FINAL REPORT – VOLUME II
THE EUROPEAN MARITIME POLICY
GUIDELINES AND RECOMMENDATIONS
THE PERIPHERAL MARITIME REGIONS VISION

SEPTEMBER 2006
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1. INTRODUCTION

The “Europe of the Sea” project is supported by 50 coastal regions and cities, and has been developed between January 2005 and September 2006. This initiative, coordinated by the CPMR, is the answer to the declaration adopted at the Saint-Malo General Assembly (2003), which invites the European regions to take on their full maritime dimension and to contribute actively to the public debate on the future European Maritime Policy launched by the European Commission.

The “Europe of the Sea” project was aimed at the following 3 main objectives:

- Before the publication of the Green Paper on a future European maritime policy (GP), to influence the consultation process and contribute to discussions by presenting the point of view of coastal regions and cities. The CPMR presented two formal contributions to the GP – the first in October 2005 proposing a set of 15 themes and 90 topics to be taken into consideration in the GP and the second in February 2006 which was more specifically focussed on issues directly affecting coastal regions and cities i.e. territorial policy, sustainable development, governance and a number of sectoral policies. Other contributions will be drafted shortly, in response to the publication of the GP.

- To contribute to the preparation of an operational document for the implementation of the new European maritime policy (White Paper or statement in the Parliament and Council) guaranteeing a role for the regions as a legitimate, essential player.

- To identify relevant themes for cooperation which could be implemented in the framework of the Objective 3 “territorial cooperation” objective for the period 2007/2013;

The project was implemented within three main phases. The methodological organisation of the project has been defined in the first phase (1st interim report); the strategic evaluation of maritime activities has been carried out under the second (2nd interim report). The last one was aimed at developing guidelines and recommendations for a European maritime policy, and guideline proposals on the role of the regions in this future policy (final report).

The project structure follows five thematic approaches: i) Economy and Employment; ii) Transports, Logistics and Maritime Safety; iii) Research Development and Innovation; iv) Sustainable Development and v) Governance. Five focus groups, each one coordinated by an expert and a partner Region, worked independently but with a common methodology, while the Project Steering Committee (the CPMR together with the regions leading each thematic group and the experts) enhanced and provided guidelines for crosscutting work. The analyses carried out in the working groups made good use of the results of the survey undertaken by the CPMR among all the partners in the project. The survey covered numerous issues linked to the maritime dimension (main strengths and weaknesses of the regions, governance of maritime affairs, contributions to a European maritime policy). The results of the survey were included in the final report. One of the schedules details the processing of the results.

The final report for the project consists of two volumes plus Schedules. The first volume contains a strategic assessment of maritime activities. It presents all the thematic reports written under the responsibility of experts, in close cooperation with the relevant partners, and includes in its conclusion a certain number of proposals for a European maritime policy on each individual theme. The second volume summarises the results of the strategic assessment and a detailed set of proposals for a European maritime policy and the regions’ role in it.

The final report also includes:
- the results of the various meetings of the Scientific Council organised by the Portuguese regions in Lisbon, Faro, Porto and Ponta Delgada,
- the contributions from the seminars in Bergen and Brest, in particular on marine research and maritime technologies,

1 Contact the CPMR General Secretariat for a copy of the survey.
- the contributions from the meeting organised by the Bretagne on the social dimension of Europe of the Sea.

The final report contains 4 chapters. Chapter 2 consists of a summary of the strategic analysis of the maritime activities detailed in volume 1. Chapter 3 lays out the guidelines and strategic objectives for a European maritime policy. Chapter 4 gives an overview of the results of the survey undertaken among partners in the project. It highlights the experience of peripheral maritime regions as regards the sea and their visions for the future drafting of a European maritime policy. Finally, the last chapter contains a series of proposals and recommendations for a European maritime policy. A report added as a Schedule presents the detailed results of the survey carried out among the regions.

These results remain to be assessed and validated by the Steering Committee and the other partners in the project.
2. SUMMARY OF THE STRATEGIC ASSESSMENT

This chapter summarises the elements used for the strategic assessment of maritime activities detailed in volume 1 of the report.

