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**COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN
PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL
COMMITTEE AND THE COMMITTEE OF THE REGIONS**

concerning the European Union Strategy for the Adriatic and Ionian Region

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Executive Summary Sheet
Supportive analytical document on the EU Strategy for the Adriatic and Ionian Region
A. Need for action
Why? What is the problem being addressed?
The Adriatic-Ionian Region is heterogeneous in terms of economic and administrative capacity. This makes cooperation between participating countries challenging. The EU Strategy for the Region addresses this problem by identifying four interdependent thematic pillars covering topics relating to challenges and opportunities specific to the Region. Transboundary/transnational by nature, these pillars will therefore all benefit from increased coordination on the part of the participating countries. However, since existing cooperation frameworks in the Region are primarily sector-based or do not match the geographical scope of the Strategy, in the absence of a joint strategic framework for cooperation facilitated by the EU, challenges to joint action are likely to persist.
What is this initiative expected to achieve?
The general objective of the Strategy is to promote sustainable economic and social prosperity of the Adriatic-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. It will also contribute to EU integration of participating Western Balkans pre-accession countries.
What is the value added of action at the EU level?
The added value of EU action consists in: (i) promoting a cross-sector approach; (ii) moving from words to action through an Action Plan; (iii) mobilising the whole spectrum of relevant existing funds; (iv) supporting accession and exploiting synergies with other macro-regional strategies; (v) strengthening compliance with EU legislation and policies and governance for implementing the Strategy; and (vi) improving coordination between existing cooperation mechanisms
B. Solutions
What legislative and non-legislative policy options have been considered? Is there a preferred choice or not? Why?
In accordance with the European Council conclusions, macro regional strategies should involve no new funding, no new institutions and no new legislation at EU level. The initiative therefore aims at making better use of existing resources, legislation and institutions. As it adopts an integrated approach, it will assist implementation of legislation, align existing sources of funding and build on the capacity of existing institutions to cooperate in the Region.
Who supports which option?
The European Council in its conclusions of December 2012 requested the Commission to submit a macro-regional strategy for the Adriatic-Ionian Region, building on experience gained through macro-regional strategies in the Baltic Sea and Danube Regions.
C. Impacts of the preferred option
What are the benefits of the preferred option (if any, otherwise main ones)?
The benefits of the preferred option are to facilitate identification of shared strategic objectives and actions needed for attaining these objectives. Involvement of the European Commission is limited to facilitating and coordinating development of strategic governance structures for implementing the Action Plan accompanying the Strategy.
What are the costs of the preferred option (if any, otherwise main ones)?

The initiative is financially neutral for the European Commission. As far as requirements in terms of staff are concerned, experience from the EU Strategies for the Baltic Sea and the Danube Regions suggests that 3-5 full time equivalents are required for facilitating and coordinating the macro-regional approach. These requirements are expected to be met through redeployment internal to the Commission with job descriptions amended so as to reflect objectives laid down in the Strategy and to accommodate needs arising from initial support in implementing the Strategy. Commission staff should furthermore be supplemented by a number of cost-free national experts seconded by participating countries.

How will businesses, SMEs and micro-enterprises be affected?

There is no explicit regime for micro-enterprises and SMEs as the Strategy is limited to coordinating regional, national and European instruments. The regime for micro-enterprises and SMEs is determined by parameters included in individual operational programmes and by the legislation in place.

Will there be significant impacts on national budgets and administrations?

National budgets and administrations would be positively impacted through a shift in prioritisation. National governments would however be requested to second staff to the European Commission at their own expense.

Will there be other significant impacts?

Other impacts may occur, but these cannot currently be identified.

D. Follow up

When will the policy be reviewed?

The Strategy will be reviewed regularly and possibly revised in light of emerging needs.

1. INTRODUCTION

The European Council of December 2012 requested the European Commission to present an EU Strategy for the Adriatic-Ionian Region (EUSAIR) by end 2014¹. This request follows the creation of the two macro-regional strategies, the EU Strategy for the Baltic Sea Region, and the EU Strategy for the Danube Region, developed under the coordination of the European Commission respectively in 2008/2009 and 2011, and currently in the phase of implementation.

1.1. Policy context

In its conclusions on the Integrated Maritime Policy of 19 December 2011, the Council expressed support for the on-going 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.

On 30 November 2012 the Commission adopted the Maritime Strategy for the Adriatic and Ionian Seas². The EUSAIR builds upon – and integrates – this Strategy, taking into account the discussion of the added value of the overall macro-regional approach. Following this discussion, on 27 June 2013, the European Commission issued a broadly positive assessment of the added value of the macro-regional strategies³, reinforced by wide support from the other EU-institutions, notably the Committee of the Regions and the European Economic and Social Committee.

As with the Maritime Strategy, the EUSAIR builds on the Adriatic and Ionian Initiative, which covers eight countries: four EU Member States (Croatia, Greece, Italy, and Slovenia) and four non-EU countries (Albania, Bosnia and Herzegovina, Montenegro and Serbia). The Strategy remains open to other partners in the Region. The EUSAIR also builds upon existing cooperation between countries of the Region, e.g. EU cross-border and transnational cooperation programmes.

2. PROCEDURAL ISSUES AND CONSULTATION OF INTERESTED PARTIES

2.1. Lead DG

The EU Strategy for the Adriatic- Ionian Region is coordinated by DG Regional and Urban Policy, in close cooperation with DG Maritime Affairs and Fisheries in charge of maritime and marine aspects. This document has been prepared by DG Regional and Urban Policy with technical support from experts and from a Commission inter-service working group..

¹ The European Council has formally asked the European Commission to coordinate an EU Strategy for the Adriatic-Ionian Region, stating in its conclusions of 14 December 2012: "Recalling its June 2011 conclusions, and subject to the evaluation of the concept of macro-regional strategies as foreseen in the Council conclusions of 13 April 2011, the European Council looks forward to the presentation by the Commission of a new EU Strategy for the Adriatic and Ionian Region before end of 2014."

² COM(2012)713 final

³ COM(2013)233 final

2.2. Consultation of interested parties

2.2.1. Consultation process

The Strategy is based on three main information sources:

- (1) A socio-economic analysis identifying the needs of the Adriatic and Ionian Region carried out by DG Regional and Urban Policy, in cooperation with external experts (overview in Annex 1 and 6).
- (2) Expertise from the Commission and other EU institutions:
 - DG Regional and Urban Policy, expertise drew on experience gained through preparation of the two macro-regional strategies for the Baltic Sea and Danube Regions.
 - DG Maritime Affairs and Fisheries drew in particular, on experience gained through preparation of the Maritime Strategy for the Adriatic-Ionian Seas. This strategy now forms an integral part of the wider Adriatic-Ionian macro-regional Strategy. Inter-service meetings and consultations with relevant DGs within the European Commission, notably DG Agriculture and Rural Development, DG Climate Action, DG Enlargement, DG Employment, Social Affairs and Inclusion, DG Energy, DG Enterprise and Industry, DG Environment, the Joint Research Centre, DG MOVE, DG Research and Innovation and the Secretariat-General, provided further sources of expertise informing preparation of the Strategy and its accompanying Action Plan.
 - Other EU Institutions, in particular the Committee of the Regions, and its Adriatic-Ionian interregional group, and the European Economic and Social Committee, made proposals of substance through their opinions and debates.

(3) Consultation of interested parties

Under the lead of DG Regional and Urban Policy, in June-July 2013 and in close cooperation with National Contact Points (NCPs) from all eight participating countries, the Commission developed a Discussion Paper on an EU Strategy for the Adriatic and Ionian Region. Following the recommendation contained in the Commission Report on the added value of macro-regional strategies (to limit the number of themes), in the light of extensive contacts between the Ministers of Foreign Affairs of the eight countries and the Commission, as well as of the consultation process for the Maritime Strategy for the Adriatic and Ionian Seas, this Discussion Paper limited itself to suggesting four interdependent themes to be addressed by the EUSAIR: "Driving innovative maritime and marine growth"; "Connecting the region" (transport and energy); "Preserving, protecting and improving the quality of the environment" and "Increasing regional attractiveness" (tourism).

Alongside the first theme, directly derived from the Maritime Strategy for the Adriatic and Ionian Seas of November 2012, the three other themes were identified as presenting challenges and opportunities that could only (or more effectively) be respectively tackled and seized through concerted and coordinated action at a transnational or macro-regional level. For instance, discussions suggested that, for Theme 1, individual countries would not be able to ensure sustainable use of deep water resources⁴. The same was seen to apply to important

⁴ This may include the exploitation of gas and mineral seabed resources and entail the definition of Exclusive Economic Zones to avoid future disputes.

challenges and opportunities in terms of transport, energy and the environment. These themes also clearly related to key objectives of Europe 2020 and South-East Europe 2020 for the Western Balkan countries, best achieved through cooperation.

Connectivity, environment and tourism are indeed the themes that the Adriatic-Ionian Initiative (covering the same group of countries) identified since 2000 as issues of common strategic relevance to all eight countries concerned and that, since then, are the subject close cooperation among them.

The work of analysis carried out by four external experts further confirmed that the four themes matched needs - or challenges - as well as opportunities of strategic importance for allowing the Region to make headway towards the general objective of sustainable economic and social prosperity through growth and jobs creation, attractiveness, competitiveness and connectivity, while preserving the environment as well as a healthy and balanced marine and coastal ecosystems.

The EUSAIR Discussion Paper was issued on 9 August 2013 as the key basis for an extensive consultation of stakeholders in the Region conducted in the period September – December 2013. It aimed at reaching out to the relevant stakeholders and at gathering their ideas regarding the four themes in order to make sure that the Strategy was realistic in its premisses, appropriate in its objectives, and responded to genuine needs among the Region's inhabitants. In line with the principle of ownership, the consultation process was conducted under the responsibility of the NCPs fulfilling a role of national coordinators in charge of preparing the Strategy. One EU Member State and one non-EU country were appointed for coordinating the theme of their choice as follows:

Themes	Coordinators
1. Driving innovative maritime and marine growth	Greece and Montenegro
2. Connecting the region (transport, energy)	Italy and Serbia
3. Preserving, protecting and improving the quality of the environment	Slovenia and Bosnia and Herzegovina
4. Increasing regional attractiveness (tourism)	Croatia and Albania

DG Regional and Urban Policy also launched an on-line consultation – based on the EUSAIR Discussion Paper mentioned above. The consultation – which was open for 12 weeks, from 25 October 2013 until 17 January 2014 - addressed all interested parties, especially regional and local authorities, inter-governmental and non-governmental bodies, international financial institutions and the private sector. It was also open to individual citizens. The on-line public consultation was structured around a set of open questions regarding the Strategy (Annex 2). The results of the consultation was published on the website of DG Regional Policy (Summary of the responses to the Public consultation is provided in Annexes 3 and 4). The list of the authorities / organisations / citizens who replied is in Annex 5.

All four themes were endorsed during the consultation process. Among many others, the following contributions were gathered:

- On 14 November 2013, DG Maritime Affairs and Fisheries, in cooperation with DG Regional and Urban Policy, organised a Stakeholder Seminar on "Boosting Blue Growth in the Adriatic-and Ionian region: towards and Action plan for the EUSAIR";
- The Adriatic-Ionian interregional group, set up by the Committee of the Region, collected views and proposals from their members – through meetings and questionnaires – and forwarded their contributions to the Commission on 13 December 2013;
- Upon request from the Commission, the European Economic and Social Committee on 21 January 2014 issued an Exploratory Opinion based on the EUSAIR Discussion Paper.

2.2.2. *Consultation results*

Overall, the consultation process emphasised that tackling shared challenges and opportunities in relation to the four themes requires coherent, integrated and coordinated approaches on the part of the countries involved. Neither unilateral national approaches nor sector-based approaches would suffice. Unsustainable use of marine and coastal area resources, fisheries and aquaculture management, mobility and transport, including cruise tourism, were emphasised as areas requiring joint responses. For example, since the countries of the Adriatic-Ionian Region share the same sea basin, unsustainable use of resources or non-compliance with European standards (e.g. in terms of pollution or over fishing) in one country were seen to have considerable impacts on the situation in other countries in terms of environmental quality or competitiveness.

Particular aspects were furthermore foregrounded under each theme. Under Theme 1, blue growth was recognised as key to promoting sustainable economic development and jobs as well as business opportunities around the sea basin. Under Theme 2, overcoming disparities in terms of transport and energy networks, reducing bottlenecks at borders and improving efficiency in infrastructure networks and regulatory frameworks, were seen as pre-conditions for a balanced socio-economic growth in the Region. The same applies for increasing the Region's accessibility, attractiveness and competitiveness. Under Theme 3, reducing pressure on marine, coastal and terrestrial ecosystems as well as pollution of the sea and halting loss of biodiversity and habitats, also inland, were identified as major issues. Lastly, diversified, high quality tourism products and services available all-year, also in the hinterland, and sustainable and responsible tourism management, were identified as important sources for boosting business and creating stable jobs.

The consultation also showed that, in addition to having cross-border impacts, certain challenges also influence different segments of the Region's economy. Examples are the link between the attractiveness of the Region for tourism, including the opportunities for jobs and growth, and accessibility and connectivity in the Region. Other examples underlined the importance of environmental quality for tourism, but also for fisheries and aquaculture. The analysis that the external experts carried out parallel to the consultation, further confirmed close interdependencies between the four themes and the importance of approaching them in an integrated manner, while taking into account disparities between EU Members States and non-EU countries.

Lastly, the process underlined that administrative and institutional capacity-building remained important issues in the Adriatic-Ionian Region. Provided strong political support and efficient governance systems were secured at the national level, an EU strategy could play a central role for implementing actions at the macro-regional level. The process also brought home the message that the Strategy could help strengthen the capacity of existing cooperation

arrangements - of which all or several participating countries were members - to deliver tangible results.

Inputs received furthermore argued that:

- (1) An integrated approach on e.g. environment ↔ mobility ↔ socio-economic development ↔ human resource development etc. would improve tackling of issues usually viewed in isolation. This would allow for synergies and better planning;
- (2) An inclusive and result oriented approach, covering more experienced and "new" EU Members States, as well as candidate and potential candidate countries, could improve the effectiveness of responses in the whole Region, aligning all relevant EU policies and funds, and would support the accession process.
- (3) Wider macro-regional solidarity would allow for equitable profit/burden sharing. It was thus argued that, for each country to achieve its objectives, inputs were needed from the other participant countries.

The consultations lay bare some differences regarding priorities to be pursued. These differences resulted from recent history, socio-economic disparities and differences in institutional capacities. The consultation process thus revealed expectations and interests in relation to the Strategy that varied according to the country from which the replies came, rather than according to the particular sector or type of stakeholders concerned.

In broad terms, three groups of countries could be distinguished:

- Greece and Italy, as the largest countries in the area, often appeared to be the main driving force behind the Strategy. Besides showing high levels of interest in the Strategy as a tool for better coordinating policies in the Region, both countries also expect the Strategy to help endow southern Europe with a positive and business-friendly spirit. Moreover, the fact that both countries hold EU Council Presidency in 2014, added momentum to their engagement.
- Croatia and Slovenia were hoping to benefit from policy coordination helping, inter alia, their maritime sectors to develop. Also, Albania, Bosnia-Herzegovina and Montenegro expected the Strategy to help develop their maritime sectors and to foster administrative cooperation. As for Serbia, its main priority concerned Pillar 2, including both transport and energy.
- All countries put emphasis on actions fostering economic growth, whereas the protection of natural resources and ecosystems - above all the Adriatic and Ionian Seas themselves - received scant attention. Replies from non-EU countries presented their involvement in the EUSAIR work as bringing them closer to the EU, and helping support their EU integration.

Stakeholders expressed contradictory opinions as to the role and involvement of the EU in the Strategy. While some believed that the idea of an Adriatic-Ionian Region was conceived as "bottom-up", then to be endorsed by the EU at a later stage (which was in effect the case), others were convinced that it was the EU that started the process in the first place. There was nonetheless wide agreement among stakeholders that, in view of often diverging national interests, the macro-regional strategy would only work if strong and clear coordination was provided at EU level. Such coordination was seen to be a pre-condition for success. Accordingly, a number of stakeholders advocated a stronger role for the Commission. They mentioned that the EU tends to delegate too much to participating countries. Regarding the

added value of the future EUSAIR, stakeholders consulted pointed to its role in promoting networking and exchange of ideas and best practices in relation to the four themes, in developing a shared macro-regional identity, in raising further awareness about the Region and in calling further attention to the Western Balkans.

