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MINISTRY FOR DEVELOPMENT & COMPETITIVENESS



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Thematic Workshop 1:

"Driving innovative maritime and marine growth

Chair:

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Background: What is a Macro-regional Strategy?

A Macro-Regional Strategy is an **integrated framework** to address common issues of EU Member States and non-EU Countries located in the same geographical area, which thereby benefit from strengthened cooperation.

This includes **challenges**, which can only (or more efficiently/effectively) be tackled through regional cooperation (e.g. environmental, or connectivity issues) and **opportunities**, where increased cooperation is of mutual interest (e.g. tourism, research, innovation, or capacity building).

Macro-regional strategies operate with no additional EU funds, no new institutions and no new legislation. Actions which will be identified in the framework of the Strategy as benefitting from a strengthened (macro-regional) co-operation, would need to be financed by EU, national or private funds. This requires more **coherence between existing funds, structures and policies**.

How the future EU Strategy for the Adriatic and Ionian Region will look like?

Following a request from the European Council of December 2012, the European Commission is called to bring forward an **EU Strategy for the Adriatic and Ionian Region** before the end of 2014. The new Strategy will build on the experience gained in the existing Baltic Sea and Danube macro-regional strategies, and will incorporate the Maritime Strategy for the Adriatic and Ionian Seas (adopted by the Commission on 30 November 2012).

After an intensive **stakeholders' consultation** across the region carried out by the participating countries and the European Commission, and taking into account the recommendations of the evaluation of the macro-regional approach (adopted in June 2013), the European Commission is proposing that the new Strategy focuses on a limited number of areas of mutual interest, where the **added value** of cooperation is clear and justified.

In its initial stage, the Strategy will be concentrated on the four following **Pillars**:

- 1) Blue Growth
- 2) Connecting the Region
- 3) Environmental quality
- 4) Sustainable tourism

Objectives and structure of the workshop

This workshop will be focused on the **Pillar 1 'Blue growth'**.

After a presentation of the outcomes of the stakeholders' consultation by the representatives of the co-ordinating countries for this Pillar (Greece and Montenegro), the expert engaged by the Commission will give his view on the challenges and opportunities for cooperation in the Adriatic and Ionian region.

The participants will be encouraged to reflect on the proposed **scope, priority topics** and **potential actions** in this particular Pillar of the future EU Strategy for the Adriatic and Ionian Region.

What is the issue?

The scope of this Pillar is to **drive innovative maritime and marine growth** in the Adriatic Ionian Region by promoting sustainable economic growth and jobs as well as business opportunities in the blue economy sectors (e.g. aquaculture, fisheries, blue biotechnologies, marine and maritime services).

This needs to build on the regional diversity in the Adriatic Ionian Region, and take into account that there are various pathways to innovative maritime and marine growth. At the same time a number of challenges and development opportunities need to be approached through cooperation among the countries, regions and cities.

Challenges and Opportunities

The Adriatic and Ionian region is short on clustering and fails to fully exploit the advantages that could be gained from better cooperation and collaboration. There is an insufficient "business resource efficient culture" in the region resulting from weak involvement of stakeholders and interrelation of business, research and the public sector. Some key sectors, such as shipbuilding, the boating industry and logistics, risk losing competitive leverage while others, such as marine technologies or blue bio-technologies, have not yet developed to their full potential.

Marine biotechnology has the potential to contribute to the creation of jobs and growth and generate spill-over effect in other sectors, despite the fact that the sector is at a nascent stage. There is a growing demand and potential for joint actions in the field of innovation, especially from the private sector, such as collecting and using marine data, combining nano and biotechnologies for the development of new materials and analysing products to support other sectors such as aquaculture and shipping.

Fishery activities are predominantly of small scale character in the Adriatic-Ionian region. About 80% of commercial fishing vessels are below 15 meters long. The sector is crucial in the regional economy, as it has important social, economic and ecological implications on coastal communities. At present, the fishery sector faces various challenges linked to global competitiveness and market forces, as well as to environmental objectives concerning the 'conservation' of fish stocks. In the fishery sector, many stocks are shared, but overexploited, while at the same time, the culture of compliance by fishermen, and the Monitoring Control and Surveillance (MCS) activities of control agencies, appears weak. Depletion of marine resources is a recognised problem in the Adriatic-Ionian region. From the about 450 species of fish life of the area, 120 are being threatened by excessive commercial fishing.

