and coastal ecosystems.’

#### 1.2.3.2 Specific objectives

For the purpose of this impact assessment, it is assumed that the focus areas form the basis of the specific objectives. Specific objectives flow directly from the focus areas and the problems and needs identified, and are defined as:

#### **PILLAR 1: Driving innovative maritime and marine growth**

1. Fishery and aquaculture: sustainability, profitability and innovation
2. Blue R&D: new skills and competences

#### **PILLAR 2: Connecting the region**

3. Maritime transport: logistic optimisations and sustainability
4. Safety and security of maritime space

#### **PILLAR 3: Preserving protecting and improving the quality of the environment**

5. Maritime Spatial Planning and Integrated Coastal Zone Management
6. Strengthening Natura 2000, the MFSD and the Barcelona convention
7. Marine litter and waste management

#### **PILLAR 4: Increasing regional attractiveness**

8. Coastal and maritime tourism: sustainability and appreciation of cultural heritage
9. Common marketing strategies
10. Sustainable development of cruise tourism

#### 1.2.3.3 Coherence of objectives

The general and specific objectives specified above are fully coherent with existing EU policies and strategies such as the Lisbon and Sustainable Development Strategies, Charter for Fundamental Rights, and the Commission's main priorities and proposals as presented in the Maritime Strategy for the Adriatic and Ionian Seas basin, the Common Fisheries Policy, the Integrated Maritime Policy, and more recently the “Discussion-Paper” on a EU Strategy for the Adriatic and Ionian Region (EUSAIR), August 2013.

The objectives are also coherent with the Marine Strategy Framework Directive, the Barcelona Convention and its protocols, the Water Framework Directive, the EU Strategy on Adaptation to Climate Change, and the Joint Commission for the Protection of the Adriatic Sea and its Coastal Areas.

The objectives as specified above, are coherent with the Europe 2020.

Table 15 – Key coherence relationships between Strategy and Action specific objectives and EU policies and strategies

Key objectives/targets of EU policies and strategies	Specific objectives (SOs) of Strategy and Action Plan	Primary coherence between Strategy/Action plan objectives and EU policy and strategy objectives
<p><b>Lisbon Strategy (LS):</b> innovation as driver for economic growth and social/environmental renewal</p> <p><b>Sustainable Development Strategy (SDS):</b> Climate change and clean energy; Sustainable transport; Sustainable consumption &amp; production; Conservation and management of natural resources; Public Health; Social inclusion, demography and migration; Global poverty and sustainable development challenges</p> <p><b>Europe 2020 (EU 2020):</b> employment, R&amp;D, energy efficiency and climate change impact reduction, age of school leavers, those in poverty</p> <p><b>Charter for Fundamental Rights (CFR):</b> Dignity, Freedom, Equality, Solidarity, Citizens' Rights, and Justice. includes transparent administrations</p> <p><b>Maritime Strategy and EUSAIR (EUSAIR):</b> sustainable economic and social prosperity, growth and job creation, through improving attractiveness, competitiveness, connectivity, environmental preservation, R&amp;D/ innovation/ SME development, capacity development</p> <p><b>Marine Strategy Framework Directive (MSFD):</b> protection of environment through cost effective strategies</p> <p><b>Barcelona Convention (BC):</b> prevent/abate pollution in the Mediterranean Sea</p> <p><b>Water Framework Directive (WFD):</b> expanding scope of water protection, ensuring good status, river basin water management, emission limits and quality standards, getting prices right, streamlining legislation, getting citizens involved</p> <p><b>Strategy on Adaptation to Climate Change (SACC):</b> a more climate-resilient Europe, through enhancing preparedness and capacity to respond to the impacts of climate change, developing a coherent approach and improving coordination</p> <p><b>Common Fisheries Policy (CFP):</b> (sustainable exploitation, regionalisation, aquaculture development, employment creation, nutritional supply, ecosystem based approach)</p> <p><b>Integrated Maritime Policy (IMP):</b> sectoral coordination, multi-sectoral issues, blue-growth, data and knowledge, spatial planning, integrated maritime surveillance, sea basin strategies</p>	<b>PILLAR 1: Driving innovative maritime and marine growth</b>	
	<p>SO 1. Fishery and aquaculture: sustainability, profitability and innovation</p> <p>SO 2. Blue R&amp;D: new skills and competences</p>	<p>SO 1. CFP, SDS, EUSAIR, MSFD, LS, EU 2020, IMP</p> <p>SO 2. LS, EU 2020, EUSAIR, IMP</p>
	<b>PILLAR 2: Connecting the region</b>	
	<p>SO 3. Maritime transport: logistic optimisations and sustainability</p> <p>SO 4. Safety and security of maritime space</p>	<p>SO 3. IMP, EUSAIR, SDS, MSFD</p> <p>SO 4. SDS, EUSAIR IMP BC WFD CFR</p>
	<b>PILLAR 3: Preserving protecting and improving the quality of the environment</b>	
	<p>SO 5. Maritime Spatial Planning and Integrated Coastal Zone Management</p> <p>SO 6. Strengthening Natura 2000, the MSFD and the Barcelona convention</p> <p>SO 7. Marine litter and waste management</p>	<p>SO 5. IMP, WFD, BC, MSFD, EUSAIR</p> <p>SO 6. MSFD, EUSAIR, SDS, CFP</p> <p>SO 7. WFD, BC, UESAIR, IMP</p>
	<b>PILLAR 4: Increasing regional attractiveness</b>	
	<p>SO 8. Coastal and maritime tourism: sustainability and appreciation of cultural heritage</p> <p>SO 9. Common marketing strategies</p> <p>SO 10. Sustainable development of cruise tourism</p>	<p>SO 8. LS, SDS, EUSAIR</p> <p>SO 9. LS, SDS, EUSAIR</p> <p>SO 10. SDS, EUSAIR</p>