The conclusions have yet to be discussed and validated by the partners in the project. Where appropriate, adjustments resulting from these discussions can be included.

2.1. GENERAL FEATURES

Europe is an international maritime power because of its geography i.e. the extent of its coastal zones, its presence on several seas and oceans strengthened by the position of its extremely remote regions, the diversity and richness of its marine ecosystems, its worldwide reputation for high-tech maritime activities, and its environmental and cultural heritage. All this makes Europe a maritime power whose authority cannot but be strengthened by the adoption of an integrated European maritime policy. The following table presents a few summarised indicators reflecting this position on a global scale.

<table>
<thead>
<tr>
<th>GEOGRAPHY AND POPULATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>The continent of Europe is bordered by four seas – the Mediterranean, the Baltic, the North Sea and the Black Sea. It is also flanked by two oceans – the Atlantic and the Arctic.</td>
</tr>
<tr>
<td>Some of Europe’s outermost regions are bordered by the Caribbean and the Indian Ocean.</td>
</tr>
<tr>
<td>The maritime zones that fall within the jurisdiction of Member States are larger than the total terrestrial area of the European Union.</td>
</tr>
<tr>
<td>The European Union coastline</td>
</tr>
<tr>
<td>Maximum distance of European residents from the coast</td>
</tr>
<tr>
<td>Percentage of European residents living less than 50 km from the coast</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COASTAL REGIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>% of the EU’s GDP generated by maritime regions</td>
</tr>
<tr>
<td>Number of recreational fishermen</td>
</tr>
<tr>
<td>Value of the recreational fishing industry</td>
</tr>
<tr>
<td>% Europeans taking holidays on the coast</td>
</tr>
<tr>
<td>% of the 14,000 EU-controlled coastal swimming areas that comply with the mandatory values laid down in the European directive on water used for swimming</td>
</tr>
<tr>
<td>Estimated number of moorings in the EU’s 3,000 marinas</td>
</tr>
<tr>
<td>Public expenditure in the EU per year devoted to the protection of the coasts against the risk of erosion and flooding during the 1990-2020 period</td>
</tr>
</tbody>
</table>
MARITIME ECONOMY

% of the EU’s GDP generated by industries and services linked to the sea, not including raw materials such as oil, fish or gas.
% of EU trade carried by sea:
External trade ~90%
Internal trade >40%
Transit through European ports per year:
Goods 3.5 billion tons
Passengers 350 million
% of the European share of the global fleet 40%
% of fish farming compared to total fishery production within the EU 19%

<table>
<thead>
<tr>
<th>EU 25 fisheries production (tonnes live weight) 2003(a)</th>
<th>Total</th>
<th>Catches, All regions (81%)</th>
<th>Fish farming, All products (19%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>7277353</td>
<td>5902394 (81%)</td>
<td>1374958 (19%)</td>
</tr>
<tr>
<td>Variation in fisheries production, 1995-2003 (a)</td>
<td>-20.8%</td>
<td>-26.5%</td>
<td>18.6%</td>
</tr>
<tr>
<td>EU 25 employment in fishery sub-sectors, 2002-2003</td>
<td>Total</td>
<td>Fishing (49.6%)</td>
<td>Processing (34.9%)</td>
</tr>
<tr>
<td>(b)</td>
<td>421318</td>
<td>208852</td>
<td>147102</td>
</tr>
<tr>
<td>Change in the number of fishermen per year since 1996/1997 (b)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EU 25 fishing fleet 2005 (b)</td>
<td>Nb of inshore boats 72302 (79%)</td>
<td>Nb of offshore boats 18892 (21%)</td>
<td></td>
</tr>
<tr>
<td>Change in the number of ships per year 1997-2004 (c)</td>
<td></td>
<td>-1.5%</td>
<td></td>
</tr>
</tbody>
</table>