At the close of the consultation process, the four themes proposed in the Discussion Paper were turned into pillars for the Strategy, with the following headings: Pillar 1-Blue Growth, Pillar 2 - Connecting the Region, Pillar 3 - Environmental quality, and Pillar 4 - Sustainable tourism.

Furthermore, while the consultation resulted in a wide range of topics proposed for actions under each pillar (former themes), only a limited number of topics were retained as those to be prioritised, i.e. needing immediate and urgent attention and gaining most from joint action⁵. These topics, presented below, are also relevant for EU policies, in particular, those with a territorial dimension.

- **Blue Growth** would focus on sustainable economic growth and jobs, as well as business opportunities arising from blue economy sectors (e.g.: blue technologies, fisheries, aquaculture, maritime and marine governance and services).
- **Connecting the Region** would focus on maritime transport, intermodal connections to the hinterland and energy networks.
- **Environmental quality** would focus on preserving marine and coastal ecosystems, on abating pollution of the sea, on preserving transnational terrestrial habitats and biodiversity, and on ensuring that actions under the other three pillars would take possible negative impacts on the environment into consideration.
- **Sustainable tourism** would focus on diversifying tourism offer (products and services) and promoting sustainable and responsible tourism management.

The consultation process also confirmed the relevance of two sets of cross-cutting aspects for all pillars:

Capacity building, including communication: Capacity building and institutional development would be much needed, especially for coordinating policy responses and strategies relevant to all four pillars, but also for ensuring stakeholder involvement, ownership and skills. Communication and awareness-raising regarding benefits to be derived from a macro-regional approach would pave the way for strengthened cooperation.

Strengthening R&D, Innovation and SMEs: R&D, with sharing of research results, was seen as an integral part of all four pillars. Innovation was considered crucial for blue growth, for developing new transport options, for improving environmental quality and for bolstering the tourist sector. While relevant for all four pillars, the business dimension was considered especially important for Pillar 1 and 4, notably in the context of smart specialisation. Activities linked to strengthening cross-border links between existing clusters involving SMEs were identified as crucial for developing new services and products.

In addition to these cross-cutting aspects, mitigating and adapting to climate change effects as well as managing disaster risks were also recognised as horizontal principles for all four pillars.

⁵ However, since the countries in the Region had different priorities, a coherent approach should nonetheless cover a reasonable range of topics so that all parties could identify potential benefits for themselves.

3. PROBLEM DEFINITION

This section presents the main challenges highlighted during the expert analysis and consultation process as characterising the Region. It furthermore highlights how existing international or transnational cooperation structures operating in the Region are addressing these challenges.

3.1. Main challenges characterising the Region

3.1.1. Heterogeneity

There are considerable disparities among the four EU Member States and also among the four non-EU countries in terms of GDP per head and unemployment rate, institutional and administrative capacity and access to resources and funding instruments.

– Socio-economic disparities:

Both in terms of GDP per head and unemployment rates, there are stark contrasts between countries. While some regions enjoy a GDP per head of 20% above the EU average with a 4% unemployment rate, others have a GDP per head which is 70% below of this average, with an unemployment rate of about 30%. For want of capacity, businesses do not sufficiently exploit the transnational dimension of marketing, innovation or research, particularly in the blue economy. Clusters involving business, research and the public sector are scarce.

– Imbalances in institutional and administrative capacity:

In the Adriatic-Ionian Region, governance is a key challenge for all participating countries. In addition to considerable imbalances with respect to administrative and institutional capacity and experience in cooperation, the countries in the Region harbour highly different political structures, institutions and governance systems. These imbalances and differences affect the capacity to respond jointly. Although accession and prospective accession to the EU are improving the situation, new systems take time to be put in place. First and foremost they require changes in mind-sets and raised awareness unlikely to happen overnight. Bridging political divides, building confidence among public and private stakeholders as well as trust among neighbouring countries, improving skills and developing effective institutional capacity and management mechanisms, are all tasks calling for medium-term support within a macro-regional framework.

3.1.2. Lack of effective coordination/cooperation between countries and funds

To date, participating countries have tended to define their policies and taken their investment decisions individually and in an uncoordinated way. Analysis has shown that there is a need to act in a more coherent way to allow policies and actions taken by the different participating countries to be mutually reinforcing, increasing their overall effectiveness and efficiency. In general terms, challenges requiring a cooperation approach relate to Pillar 2 (Connectivity) and Pillar 3 (Environmental quality), while opportunities to be better exploited through joint action relate to Pillar 1 (Blue Growth) and Pillar 4 (Tourism)..

Provided some countries are able to improve their access to funding, and provided funds are deployed in support of commonly agreed objectives and related investments, financial instruments could considerably improve return on investments as well as secondary benefits.

3.1.3. *Weak implementation of EU policies*

In order to make the Region more consistent with the EU policy objectives overall, especially those laid down in Europe 2020 and, in parallel, the South-East Europe 2020, drastic reduction of implementation gaps and delays among EU participating countries and regions as well as improved alignment on the part of non-EU participating countries to EU legislation and policies are required.

3.1.4. *Need for strengthening existing inter-governmental cooperation structures*

Owing to recent history and to weak institutional and administrative capacity in several participating countries, focus has often been put on establishing national governance arrangements rather than transnational ones. Although a number of inter-governmental frameworks are already in place to facilitate transnational cooperation, most of these arrangements have a strong focus on country-by-country approaches. More often than not addressing one issue at the time, these arrangements also tend to overlook interdependencies between policies and actions taken in different sectors. The result is a fragmented approach to many of the challenges of the Region and under-performance in terms of its potential.

A number of cooperation structures and arrangements already address, for instance, fisheries, transport or environmental issues. To date, progress has however been poor in e.g. halting dramatic decline of fish stocks in the Adriatic-Ionian sea basin. Despite considerable investments under the South-East Europe Transport Observatory (SEETO) in the road and rail networks in the Western Balkans, flows of good and people are still hampered by inadequate capacity and cumbersome procedures causing excessive delays at border-crossing points. As for environmental quality, despite programmes undertaken notably by UNEP/MAP and its MED POL, the level of pollution, notably in the North Adriatic, remains high and coverage in terms of offshore Marine Protected Areas (MPAs) beyond 12 nautical miles is the lowest of all EU marine regions.

Cooperation activities in these fields, in any, are often of a bilateral nature (with a few exceptions, e.g. within European Territorial Cooperation Programmes) and between EU Member States.

The geographic scope of most of the existing cooperation frameworks furthermore tends to be either larger or narrower than the scope of EUSAIR. For instance, the Regional Cooperation Council, covers Western Balkans only, while the Joint Commission for the protection of the Adriatic Sea and coastal areas⁶ does not cover the Ionian Sea. Other initiatives have a wider geographical scope, encompassing all South-East European countries (for instance SEETO) or the entire Mediterranean, as is the case for the Barcelona Convention. Of all existing cooperation structures, the Adriatic-Ionian Initiative (AII) alone has a geographical scope congruent with that currently defined for the EUSAIR.

Overview of a selection of existing cooperation structures:

The main transnational bodies in the Adriatic and Ionian Region are:

- **Adriatic Ionian Initiative (AII).** The Adriatic Ionian Initiative counts in total eight members: Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Montenegro, Serbia

⁶ Established in 1977 under the Agreement on Cooperation for the Protection of the Adriatic Sea and coastal areas from pollution concluded in 1974 between the former Yugoslavia and Italy, this Commission only covers the Adriatic Sea.

and Slovenia. The AII is an inter-governmental body - initiated with the Ancona Declaration (2000) - as a tool for stabilising a post-conflict area. The AII emphasises regional cooperation among its members in relation to tourism, culture, inter-university cooperation, SMEs cooperation, transport and maritime cooperation, environment and protection against fire.

- **Forum of Adriatic and Ionian Chambers of Commerce.** The Forum of Adriatic and Ionian Chambers of Commerce is a transnational non-profit organisation, which links the Chambers of Commerce of Italy, Croatia, Bosnia Herzegovina, Montenegro, Slovenia, Greece and Albania. Its main objective is to strengthen the cooperation and opportunities for socio-economic development in the Adriatic and Ionian Region. Topics of common interest include agriculture, environment, women's entrepreneurship, transport, tourism, fisheries and aquaculture.
- **Forum of Adriatic and Ionian Cities.** The Forum of Adriatic and Ionian Cities includes urban areas from seven countries: Albania, Bosnia and Herzegovina, Croatia, Greece, Italy, Montenegro and Slovenia. Its main objective is to build and develop the economic, social, environmental and cultural heritage of the coastal cities in the Adriatic and Ionian area, through fostering cooperation and partnerships between the local authorities of the member countries. Several projects contribute to this objective.
- **UNIADRION** is a university network across the Adriatic-Ionian Region, which aims at establishing permanent connections among universities and research centres in the area. This university network is engaged in protection, cataloguing and promotion of cultural heritage; sustainable environment, cultural tourism and development, economy, communication, ports and economic relations.
- **South East Europe Transport Observatory (SEETO)** was signed in 2004 by the Governments of Albania, Bosnia and Herzegovina, Croatia, the former Yugoslav Republic of Macedonia, Montenegro, Serbia, the United Nations Mission in Kosovo, and the European Commission. It is a regional transport organisation established by a Memorandum of Understanding (MoU) for the development of the Core Regional Transport Network. The aim of the SEETO is to promote regional cooperation in the Western Balkans in developing the multimodal SEETO Comprehensive Network and to connect it to the EU's TEN-T. It constitutes the indicative extension of the TEN-T into the Western Balkans. Furthermore, SEETO aims at promoting and enhancing local capacity for implementation of investment programmes, management and data collection and analysis of the Core Regional Transport Network.
- **Energy Community.** The Energy Community is an international organisation dealing with energy policy. The organisation was founded by the Treaty establishing the Energy Community signed in October 2005 in Athens. The Parties to the Treaty are the European Union and eight Contracting Parties: Albania, Bosnia and Herzegovina, Kosovo⁷, the former Yugoslav Republic of Macedonia, Moldova, Montenegro, Serbia and Ukraine. Seventeen European Union Member States have the status of participants. The Treaty contains also special measures applicable to Austria, Greece, Hungary, Italy, Slovenia, Bulgaria and Romania. The Energy Community's mission is to extend the EU internal energy market to South East Europe, and beyond, on the basis of a legally binding framework. The overall objective of the Energy Community Treaty is to create a steady

⁷ * This designation is without prejudice to positions on the status, and in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

regulatory and market framework in order to: attract investment in power generation and networks to ensure stable and continuous energy supply that is essential for economic development and social stability; create an integrated energy market allowing for cross-border energy trade and integration with the EU market; enhance the security of supply; improve the environmental situation in relation to energy supply in the region; enhance competition at regional level and exploit economies of scale.

Most transnational cooperation structures in the Adriatic-Ionian Region are either developed under the umbrella of international organisations or have been set up in the context of initiatives of stakeholders spontaneously joining forces across borders. Several of these structures implement actions pertaining to one or more of the four pillars.

Of particular relevance for Pillar 1, maritime safety is a main concern for SAFESEANET, a European platform covering all European sea basins. AdriaMED, a FAO Regional project supports responsible fisheries in the Adriatic through scientific cooperation and the General Fisheries Commission for the Mediterranean (GFCM) monitors fish stocks throughout the Mediterranean. Transport and energy are key issues under respectively SEETO and the Energy Community. Underlining the importance of environmental problems in the Adriatic-Ionian Region, a fair number of cooperation structures deal with Pillar 3. The Adriatic-Ionian sea basin is thus covered in part by the Joint Commission for the protection of the Adriatic Sea and coastal areas and included in the Mediterranean Action Plan (UNEP/MAP) under the Barcelona Convention. Also terrestrial parts of the macro-region are covered by the Initiative for Environment and Security (ENVSEC) for South East Europe, a partnership between the United Nations Development Programme (UNDP), the United Nations Environmental programme (UNEP), the Organisation for Security and Cooperation in Europe (OSCE), the North Atlantic Treaty Organisation (NATO), the United Nations Economic commission for Europe (UNECE) and the Regional Environment Centre for Central and Eastern Europe (REC). Other cooperation bodies, mainly focusing on the Adriatic Sea, are the Adriatic Sea Partnership (ASP) and the Adriatica Protected Areas Network (AdriaPAN). As for Pillar 4, it is clearly of central interest for the Forum of Adriatic and Ionian Chambers of Commerce, the Forum of Adriatic and Ionian Cities and the Adriatic Ionian Euro-Region (AIE).

4. PROBLEM DEFINITION BY TOPIC

As signalled in sub-section 2.2.2. both the on-line public consultation, the consultation of stakeholders and the major conference closing the consultation process (Athens, 6-7 February 2014), endorsed a number of topics under each pillar as those in need of urgent attention while being expected to gain most from joint action. This section further justifies the choice of topics, explaining - as far as the scantiness of reliable data for many participating countries will allow - why each of these topics is of particular relevance to the Adriatic-Ionian Region and should be prioritised.

4.1. Pillar 1 – Blue growth

Blue technologies

Characterised by a lack of clusters of companies, research centres and public agencies from several participating countries, the Adriatic-Ionian Region fails to exploit fully the advantages to be derived from trans boundary cooperation. This concerns in particular blue technologies. Outdated technologies, lack of support schemes, planning and financial funds, still limit blue

R&D&I, notably in non-EU countries, while some key sectors – such as shipbuilding, the boating industry and logistics – risk losing competitive leverage. Full development of the Region's potential in marine biotechnology could favour the creation of high-skilled jobs and growth. The private sector is increasingly calling for joint actions in the field of innovation, for example in collecting and using marine and seabed data, and in developing new materials and analysing products.

Fisheries and aquaculture

Fisheries

Fisheries constitute an important sector throughout the Adriatic-Ionian sea basin, with important social, economic and ecological implications. The social, cultural and economic contribution of fisheries is crucial at the local and regional levels, especially on islands and in remote coastal regions. Depletion of marine resources is, however, a recognised problem across the sea basin, although to a different degree for the two seas⁸. From the approximately 450 species of fish life of the area, 120 are threatened by excessive commercial fishing. The culture of compliance and the monitoring, control and surveillance capacity are still weak in many participating countries. The fishery sector also faces various challenges linked to global competitiveness and market forces. Fishery activities are predominantly of small-scale character. About 80% of commercial fishing vessels are below 15 meters long.

While integrated control of fisheries is critical for the entire Adriatic-Ionian sea basin, participating candidate and potential candidate countries (with the exception of landlocked Serbia) are particularly dependent on such measures. Better cooperation across the sea-basin can also trigger a virtuous process of increasing the profitability and competitiveness of fishery activities for the benefit of the coastal communities depending on fisheries. For the Adriatic, the benefits of changing fishing access rights, combined with sustainable management, are estimated at EUR 721 million annually.⁹

Aquaculture

Aquaculture provides potential for alleviating pressure on open seas fisheries in the Region. The development of a strong, high-quality aquaculture sector that is economically sustainable and environmentally-friendly can contribute to creating jobs and to supplying healthy food products. However, a number of barriers prevent the development of the full potential of aquaculture in the Adriatic-Ionian sea basin: limited access to space and licensing; industry fragmentation; limited access to seed capital or loans for innovation; time-consuming administrative procedures and red tape¹⁰.

⁸ According to the European Environmental Agency (EEA), more than 75% of stocks in the Adriatic are overfished. In the Ionian Sea this percentage is lower (50%) but remains alarming (Source: 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)

⁹ Costs and benefits arising from the establishment of maritime zones in the Mediterranean Sea. DG Maritime Affairs and Fisheries, 2013.

¹⁰ Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic/Ionian and Black Sea. DG Maritime Affairs and Fisheries, 2013, Report 2.