### 1.2.4 Options to be assessed

This impact assessment considers two options:

- Option 1: the no change/base case scenario.
- Option 2: Having a Strategy and Action Plan.

It is not considered appropriate to evaluate the impacts of other, or a wider range of options, given that:

- a. The specification of what would be contained with the Action Plan is not yet agreed.
- b. The Action plan involves no new funding, so there is no merit in assessing the impacts of Action Plans involving different levels of funding.

#### **Option 1: the no change/base case scenario**

The specification/content of this is option is represented by:

- The national policies and regulations already in place, as extensively detailed/profiled in Report 1 of this study;
- Existing governance, as described in question 3 of Task 3.2 of this report;
- Existing levels of coordination and cooperation as profiled earlier in this report (see question 2 of Task 3.2 as presented in this report);
- The existing levels of GVA and employment as presented in Report 1 of this study and the country fiches for the largest MEAs;
- The current state of the environment e.g. habitats, marine pollution, state of fish stocks (as discussed earlier in Task 3.1 of this report);
- The current expected evolution in MEAs in the absence of an Action Plan i.e. sectoral growth which might occur and sectoral potential identified in Report 1 (in the absence of any support from an Action Plan) in terms of the fastest growing activities, and the activities with the most potential which might be expected to develop based on existing policies, coordination, expenditure, etc.
- Considerable differences in existing capacities and approaches within the region, despite some emerging regional initiatives.

When considering the information/data presented in Report 1, the country fiches, and the data availability for different MEAs and pillars as described in Task 3.1 of this report (which while far from complete is nevertheless extensive), it is clear that this study has presented a no change/base case scenario that has a strong factual basis and can be understood in quantitative terms.

Data and information presented, suggest that the current problems, while to some extent being addressed, are nevertheless serious.

#### **Option 2: Having a Strategy and Action Plan**

The Action Plan that is the subject of this impact assessment has not yet been proposed/agreed. Presentation/specification of option 2 (having an Action Plan), is therefore problematic. However, given the extensive process of consultation in terms of round tables and workshops that has already taken place (as discussed under question 3 of Task 3.2) the contents of the Action Plan can be assumed to include actions as inferred in the August 2013 Discussion Paper from all of the bullet points listed by pillar i.e. what are termed challenges/objectives in the Discussion Paper are in fact considered to be potential priority action areas for the purpose of this impact assessment. Again, for

the sake of brevity/space, there is no need to repeat/copy these potential actions in this impact assessment.