ESTIMATED TURNOVER

<table>
<thead>
<tr>
<th>2004 sector</th>
<th>Million euros</th>
<th>% of global value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping and transport</td>
<td>151137</td>
<td>44.1%</td>
</tr>
<tr>
<td>Maritime tourism activities</td>
<td>71812</td>
<td>42.7%</td>
</tr>
<tr>
<td>Marine oil and gaz</td>
<td>19112</td>
<td>20.9%</td>
</tr>
<tr>
<td>Fish and shellfish processing</td>
<td>8241</td>
<td>10.3%</td>
</tr>
<tr>
<td>Maritime equipment and amenities</td>
<td>16675</td>
<td>22.9%</td>
</tr>
<tr>
<td>Fisheries</td>
<td>4758</td>
<td>8.5%</td>
</tr>
<tr>
<td>Shipbuilding</td>
<td>13143</td>
<td>34.8%</td>
</tr>
<tr>
<td>Ports</td>
<td>10478</td>
<td>41.9%</td>
</tr>
<tr>
<td>Marine fish farming</td>
<td>3483</td>
<td>14.6%</td>
</tr>
<tr>
<td>Cruise sector</td>
<td>2365</td>
<td>19.7%</td>
</tr>
<tr>
<td>Research and development</td>
<td>3273</td>
<td>30.8%</td>
</tr>
<tr>
<td>Maritime trade</td>
<td>2736</td>
<td>40.0%</td>
</tr>
<tr>
<td>TI maritime</td>
<td>1382</td>
<td>38.7%</td>
</tr>
<tr>
<td>Minerals and aggregates</td>
<td>1344</td>
<td>49.0%</td>
</tr>
<tr>
<td>Renewable energies</td>
<td>121</td>
<td>94.5%</td>
</tr>
<tr>
<td>Underwater telecommunications</td>
<td>185</td>
<td>16.4%</td>
</tr>
<tr>
<td>Oceanic levees</td>
<td>538</td>
<td>26.7%</td>
</tr>
</tbody>
</table>

Source: Facts and figures on the sea and oceans, European Commission 2006
(a) source: Pêche Annuaire 2005 (Eurostat)
(b) source: Survey: “Current employment situation in the Fisheries sector (2006)”, DG Fisheries and Maritime Affairs
(c) source : EU fleet register
2.2. ECONOMY AND EMPLOYMENT

The maritime economy encompasses a wide range of activities, including primary industries (fisheries, mining), manufacturing industries (shipbuilding, equipment), services (maritime transport, financial services, tourism), public services such as the Navy and marine science.

Maritime activities can be classified into three categories. a) Core maritime activities (e.g. fishing, shipbuilding, shipping, ports, offshore energy) are strictly maritime-related and vitally depend on the sea. b) Tangent activities (e.g. equipment manufacturing, financial services, tourism) have strong links with core activities in terms of specific products and support services as well as in terms of development c) Indirect activities (e.g. miscellaneous manufacturing industries, logistic services) include suppliers or clients of core and tangent activities.

Maritime activities are sensitive to world trade (as major exporters) and to coastal resources and environment. Their development depends on both the world economic context and the state of coastal zones. Over the recent years a steady growth of world GDP and international exchange, and a sharp increase in commodity prices, particularly oil, occurred and are still going on, with various impacts on maritime activities.

The strengths of the European maritime economy principally reside in a range of competitive marine-related manufacturing industries and services, including offshore energy, insurance and shipping. Maritime clusters play a relevant role towards the development of some European regions. Cooperation between RDI organisations, enterprises, training institutions, with the support of regional and local public entities is a key factor in enhancing the added value and the competitiveness of maritime activities. There is a wide diversity of maritime cluster situations that can be learned from experiences like Schleswig-Holstein, Møre og Romsdal, Toscana, PACA or Comunidad Valenciana, for instance. Coastal tourism also represents an important activity for peripheral maritime regions. The value of relevant natural and cultural assets from coastal regions must be highlighted following a sustainable development approach.

Weaknesses appear in the slow adjustment of traditional maritime industries (mainly shipbuilding and fisheries) to competition and resource constraints: overcapacity remains a problem. In addition, coastal environment is threatened by pollution and demographic pressure, inter alia through the development of tourism and urban areas.