Italy and Greece are important producer countries for farmed fish, producing over 280,000 tons per year. There is a significant potential in the Region for increasing capacity and thereby strengthening the economic development in the sector as well as decreasing pressure on wild stocks. While in Italy (especially on the North-Adriatic shore) aquaculture is strictly linked to the conservation of habitats, ecosystem services and tourism, other countries such as e.g. Greece, Albania and Montenegro lack appropriate planning in most suitable zones for aquaculture.

Maritime services and marine governance

Measures taken so far pertain mainly to administrative capacity to deliver maritime or marine services of public interest, with few targeting blue technologies, fisheries or aquaculture in particular. Trends in the fast growing cruise industry and in logistics and distribution systems have led to an increased need for value added services in ports. Services facilitating access to ports are required, such as new operational procedures reducing bureaucratic burdens, and good sequential or parallel coordination of the different services provided by port actors inside and outside the port, in the context of door-to-door logistics.

Cooperation is needed for strengthening public sector capacity for coordinating planning of marine and maritime activities so as to ensure better marine governance drawing on existing resources.

4.2. Pillar 2 – Connecting the region

Maritime transport

Maritime transport is an economic sector that can play a significant role in Adriatic- Ionian countries. During the 1960s, 1970s and 1980s, the ports of the macro-region were unable to develop their container traffic as the Region was considered peripheral. Recent trends of trade have increased the competitive position of the North Adriatic ports as natural gateways to Central and Eastern Europe. There is evidence that these ports could secure 6 million TEU containers/year of traffic by 2030 (or 11.3% of the EU market). This would represent traffic growth of almost 350% over 20 years, provided good railway access is granted to the hinterland.

Ports also play a key role in local traffic, with ferries and Ro-Ro short-sea shipping. More routes would decrease the distances between the two coasts of both seas. Tourism is heavily dependent on ports, for cruise ships, big and small, and for yachting. Ports require new facilities such as cranes, new passenger terminals as well as Liquid Natural Gas (LNG) terminals. On the problematic side, ports are a possible gate for unlawful trades concerning drugs, weapons and counterfeited goods, giving rise to serious security concerns. Ports will also need to invest substantially in order to meet technological, industrial, safety, security, environmental and climate change challenges.

Investments in innovation and modernisation of infrastructure, promotion of safe and secure maritime traffic should be priorities in the entire area. Traffic monitoring and management remain pressing issues in the Region. The current Adriatic Traffic Reporting (ADRIREP) system, a mandatory Ship Reporting System in the Adriatic Sea, is outdated and is not fully serving the objective of monitoring maritime traffic in the face of increasing congestion. Significant improvements are still needed for harmonising procedures and data exchanges, and for establishing mechanisms to enable maritime traffic information exchange between

national Vessel Traffic Management Information Systems, also enrolling the non-EU maritime participating countries in SafeSeaNet¹¹.

While presenting a clear asset, the many islands in the Region will not be able to develop their comparative economic advantage without connections to the mainland within the macro-region (and beyond) being improved.

Intermodal connections to the hinterland

Following years of isolation and conflict, the Adriatic-Ionian Region is characterised by considerable infrastructure disparities between the countries. To support increase in maritime transportation of goods, intermodal connections to the hinterland, via rail, air or inland waterways need to be upgraded so as to take account the Region's particular mix of sea, coasts, plains and mountains. The need is highest in the non-EU countries. Ports of the Adriatic and Ionian Seas, as well as railway lines and airports, are immediate entry points to the Region.

Despite current and planned projects indicating that rehabilitation of main rail lines has commenced after a long period of under-investing in infrastructure and in rolling stock, both freight and passenger traffic volumes transported by rail continue to decline. Railway corridor X from Salzburg to Thessaloniki needs urgent rehabilitation. Excessive waiting time when crossing the numerous borders, presents one of the most serious impediments to competitive railway services.

In view of the undeveloped road and railway traffic infrastructure, the fastest and cheapest way to increase intraregional links between the countries of the region may be by air. A continuing challenge in air transport is underdevelopment of the air route network, vital for attracting business and tourists, especially east-west routes and routes linking destinations other than capitals and major cities.

Energy networks

Whereas investment in infrastructure is crucial for achieving market competition for both electricity and gas, the energy markets in the Region remain fragmented. Development of freely accessible energy trading/auctioning platforms is necessary for enhancing market competition.

In the electricity market, removal of regulated electricity prices, substantial easing of network congestion and barrier-free cross border exchanges of energy, remain ultimate goals. The Energy Community interconnection plans include connecting new renewable energy to the grid, integrating energy markets, enhancing the security of supply, and improving the reliability, quality and efficiency of energy services. Interconnecting electricity grids and ensuring adequate grids capacity are pre-conditions for large scale investments in renewable energy.

For gas, substantial investments in transmission and storage infrastructure are required in order to improve market supply. Developing natural gas infrastructure will also help currently isolated regions to have access to the resource. It will ensure continuous and secure supplies

¹¹ SafeSeaNet is a European vessel traffic monitoring and information system, established in order to enhance maritime safety, port and maritime security, marine environment protection and efficiency of maritime traffic and maritime transport in EU waters.

through renovated and modernised network and bring LNG from a wider range of export markets via new routes (Trans Adriatic Pipeline – TAP, and the Ionian Adriatic Pipeline - IAP).

Each country would forego important economies of scale, should it pursue full energy independence and security of supply on its own. The most efficient way of achieving these goals would be to plan infrastructure developments with its neighbours and increasingly rely on the regional energy trade. According to a Power Generation Investment Study conducted for the World Bank, a coordinated approach in South East Europe would reduce investment requirements in electricity generation and reduce energy expenses by around 10% by 2020.

A key investment barrier stems from regulated and/or non-cost-reflective prices and tariffs. In the majority of cases, regulated end-user prices do not reflect the real costs of electricity supply. The regulatory framework is not in line with the EU *acquis*, especially regarding wholesale market opening, transparency of capacity allocation and third-party access to networks. Slow progress in unbundling supply and distribution still constitute a major barrier to market opening since it creates an unequal playing field between the incumbent supplier and a new entrant. Furthermore, differences in allocation of cross-border capacity (in particular non-market based allocation) as well as in pricing methodologies constitute obstacles to trading.

4.3. Pillar 3 – Environmental quality

The marine environment

Given that the Adriatic and Ionian Seas represent the backbone of the Region and constitute its major asset, maintaining these seas in a healthy condition should be an overall concern for all maritime participating countries. Under this topic two issues were identified as particularly relevant for the Adriatic-Ionian marine environment, namely threats to coastal and marine biodiversity and pollution of the sea.

a) Threats to coastal and marine biodiversity

The Adriatic and Ionian Seas harbour rare or unique coastal and marine ecosystems. They are home to almost half of all the recorded marine species found in the Mediterranean Sea. This rich biodiversity is brought about by high variation in hydro-geographic and other conditions, resulting in a large number of diverse ecosystems and habitats. The highly indented eastern coast of the Adriatic also acts as a breeding ground and nursery to a large number of species. This high biodiversity of these seas is the basis for tourism, recreational and fishing activities, and contributes greatly to the macro-region's cultural heritage.

Increased human use of the coastal and marine space, however, in particular for fishing, maritime transport, tourism and construction, has intensified pressure on coastal and marine ecosystems, often resulting in destruction of breeding grounds and habitats. Aquaculture is a rapidly growing industry which is not regulated in all countries so as to ensure environmentally-friendly practices. Illegal and uncontrolled construction, sealing soils, is a widespread phenomenon along most shorelines, with demand from tourism for additional construction further compounding the problem.

Incidental catches poses a threat to coastal and marine biodiversity, including fish, sea turtle, cetacean, seabird and other species. Invasive alien species from aquaculture and ballast water

discharge also threaten endemic species, and illegal collection of sponges and corals are further cause for concern.

b) Pollution of the sea

Owing to its semi-enclosed and relatively shallow nature, the Adriatic is highly vulnerable to anthropogenic pressures. Its waters are exchanged with those of the open seas of the Mediterranean only once every 3 or 4 years and the North Adriatic is the shallowest part of the entire Mediterranean Sea, with an average depth of around 50 metres. The Ionian Sea is less vulnerable to such impacts as it is part of the open Mediterranean waters. However, pollution from the Adriatic is exchanged with the Mediterranean through the Ionian Sea, and the latter is therefore also affected by human activities in the Adriatic.

Pollution of the two seas originates from a number of different sources: intensive maritime transport resulting in oil spills, including large scale pollution events and noise pollution, pollution from rivers as a result of excessive use of nitrates on agricultural land and insufficient waste water treatment in several participant countries. Poor solid waste management result from a combination of scant investments in solid waste treatment infrastructure, lack of awareness on the part of the general public, weak enforcement and increasing urbanisation of coastlines. This in turn results in a large number of illegal landfills including hazardous waste. Pollution is also caused by ecologically-unsound aquaculture practices, entailing discharge of nutrient and chemicals into the sea. Marine litter, stemming from both land-based sources and lost and discarded fishing gear, poses a serious problem to the entire sea basin. In addition to entailing significant costs to shipping operators, marine litter affects the safety and health of humans and marine wildlife. Coastal and recreational activities account for more than half of the litter found on beaches.

Transnational terrestrial habitats and biodiversity

The macro-region has a rich biodiversity in comparison to the average European region, with many endemic species. Several eco-regions¹² stretch across borders. These eco-regions include the Illyrian deciduous forests, the Dinaric Mountains and the Pannonian mixed forests. The Region also contains a number of unique ecosystems, including karstic regions and tectonic lakes. The preservation of these is essential to Europe's natural heritage and requires joint action from the countries concerned. They also host habitats and landscape elements of central importance for large carnivores such as the wolf, Eurasian lynx and brown bear. These species require large habitats to sustain viable populations.

The Adriatic Flyway is one of the main routes for millions of migratory birds crossing the Mediterranean, with birds making a resting stop along the eastern Adriatic. A number of bird species also spend winters in the area. Alongside lack of areas in which hunting is banned, hunting rules that are not in line with EU legislation (as well as low enforcement of existing rules) result in vulnerable, threatened or endangered migratory bird species being killed. The issue of illegal hunting of migratory birds has impacts for the EU as a whole.

Climate change is expected to affect much of the Region more severely than elsewhere in the EU, especially its natural habitats and biodiversity. Climate change effects on biodiversity can

¹² According to the definition of eco-regions used by WWF, these are land or water areas that contain a geographically distinct assemblage of natural communities which (1) share a large majority of their species and ecological dynamics, (2) have similar environmental conditions, and (3) interact ecologically in ways that are critical for their long-term persistence.

however be reduced by bolstering the general resilience of ecosystems.

4.4. Pillar 4 – Sustainable tourism

Diversified tourism offer (products and services)

Combined with outstanding natural capital, a rich cultural, historic and archaeological heritage constitutes one of the Adriatic-Ionian Region's strongest assets. Yet, although tourism is already one of the main, fast-growing economic activities and GDP contributor, its potential is not fully exploited. Few tourism actors in the Region adhere to sustainable tourism based on innovative, high-quality tourism products and services with light ecological footprint that would make the Region an even more attractive destination. Diversified and high-quality products and services can thus be vehicles for attracting more and/or different types of tourists, prolonging tourist seasons and attracting visitors to inland destinations, thereby creating new business opportunities and more and better jobs in the Region.

By reducing the industry's dependence on the seasonal model, and by taking into consideration impacts of a changing climate, this approach will reinforce the Region's comparative advantage. Moreover, diversified forms of tourism¹³ have not been sufficiently integrated into wider regional development strategies. Such strategies could link these forms of tourism to creative and/or cultural industries, as well as cultural entrepreneurship with a view to further reinforcing the strong comparative advantage the Region has already built.

Sustainable and responsible tourism management (innovation and quality)

The current state of Adriatic-Ionian cooperation in sustainable tourism management is rather limited. There are few attempts of resolving collectively common problems in terms of organisation, human resources and funding. The net gains of a joint approach would encompass better management of increased tourist flows, including joint analysis of tourism trends and their potential impact, joint access to new tourism markets, more business opportunities and dissemination of new technologies and know-how.

In order to develop products and services and to increase their quality and value, the tourism industry thus needs to build innovation transfer networks. Exchange of best practices (mainly at transnational and/or interregional level) as well as common branding of Adriatic-Ionian tourist products and services, targeting major overseas tourist markets, can reinforce a commercially strong, business-oriented and competitive tourism industry in the Region.

Such commercial prospects need to be anchored to the sustainable tourism concept. In many instances, intensive tourism activities are not managed soundly. These activities have negative effects (production of waste, unregulated construction, pressure on water, land and biodiversity, etc.) on the coastal, marine and hinterland environment, on whose good environmental status they depend. The shared responsibility of all stakeholders, i.e. of the public and private actors as well as of tourists/visitors is therefore a fundamental principle to be built into the sustainable tourism approach.

¹³ E.g. cultural tourism, cycling and sports tourism, eco-tourism, thermal, health and wellbeing tourism, nature tourism, historical, scholastic, pilgrim tourism, agro-tourism, rural tourism, business, or tourism capitalising on the maritime and sub-aquatic cultural heritage, industrial heritage or the economic fabric of a region, etc.

5. ADDED VALUE OF AN EU STRATEGY FOR THE ADRIATIC-IONIAN REGION

5.1. Promoting a cross-sector approach

As seen in Sub-Section 3.1.2, coordinating actions addressing the same range of problems or targeting the same geographical area remains an issue. An important aspect of the added value to be derived from the Strategy is precisely that, associated with a sea basin/ macro-regional perspective, its cross-sector approach will highlight possible complementarities and synergies between policies and programmes currently carried out in the Region by various existing cooperating structures, yet largely overlooked so far. It can thereby be instrumental to translating interdependencies between sector-based policies into concrete actions and projects, under each pillar, that are attentive to possible impacts on actions conducted under other pillars. In the same stride it will help minimise risks of overlaps and duplication of efforts.

By tying together the different policy areas covered by the four pillars, the Strategy can furthermore support territorially-coherent implementation of policies and programmes with a spatial dimension and can advance socio-economic convergence between participating countries and regions by helping create conditions for generating new jobs (notably related to blue growth and tourism).

5.2. Moving from words to action: The Action Plan

An aspect underlined by the Commission Report concerning the added-value of macro regional strategies" (COM(2013)468 of 27 June 2013), is the need, through projects, actions, decisions, networks, for moving from words to actions. As documented by the EUSBSR and EUSDR, the Action Plan is one of the key elements of any macro-regional strategy. Accordingly, the Action Plan accompanying the EUSAIR Communication represents the operational component of the Strategy and forms the indispensable linkage between the objectives stated and concrete actions undertaken to achieve these objectives. Covering the four pillars and the related topics set out in the Communication, it lists a number of indicative actions and examples of projects assumed to contribute to meeting needs identified in relation to these topics. The Action Plan also underlines the importance of an integrated approach taking into account effects of each action on other policy fields. More concretely, when implementing these actions, broad consultation of the bodies in charge of other policy fields is required at all levels of planning and decision-making.

Selection of actions and projects will follow a similar practice to that of the two existing macro-regional strategies. For each pillar, representatives from relevant line ministries of all participating countries would identify actions and related projects they deem likely to have greatest potential impact in terms of addressing the problems recognised jointly as calling for priority attention. EU services will be associated in these discussions in order to secure coherence with EU policies and priorities.

Once an action or project is selected to form part of the Action Plan, and provided its technical quality is satisfactory, it will be up to the participating countries and stakeholders concerned to ensure that this action or project is properly implemented. To enable good implementation of each action or project, the Action Plan should remain reasonably stable for a certain laps of time. However, since priorities are likely to change over time, actions and projects can be reviewed and possibly revised in light of new pressing needs that may have emerged (these decisions will be taken by the countries and the Commission meeting

regularly during the implementation phase). This will in effect turn the Action Plan into a "rolling" Plan.

5.3. Mobilising the whole spectrum of relevant existing funds

The actions and projects listed in the Action Plan are in principle eligible under many relevant funding instruments, whether anchored to EU or national budgets, whether provided by international organisations or stemming from the private sector. While no new EU funds are set aside for the EUSAIR, in order to improve value for money, the Strategy will strive to align EU programmes for which participating countries are eligible.