In addition, it should be noted that the final and detailed content of the Action Plan can also be expected to reflect the outputs of this study: the country fiches, the summary of constraints to MEAs in each country and the potential solutions (sub-task 2.8), and the identification of national priority actions by MEA (sub-task 2.9) all as reported in Report 1; and sub-tasks 3.1 and 3.2 above in this report. However, it is not currently known which specific actions individual countries might end up being engaged with.

The final Action Plan can therefore be expected to reflect an amalgam of the ideas contained in the Discussion Paper and the outputs of this study.

However, what is assumed is that only common and cross-border issues will be part of the Action Plan. This assumption is based on the text in the Maritime Strategy for the Adriatic and Ionian Seas basin which states that *'The strategy will define viable actions and joint initiatives addressing challenges and opportunities with a cross-border dimension that can be solved only by common engagement'*, and text in the Discussion Paper which highlights that *'the strategy should focus on areas of (macro) regional mutual interest with high relevance for the Adriatic and Ionian countries. Main priority areas and objectives of the Action Plan should emerge as shared aspirations and sustainable solutions to common challenges'*.

In addition it is assumed that the Action Plan will provide no new funding, no new institutions, and no new regulations. This assumption is based on the text of the Maritime Strategy for the Adriatic and Ionian Seas basin which states that *'Thanks to smart management, implementation of this strategy can act as an economic driver without needing any extra money'* and that the Strategy will *'...utilise the existing resources, legislation and structures to foster cross-border partnerships and prioritise objectives around which local, regional and national actors can be mobilized to turn the priorities of the Europe 2020 Strategy into targeted actions'*. Obviously these assumption/conditions of the proposed Strategy and Action Plan, have important implications for the assessment of impacts.

## 1.3 Assessing the impacts

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### 1.3.1 Economic, environmental and social impacts of an Action Plan

The economic, environmental and social impacts of the no change/base case scenario, are those presented in the outputs of this study i.e. existing performance and reflecting how the existing trends and developments would impact on them. It is probable given existing policies, coordination, and strategies, that while current problems would continue, the base case scenario would nevertheless be expected to result in some improvements in economic, social and environmental variables in the future, unless such initiatives weakened over time which is quite possible. However, it can also be hypothesized that without the Action Plan (with its balanced emphasis on the three pillars of sustainable development), countries in the region might be inclined to focus more strongly on the economic pillar of development. This supposition is supported by the strong concentration of 'economic' type priority areas/actions suggested by countries in Report 1 of this study. Without sufficient emphasis on the environmental pillar, *long-term* economic, social and environmental development may be threatened, and sacrificed for short-term economic gains.

Recognition of this inter-linkage between economic, environmental and social impacts is critical. As already noted, the lack of an Action Plan at the time of writing, and the uncertainty over the specific actions to be supported, mean that any quantifiable estimation of impacts is not possible. This is due the fact that it is not known which countries would buy-in to and participate in different possible priority actions.

Nevertheless, in considering the possible *types* of economic, social and environmental impacts that would result in option 2 (having an Action Plan) even if not their *quantum*, the table reported in Annex chap. 6 attempts to categorise the proposed priority actions in the Discussion Paper into those which have a primary, and secondary positive impact, on the economy, social conditions and the environment. And for each priority action and indication is provided of the type of economic, social, or environmental benefit that can be expected to result.

It is evident from the likely priority actions defined in the Discussion Paper and the four pillars, and their impacts as presented in the table in Annex, chap. 6, that the Action Plan would support a balanced emphasis on the three pillars of sustainable development. 29 priority actions result in primary economic benefits, 31 result in primary social benefits, and 31 in primary environmental benefits. However being more specific about the potential impacts is not possible given that little information is available about the specific nature of the possible priority actions, and no definitive picture as to whether the proposed priority actions will in fact be included in the final Action Plan.

It can be observed from the table in Annex, and indeed should be recognised when interpreting it, that:

- Environmental improvements often lead to long-term economic (GVA) and social (employment) benefits;
- In some cases environmental improvements, such as improvements in fisheries stocks, might require *short-term* negative impacts on social conditions e.g. loss of wages or employment through limiting catches, so as to ensure long-term sustainability of stocks. The table in Annex below does not incorporate such short-term negative impacts.
- Economic benefits can generally be assumed to have secondary positive benefits in terms of employment; and
- Economic benefits in specific MEAs supported by priority actions, can be expected to have considerable multiplier impacts/benefits, through upstream linkages with input suppliers, and downstream linkages for example with sales, marketing, processing and other related activities. These multiplier impacts are not considered in the table in Annex.