On the other hand, employment decreased in traditional activities over the past three decades or so. An employment switch occurs towards tangent and high tech core industries. Working and living conditions in shipping and fisheries are very hard. Seafarers face harder then average living conditions. Changes in working conditions are required to attract young people and more skilled people for these activities to enhance their competitiveness.

Regional development opportunities remain numerous but vary widely across Europe, depending on region's areas of specialization and autonomy. Securing conditions for maritime regions' sustainable development critically depends on a more efficient co-ordination in terms of facility investment planning and information exchange. Two instruments could therefore help to promote regional development opportunities. The first one would be an observatory of the European maritime economy. It would collect data on the economic and environmental situation of maritime activities. It would facilitate information exchange between regions.

The second one would be a maritime cluster observing system. Clusters in question are co-operation networks between industrial firms and research and development organisations. Few maritime clusters exist in Europe at present. The aim of an observing system would be to collect data on their working and achievements, make them available to regions, and so promote the orderly development of maritime clusters in Europe.
2.3. TRANSPORT, LOGISTICS AND MARITIME SAFETY

Regarding Transport and Logistics the main facts regarding market shares of the various modes for intra-EU trade stresses the overall good position of short-sea shipping (SSS), emphasizing however that this position is achieved mostly through low value goods and that EU Transport policy is determined on obtaining a higher market share for maritime transport. Recognizing the need for high quality on the door-to-door service has shifted the concept from Short-Sea Shipping to Motorways of the Sea (MoS).

The potential benefits for maritime regions deriving from this conquest of market share depend mainly on the location of logistics activities. Some barriers to the commercial success of SSS have to be removed, followed by the conversion of service attributes necessary for the shift from SSS to MoS. The following list presents the main problems to be removed:

- Cumbersome and costly administrative procedures;
- Inadequate physical infrastructures;
- Highly asymmetrical requirements between modes on cargo transport and handling;
- Inefficient rules in port labour and services;
- Inland transport is a main cost components of SSS chain
- Lack of availability of a global package of insurance cover for multi-modal transport;
- High cost imposed on SSS by icebreaking service.

From the client’s point of view the main weaknesses of SSS have been related to the difficulty of guaranteeing delivery times and to low frequency of service on most routes. The low frequency of service is not only a factor but it is very much dependent on the commercial success of those services, so some securing of public support is needed. The Marco Polo programme seems to have been unable to sustain viable operation after public support is gone.

The development of MoS has to be addressed, tackling the barriers mentioned above and namely:

- The land transport links to/from ports;
- The facilities for quick handling of ships and cargoes in the ports;
- The simplification of administrative procedures, namely the adoption of a single transport document;
- An appropriate system of liability covering the whole transport chain;
- Marketing, organization and concentration of cargoes.

Regions can play an important role in mobilizing critical factors for the success of MoS with particular emphasis on the provision of land links to ports, possibly physical facilities in ports (when they depend on regional governments) and, not least, marketing and organization in favour of the concentration of cargoes.

Maritime Safety is a complex problem due to the hazards related to the sea and their uncertainties but also due to other factors, among them manpower and their qualifications, condition of ships and incident management schemes.

Following the high level of damage and the high visibility of the Erika accident off the Atlantic Coast in December 1999, the EC launched some initiatives on maritime safety, the Erika I, II and III packages. In the Erika I package measures dedicated to ship inspection, ship classification societies and a quicker phasing out of single-hull tankers worldwide were taken and came into force from July 2003. The Erika II package produced two decisions: the creation of the European Maritime Safety Agency (2002) and the creation of a surveillance and information system to improve vessel monitoring (2005). The Erika III package includes a lot of important measures on both active and passive safety. It is not yet in force.

Some concrete suggestions for action on those sources of risk are proposed. For both ships and crews, the suggestions point to making use of the information provided by classification societies (regarding the condition of ships) and captains (regarding the qualifications of the crew), and using the additional
information provided by inspections to review the ratings of classification societies and captains. Subsequently, lower ratings imply a higher frequency of inspections, a reduced level of tolerance to risky situations, and possibly a ban on access to ports and territorial waters.