The Strategy does not rely on one specific EU budgetary line or funding instrument. Various forms of EU funding would provide a substantial resource for implementing the Action Plan. For instance, instruments and policies such as the European Structural and Investment Funds (ESIF), the Instrument for Pre-accession Assistance (IPA), the EU programme for the Competitiveness of Enterprises and Small and Medium-Sized Enterprises (COSME), 'Liaison entre Actions de développement de l'Economie Rurale', meaning 'Links between the Rural Economy and Development Actions' (LEADER), Trans-European networks-Transport (TEN-T), Trans-European Networks-Energy (TEN-E) and HORIZON 2020 are all relevant to the four pillars.

Launching of the Strategy coincides with the start of the 2014-20 programming period. Since the ESIF and IPA Regulations expressly foresee coherence between programming documents and macro-regional strategies, embedding the macro-regional approach in 2014-2020 Partnership Agreements and Operational Programmes for EU countries (Greece, Italy, Slovenia and Croatia) as well as in Strategy papers and programmes for non-EU countries (Montenegro, Serbia, Bosnia and Herzegovina and Albania), will be ensured.

The Strategy does not however seek only to mobilise EU funds and instruments but also national, regional, local, public and private sector resources. Considerable efforts will also be made to encourage participating countries to pool their resources as well as to attracting private investor money, and notably venture capital, to boost innovation.

International Financial Institutions can furthermore supplement these funds. A case in point is the Western Balkans Investment Framework (WBIF). This is a joint initiative of the EU, International Financial Institutions, bilateral donors and the governments of the Western Balkans, formed to support economic and social development and the EU integration of the Western Balkan countries by providing technical and financial assistance for strategic projects in the areas of infrastructure, energy efficiency and private sector development. In addition to EU funds, it thus pools resources from International Financial Institutions such as the European Bank for Reconstruction and Development (EBRD), the European Investment Bank (EIB), the Council of Europe Development Bank (CEB), the World Bank (WB) as well as bilateral donors and private investors.

5.4. Supporting accession and exploiting synergies with other macro-regional strategies

A feature peculiar to the EUSAIR is that it involves both EU-countries and non-EU countries. This entails added value in terms of external policy and enlargement since it bolsters preparation for accession of participating candidate and potential countries. Moreover, far from creating new borders and bringing territorial continuity into jeopardy, the Strategy will allow exploiting synergies notably with the EUSDR which includes five EUSAIR countries

and addresses transport, energy and the environment as key fields of action. While the INTERACT programme can play a central role in ensuring coherence and synergy between the two strategies, efforts are already made to ensure that the same people are acting as National Coordinators for both strategies. Furthermore, ETC transnational territorial cooperation programmes can act as facilitators where stakeholders from different macro-regional strategies can meet, as was the case for the Central Europe Transnational Programme in the period 2011-2013.

5.5. Strengthening compliance with EU legislation and policies and governance for implementing the Strategy

Section 3.2 in the added value report (COM(2013)713) identifies macro-regional strategies as building blocks for EU-wide policy, marshalling national policies into more coherent implementation of EU programmes and better compliance with EU legislation. Through its four pillars, the EUSAIR can thus be expected to ensure better implementation of e.g. the Maritime Strategy Framework Directive, the Trans-European Transport Network, the Trans-European Energy Network and Environmental Directives such as the Habitats Directive, the Birds Directive and the Water Framework Directive. This section also points to (administrative and institutional) capacity-building as an important cross-cutting aspect and as a pre-condition for improving policy development and implementation.

In light of experience gained from the two macro-regional strategies already in place for respectively the Baltic Sea and the Danube Regions, the Communication for the EUSAIR will spell out a number of key conditions for overcoming weak implementation of EU policies and for ensuring effective governance of the Strategy, namely:

- Countries should recognise the Strategy as cutting across sector policies, and of concern to every level of government;
- Full and effective involvement of the non-EU countries must be ensured at all levels;
- High level political support is crucial. Ministers need to determine the overall direction of the Strategy, to take ownership and responsibility, including ensuring alignment with policies and funds, and to provide the necessary resources and status to the decision-taking and technical levels;
- As guarantor of the EU dimension, the Commission should ensure a strategic and coordinated approach at EU level; Furthermore, the Commission is a key facilitator in ensuring that the process makes headway, providing advice and, in cases of disagreements, encouraging discussion as an impartial, legitimate and credible partner. Through its participation in Monitoring Committees of EU Funds (in advisory capacity), the Commission has a key role in promoting the alignments of programmes to the objectives laid down in the Strategy;
- The participating countries shall ensure monitoring and evaluation of progress and provide guidance to implementation;
- Good use of the work of existing regional organisations should be made;

- Reliable support must be provided to Coordinators, especially using the institutional and capacity-building support from the 2014-2020 Adriatic-Ionian transnational cooperation programme.

To conclude, the EU Strategy for the Adriatic-Ionian Region can deliver concrete results building on political support from the European Council, EU institutions, national Governments, regional bodies as well as technical expertise from line Commission's DGs and Ministries. It can develop and reinforce a process leading to actions developed in an open, transparent and legitimate manner. Finally, it can deliver significant impact through policy alignment and through mobilisation of existing financial instruments. It is designed to bolster a cooperative attitude among the countries and stakeholders of the Adriatic-Ionian Region, in pursuit of shared aims and responsibilities.

5.6. Improving coordination between existing cooperation mechanisms

While existing cooperation structures in the Adriatic-Ionian Region each pursue objectives in a range of activities pertaining to e.g. socio-economic and infrastructure development, protection of the environment, transport, etc., they would nonetheless benefit from a more integrated approach. By providing a framework within which converging objectives can be identified, the Strategy can play an important role in promoting greater coherence among these structures. The macro-regional approach can also be expected to strengthen cooperation between authorities within each country, thereby bolstering multi-level governance.

6. OPTIONS REGARDING THE COMMISSION'S ROLE

The likely impact of different options regarding the involvement of the Commission in the implementation of the Strategy will be discussed below against the following parameters:

- (1) Effectiveness: Understood as improved progress on stated objectives.
- (2) Efficiency: Indicating a cost-benefit perspective, i.e. results can be achieved in a cost efficient way.
- (3) Political acceptance: Understood as a long-term, politically-supported cooperation process grounded in ownership by key stakeholders in the Region, strong leadership and wide support for jointly defined objectives and actions.

6.1. The options

This sub-section will discuss which option would be most effective and efficient, and would promote the highest level of political acceptance.

A first option is developed on the basis of a 'status quo' baseline scenario', while three additional options are presented, based on different degrees of Commission's involvement.

Option n°1: The Commission is not involved (baseline scenario)

The Commission does not present a strategy for the Adriatic and Ionian Region. Under this option, two possible scenarios have been developed as it cannot be excluded that the countries themselves will prepare such a strategy

Scenario 1.1: There is no strategy for the Adriatic and Ionian Region

A strategy for the Adriatic- Ionian Region is not presented. Separate policies continue to be designed and implemented at EU and national level.

Scenario 1.2: There is a strategy, but not prepared nor presented by the Commission

A strategy for the Adriatic-Ionian Region is developed by the countries of the Region themselves, through inter-governmental agreement or stronger cooperation.

Option n°2: The Commission's role is limited to preparing and presenting a strategy

The Commission prepares and presents a strategy, but the implementation happens solely at inter-governmental level, without any involvement on the part of the Commission.

Option n°3: In an initial phase, the Commission takes on a role as strategic coordinator and its role is reconsidered when support structures in the Region are further developed.

A coordinated strategy is developed using the existing EU structures, with the European Commission playing a facilitating role. The Strategy is prepared by the Commission as a Communication to the European Council, European Parliament, Committee of the Regions and to the European Economic and Social Committee. An Action Plan is attached. When appropriate, the European Commission may leave the facilitator role to the participating countries.

Option n°4: The Commission takes an active role in strategic coordination of the strategy through a permanent secretariat facilitating the process.

6.2. Analysis of impacts of the different options

Option n°1: The Commission is not involved (baseline scenario)

Scenario 1.1: There is no strategy for the Adriatic and Ionian Region

Under this scenario, the challenges and potential in the Region, which require coordinated response from the involved countries, can only be approached through the insufficient coordination mechanisms described in sections 3.1.1 and 3.1.2. In other words, the prospects for a well-structured and strengthened cooperation in the Adriatic-Ionian Region are reduced.

The EU already provides some cooperation frameworks (through legislation and financial instruments) which partly address major challenges and opportunities, but these are not region-specific. In addition, there are already existing inter-governmental frameworks which facilitate cooperation on certain issues. However, a comprehensive strategy approach is missing, there is insufficient institutional capacity, and there are persisting implementation gaps. The result is a fragmented approach to many of the challenges of the Region, and under-performance in terms of its potential. Common challenges are less likely to be addressed in a coherent way and common opportunities less likely to be seized as sector policies and national interests will continue to prevail. The **effectiveness** of this baseline scenario, with regards to reaching the objectives, is therefore limited.

This option would create no additional direct costs either for the participating countries or for the European Commission. The administrative costs would be borne by existing organisations. EU Member States and non-EU countries would use their existing procedures

to undertake actions. However, indirect, long term costs ("cost of no-Strategy") may be high as the potential with regard to mobility, accessibility and socio-economic development, reduction of environmental damage and natural and man-made disaster risk management remain unfulfilled. With the likelihood of the inaction cost exceeding the extra cost of cooperation, the **efficiency** of this option may be considered neutral to negative.

Finally, given the request from the European Council, its **political acceptance** would be low.

Scenario 1.2: There is a strategy, but not presented by the Commission

Under this scenario, a strategy would be developed and implemented by the countries themselves, using existing or new inter-governmental processes. There would be little or no involvement of the Commission.

This option presents a considerable risk: absence of a neutral coordinator may lead to unbalanced views on the part of stakeholders, with the result that the Strategy would not take into account the full range of challenges and opportunities of the Region. This option may, however, have some capacity for delivering jointly agreed priorities. There is evidence that this approach can indeed be effective for small, relatively homogenous regions enjoying a long history of cooperation and building on well-established structures. However, the consultation of stakeholders raised major doubts as to how successful this option could be in the Adriatic-Ionian Region. More likely than not, its size and heterogeneity, its history, and weak governance structures upon which to build, would make the **effectiveness** of this option sub-optimal.

Under this option, no additional administrative costs would fall on the European Commission. Costs for preparing the Strategy would be borne entirely by participating countries. Without the European Commission playing an active part, the alignment of EU policies and funds from EU programmes to proposed actions would prove more difficult. The option is therefore considered negative to neutral in terms of **efficiency**.

Finally, given the request from the European Council expressly asking the Commission to present a macro-regional strategy for the Adriatic-Ionian region, **political acceptance** would be low.

Option n°2: The Commission's role is limited to preparing and presenting a strategy

This option needs considerable long-term commitment and stable resources from the Adriatic-Ionian countries. Past experience, in general, has shown that this approach can be vulnerable to changing political interests in the countries and can be hampered by poor capacity making the cooperation process difficult to uphold. **Effectiveness** of this option to deliver results hinges entirely on continued political support in the Adriatic-Ionian countries.

As in scenario 1.2, the European Commission does not play an active part in the implementation of the Strategy, so here again, the alignment of EU policies and funds from EU programmes to proposed actions may prove challenging. Combining the low cost of the European Commission's involvement with the possibility that EU funds would be mobilised to a limited degree would entail neutral **efficiency**.

Finally, as in scenario 1.2, insufficiencies in terms of well-functioning cooperation and coordination structures are indeed an important reason for the request from the Member

States, through the European Council, for an active involvement of the European Commission in the process. The **political acceptance** for this option may therefore be considered low.

Option n°3: In an initial phase, the Commission takes on a role as strategic coordinator and its role is reconsidered when support structures in the Region are further developed.

Under this option the European Commission acts as a facilitator to the process of developing and implementing a coherent Strategy for the Region. This will entail offering strategic support by identifying shortcomings that need to be addressed at the political level, suggesting ways of overcoming possible implementation stalemates as well as facilitating evaluation of progress. The Commission will ensure a strategic and coordinated approach at EU level, and integration of the macro-regional approach into EU policies. It will provide an EU-perspective, supported by a High-Level Group on macro-regional strategies with representatives of the EU-28 as well as non-EU countries participating in the Strategies.

These roles would be performed in close cooperation with the participating countries, and with all relevant services of the Commission, notably those having gained experience from the EU Strategy for the Baltic Sea Region and the EU Strategy for the Danube Region, and from sea-basin strategies. When performing these roles, the relevant Commission services, will help participating countries collect reliable and regularly updated data and will help them plausible targets and result indicators for the actions selected for implementation. The **effectiveness** of this option would therefore be high.

In terms of resources, in an initial phase, the Commission role under this option is expected to require 3-5 full time equivalents. This requirement will be met by redeploying existing posts to these new tasks. The involvement of the Commission will be reconsidered as soon as effective cooperation structures are in place. While taking into account the specifics of the Region, these cooperation structures will build on experience from existing macro-regional strategies and on recommendations contained in the Commission Report on Governance of macro-regional strategies. As all participating countries will be expected to take on effective leadership and ownership of the Strategy, Ministers will determine the future direction of the Strategy, align policies and funds, and provide the necessary resources and status for the decision-making and technical levels. In the light of the balanced requirements in terms of resources between the Commission and the countries, the **efficiency** of this option can be considered as satisfactory.

Regarding political acceptance, this option foresees Commission support for cooperation, while highlighting the need for participating countries to take responsibility for implementation of the Strategy. As a further political benefit, the process of EU integration of non-EU countries would be facilitated by Commission support encouraging their full involvement in implementation. Given the effectiveness and efficiency which this option displayed in the other macro-regions, and provided well-functioning cooperation structures are in place, **political acceptance** for this option can be foreseen to be high.

Option n°4: The Commission takes an active role in strategic coordination of the strategy through a permanent secretariat facilitating the process

This option actively involves the European Commission as a long-term facilitator to the process, supporting the Adriatic-Ionian countries in developing and implementing a coherent Strategy for the Region. The development of such an EU Strategy is done in close cooperation

with the involved countries and with all relevant services of the European Commission, but remains open-ended.

With the active involvement of the European Commission, such an approach would reinforce implementation of EU policies in the Adriatic- Ionian Region. This would close existing implementation gaps and make EU policies more effective. The European Commission is a neutral actor in the Region, competent to deal with a number of policy areas through the DGs, and has learned lessons from implementation of the two macro-regional strategies that preceded the EUSAIR. The coordinating role of the Commission would furthermore improve alignment of national, regional and EU funds to support the implementation of the Strategy, thus raising the **effectiveness** of actions toward jointly agreed objectives. The downside of this option is, however, that since the Commission's involvement is open-ended, the participating countries would not develop the capacity to manage the process themselves, leaving the Strategy exposed to changing Commission priorities and resource availability.

Direct costs of this option pertain to resources needed in terms of staff so as to facilitate the development and implementation phase. Establishing a permanent secretariat for the EUSAIR within the Commission would entail costs that would be higher than in Option 3; these costs would also be open-ended. The **efficiency** of this option is therefore considerably lower than Option 3, even with comparable effectiveness.

Regarding political acceptance, in terms of ensuring strategic leadership from participating countries and their long-term ownership in the Region, this option could draw on the experience of the EU Strategy for the Baltic Sea Region and the EU Strategy for the Danube Region now being implemented. It would, however, contravene requests on the part of the Council to avoid additional formal EU structures. In the absence of key actors in the Region steering the process and priorities, there would also be a risk of ownership and innate capacity not being sufficiently developed. **Political acceptance** could therefore end up being negative.

7. COMPARING THE OPTIONS

In view of the analysis of expected impacts of the different options, Option n°3, according to which the Commission takes on the two roles of facilitator and of strategic coordinator in an initial phase, while its role will be reconsidered when support structures are further developed, appears to be the most commendable.

Privileging this option is grounded in the assumption that its effectiveness and efficiency will be high, and that, thanks to strengthened leadership and ownership on the part of participating countries, political acceptance will be good.

In terms of staff resources, Option 3 requires more commitment than the baseline scenario, but is less resource intensive and less open-ended than Option 4 which requires creation of a permanent secretariat (or its equivalent) within the European Commission. Since resources in terms of staff in core services of the European Commission concerned by the Strategy will be redeployed and their job description amended so as to reflect objectives laid down in the Strategy and to accommodate needs arising from initial support in implementing the Strategy, overall administrative costs will remain at existing levels. Commission staff should furthermore be supplemented by a number of cost-free national experts seconded by participating countries.