A general comment should also be made with respect to social impacts, given that all actions contained within the Action Plan would be common between more than one country. This, and the nature of the priority actions themselves, means that social benefits can be expected to flow from the concept of the macro-regional strategy itself e.g. integration, coordination, cooperation, multi-level governance, and partnerships (as highlighted in the ‘Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee, and the Committee of the Regions’). While these types of social benefits flowing from an Action Plan would be particularly relevant between *countries*, it can also be expected that enhanced social benefits of this nature would also be experienced between *institutions/organizations within Member States*; such benefits have been evident in other macro-regional strategies e.g. EUSDR and EUSBSR.

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

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

**1.3.2 Administrative burden**

Given that it is assumed that the Action Plan would not be the subject of additional funds, legislation or institutional structures, but would just ensure smarter and prioritised use of existing funds and building on existing networks and coordination in the region, it can also be assumed that there would be little administrative burden of the Action Plan on Member State administrations, over and above its monitoring and evaluation. While the Action Plan could be expected to reduce the administrative burden for private sector enterprises in the region.

**1.3.3 Comparing the options**

In comparing the two options, while not quantifiable, given the discussion above it can safely be assumed that if option 2 (the Action Plan) is implemented, the economic, social, and environmental impacts would be greater than the no change/base case option. This means that the effectiveness (i.e. impact) would be greater from having the Action Plan, than from not having it.

In addition, the fact that no additional funds are required/assumed for the Action Plan, means that the efficiency (i.e. value for money) of the funds already committed would be enhanced under option 2. It can safely be assumed, based on the experience of other macro-regional strategies (e.g. the EUSDR and the EUSBSR), that the lack of additional funds with the Action Plan can be expected to result in countries pushing to identify additional funding sources and to make existing money work harder with available resources being better targeted and used based on critical assessment of priorities.

With respect to coherence, it can also be concluded that option 2 would be more coherent in terms of support for the objectives as stated earlier (which in turn flow from the problem definition).

The added value of the adoption of a strategy i.e. option 2 (reflecting best practices in the Baltic and the Danube which show the added value of a such a strategy) as a whole is that:

- It consolidates the cooperation currently established in the area; without the strategy, this cooperation may not be prolonged;
- It converges financial sources to needs specifically identified by stakeholders;
- It helps to converge political efforts and ensure common ground for cooperation – a notable result for an area still at war 10 years ago.

**Table 16: Summary comparison of options**

	Option 1: No change/base case	Option 2: Action Plan
<b>Effectiveness</b>	Some improvements in economic, social and environmental improvements over time given existing plans/coordination, but <u>impact threatened/constrained</u> by a lack of balance between the three pillars of sustainability, and many problems remaining	<u>Significant and sustainable</u> improvements in economic, social, and environmental impacts, with problems significantly reduced, and support for continued cooperation which may otherwise reduce over time
<b>Efficiency</b>	<u>Some</u> improvements in efficiency/value for money over time based on existing/planned coordination at regional level	<u>Significant</u> improvements in efficiency/value for money given improved regional planning for use of existing funds with no additional resources required, and better matching of the use of funds to needs
<b>Coherence</b>	Only <u>partial</u> coherence with objectives as specified	<u>Full</u> coherence with objectives specified, and improved converge of political initiatives

**1.3.4 Arrangements for future monitoring and evaluation**

With respect to monitoring and evaluation, a number of steps need to be taken.

Firstly in order to guide overall implementation of the Action Plan, a logframe for the Action Plan should be developed, to include the objectives specified above, and the priority actions finally agreed for inclusion in the Action Plan. Perhaps most importantly, the logframe should include

indicators to measure the types of impacts discussed in this report. Earlier text in this report has identified data availability and data gaps, providing good information on the type of indicators which could be included based on data available. The logframe should also include means of verification for all indicators proposed.

The fundamental difference between monitoring of the Action *Plan progress and inputs/outputs*, as opposed to the evaluation of its *results/impacts*, must also be recognised.