Regarding incident management, preparation of contingency plans to define places of refuge, as included in the Erika II package, is considered positive but insufficient, and the proposal is made to define the obligation of Member States to prepare Incident Management Plans for their coasts, including the regions of the same ecosystem (sea basin) in the preparation of those Plans, with an obligatory character for the regions of the same country and a non-binding consultation of regions of other countries.

2.4. RESEARCH AND MARITIME INNOVATION

Knowledge is at the core of the Lisbon agenda to make Europe the most dynamic and competitive knowledge-based economy in the world. This applies also to marine and coastal areas and to marine and maritime activities. Marine science and technology is a diverse area with many disciplines and issues involved. There are a large number of marine research institutes or organisations in Europe. Some of these are government laboratories belonging to national agencies with tasks related to fisheries and environmental monitoring and assessment. Others are parts of or associated with universities and carry out marine research. Others again are consultancies or centres which compete for funding for both basic and applied science. Many large private companies also have their own R&D sections involved in marine research technologies.

The need for integration has been clearly recognised, and the scope and instruments of the EU’s 6th Framework programme for research (FP6) have contributed to this effect. The proposed FP7 for 2007-2013 aims to continue the development towards more integrated research and to the realisation of the European Research Area.

The global Millenium Ecosystem Assessment demonstrates that the human and economic developments have resulted in a substantial loss in biodiversity and therefore have not been sustainable. This calls for strict prioritisation of research that helps us to achieve sustainability. Marine ecosystems are complex with a diversity of habitats, organisms and physical and ecological dynamics and variability. Man is part of the natural ecosystems. Understanding and managing the interactions between complex human systems and marine ecosystems requires an integrated and systemic approach with coordinated research involving many scientific disciplines in broad collaborative efforts.

The Ecosystem approach to management sets requirements for scientific support in the form of monitoring, assessment and advice for management measures. The proposed new Marine Strategy Directive can be seen as a legal and practical implementation of the ecosystem approach to the management of European seas and coastal areas. The core of the directive is the concept of good environmental status which is to be achieved by 2021 at the latest. The concept of environmental status is to be made operational through an initial assessment, determination, setting of targets, and establishment of monitoring programmes. Member states are to co-operate around defined geographical regions or sub-regions when they make their strategies including packages of measures to achieve good environmental status.

The regions or sub-regions prescribed in the proposed directive correspond to Large Marine Ecosystems (LMEs). They include the Baltic Sea, the North Sea, the Celtic Seas, the Bay of Biscay and the Iberian Coast, the Western Mediterranean Sea, the Adriatic Sea, the Ionian Sea, and the Aegean-Levantine Sea. The marine waters surrounding the Canary Islands are included in the Canary Current LME. It is suggested that the marine waters around the Azores should be considered a separate LME, while Madeira could be included in the Canary Current LME.

Environmental assessments draw upon results from monitoring and research, by summarising and analysing existing information. In this process gaps in knowledge are identified. It is suggested that the initial assessments to be carried out for all the LMEs of the European seas should be used to identify key research items to be incorporated in prioritised regional research agendas. These should be implemented with support from FP7. An objective should be set for good knowledge of the European seas to be reached.
by the same time as good environmental status, by 2021 at the latest. This could be a focus for a marine component of the next Framework programme (FP8) for the approximate period 2013-2020.

The European LMEs (or regions/sub-regions) as management units form specific arenas for co-ordination, collaboration and integration across sectors and disciplines. At this scale, practical arrangements can be set up for the scientific support and collaboration and for the integration of the finer-scale ICZM issues into the wider LME-scale framework. The International Council for the Exploration of the Sea (ICES), as a regional inter-governmental research organisation, should be given a central role in assessments of the status of the LMEs and in the process of generating the regional research agendas.

2.5. SUSTAINABLE DEVELOPMENT

The maritime dimension of sustainable development can be considered within a two-sided context which serves as a framework for the work undertaken by the CPMR as part of the Europe of the Sea project.