Table 1a. Summary of the analysis of the impacts of the different options as far as selected topics under Pillar 1 and 4 are concerned

Option	Effectiveness	Efficiency	Political Acceptance	Comments
1.1 - The Commission is not involved; there is no Strategy	0	0	0	The option represents the base line scenario and would only influence the Region in terms of the cost of non-action. Capacity to cooperate of candidate and potential candidate counties would remain low and the effectiveness and efficiency would therefore be neutral while the political acceptance would be negative given the request by the European Council.
	0	0	0	Fisheries: capacity and awareness to implement the multiannual management plans for small pelagics will remain limited and stock depletion will continuous at the current pace.
	0	0	0	Maritime surveillance: full functionality of ADRIREP system will not be achieved, thus capacity to monitor the vessel traffic and to coordinate competent bodies and speed up decision-making process during crisis will remain weak (in particular in the South-West Adriatic).
	0	0	0	Marine litter: growing quantity of litter will cumulate on beaches and seabed and undermine the quality of the ecosystem and tourism offer.
	0	0	0	Tourism: the full potential of cruise sector is not tapped into by local economies, failing to capture its full economic benefits and chances, and to mitigate the possible negative effects of an intensive influx of tourists.
1.2 - There is a Strategy, but not presented by the Commission	+	0	0	This option could lead to some positive results but given the weaknesses of existing cooperation structures, the effectiveness may be limited. In terms of efficiency and effectiveness, the option is considered neutral – on the one hand, it would entail no additional resources on the side of the European Commission, on the other hand, in the absence of facilitation

Option	Effectiveness	Efficiency	Political Acceptance	Comments
				by European Commission, cooperation efforts may prove without significant impact, while more resource intensive on the side of participating countries. Also given the request from the European Council for the European Commission to present a strategy for the Region, political acceptance would likely be low.
	0	0	0	Fisheries: Mere existence of a Strategy would not be sufficient to tackle the problem of stakeholders' weak capacity in terms of governance..
	+	0	0	Maritime surveillance: Existence of a Strategy may be assumed to have a positive effect on the upgrading of ADRIREP although it may not achieve full effectiveness in terms of involvement of all coastal countries. There is also an issue of capacity notably by candidate and potential candidate countries.
	0	0	0	Marine litter: lack of cooperation is likely to persist
	+	0	0	Tourism: The existence of a Strategy might provide a basis for establishing a dialogue amongst different public and private sector actors. However, it will not address the existing gaps in terms of cooperation and coordination capacity amongst these stakeholders in the participating countries. This capacity is critical for providing the facilities and service needed at call ports and for integrating local coastal and inland tourist attractions into cruise routes..
2 - The Commission's role is limited to the preparation and presentation of the Strategy	+	0	0	The same arguments as for Option 1.2 apply. In the absence of an independent and reliable player available for facilitating lasting cooperation structures and alignment and implementation of policies and funding, the Strategy would not be effective in delivering optimal results. Deployment of resources by the Commission would be limited to the preparatory phase. In terms of political acceptance, this option meets the wording of the request from the European Council, but would entail a lesser role for the European Commission in following up on the Strategy. Political acceptance is therefore considered neutral.

Option	Effectiveness	Efficiency	Political Acceptance	Comments
	+	0	0	Fisheries: This option may have an increased effectiveness compared to option 1.2 in terms of consistency with EU policies and Europe 2020.
	0	0	0	Maritime surveillance: no significant difference compared with Option 1.2.
	+	0	0	Marine litter: This option may have an increased effectiveness compared to option 1.2 in terms of consistency with EU policies and Europe 2020.
	0	0	0	Tourism: No significant difference compared with Option 1.2.
3 – In an initial phase, the Commission takes on a role as strategic coordinator and its role is reconsidered when support structures in the Region are further developed.	++	++	++	This option would facilitate coordinated development of the Strategy and establishment of structures to follow up the Action Plan. The targeted and time-limited role of the European Commission would reduce the risk of participating countries' relying open-endedly on the European Commission implementing measures that are national/regional in nature. Political acceptance of this option can be expected to be high.
	++	++	++	Fisheries: This option is likely to improve the prospects for better implementation of multiannual fishery management plans.
	++	++	++	Maritime surveillance: as for Option 1.2, but with better prospects for the involvement of all coastal countries and improved capacity for candidate and potential candidate countries..
	++	++	++	Marine litter: the existence of a macro-regional strategy and strengthened cooperation between countries facilitated by the Commission, will significantly improve the situation.
	++	++	++	Tourism: the strategy will address the existing gaps in terms of cooperation and coordination capacity amongst these stakeholders in the participating countries..

Option	Effectiveness	Efficiency	Political Acceptance	Comments
4 - The Commission takes an active role in strategic coordination of the strategy through a permanent secretariat facilitating the process	+	+	+	Like Option 3, this option would produce an effective Strategy thanks the European Commission's coordinating role. However, efficiency will be reduced compared to Option 3. Political acceptance can be expected to be high, though the risk would be that participating countries do not take seriously leadership and ownership of the Action Plan.
	++	+	+	Fisheries: It would have the same impact of Option 3, but with a lower efficiency, owing to a longer-term need for Commission resources.
	+	+	0	Maritime surveillance: A dominant role on the part of the Commission may affect negatively a strategy whose successful implementation lies with national bodies. Effectiveness, efficiency and political acceptance are therefore considered lower than for Option 3.
	++	+	++	Marine litter: It would have the same impact as Option 3, but with a lower efficiency owing to long-term pressure on Commission resources.
	+	+	+	Tourism: A dominant role on the part of the Commission may affect negatively a sector that requires a strong involvement by and a sound dialogue between business and local authorities. Effectiveness, efficiency and political acceptance are therefore scored lower than for Option 3.

0 is the baseline scenario

+ and ++ means that the impact is positive compared to the baseline scenario

- and -- means that the impact is negative compared to the baseline scenario

8. ENVIRONMENTAL, SOCIAL AND ECONOMIC IMPACT ASSESSMENT

The following table contains a qualitative evaluation of the effects of collective action under the main challenges, assuming governance structures able to ensure implementation is put in place.

Fisheries and Sustainable Aquaculture - Aquaculture sector represents in the EU roughly 80,000 direct jobs, a vital source of income in numerous EU coastal areas. Most of these jobs are, however, in the shellfish segment and on a part time basis. Italy and Greece are amongst the first producer countries in the whole Mediterranean for farmed fish, producing over 284,000 tons per year. Aquaculture can also alleviate fishing pressure and thus help to preserve fish stocks. An integrated and harmonized approach would thus have positive economic and environmental impacts on the region.

Blue-technology - Marine biotechnology has potential for contributing to creation of jobs and to the supply of healthy food products, respecting the EU and international rules and would thus contribute to improving the environmental and economic status of the Region.

Maritime and marine services - Maritime spatial planning and coastal zone management are main conditions for achieving Blue Growth and would have a positive economic impact on the entire region.

Maritime Transport - Generally speaking major parts of the Adriatic- Ionian Region form today an area of low economic development, largely ignored by the major traffic and energy flows. Better transport and energy connections are a compelling need for the macro-region as a whole and a pre-condition for its economic and social development. Efficient and clean transport connections, capable of absorbing effectively increased traffic flows, while paying due attention to climate change effects and disaster risks, will attract foreign direct investments and tourism, hence creating jobs and prosperity.

Intermodal hinterland transport - Better use of intermodal transport will reduce costs of delivering goods in Central and Eastern Europe coming from Asia, while improving the eco-balance and restoring the competitive position of North Adriatic ports.

Energy Networks - Better interconnected energy networks as well as well-functioning energy markets will benefit the whole macro-region and beyond, hence facilitating sound economic growth.

Marine biodiversity- Overfishing, habitat destruction and destruction of breeding grounds, invasive alien species and ecologically-unsound aquaculture practices have resulted in negative impacts for fish, marine mammals, seabirds and virtually all marine plant and animal life in the Adriatic-Ionian sea basin.

Transnational terrestrial habitats/biodiversity - Transnational cooperation is particularly important for preserving biologically-diverse terrestrial eco-regions spanning national borders, for protecting large carnivores with habitats stretching across much of the macro-region and migratory birds along the Adriatic Flyway. A harmonised approach at macro-regional level would thus have a positive environmental impact on the whole region.

Pollution of the Sea- Pollution of the seas is caused by maritime transport, eutrophication resulting from fertiliser run-off from agricultural lands, particularly in the North Adriatic, and pollution from rivers resulting from inadequate waste water treatment, pollution from aquaculture, oil-chemical industry and natural gas exploration. This has negative impacts both for marine wildlife and for human use of the sea (especially tourism).

Tourist routes- Further development and branding of transnational tourism routes is an excellent way of promoting diversity and wealth in the Adriatic- Ionian Region. They also offer lasting economic benefits as they build on local knowledge, skills and heritage assets while connecting and promoting lesser-known remote destinations in the Region.

Diversified offers and services- Joint cooperation to diversify the regional economy (compared to other competitors), reducing the dependence of the tourism sector on the seasonal model with complementary value added products and services would have a positive economic and social impact on the Region.

Sustainable and responsible tourism management - By integrating sustainability approaches into their activities, tourism stakeholders will protect the competitive advantages that make the Adriatic Ionian an attractive tourist destination. Addressing sustainability concerns in a socially inclusive and responsible manner (quality and sustainability of jobs created) will also help the tourism industry of the Region establish links with innovation transfer networks with a view to offering innovative products and services and to increasing their quality and value.

Table 2. Policy scenario impacts

Strategic Action	environmental	economic	social
Aquaculture & fisheries	+	+	+/-
Blue-technology	+	+	+/-
Maritime & marine services	+	+	+/-
Maritime Transport	+/-	+	+/-
Intermodal hinterland transport	+/-	+	+/-
Energy Networks	+/-	+	+/-
Marine biodiversity	+	+/-	+/-
Transnational terrestrial habitats/ biodiversity	+	+/-	+/-
Pollution of the Sea	+	+	+
Tourist routes	0	+	+

Diversified offers and services	0	+	+
Sustainable tourism infrastructure	+	+	+

Environmental Impact Assessment

Among its objectives, the EUSAIR aims at improving the environmental status of the Region. When applicable, strategic and direct environmental assessment procedures will be applied in accordance with EU legislation¹⁴ to ensure that plans, programmes and projects likely to have significant environmental effect, also across national borders, are subject to proper environmental assessment prior to their authorisation.

Social Impact Assessment

The EUSAIR will aim at improving socio-economic conditions in the macro-region and thereby also social inclusion, e.g. in the job market. The direct social impact of the Strategy will be assessed in due course in relation to actions/projects implemented in the Region and linked to the objectives of the Strategy.

Economic Impact Assessment

The EUSAIR will aim at strengthening the economy of the macro region. The combined GDP of the region, estimated from Eurostat figures is close to EUR 1,900 Bn (2012). The population covered by the Strategy is approximately 70 million inhabitants. In addition to the ESIF and IPA funds, major international financial institutions are active in the Region (e.g. EIB has earmarked approximately EUR 5 Bn for the four non-EU EUSAIR countries for the 2014-2020 programming period). The direct economic impact will be assessed in due course in relation to actions/projects implemented in the Region and linked to the objectives of the Strategy.

For further illustration on economic importance of certain sectors in the Region, see Annex 6.

9. MONITORING AND EVALUATION

Implementation of the EU Strategy for the Adriatic-Ionian Region could be monitored at three levels:

- **Milestones** for putting in place the necessary governance structures (e.g. thematic working groups, establishing responsible actors for the collection of data, establishment of communication arrangements within the Region and contact points for stakeholders).
- **Defining the targets** for each action selected for implementation. To this end, it is mandatory first to define baselines. When evaluating the actual impact of the Strategy, a medium-term rather than a short-term perspective needs to be adopted.
- **Result indicators.** In light of baseline situation and targets defined, results indicators will need to be worked out against which progress in achieving the Strategy's overall objectives can be evaluated.

Monitoring and evaluation of progress will also improve both visibility and accountability in relation to actions carried out under the Action Plan.

¹⁴ Directive (2011) 92/EU and Directive (2001) 42/EC.

In line with its role in supporting the peer review process, the Commission could identify areas where progress is slow, and, where appropriate, make proposals on specific measures to address. This would also be in line with the Commission report on added value of macro-regional strategies¹⁵, including the possibility of sunset clauses, where actions are deemed of little value. Review and possible revision of the Action Plan will also take into account how effective and efficient the governance structures put in place have proved in implementing the Plan.

10. CONCLUSION

This document acknowledges the request of the European Council to establish an EU Strategy for the Adriatic-Ionian Region, as a framework for cooperation to support sustainable development and integrated action in a macro-regional and transnational context. The Strategy will be accompanied by a rolling Action Plan that identifies concrete topics and projects in relation to which cooperation should be intensified.

As outlined, the design of the EU Strategy for the Adriatic-Ionian Region will be based on the following elements:

- a) An extensive consultation process: From the EUSBSR and EUSDR it is clear that the political acceptance of the actions proposed was high, thanks to a wide and open consultation process. Therefore, the Commission used the same tools and the same approach when preparing the macro-regional strategy for the Adriatic-Ionian Region, i.e. meetings with specifically-appointed National Contact Points, organising extensive stakeholder consultation, including on-line public consultation and inter-service coordination within Commission services;
- b) A Communication and Action Plan: The structure and organisation of both documents will reflect lessons learnt in the preparation and implementation of previous macro-regional strategies as well as main messages from the consultation process;
- c) A governance and implementation framework for cooperation: The Strategy will also take into account main principles and recommendations contained in the Report from the European Commission on the governance of macro-regional strategies. The existing High-Level Group on macro regional strategies will embrace also the new Adriatic-Ionian Strategy, taking into account the specificities of this area, in particular the large participation of non-EU pre-accession countries. Coordination of each pillar will be done by Pillar Coordinators, (an EU and a non-EU participating country) and the Commission will facilitate the process, coordinate the work and evaluate progress.
- d) Alignment of existing EU, national, regional and local public as well as private funds.

For each of these elements, experience gained from preparing and implementing the EU Strategy for the Baltic Sea Region and the EU Strategy for the Danube Region, as well as

¹⁵ COM(2013) 468

from sea-basin strategies, has been used as a source of inspiration, specific to the Adriatic-Ionian Region.

ANNEX 1

Justification of the inclusion of areas of cooperation (pillars) in the EU Strategy for the Adriatic and Ionian Region

The following table analyses whether each pillar should be treated in a macro-regional framework. To do so, it uses three criteria: is there a need to cooperate between different countries on specific issues (a strategy being a process to agree and implement concrete actions)?; is the topic specific to the Adriatic and Ionian Region?; and is action in this topic in line with priorities / policies at EU level?

Cooperation in the following fields should also facilitate an integrated approach, valuable in addressing challenges and opportunities in a comprehensive manner. In particular, sustainable development and territorial cohesion approaches (e.g. spatial planning) can be usefully reinforced.