This could typically mean that stakeholders involved with the Action Plan itself should agree on ongoing monitoring mechanisms and the format of monitoring reports, while external evaluators would need to complete evaluations at mid-term and on completion of the assumed time period over which the Strategy/Action will be implemented.

It is not known to the contractors the extent to which stakeholders involved with the background work to prepare the EUSAIR, and the Action Plan, have already discussed/agreed on such issues.

## 1.4 Specific conclusions

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The impact assessment has therefore considered two basic options: (i) Option 1 - the no change/base case scenario, where no Strategy or Action Plan will be implemented and (ii) Option 2 - having a Strategy and Action Plan.

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

Specifically as regards the Option 2, an important assumption with respect to **social impacts**, is that actions would be common between more than one country. This, and the nature of the priority actions themselves, means that **social benefits can be expected to flow from the concept of the macro-regional strategy** itself to the overall area in general, strengthening cooperation efforts and optimising the use of resources for more targeted uses. As highlighted in the Overall assessment (“Added value for the EU to be involved”), a greater added value of establishing the Adriatic-Ionian macro-region under the EU umbrella is that it can be a powerful tool to spur EU integration towards the East, and to ensure continued regional cooperation which might otherwise reduce over time (under Option 1), and also enhanced political convergence.

If Option 2 (the Action Plan) is implemented, the economic, social, and environmental impacts would be greater than the no change/base case option. Furthermore, the fact that no additional funds are required for the Action Plan, means that the **efficiency (i.e. value for money) of the funds already available would be enhanced** under Option 2, especially by ensuring that there is a better matching of funds to needs. Countries would be incentivized to identify additional funding sources and to make existing money work harder with available resources being better targeted and used based on critical assessment of priorities.

## General conclusions

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## 1 Final results of the analysis

The purpose of these general conclusions is to draw a final holistic framework from the different analysis steps carried out in this study which, in turn, will provide concrete support for designing the EUSAIR Strategy and related Action Plan. Although results and proposals included in these conclusions derive from robust quantitative and qualitative analyses, outcomes should be handled cautiously. In fact, the analysis raised awareness of an overall lack of harmonized and comparable quantitative data in candidate and potential candidate countries, which made it difficult, in some instances, to raise the analysis from country to regional level. Thus, alternative qualitative indicators have been used to reach an appropriate level of homogeneity at regional level.

Major findings and results of our analyses confirm that, historically, the interactions between countries and regions in the Adriatic-Ionian area have been strong, and the EU accession process in the Balkan countries made these relations even stronger. These interactions have contributed to creating awareness that littoral countries and regions should be part of a common basin, sharing common interests and common problems.

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

- A. the proposed EUSAIR discussion paper of August 2013, as drafted by the European Commission in its four Pillars and its focus areas<sup>59</sup>, called for being **specific<sup>60</sup> to the Adriatic and Ionian geographical area** under quantitative and qualitative points of view;
- B. the **existing cooperation** in the area proved to be particularly intense between EU Member States while candidate/potential candidate countries have been less involved in cooperation projects;
- C. the **governance system**, which is the process leading towards the drafting of the Strategy, has proven to be effective and has involved a number of relevant stakeholders;
- D. there is a **clear EU value added**, given that the EUSAIR clearly creates a value beyond the value that would result from spontaneous cooperation among stakeholders;
- E. **social benefits**- especially new jobs, improvement of public health and increase of skills - are expected to flow from the macro-regional approach through strengthening cooperation efforts and optimising more targeted use of resources, as clearly shown in the impact assessment;
- F. several gaps have been identified **between existing problems/barriers at a macro-regional level and the EUSAIR specific objectives**, but the concrete actions proposed to fill these gaps are derived directly from key proposals put forward by stakeholders of the area.

### 1.1 Specificity of the EUSAIR to the Adriatic and Ionian sea basin

Quantitative analyses revealed firstly that the maritime component of the EUSAIR encompasses almost<sup>61</sup> the entire spectrum of the marine and maritime activities as mapped in Task 2 of this study,

<sup>59</sup> The term "focus areas" has been adopted in order to group “specific objectives/main challenges” defined in each Pillar by the EUSAIR discussion paper.