- A political context characterised by recent initiatives taken by the European Commission in complementary areas, i.e. “marine strategy”, “integrated coastal zone management strategy”, and the priority given to the state of the environment in coastal areas by the European Environment Agency.
  Other initiatives are related less directly to the maritime sector, but nevertheless include a strong maritime dimension, e.g. adoption of the second Community programme on climate change (ECCP II), and the initial guidelines on the future Objective 3 of cohesion policy which provides wide scope for maritime cooperation.

- A technical context which focuses on making available information, methods and instruments to help design schemes and projects that take on board the maritime dimension. This technical aspect also includes relations between various EU policies with an impact on the sea, e.g. fisheries, regional policy and transport policy.

The regional position regarding sustainable development of coastal areas focuses on the introduction and gradual widespread application of the principles of integrated coastal zone management (ICZM), a strategy in which they intend to be fully involved during the phase due to get under way in 2006. For the maritime regions, it is therefore vitally important to publicise and promote ICZM as part of a move towards a new model of development.

The regions also support the marine strategy adopted by the Commission, especially with regard to its ecosystems approach. They do point out however, that this strategy alone is not enough to give a “sustainable development” approach to the Green Paper. They also underline the importance of the link between the strategies and instruments designed to implement them, especially schemes that help foster transnational and interregional cooperation.

The proposals set out by the member regions of the Sustainable Development working group focus mainly on:

- The need to employ cooperation programmes to implement the Green Paper guidelines, and in this respect, the need to introduce a framework for these programmes setting out the eligible criteria, subject areas and types of partnership;

- The need to follow the guidelines put forward by the European Environment Agency to improve the links between information and the way it is used in coastal areas;

- Setting up a structure to coordinate initiatives carried out in the different sea areas, with a view to encouraging the dissemination and promotion of experiences and best practices, especially for topics included in the development of Agenda 21;
A reform of the methods of governance so as to promote a joined-up approach in place of the sectoral approach that dominates at present.

The maritime regions stress that the Green Paper provides a good opportunity to introduce a new development model based on the principles of sustainable development. Finally, they underline the changes that are needed in terms of thinking and action both within the Commission as well as between the various institutions and their partners, the regions being at the forefront in this regard.

2.6. GOVERNANCE

Governance under the Europe of the Sea project is a contribution for the development of a more coherent, consistent and efficient policy framework for the European seas’ policies. It aims at enhancing the effectiveness of participation of regions in the decision-making process for oceans - an issue deeply rooted in their national systems -, in particular their ability to influence EU’s policy-making regarding the seas future framework. The following questions synthesise the goals of this contribution:

What is the present role of regions in oceans and seas policy?

What are the potential roles of regions in the EU oceans and seas policy?

The sustainability of maritime activities, especially coastal communities’ livelihoods, is inextricably connected to the quality of the marine environment and the resources therein. Therefore, the approach for a governance system must go beyond maritime activities, and consider the oceans as a whole, including, the marine environment and sea-land interface issues.

The nature of oceans policy has been deeply shaped by international relations, through both generally accepted practices and a long and complex series of instruments, not always coordinated in a coherent manner. The United Nations Convention on the Law of the Sea (UNCLOS), the constitution of oceans, lays out the major principles for the regime of use and jurisdiction of States over the ocean space. Almost all uses of oceans and seas are included, of which environmental pollution, resource management (in particular fisheries), and navigation constitute the major policy drivers. Through other international sectoral and regional instruments, UNCLOS’ goals, principles and norms are further developed and implemented.

The majority of the European seas are covered by agreements with regional scope focusing on different sectoral policies, where States are called to co-operate on global and regional basis. The EU Marine and Maritime policies constitute an additional layer of policy making for States. With the rise of the “Europe of the Sea” concept, it is also predictable that the EU will become a major actor in global oceans’ governance. There are numerous EU sectoral policies for the European seas. Their integration at EU level will be a major challenge to the conventional sectoral process of decision-making applied by policy makers and public managers within the EU and its member States.