Pillar	Need for strategy (cooperation)	Specific to Adriatic Ionian	In line with EU policies & instruments
<i>Issues for which cooperation is a must due to strong cross-border externalities</i>			
Maritime and marine growth	EU compliance and development of joint standards (incl. administrative cooperation to simply and harmonise formalities for shipping as provided in the EU aquis) Deep sea resources management Monitoring & Surveillance Joint planning activities (incl. MSP and ICZ)	Overexploited fish stocks Inefficient fishery sector Underexploited potential of aquaculture Underexploited potential for blue innovation and blue growth	CFP EMFF ESF ESIF Horizon 2020 Smart Specialisation Policies
Connectivity	Optimising interfaces, procedures and infrastructure to facilitate trade with southern, central and eastern Europe Maritime security Improvement of ADRIREP system Extension of NAPA cooperation Transnational road and rail networks Reinforcement of air connections Integration of energy networks Joint energy market	Infrastructure networks not always efficient (too many bottlenecks) Need for sustainable transport solutions Vessel traffic congestion Underexploited location advantages in global maritime transport	CEF EBRD EIB ESIF Sustainable EU Transport Corridors TEN-E TEN-T WBIF
Environmental quality	Threats to coastal and marine biodiversity/marine protected areas Pollution of the sea Marine litter Inappropriate development of coastal zones Protection of transnational habitats Protection of migratory species Climate change	Marine water quality / pollution of the sea Threatened coastal and marine ecosystems, habitats and species Management of Natura 2000 areas Threatened coastal and marine ecosystems, habitats and species Management of Natura 2000 areas Transnational habitats for carnivores and terrestrial biodiversity Ecosystem resilience	7th Environment Action Programme Marine Strategy Framework Directive EU 2020 Biodiversity Strategy (COM (2011) 244 final). Habitats and Birds Directives Green Infrastructure Strategy (COM (2013) 249 final) EU Strategy on adaptation to climate change

			(COM (2013) 216 final) Water Framework Directive CFP EMFF ESF ESIF Horizon 2020 ICZM LIFE
Sustainable tourism	Capitalise on natural and cultural heritage jointly to promote the common Region Coordinated approach to cruise tourism	Strong cultural heritage Constant challenges to innovate and improve competitiveness Insufficient trans-border cooperation Underexploited tourism potentials	European Agenda for Culture ESIF Smart Specialisation Policies Sustainable tourism policy
<i>Issues for which cooperation should strengthened, due to common challenges, cross-border externalities and political trade offs</i>			
Maritime and marine growth	Technology transfer and maritime clusters Development of new products / services	Underexploited potential of aquaculture Underexploited potential for blue innovation and blue growth	CFP EMFF ESF ESIF Horizon 2020 Smart Specialisation Policies
Connectivity	Exchange of experiences (e.g. on multimodality) Improvement of hinterland connections Improve islands connectivity Improvement of ICT infrastructure	Infrastructure networks not always efficient (too many bottlenecks) Need for sustainable transport solutions Underexploited location advantages in global maritime transport	ESIF Sustainable EU Transport Corridors TEN-E TEN-T
Environmental quality	Efficient use of water, addressing water scarcity Municipal solid waste management Soil erosion Low carbon development	Fresh water access Soil erosion Energy consumption	Water Framework Directive EU 2020 Strategy Road Map for a Resource Efficient Europe Waste Framework Directive Soil Protection Strategy (COM(2006) 231 final) CFP EMFF ESF ESIF Horizon 2020 ICZM LIFE
Sustainable tourism	Development of joint standards / brands Exchange of experiences (e.g. new tourism concepts)	Strong cultural heritage Constant challenges to innovate and improve competitiveness Insufficient trans-border cooperation Underexploited tourism potentials	European Agenda for Culture ESIF Smart Specialisation Policies Sustainable tourism policy

ANNEX 2

Scoping Paper and questionnaire for the on-line public consultation (25 Oct. 2013 – 17 Jan 2014)

Subject: Scoping Paper for the public consultation

The European Council of 13/14 December 2012 has formally asked the European Commission to present an EU Strategy for the Adriatic and Ionian Region before the end of 2014"(...) subject to the evaluation of the concept of macro-regional strategies (...) of June 2013.

Objectives of the EU Strategy for the Adriatic and Ionian Region (EUSAIR)

The EUSAIR aims 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. The EUSAIR incorporates the Maritime Strategy for the Adriatic and Ionian Seas, adopted by the Commission on 30 November 2012. The Strategy concerns eight countries: 4 EU Member States (Croatia, Greece, Italy and Slovenia) and 4 non-EU countries (Albania, Bosnia and Herzegovina, Montenegro and Serbia). It focuses on areas of regional mutual interest and it is structured around four pillars:

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

The EUSAIR is in line with the Europe 2020 framework, as well as with the Lisbon Treaty which states that the EU shall promote economic, social and territorial cohesion, and solidarity among Member States. Macro-regional strategies are test cases of what territorial cohesion means in practical terms. The EUSAIR will also contribute to the EU dimension of candidate/potential candidate countries in the Region.

Context and aims of the consultation

The public consultation on the EU Strategy for the Adriatic and Ionian region aims to reach relevant stakeholders and to gather their ideas 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. Therefore, the European Commission is actively seeking the contributions of all those interested (including Member States, neighbouring countries, regions, municipalities, international organisations, financial institutions, the socio-economic partners and civil society). This is why an extensive stakeholders consultation in the Region is organised in the period September-December 2013, on the basis of the 'Discussion Paper' provided by the Commission, as well as this on-line public consultation.

The purpose of this Scoping Paper is to guide those providing a contribution on the major topics related to the EUSAIR. When considering the questions it is important to keep in mind that the actions and projects to be proposed should (a) concern the Adriatic and Ionian region as a macro-region - as opposed to the national or EU level -, (b) have a positive impact on the citizens, enterprises, and the environment and (c) be feasible in the short to mid-term. The questionnaire consists of five sections on which input would be welcomed. If you wish to contribute with a

paper which would elaborate the topics of the EUSAIR and/or issues raised by this questionnaire, you are welcome to send it as an attachment in PDF to REGIO-EU-ADRIATIC-IONIAN-STRATEGY@ec.europa.eu.

Your contributions will be most useful to us in developing an EU Strategy which addresses the critical concerns of the Adriatic and Ionian region. Please submit your response to this public consultation by **17 January 2014**.

Next steps

The results of this consultation will be published in the form of a summary report early in 2014. The contributions will be further discussed in the frame of the conference organised in Athens, on 6-7 February 2014, and will support the preparation of the EUSAIR. A Communication concerning the Strategy will be adopted by the Commission in 2014.

Thank you for your contributions!

Questionnaire

PUBLIC CONSULTATION ON THE EU STRATEGY FOR THE ADRIATIC AND IONIAN REGION

The overall objective of the EU Strategy for the Adriatic and Ionian Region (EUSAIR) is to promote sustainable economic and social prosperity of the 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. The public consultation on the EUSAIR aims to reach relevant stakeholders and to gather their ideas 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. For additional information please download the Scoping Paper for the public [here](#).

Please note it is important to keep in mind, when considering the following questions, that the actions and projects to be proposed should (a) concern the Adriatic and Ionian region as a macro-region - as opposed to the national or EU level -, (b) have a positive impact on the citizens, enterprises, and the environment and (c) be feasible in the short to mid-term.

Section I - BACKGROUND INFORMATION

1. Please specify in which capacity you are completing this questionnaire *:

- As an individual/private person
- On behalf of a Public Authority
- On behalf of an International Organisation
- On behalf of a Civil Society Organisation
- On behalf of a Private Industry
- On behalf of an Academic/research institution
- Other

2. Please provide your name, and when relevant the name of your organisation*

3. If your organisation is registered in the Transparency Register, please indicate your Register ID number. If your organisation is not registered, you can register now. Responses from organisations not registered will be published separately.

4. Please provide your country of residence / establishment*
 - List of EU countries
 - Please specify the name of the country*

5. How well do you know the Adriatic and Ionian macro-region?*

 - Very well informed
 - Fairly well informed
 - Not very well informed
 - Not informed at all

6. How well informed are you about the EU macro-regional strategies?*

 - Very well informed
 - Fairly well informed
 - Not very well informed
 - Not informed at all

7. Please provide your e-mail address

Section II - EUSAIR NEEDS

8. What are the main topics (economic, environment and social) challenges and opportunities in the Adriatic and Ionian region which would benefit from a macro-regional approach?

9. What are the main administrative and governance challenges in the Region (in particular with focus on macro-regional cooperation)?

10. How can the cooperation and coordination across national borders / at transnational level be improved in the Region?

11. What are the needs in terms of funding and how to improve the use of existing financial instruments to achieve the objectives of the Strategy?

Section III - EUSAIR Solutions

12. What are in your views the main topics on which the EUSAIR should concentrate? (please, tick)

I Driving innovative maritime and marine growth

- Maritime clusters and research
- Blue bio-technologies
- Aquaculture
- Fisheries
- Seabed exploration
- Human capital

II Connecting the Region

- Waterways, air, road and rail systems
- Intermodal nodes
- Security and safety of sea and inland transport modes
- Energy systems and security of supplies
- Increased use of renewable and clean energies, energy efficiency and savings

III Preserving, protecting and improving the quality of the environment

- Marine environment
- Quality of water, air and soils
- Biodiversity and landscapes
- Mitigation and adaptation to climate change
- Natural risks
- Spatial planning

IV Increasing regional attractiveness

- Adriatic and Ionian Region identity natural and cultural heritage
- Tourism
- Human capital
- Inclusion of disadvantaged groups

13. Please indicate any other topics that should be addressed by the EUSAIR.

14. Which of the above topics might benefit from being considered together in an integrated approach?

15. What are the main concrete actions and projects, which in the short to medium term, could contribute to fulfilling the objectives of the EUSAIR. Please select relevant pillar and indicate max 4 actions/projects.

Please select relevant pillar for action/project 1:

Pillar I Pillar II Pillar III Pillar IV

Please select relevant pillar for action/project 2:

Pillar I Pillar II Pillar III Pillar IV

Please select relevant pillar for action/project 3:

Pillar I Pillar II Pillar III Pillar IV

Please select relevant pillar for action/project 4:

Pillar I Pillar II Pillar III Pillar IV

16. Which are the main actors in the Region that need to be involved in the implementation of the EUSAIR to ensure that it will run successfully (incl. issues such as relevant decision makers, project actors, financing sources)?

17. How can the administrative and governance capacity in the Region be improved and what kinds of governance arrangements are needed to implement the Strategy?
(partnerships, coordination mechanisms, monitoring & evaluation, communication & visibility, decision making on projects ...)

Section IV – ADDED VALUE

18. How would the strategy contribute to improve the situation? Please, specify what results you do expect from the implementation of the Strategy.

19. What would be the added value of the EUSAIR? Please specify the added value of the Strategy, as compared to individual actions to be taken in the countries or regions, when it comes to policy design and implementation.

20. Please specify what extra benefits are there at the European Union level?

Section V – FURTHER THOUGHTS

21. Any further comments of relevance for the development and implementation of the EUSAIR?

ANNEX 3

EU STRATEGY FOR THE ADRIATIC AND IONIAN REGION

Summary Report on the on-line public consultation

The Commission organized a general on-line public consultation on the EU Strategy for the Adriatic and Ionian Region in the period 25 October 2013 – 17 January 2014. The aim of the consultation was to gather ideas about the future actions and projects in the Adriatic and Ionian Region which could benefit from a macro-regional cooperation approach.

Main results:

- Approximately 100 authorities, institutions or individuals responded to the consultation and presented their views.
- The profile of respondents is varied: academic/research institutions, private persons, public authorities, private enterprises, civil society, international organisation and other.
- The responses come mainly from Italy and Greece. There were also replies from outside the Adriatic and Ionian Region, e.g. Belgium, United Kingdom, Hungary, France, Canada.
- The main identified administrative and governance challenges in the region are:
 - ✓ Differences in the economic and social development of the participating countries;
 - ✓ Poor coordination between regional and national levels;
 - ✓ A top-down approach by national administration vs. social society;
 - ✓ Differentiate access to the EU funds;
 - ✓ Cultural, historical and linguistic barriers;
 - ✓ Lack of administrative capacity and of adequate human resources
- Possible financing sources indicated by the respondents are the following: EU funds; European Investment Bank (EIB) and European Investment Fund (EIF) financial instruments (to be tailored for the Strategy); private funding; Public Private Partnership Investments.
- The main constraints with regard to financing: Stakeholders are not well informed about the available funds in the region; High administrative and regulatory burdens.
- With regard to governance, there is an overall agreement that stronger coordination among countries is needed. Different proposals were indicated (e.g. Permanent secretariat, e-governance structure, etc.)
- There is an overall agreement that the four priorities identified by the participating countries and the European Commission ('Blue Growth', 'Connecting the region', 'Environmental Quality', 'Sustainable Tourism') are indeed the main ones.
- Regarding the 'Blue Growth', in respondents' opinion, a creation of maritime clusters and research should gain the most attention, while human capital is also considered highly important. Further topics on which the Strategy should focus are blue bio-technologies, aquaculture and fisheries.
- Regarding the 'Connecting the region', the main focus points that the respondents identified are the waterways, air, road and rail systems and, the increased use of renewable and clean energies, and energy efficiency.
- Regarding 'Environmental Quality', the survey participants indicated the marine environment, biodiversity, the quality of water, air and soils as the main topics.

- Regarding 'Sustainable Tourism', the respondents spotted as most important the Adriatic and Ionian Region identity and natural and cultural heritage.

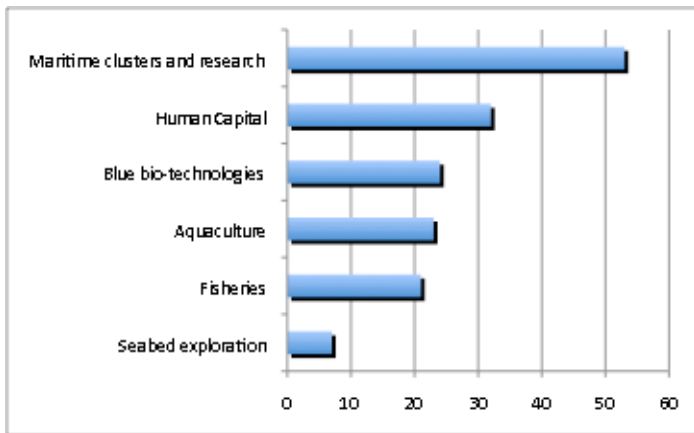
ANNEX 4

Summary of responses to the online public consultation

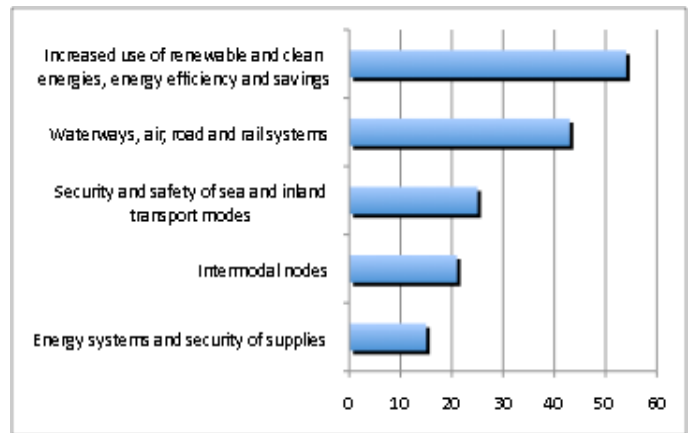
Tables and graphs

Section 2.2.2: Consultation results

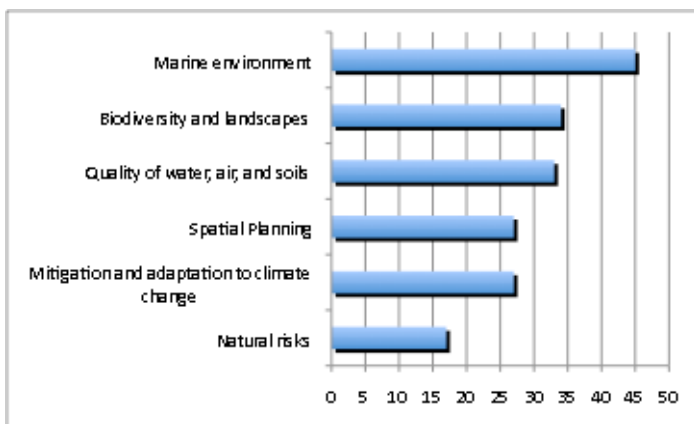
Main topics for innovative maritime and marine growth stressed in the stakeholder survey



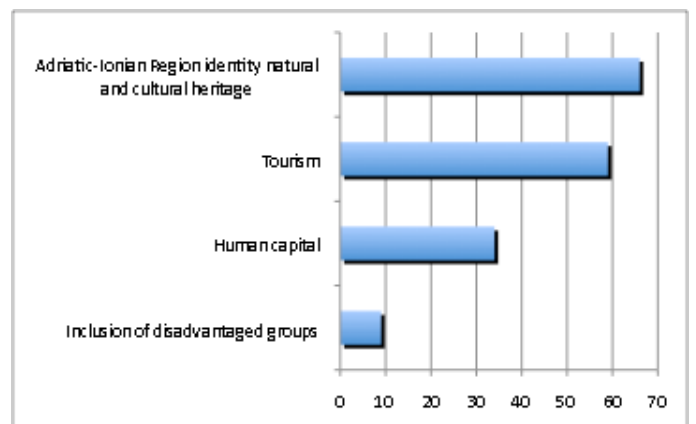
Main topics for connectivity stressed in the stakeholder survey