<sup>60</sup> Among study objectives it was requested to assess if the proposed focus areas within each Pillar are “specific” to the Adriatic and Ionian sea-basin. The specificity has been considered as the “existence, more or less accentuated, of a given focus area and related maritime activities in the area, at macro-regional and national level”.

covering around 96% of total blue GVA produced in the area. Also from a qualitative point of view, EUSAIR's pillars and focus areas were designed to be specific to the macro-region. As a matter of fact, for each focus area, the analysis showed the existence of a broad number of data, documents, studies, national and international projects that covered all the topics and issues encompassed by the EUSAIR discussion paper, proving therefore that all these focus areas are specific to the Adriatic and Ionian sea-basins.

On the other hand, the analysis highlighted that, while some focus areas have an impact on the macro-region as a whole, in some specific instances, geographical areas of the macro-region are affected in different ways.

- **Pillar 1 – Driving innovative maritime and marine growth.** Sustainable fishery management affects mainly the Adriatic Sea (75% of stocks in the Adriatic are overfished, source: EEA) and to a lesser extent, the Ionian (50% of stocks are overfished). The discussion paper takes the local specificities of the aquaculture sector into account, envisaging interventions at national level specifically for planning space and co-locating aquaculture with other activities.
- **Pillar 2 – Connecting the region.** While maritime safety is specific to the entire region, the analysis found that infrastructural interventions should be differentiated. For example, in the northern Adriatic ports, there is need for innovating facilities (e.g. Trieste, Koper), while in the South Adriatic and Ionian, investments should be mainly addressed to build new infrastructures and related facilities such as Bar's intermodal connections or the Ionian port system, which are currently concentrated mainly in Taranto. In terms of environmental sustainability of maritime transport, the Northern Adriatic is indeed the “most affected area” due to the remarkable level of maritime traffic. In this area, the environmental impact of shipping should be regulated and reduced.
- **Pillar 3 –Preserving, protecting and improving the quality of the environment.** This Pillar and its focus areas were determined to be relative to the entire region. In fact, the analysis highlighted that environmental issues affect the sea basins as a whole. However, the development of MSP and ICZM should be prioritized in the North Adriatic, because of its high concentration of maritime activities (ports, fishing, extractive activities, tourism, cruise) as well as the effects generated by inland anthropic activities.
- **Pillar 4– Increasing regional attractiveness.** The focus area “sustainable development of cruise tourism” was found to be specific for some countries (i.e. Italy and Greece) where the activity has generated concerns about its impact on the territory and on resource depletion. However, this focus area also affects candidate/potential candidate countries, where support to the overall sustainable development of cruise tourism needs to be enhanced, in order to increase their attractiveness as cruise destinations and insert them in international routes/itineraries. As for the focus area “enhancing the value and appreciation of cultural heritage”, the entire sea basin is affected but in different manners: while candidate/potential candidate countries need to promote their respective heritages, EU countries should reinforce their existing positions which call for protecting their rich cultural endowments.

## 1.2 Level of exiting cooperation in the area

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While the survey found cooperation in the area to be generally strong for all Pillars, cooperative activities were found to be **particularly intense between EU Member States**, probably because of

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<sup>61</sup>Only agriculture on saline soils is not covered by the EUSAIR. Actually, it is worth mentioning that in the Adriatic and Ionian region, agriculture on saline soils occurs totally in coastal NUTS 3 and significantly affects the coastal area employment especially for Italy (around 74.000 employed) and Greece (around 44.000). At sea-basin level, this activity covers more than 22% of total blue employed persons.

the availability of wider EU funds which incentivizes cooperation. On the contrary, **candidate/potential candidate countries were found to be less involved in cooperation projects**, especially in Pillars 1 and 2, and in multilateral projects, as they prefer to be involved at bilateral or regional levels. As a matter of fact, it emerged that these countries preferred to be involved in projects which require “less capacity”. Therefore, in order to fill this gap, the EUSAIR should focus on capacity building in the early implementing phase, supporting a major involvement of candidate and potential candidate countries. Under a general point of view, the implementation of EUSAIR and its adequate promotion in candidate and potential candidate countries should support the improvement of cooperation in the area, optimising its efforts and efficiently addressing regional needs.