Aquaculture provides potential to alleviate pressure on capture fisheries and is one of the most promising marine economic activity for the macro-region. The aquaculture sector stands for roughly 80,000 direct jobs in the EU. On the Mediterranean coast, Italy and Greece are amongst the first producer countries for farmed fish, producing over 284,000 tons per year. While aquaculture can also alleviate fishing pressure and help to preserve fish stocks, there is limited access to space and licensing, the industry is generally small-scale and fragmented, there is poor and limited access to capital or loans for innovation, and the industry growth is hindered by time-consuming and potentially costly administrative procedures and bureaucracy. Also, the sourcing of feed for aquaculture is a critical issue.

A sustainable **fishery management** policy is likely to offer synergies and cost-savings efficiencies with regards to control and possibly monitoring and data collection. A well-conceived management regime can convert a marginal or even doubtful benefit into very positive economic, as well as ecological, range of benefits. Linking other zones to proper control and monitoring is equally a prerequisite for the full realisation of the incremental benefits compared to the costs.

How cooperation can help? Strategic topics/actions

Given the wide range of challenges as well as potentials in the macroregion, three strategic topics have been identified as those which could particularly benefit from macro-regional cooperation.

Aquaculture & fisheries. Cooperation in the fields of aquaculture and fisheries is of importance with regard to e.g. EU compliance and the development of joint standards, as well as joint monitoring and surveillance activities and the strengthening of the connectivity and internationalisation of existing clusters on these fields. For instance, EU compliance is an important issue, not only because the level and approach to compliance differ between the four EU Member States, but also because the non-Member States do not lie under the same rules as the EU Members States. This implies differences in the legal and administrative frameworks which can hamper the development of the macroregion as one integrated area. Therefore in various fields cooperation on compliance issues can help to improve the

situation and to find common answers on how to comply with certain aspects. Possible fields of actions include 'thematic EU compliance networks', 'development of common standards and practices', 'joint actions for stopping illegal activities', and 'EUSAIR communication'. In a wide range of fields, such as fishery, aquaculture or boating, harmonised or even common monitoring and surveillance systems in the macroregion could help to better understand the development challenges and potentials in the area and inform policy processes. Possible fields of actions include 'fish monitoring platforms', 'multiannual management plans for fisheries' and 'research on fish stocks'.

Blue-technology. Innovative marine and maritime growth is also closely linked to smart specialisation, including in the field of blue-technology. In order to strengthen smart specialisation and the preconditions for entrepreneurial discovery, the development of technology transfer platforms bringing together research activities and enterprises in the maritime sector could be strengthened. Going beyond national borders, will help to establish the best possible links and may also contribute to strengthening the connectivity and internationalisation of clusters/platforms of expertise. Possible fields of actions include 'internationalisation of existing clusters', and 'joint technology transfer platforms'. Linking up with entrepreneurial discovery processes, this also could involve product and service innovations with regard to macroregional specificities. Possible fields of actions include 'aquaculture focusing on regional specificities', 'diversification of fishery activities', 'underwater exploration/activities (e.g. marine robotic)', 'deep sea knowledge (e.g. mapping and marine bio-technologies)', 'green ships and new materials' and 'blue energy'..

Maritime & marine services. Cooperation on various services - notably linked to the capacity building of the public sector and a better coordination of planning activities - is needed to prepare the ground for better marine and maritime growth. In a wide range of fields, coordination of activities, e.g. via joint planning efforts, might help to make better use of the existing resources in the macroregion. The focus of such activities is mainly on bringing together national or regional planning activities under a common roof. Possible fields of actions include 'common maritime spatial planning strategies', 'common aquaculture site management', 'multiannual management plans for fisheries', and 'branding/certification of EUSAIR marine products'.

The topics included under this Pillar need to address in an **horizontal way** the following issues:

- capacity building (e.g. in terms of cooperation on monitoring and surveillance activities, institutional development incl. the harmonisation of legislation) as well as communication, awareness raising and participation of stakeholders;
- the business dimension of strengthening R&D, innovation and SMEs, especially with regard to smart specialisation.

Links to other Pillars

The work on Pillar 1 is certainly closely interlinked with the topics of the other three Pillars such as Pillar 2 ("Connecting the region"), Pillar 3 ("Environmental quality") and Pillar 4 ("Sustainable tourism"). These close connections are expressed in closely related topics and also the cross-cutting issues which are the same for all Pillars.

Some guiding questions for the discussion:

- **Would you agree with the topics identified as of macro-regional relevance?**
- **Which actions would you consider most important? Which ones can have a bigger impact?**
- **Which type of projects would fit in the scope of this pillar? Are there any projects which can be implemented in the short term?**