Main topics for environmental quality stressed in the stakeholder survey



Main topics for attractiveness stressed in the stakeholder survey



ANNEX 5

List of the authorities / organisations / citizens who replied to the online public consultation

No	Name of the person/organisation
1	A.C.E. Consulting dba A.C.E. Construction Consulting
2	Individual Person
3	Regione Emilia-Romagna
4	Individual Person
5	University of Bologna
6	Institute for Oceanography and Fisheries
7	SimFWD P.C
8	Consorzio Alta Ricerca Navale - Rinave
9	Individual Person
10	Vice President Italia Nostra Onlus Sezione Di Udine
11	University of Udine Economic Unit Department of Food Science
12	National Institute of Astrophysics - Astronomical Observatory of Trieste
13	Università di Udine
14	Centro di Riferimento Oncologico (CRO AVIANO) - National Cancer Institute
15	Friuli Innovazione, Research and Technology Transfer Center
16	Italia Molise
17	Secretary General at Unioncamere Veneto
18	Individual Person
19	Venice Port Authority
20	Municipality of Messolonghi, Aitolia y Acarnania, Greece
21	AREA Science Park
22	DIAL Univerità di Udine
23	Consigliere regionale Puglia - Vice Sindaco Cerignola (Fg)
24	Individual Person
25	University of Ioannina Medicval School. Ioannina, Greece
26	Centro di Riferimento Oncologico (CRO AVIANO) - National Cancer Institute
27	Individual Person
28	Individual Person
29	Molise Region
30	Responsabile UOC Anatomia Patologica AUSL Pescara
31	Individual Person
32	Universitary Hospital "Mother Theresa", Faculty of Medicine , Department of Anatomic Pathology
33	Confcommercio Imprese per l'Italia of Friuli Venezia Giulia
34	European House, Budapest
35	Individual Person
36	Province of Udine
37	Region of Crete,
38	FINCANTIERI SPA
39	Individual Person
40	Regione Emilia Romagna
41	EUROGIA2020
42	WWF European Policy Office (on behalf of WWF Greece, WWF Italy and WWF Mediterranean Programme Office)
43	Region Of Ionian Islands
44	Ruđer Bošković Institute
45	Individual Person
46	Individual Person
47	helIFOR.eu
48	Individual Person
49	Individual Person
50	Individual Person
51	Eurotrieste
52	European Straits Initiative
53	Medpan - Mediterranean Protected Areas Network
54	Italia Nostra - Sezione Provinciale Di Viterbo

- 55 Technological Educational Institute Of Ionian Islands
- 56 Oecon Group
- 57 Municipality Of Kefallonia
- 58 Hellenic-Italian Chamber Of Commerce Of Athens
- 59 Chamber Of Achaia
- 60 Associazione Verdi Ambiente E Società Onlus
- 61 Studio Cittaro Srl - Italia Pradamano (Ud)
- 62 Individual Person
- 63 Hellenic Republic, Ministry Of Interior
- 64 Thetis S.P.A.
- 65 Institute For Marine Sciences, National Research Council
- 66 OGS (Istituto Nazionale Di Oceanografia E Di Geofisica Sperimentale)
- 67 President Biennale Habitat - President Habitat World
- 68 University Of Trieste (Italy)
- 69 Brodarski Institut Zagreb
- 70 Orthologismos S.A. (Thessaloniki-Greece)
- 71 European Boating Association (Eba)
- 72 CORILA - Consortium For Managing Research Activities In The Venice Lagoon
- 73 Ionian University, Department Of Informatics, Corfu, Greece
- 74 Federcoopescas-Confcooperative
- 75 Coordination Of Research Institutions Of Friuli Venezia Giulia Autonomous Region, AREA Science Park Trieste
- 76 Lega Pesca
- 77 Institute For Central-Eastern And Balkan Europe (IECOB)
- 78 Agci Agrital - Associazione Generale Cooperative Italiane Settore Agro Ittico Alimentare
- 79 Department Of Chemical And Pharmaceutical Sciences, University Of Trieste
- 80 Management Body Of Messolonghi Lagoon
- 81 Marche Regional Authority In Collaboration With Istituto Piepoli (Rome) And Other Institutions And University System
- 82 Marche Regional Authority
- 83 Marche Region, Research And Innovation Department
- 84 Life Maestrals- Comune Di Campomarino
- 85 Centro Euro-Mediterraneo Sui Cambiamenti Climatici SCARL
- 86 Basilicata Region
- 87 USR Per Le Marche (Ministry Of Education) Regional Board ANCONA IT
- 88 Individual Person
- 89 Chair Of The Department Of Biology, University Of Patras
- 90 International Scientific Forum "Danube - River Of Cooperation"
- 91 European Network For Accessible Tourism - ENAT Asbl.
- 92 Unione Italiana Lavoratori
- 93 Technological Educational Institute of Ionian Islands
- 94 Friuli Innovazione, Research and Technology Transfer Center
- 95 DITENAVE
- 96 Ministry of Foreign Affairs Former Yugoslavian Republic of Macedonia
- 97 Pesca dell'Alleanza delle Cooperative Italiane

ANNEX 6

Illustration of economic importance of certain sectors in the Region

Four thematic papers have been elaborated for that purpose reviewing “innovative maritime and marine growth”, “connectivity”, “environmental quality” and “(tourism) attractiveness” issues in the Adriatic and Ionian Region. These reports identify the needs in the Region and also highlight the potentials.

A presentation of selected socio-economic features can also be assessed via the European Atlas of the Seas (http://ec.europa.eu/maritimeaffairs/atlas/maritime_atlas) and various reports provided by DG Mare, DG Regio, Eurostat, ESPON (www.espon.eu) and other European bodies.

A lot of the socio-economic challenges and potentials in the Region are linked to maritime activities. Putting together some economic figures from the various countries, the main maritime activities in terms of GVA and persons employed 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%). 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. (DG MARE, 2013, Report 2, Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic/Ionian and Black Sea)

Function/activity			GVA		Employment	
			EUR, billion	% on total GVA	*1.000	% on total empl.
0. Other sectors	0.1	Shipbuilding and ship repair	1,21	5,6	40,49	7,6
	0.2	Water projects	0,31	1,4	8,12	1,5
1. Maritime transport	1.1	Deep-sea shipping	1,41	6,5	10,93	2,0
	1.2	Short-sea shipping (incl. Ro-Ro)	2,72	12,7	28,78	5,4
	1.3	Passenger ferry services	0,95	4,4	13,65	2,6
	1.4	Inland waterway transport	0,07	0,3	2,50	0,5
2. Food, nutrition, health and ecosystem services	2.1	Fishing for human consumption	2,85	13,3	95,42	17,9
	2.2	Fishing for animal feeding	0,00	0,0	0,00	0,0
	2.3	Marine aquaculture	0,25	1,2	4,03	0,8
	2.4	Blue biotechnology	0,00	0,0	0,00	0,0
	2.5	Agriculture on saline soils	0,81	3,8	118,70	22,2
3. Energy and raw materials	3.1	Offshore oil and gas	2,18	10,2	5,97	1,1
	3.2	Offshore wind	0,00	0,0	0,00	0,0
	3.3	Ocean renewable energy	0,00	0,0	0,00	0,0
	3.4	Carbon capture and storage	0,00	0,0	0,00	0,0
	3.5	Aggregates mining (sand, gravel, etc.)	0,00	0,0	0,00	0,0
	3.6	Marine minerals mining	0,00	0,0	0,00	0,0
	3.7	Securing fresh water supply (desalination)	0,06	0,3	0,67	0,1
4. Leisure, working and living	4.1	Coastal tourism	7,02	32,7	176,41	33,0
	4.2	Yachting and marinas	0,21	1,0	7,49	1,4
	4.3	Cruise tourism	0,78	3,6	14,86	2,8
5. Coastal protection	5.1	Protection against flooding and erosion	0,12	0,5	1,13	0,2
	5.2	Preventing salt water intrusion	0,00	0,0	0,00	0,0
	5.3	Protection of habitats	0,27	1,3	2,71	0,5
6. Maritime monitoring and surveillance	6.1	Traceability and security of goods supply chains	0,09	0,4	0,85	0,2
	6.2	Prevent and protect against illegal movement of people and goods	0,09	0,4	0,85	0,2
	6.3	Environmental monitoring	0,09	0,4	0,85	0,2
Total			21,49	100,0	534,43	100,0

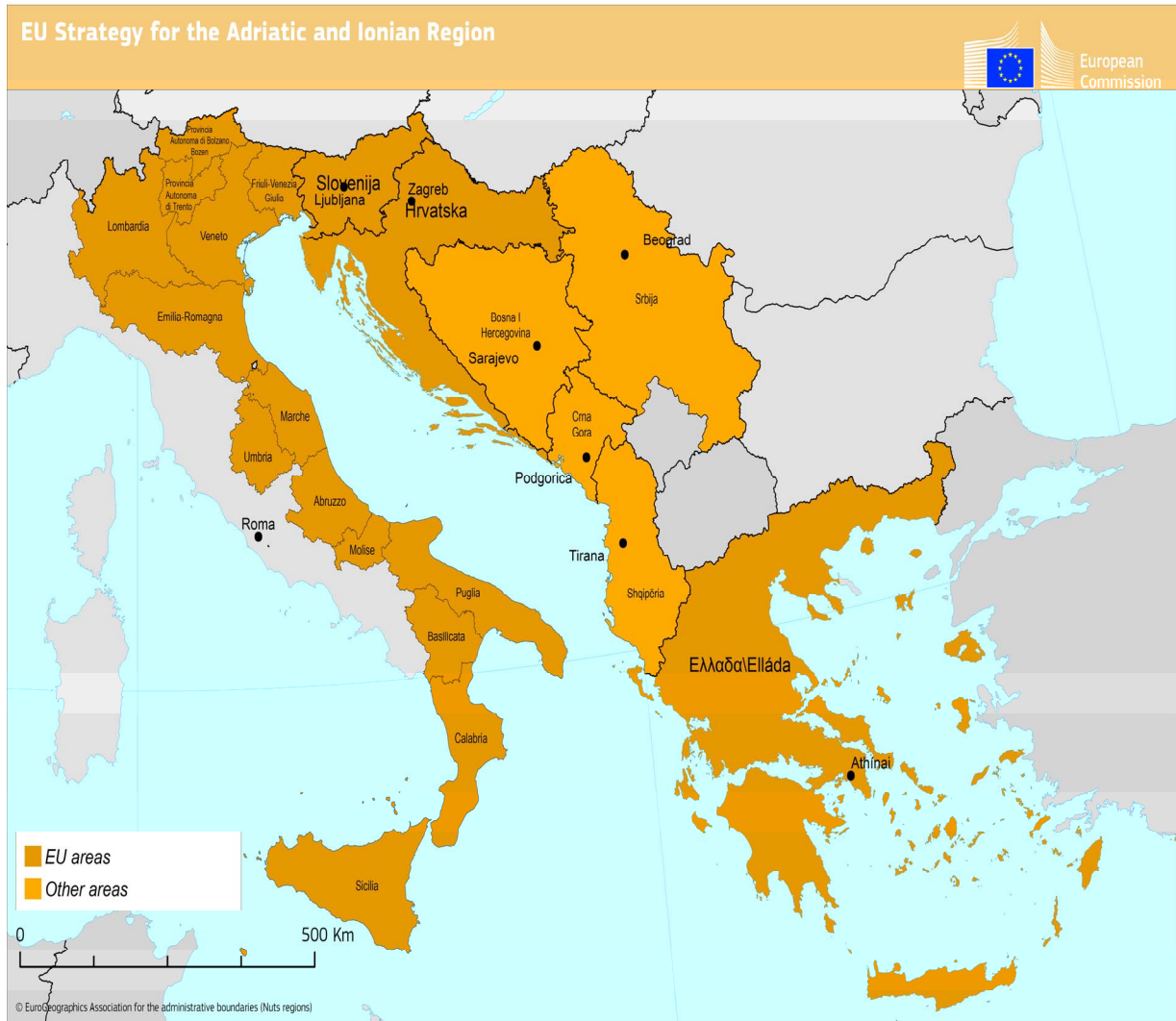
(DG MARE, 2013, Report 2, Studies to support the development of sea basin cooperation in the Mediterranean, Adriatic/Ionian and Black Sea)

To fully exploit the potentials of the maritime sectors and facilitate their improved contribution to smart, sustainable and inclusive growth some key diversities in the Region as well as a series of challenges need to be approached in cooperation. Furthermore, some of potentials can be better exploited in cooperation.

At the same time one needs to take into consideration that the Adriatic and Ionian Region comprises a heterogeneous group of countries, both as regards socio-economic developments, size and also EU membership. A particular divide which shapes the Region is between the four EU Member States Croatia, Greece, Italy and Slovenia and the four non-Member States Albania, Bosnia-Herzegovina, Montenegro and Serbia.

ANNEX 7

Map of the EU Strategy for the Adriatic and Ionian Region



Thematic Workshop 1:

"Blue Growth"

Summary Report on Workshop Conclusions

Athens, 7 February 2014

Chair:

Beate Gminder, Head of Unit, Directorate General for Maritime Affairs and Fisheries, European Commission

Speakers:

Vassilios Tselios, Ministry of Foreign Affairs, Greece

Mathilde Konstantopoulou, Ministry of Development and Competitiveness, Greece

Danijela Stolica, Ministry of Agriculture and Rural Development, Montenegro

Kai Böhme, expert

Facilitator:

Amparo Montán, INTERACT Point Valencia

Rapporteurs:

Nassos Sofos, Directorate General for Regional and Urban Policy, European Commission and **Luca Marangoni**, Directorate General for Maritime Affairs and Fisheries, European Commission

Participants:

Participants included representatives from 7 out of 8 countries, from the public and private sector with strong interest in the maritime and marine affairs.

Summary

The workshop discussed the scope, the topics and the potential actions identified during the stakeholder consultations within the framework of pillar I of the future Strategy. Participants acknowledged the scope of the pillar and recognised the importance of fisheries, aquaculture, blue technology and maritime and marine services for the macro-region. They identified different opportunities and challenges to approach in a jointly manner, such as the maritime spatial planning. The title of the pillar was amended to "Blue growth" to better cover the topics discussed.

Scope

The workshop allowed validating the scope of the pillar, already identified during the public and stakeholders' consultation. This pillar was found to have close links with the other three pillars. Discussions have highlighting five needs:

- Need to be specific to the Adriatic & Ionian region: local challenges and problems, whilst thinking globally. This implies increasing innovation capacity to compete globally, whilst ensuring environmental sustainability (key words "GLOCAL");
- Need to involve local stakeholders at ground level and reinforce roles, relations and networking amongst different stakeholders (key word "BOTTOM-UP APPROACH");
- Need to raise competencies by promoting circulation of ideas and skills and mobility of researchers and workers (key word "BRAIN CIRCULATION");
- Need to reinforce multilevel governance of maritime space and institutional capacity, notably in candidate and potential candidate countries and harmonize standards and rules (key word "CAPACITY BUILDING");
- Need to share data and information both for stakeholders and the general public (key word "DATA CLOUD").

Topics

Stakeholders have confirmed three topics to be addressed under this pillar: 1) Fisheries and aquaculture, 2) Blue technologies and 3) Maritime and marine services. More in particular:

Fisheries and aquaculture

The social, cultural and economic contribution of fisheries is crucial at local and regional level, especially in case of islands and remote regions. Besides the capacity building, R&D, sustainability and communication-marketing, the importance of the information flow among the stakeholders was highlighted. The most important aspects for fisheries and aquaculture were: institutional development, involvement of local actors, increased skills, strengthening R&D, innovation, clustering, developing businesses and branding. Sustainability was evocated as a horizontal issue. However, to mainstream environmental sustainability may reveal to be challenging and difficult to be implemented. Aquaculture has a lot of potential, but it needs appropriate locations to develop (e.g. Maritime Spatial Planning). Fisheries is a challenged sector as there are issues on overfishing and compliance with EU and international rules. Both activities are recognised as important and "fragile". All actions should be addressed respecting the character of the activities and the regional specificities.