In addition to recognizing the strength of the cooperation due to EU-funded projects sources, the analysis has also identified and highlighted the existence of several political-economic initiatives and actions such as the Forum of Adriatic and Ionian Chambers of Commerce, the Adriatic Ionian Initiative and the Adriatic-Ionian Euro-region, all of which optimize the potential for EUSAIR to address regional needs efficiently, through increasing countries’ awareness that being part of the same geographical area means sharing the same problems and needs.

Within this context and following the analysis of the level of existing cooperation, establishing a macro-regional strategy should further boost cooperation between the EU and potential/candidate countries by reinforcing the political-economic cooperation already present in the area.

### 1.3 Effectiveness of governance system

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The overall process that led to the drafting of the EUSAIR discussion paper also contributed to making the **governance system**<sup>62</sup> effective, as reported in the present study. Furthermore, the analysis confirmed that the consultation process launched with COM (2012) 713 “A Maritime Strategy for the Adriatic and Ionian Seas” and related workshops (Athens, Trieste, Portoroz, Zagreb and Brussels) also was responsible for a high level of participation from a broad and diversified number of relevant stakeholders across the entire area.

However, as stated in this report, the governance system proposed for the EUSAIR should take into account that: (i) more responsibilities should be concentrated with a small number of actors; (ii) roles of national contact points and priority coordinators should be strengthened with respect to other regional strategies already implemented; (iii) the involvement of stakeholders should be institutionalized in order to ensure subsidiary to the Strategy; (iv) communication actions should play a pivotal role in the overall governance system; and (v) coordination between strategies (especially macro-regional) should be envisaged.

### 1.4 Added value for the EU to be involved

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Within the overall governance of the EUSAIR, the role of the EU has been widely acknowledged – by our analysis and also by interviewed stakeholders – as pivotal in supporting cooperation in the area and in streamlining consultation processes led by the Countries of the Adriatic and Ionian. It also emerged that there is a **clear added value for the EU to be involved** and that a strategy supported by the EU is quite likely to **create a value beyond what would result from spontaneous cooperation among stakeholders**.

Indeed, the EU has financed directly or indirectly a significant number of maritime projects over the years, both at transnational and cross-border level. This however should not suggest that the role of the EU has been limited to a mere “financial backer” of projects carried out by third parties. As a

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<sup>62</sup>As analysed in this Report, given that a Strategy and an Action Plan does not exist yet, the governance has been intended as the act of governing the process which is leading towards the adopting of the EUSAIR.

matter of fact, EU policies have shaped cooperation basics that have contributed to **aligning projects to what now are well-established principles**, such as the ones laid out in Europe 2020.

Of particular importance is the Instrument for Pre-Accession Assistance, which, formally dedicated to assisting candidate and potential candidate countries in the progressive alignment with the *acquis communautaire*, has strengthened the sustainable development capacity of the Adriatic Region through an agreed strategy of actions between partners of the eligible territories.

Furthermore, EU-driven cooperation has greatly influenced non-EU cooperation, with the latter aligning or converging to EU policies. This is the case, for instance, of FAO's projects AdriaMED and EastMED whose approaches towards fisheries management share many similarities with the Common Fisheries Policy of the EU.

In light of the above, the analysis has confirmed that, besides guaranteeing the necessary financial support, the use of EU funding has had the effect of aligning bottom-up cooperation initiatives to EU policy objectives.

These findings have also been confirmed by stakeholders' perception of how EU involvement can contribute to the Adriatic and Ionian macro-region. One of the most important arguments in favour of the EU's involvement in the macro-regional strategy is the spill-over effect that the EUSAIR may have on the EU integration process, especially in relation to the Balkan area. In other words, the Strategy can be a powerful tool define and launch a new cooperation model under the EU umbrella in the region..

## 1.5 Assessment of the impacts of the Strategy to the macro-region

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This assessment has considered two basic options: (i) Option 1 - the no change/base case scenario, where no Strategy or Action Plan is implemented and (ii) Option 2 - having a Strategy and Action Plan. In the first case, even without the Strategy, the current and ongoing policies, coordination and strategies in the sea basin could be expected to result in some improvements in economic, social and environmental variables. However without the Action Plan, countries in the region might be inclined to focus more strongly on the economic development pillar rather than on a more "balanced" development of all topics encompassed in the EUSAIR discussion paper.

Thus it is critical to note that the analysis confirmed that the adoption of the Strategy and the implementation of an Action Plan are expected to generate social, economic and environmental impacts. As to the **1<sup>st</sup> Pillar**, the implementation of the Strategy is expected to have an economic (overall improvement of gross value added of seafood business) and environmental (preservation of stocks and habitats) impact. On the other hand, as a secondary element, the Strategy might also create new jobs, having therefore a remarkable social impact as well. As regards, the **2<sup>nd</sup> Pillar**, focus areas related to transport issues are expected to have a social and economic impact, given that it should improve inter-regional connectivity and increase competitiveness, trade movements, investment flows of businesses. On the other hand, focus areas related to "maritime safety and security" should mainly have an environmental impact, reducing pollution and risks of disasters. The **3<sup>rd</sup> Pillar** – due to its environmental focus – is obviously expected to have an environmental impact, increasing the water quality, protecting biodiversity and reducing litter. Finally, the **4<sup>th</sup> Pillar** is expected to have mainly an economic and a social impact. It is expected to increase the tourism attractiveness of the area, benefiting not only tourism businesses, but also local economies. Furthermore, as an indirect effect, it should improve the overall level of employment in the area, especially in coastal area, given that coastal tourism represents one of the most promising activities in the macro-region.

Of these expected impacts, **social benefits especially are expected to flow from the concept of the macro-regional strategy itself to the overall area**. In this regard, the analysis highlighted that no additional funds are required for the Action Plan. Given the "3 NOs rule" (no new legislation, no

new funds, no new organizations), this means that the efficiency (i.e. value for money) of the funds already available would be enhanced if the Strategy were adopted, especially by ensuring that there is a better matching of funds to needs.

## 1.6 Existence of gaps

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As pointed out in the scope of the EUSAIR discussion paper, the Strategy should focus on the areas of “macro-regional interest” that have high relevance for the Adriatic and Ionian countries. It is therefore of critical importance to ensure proper identification of the area needs which should/could be addressed within the Action Plan. The gap analysis conducted with the present study has revealed the existence of some gaps between problems/barriers at a macro-regional level and the EUSAIR specific objectives. These gaps were identified through (i) analysis of workshops/meeting/conferences organised within the consultation process led by countries, and (ii) interviews with relevant stakeholders in the area.

Indeed, the analysis showed that existing gaps can be smoothly tackled and feasible proposals can be implemented. This is mainly due to the fact that (i) the EUSAIR discussion paper is based on a **bottom-up approach of collecting needs from the territory and integrating them in a macro-regional perspective** and (ii) the entire process leading towards the EUSAIR discussion paper has been **effectively coordinated by the EU and managed by countries**.

In the big picture, it emerged that the EUSAIR’s four Pillars appear to focus more on innovation, technology and research objectives than on legislative/implementation of rules and socio-economic aspects. For instance, in Pillar 1, two socio-economic gaps have been identified. The first one relates to the fact that EUSAIR does not introduce measures to limit the socio-economic impact of “reducing fishing efforts”. Thus, to fill this gap, it has been proposed to introduce measures for diversifying fishing activities through FLAGs (for EU countries) and IPA funds (for non-EU). The second socio-economic gap regards the access of farming companies in the macro-region to finance, which present a significant constraint by limiting the growth of the aquaculture sector. Given that EUSAIR does not encompass specific measures for accessing finance, it has been proposed to facilitate farming companies’ access to funds (EMFF for EU countries and IPA for non-EU) by exploring the possibility of introducing a “guarantee scheme” at macro-regional level for funding the sector.

As shown in the two examples above<sup>63</sup>, concrete actions have been proposed to fill these gaps. It has to be taken into account that these proposals, fully reported in “Key investments and research priorities” chapters<sup>64</sup>, are based on territories’ concrete needs, and thus contribute to implementing the bottom-up approach needed for the successful implementation of the Strategy and its Action Plan.

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<sup>63</sup> For the entire gap analysis, please see Chapters 4 of each of the four “Thematic Reports”

<sup>64</sup> For the complete lists of key investments and research priorities, please see Chapters 3 of each of the four “Thematic Reports”.

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