Blue technologies

Technology development should address problems (e.g. sea pollution, CO2 emissions from maritime transport) and weaknesses (lack of data/knowledge and capacity) and/or unleash potentials (e.g. ITC, robotics, seabed exploration) specific to the Adriatic-Ionian Sea basin. The need to develop disruptive innovation to compete globally, whilst ensuring sustainability, was highlighted. However, this can happen only if the exchange of people, knowledge and ideas within the region is actively promoted. "Brain circulation" and sharing of information and knowledge have been evocated as the cornerstone to innovation and sustainable blue growth. A second important dimension was the role of the different actors and the interaction amongst SME, research centres, public bodies/institutions and citizens. Governance aspects were raised, notably referring to deep sea water and seabed exploration. Different needs and capacities amongst countries and stakeholders have been underlined, notably by referring to governance, institution building needs and the mobility of workers and researcher.

Maritime and marine services

Maritime and marine services are merely focusing on public sector activities largely linked to other topics of the EUSAIR strategy and other subjects of Pillar 1 (aquaculture-fisheries, blue technology). Main issues discussed included Capacity Building, Maritime Spatial Planning, Internationalisation of Businesses and Clusters, Research & Innovation and Communication. The discussion also underlined that activities need to be future oriented, bridge between local and global developments (key word: "glocal"), and build on existing experience, tools and infrastructure. There is a need to distinguish between short, medium and long-term objectives. The involvement of local actors (incl. civil society) within the multi-level government is important.

Suggested Actions

Topics	Actions
Fisheries and aquaculture	<ul style="list-style-type: none">• Developing operational typologies that capture the diversity and characteristics of relevant sector (environmental, administrative, technical, social, cultural) and focus on the crucial parameters characterising the activities and governing their dynamics. Collection and sharing of new specific data (involvement of research institutions from all countries).• Improving clustering activities/efforts among regions and among activities (fisheries, aquaculture, tourism, fishing as leisure) and links to other sectors such as tourism.• Raising competencies/skills of the stakeholders (needs common at macroregional level).• Defining and realising a well organised monitoring plan of the activities and the environment. Fishing should be complemented with other activities to protect the fishing-dependent areas.• Improving communication and marketing. Promotion of the products and identification of new markets. Improving the acceptance of aquaculture products in society (image).

Blue technologies

- Deep Sea resources: seabed mapping, deep sea observation, research platform on robotics/unmanned marine vehicles and biosecurity;
- Green Sea mobility: research platform for new materials and sensor technologies to reduce costs by lowering cost repairs and saving energy and to develop new propulsion modes and the use of renewable energies. This includes cluster development on green ship building and new materials.
- Knowledge sharing: IT platform for exchanging data and knowledge (knowledge innovative communities, data cloud).
- Facilitating the involvement of partners from candidate and potential candidate countries through capacity building and the promotion of brain circulation and workers/researchers mobility.
- Ensuring the necessary legal framework for exploiting deep sea water and seabed resources in a sustainable manner, through governance mechanisms such as by establishing maritime zones.
- Facilitating access to finance and promoting start-up to prototype ideas and facilitate industrial spin off of RTD results.
- Promoting citizen and business awareness on new technologies

Maritime and marine services

- Maritime spatial planning, integrated coastal zone management at the forefront (ADRIPLAN). Innovative planning (and technological solutions) in coastal defence related to sea level rise (need for joint action).
- Harmonise standards and regulations across the countries, in a variety of fields (environmental standards for boats and shipping, green shipbuilding, use of alternative fuels by boats)
- Internationalisation of clusters and businesses: Building on existing experience and infrastructure and focusing on smart specialisation and smart communities, sectoral/cross-sectoral networking, networking between industry and academia, clusters inventory (“phone book”).
- Networking of cities with similar profiles focusing on the development of a joint strategy for coastal cities in the new millennium.
- Raising the competencies of people working in the field (increase mobility) and provide targeted trainings within key sectors in themes such as institutional development, capacity building.
- Data Integration - Inventory of existing platforms to bring together and make accessible data sources. (Trieste Gulf model, EMODNET pilot for chemistry, Sea Basin Check Points).
- Communicating-informing: 1) the stakeholders and 2) the general public. Building a macroregional identity and improving knowledge through exchange of good practice.

Thematic Workshop 2:

"Connecting the Region"

Summary Report on Workshop Conclusions

Athens, 7 February 2014

Chair:

Willebrordus Sluijters, Head of Unit, Directorate-General for Regional and Urban Policy, European Commission

Speakers:

Andrea Vitolo, Ministry of Foreign Affairs, Italy

Rossella Rusca, Department for Development and Cohesion, Italy

Pavle Jankovic, Ministry of Foreign Affairs, Serbia

Philippe Claeys, expert

Facilitator:

Philipp Schwartz, INTERACT Point Turku

Rapporteur:

Giannantonio Ballette and **Iva Babic**, Directorate General for Regional and Urban Policy, European Commission

Participants:

There were ca. 70 participants representing national, regional and local authorities and other private and public bodies from the Region. Most of participants belonged to the 'Transport' sector.

Summary

The workshop discussed the scope, the topics and the possible actions of pillar II "Connecting the Region". In the discussion, more emphasis was put on the Maritime transports. Rather than an objective choice, this reflected the biased representativeness of the participants. Given the maritime genesis of the future Strategy, it is understandable – as already proved in the course of the stakeholder consultation - that participants were more focused on maritime than on hinterland, and on transport than on energy.

Scope

Participant acknowledged the scope of pillar II, which should focus on better transport and energy connections in the macro-region. Given the heterogeneity of situations in the Region, there is an evident need, within this pillar, to invest in (administrative, institutional) capacity building. Communication is also an important aspect to, i.a., involve population in the decision making and gain their support on initiatives to be implemented. Research, innovation as well as the involvement of the private partners are essential cross-cutting aspects for achieving the objectives of this pillar and hence those of the entire Strategy.

Topics

Stakeholders agreed that this pillar should focus on three strategic topics: improving maritime transports, developing intermodal links to the hinterland and, with regards to energy, improving interconnections. In both transport and energy networks, the Strategy should combine investments on the networks and soft measure, in particular to ensure the correct application of the regulatory framework.

Concerning **maritime transports**, the accent was put on the need to clustering port activities and services, to develop port terminals, including certification re. safety, sustainability, etc. It was also mentioned the need of ensuring a level playing field in the region by promoting compliance with international and European rules.

With regards to **intermodal links with the hinterland**, participants agreed on the need to priorities and promote investments on the comprehensive network, starting with cross-border bottlenecks. The Adriatic Ionian motorway from Trieste to Patras is considered a must for the Region. In order to further develop motorways of the sea, there is a need to improve road and rails infrastructure that link the ports with the hinterland.

Better interconnected **energy networks** will benefit to the whole macro-region, favouring a sound economic development. Focus should be on cross-border interconnection of electricity grids (also as a way to promote the development of energy production from renewable sources) and completion of transnational gas pipelines creating a gas ring in the region. Special attention should also be put on the removal of barriers to cross-border investments.

Suggested Actions

Topics	Actions
Maritime transports	<ul style="list-style-type: none"> • Clustering port activities/services • Development of port terminals • Certification system of ports (safety, environment, ..) • Improvement of the ADRIREP (Adriatic Traffic Reporting) system • Developing new motorways of the sea, and related port infrastructures and ITS (Intelligent Transport System) • Berth allocation system for cruise ships • Standardisation of legal requirements & capacity building (e.g. adoption of EU <i>acquis</i> for non-EU countries)
Intermodal hinterland	<ul style="list-style-type: none"> • Investments on the comprehensive network • Adriatic Ionian motorway, from Trieste to Patras • Development of air transport • Motorways of the sea: intermodal links to the hinterland • Progress in railway reform (incl. capacity building) • Cross-border facilitation (physical and non-physical investments) • Integrated planning of infrastructure development • Develop nodes and hubs in the hinterland

Energy networks

- Electricity: improvements of cross-border interconnections
- Gas: realising the TAP (Trans-Adriatic Pipeline) and its IAP (Ionian Adriatic Pipeline) connection
- Remove barriers for cross-border investments (e.g. through regulatory measures)
- Improve efficiency of energy networks

Thematic Workshop 3:

"Environmental Quality"

Summary Report on Workshop Conclusions

Athens, 7 February 2014

Chair:

George Kremlis, Head of Unit, Directorate-General for the Environment, European Commission

Speakers:

Mitja Bricelj, Ministry of Agriculture and Environment, Slovenia

Agnes Kelemen, expert

Facilitator:

Ivana Lazić, INTERACT Point Vienna

Rapporteur:

Jelena Stojovic, Directorate General for Regional and Urban Policy, European Commission

Participants:

There were more than 70 participants from different national/regional public authorities, research centres, universities, associations, institutes, etc.

Summary

The workshop discussed the scope, the topics and the potential actions, identified during the stakeholder consultation, in the framework of pillar III of the future Strategy.

In order to tackle the main environmental challenges in the Region, such as the unsustainable use of marine and coastal area resources, loss of marine and terrestrial natural habitats and ecosystems, maritime transport pollution and accident risks, coastal water quality, etc., all agreed that **cooperation and coordination** between the participating countries is essential.

Participants agreed that the Strategy needs to address challenges related to **marine biodiversity, pollution of the seas and terrestrial biodiversity and habitats** and urged to highlight the link between the marine and terrestrial environment. The key consideration, besides the vertical environmental integration in pillar III, is to ensure **environmental integration in the three other pillars of the Strategy** with the view to making them sustainable.

Discussion also focused on the issues related to implementation of actions agreed, which were hampered by low levels of administrative and financial capacity and weak enforcement.

Scope

The results of the stakeholder consultation on pillar III conducted by Slovenia and Bosnia and Herzegovina in the Adriatic and Ionian Region in the period September-December 2013, were thoroughly discussed among the workshop participants. The scope of the pillar was validated. Accordingly, the title of the pillar was changed into "Environmental Quality", which encompasses the notion of "preserving, protecting and improving (the quality of the environment)".

Topics

Protecting the marine environment (marine biodiversity and pollution of the seas) and transnational terrestrial habitats and biodiversity are confirmed as the main topics to be addressed by the future Strategy under this pillar. During the discussion, the importance of the **Integrated Coastal Zone Management, Maritime Spatial Planning** and **climate change adaptation** were also highlighted as relevant aspects. Furthermore, **strengthening of the administrative, technical and scientific capacities**, establishment of common platforms for **research, observation and monitoring, and innovative solutions** are seen as important needs/opportunities to be tackled by the future Adriatic and Ionian Strategy.

Suggested Actions

Topics	Actions
Marine biodiversity	<ul style="list-style-type: none"> • establishing networks for the monitoring, care and recovery of species and the development of action plans for safeguarding them • enhancing cooperation in marine research on impact of climate change • data exchange and the transfer of good governance • creation of trans-border, open-water protected areas and strengthening cooperation/ setting up networks of coastal and marine protected areas to preserve ecosystems • introducing Integrated Coastal Zone Management (ICZM) and Maritime Spatial Planning (MSP) through exchange of best practices; • strengthening new forms of sustainable tourism and fisheries
Pollution of the seas	<ul style="list-style-type: none"> • addressing oil spill problems with coordinated contingency plans at macro-regional scale • defining an action plan for marine litter and establishing operational protocols related to litter monitoring • setting up harmonised methods for prevention, reduction, and recovery of waste at sea • coordinated fight against eutrophication, targeting at source the loads of eutrophication substances • developing new cluster-type cooperation initiatives

Transnational terrestrial habitats and biodiversity

- data exchange and the transfer of good governance
- the creation of trans-border protected areas
- networks for the monitoring, care and recovery of species and the development of action plans for safeguarding them

Thematic Workshop 4:

"Sustainable Tourism"

Summary Report on Workshop Conclusions

Athens, 7 February 2014

Chair:

Raphaël Goulet, Head of Unit, Directorate-General for Regional and Urban Policy, European Commission

Speakers:

Blanca Belošević, Ministry of Tourism, Croatia

Sofjola Kotelli, Ministry of Urban Development and Tourism, Albania

Antonis Fysekidis, expert

Facilitator:

Riitta Ahdan, INTERACT Point Turku

Rapporteurs:

Joanna Mouliou and Beatriz Jerez, Directorate General for Regional and Urban Policy, European Commission

Participants:

More than 110 participants attended, covering all sectors of activity (private, public, NGOs, universities, research centres, clusters).

Summary

The panel speakers raised a number of important issues that were identified during the consultation of the stakeholders. They reported on: how the consultation process has been carried out; how heterogeneous, national and local level inputs have been transformed into macro-regional ones; the strong links with the other pillars (esp. pillar II "Connecting the Region"); the hinterland dimension of the Strategy in addition to the coastal and maritime ones.

Additionally, they presented the main challenges and opportunities for sustainable tourism in the Adriatic and Ionian region that have to be considered for the drafting of the Strategy Action Plan.

The presentations of the panel speakers provided a good basis for the discussion in the Workshop on the scope of the pillar, the topics to be addressed and the type of potential actions that should be considered.

With the active participation and engagement of the participants, the Workshop resulted in in-depth discussions on substance with several thoughtful recommendations and suggestions for the Strategy. Among others, participants called for a Strategy that should

facilitate the active involvement of the private actors in the implementation of the future actions in the tourism sector.

Scope

The workshop marked the end of the extended stakeholder consultation process on pillar IV and its aim was to reflect on the proposed scope, the topics to be covered and the potential actions to be implemented in its framework.

There has been a consensus on the scope of the pillar, the challenges and the opportunities across the Region. Participants acknowledged the need to focus the objective of the pillar towards sustainable tourism, recognising sustainability and quality as fundamental aspects to boost the competitiveness of the tourism sector in the Adriatic-Ionian Region. For the sake of clarity and consistency, the title of the pillar has been changed accordingly into "Sustainable Tourism".

Topics

Participants in the workshop suggested the inclusion of 4 topics:

- Diversification of tourism products and services
- Quality of tourism services and products (through common standards and certification)
- Sustainable tourism management (through harmonised statistics and indicators)
- Accessibility (travel facilitation and accessible services)

Likewise, cross-cutting issues common to the other pillars were identified, such as:

- Capacity building for both, private – business and public sectors (incl. learning and training, communication and information)
- Research and innovation, and SMEs development

Suggested Actions

Topics	Actions
Diversified tourism products and services	<ul style="list-style-type: none"> • Tourism routes (mapping existing routes, identifying potential synergies on existing routes, creating new routes building on the assets of the Region). • Thematic tourism: culinary, archaeological, farming, fishing, religious, sport competitions etc.
Quality (through standardisation and certification)	<ul style="list-style-type: none"> • Creating guidelines, exchange of best practices. • Education and training: training for professionals in tourism; knowledge exchange between universities. • Establishing common standards and certification rules and procedures for products and services. Common definition of quality ('stars' classification for hotels) • Coordination for search and rescue (especially regarding tourist yachts) and other emergency situations • Strategy for a Region common branding building process based on the offer of tourist products and services.
Tourism management (through adequate use of statistics and indicators' systems)	<ul style="list-style-type: none"> • Establishing common indicators and statistics. Dissemination and valorisation of the existing European indicator system (ETIS). • Developing innovative strategies and tools to tackle seasonality and congestion in ports during high season. • Mapping of the tourism development institutions per country. • Collaboration among clusters. • Stimulating smart specialisation for sustainable tourism.
Accessibility "Tourism Accessible for all!"	<ul style="list-style-type: none"> • Facilitation of visa issuing for non-EU travellers and other common visa provisions • Connection of hinterland areas and coastal areas. • Fostering interregional routes and connectivity between the areas, esp. remote places and islands. • Use of social media and information technology tools. • Services and products for seniors and people with special needs. • Solidarity in tourism with inclusion of less visited areas.