The proposal of directive for the implementation of the EU Marine Strategy identifies a set of EU Marine Ecosystems/Regions for its implementation (see chapter 2.4), recommending that the governance system should be further developed through the EU Maritime Policy. The development of both the EU Marine Strategy and the Maritime Policy creates an opportunity to ensure that the appropriate mechanisms are put in place to articulate in a coherent manner these two major frameworks. The European Marine Ecosystems/Regions could also be considered as a fundamental unit for development and implementation of the European maritime policy objectives as a whole, i.e.:

- Management of the marine environment and its natural resources;
- Management of human activities in the marine environment and coastal areas;
- Marine RD&I: EU Marine Ecosystem Research Networks;
- Marine Information Systems and Marine Observatories: Monitoring, Assessment, Statistics, Policy Processes, Education and Awareness (see chapter 2.2 for marine economy);
Cooperation between regions (and nations) in marine and maritime affairs, in the frame of the same Large Marine Ecosystems

Given the importance of European Marine Ecosystems/Regions for an effective management of the European seas, it is crucial ensuring that their delimitation is the most appropriate, and that it is fully supported by States and regions. The EU Marine Strategy proposed a common region EU Marine Ecosystem/Region for the Archipelagos of the Azores, Madeira and Canary Islands, also known as Macaronesia. However, there is a general gap on knowledge regarding the marine realm of Macaronesia, which is also highlighted by the ICES. Therefore, an overall study to establish the best management unit for these archipelagos should be undertaken.

Maritime governance concerns a wide range of sectoral policies to be coordinated at a multilevel approach, from the international sphere to the regional and local level. Across Europe coastal regions are major implementers of EU and national policies on the ground, including the WFD, Natura 2000, EIA, SEA and ICZM. Therefore, coastal regions are key partners for achieving EU Maritime Policy objectives, as well as of marine ecosystems and national ocean policies. However, their roles and mandates for participation in oceans policy development and implementation are very limited, since most powers are concentrated in the national governments and institutions. Both the overseas experiences and the cases across Europe, show a lack of clear mandate and role for the subnational levels in oceans policy, as well as the appropriate institutions and mechanisms. However, these are fundamental for a successful implementation of an EU integrated ocean policy that reflects the needs of the EU citizens.

In general, infra-state levels tend to participate in national policy simply as major implementers of issues affecting the coastal environment, but they have no mandates to develop such policies at the infra-state/regional basis, and often their participation is quite Ad hoc. Coordination between the sub-national levels and national authorities depends on the capacity of initiative and mobilization of decision-makers at both national and regional/local level. The lack of clear mandates and roles of the infra-state level poses a major threat to the effective implementation of ocean policies on the ground, both at national and at marine ecosystem levels.

Presently, nations are expanding uses of/on oceans towards offshore areas, while several sectoral frameworks and national ocean policies are still non-existent, or are at their infancies. The development of the EU maritime policy is also an opportunity for deeper reflection on the potential role of regions EU and national levels: uses have increased and diversified on coastal areas; conflicts are increasing while coastal populations and users are increasing. In this reflection a new stakeholder category should be recognised: coastal cities, in particular, ports cities.

Both overseas experiences and the analysis of the cases across Europe show that the infra-state level is the optimal level for strategic planning and development of ICZM in articulation with the communities for concrete action. The lack of articulation and coherency between ICZM and management of large marine areas/ecosystems hinders the effectiveness of both ICZM and the management of offshore areas. For the European seas, ICZM should be included in EU Marine Ecosystems / Regions process and coherency between ICZM and offshore activities must be ensured.

Integrated ocean policies require new mechanisms and institutions for policy implementation. The EU Commission should take the steps forward to develop an institutional framework with strong leadership, including a body and process of coordination of sectoral policies, as well as mechanisms for participation and means for policy implementation. There are two distinct levels for regions to participate in the EU marine and maritime policies: EU Commission and EU Marine Ecosystem/Region levels. The overall scheme of governance for the European seas could include:

- The reinforcement of the participation of EU maritime regions in the overall policy process, to ensure that specificities of regions are fully reflected in the drafted policies and instruments.

- The development of tripartite partnership between the EU<>States<>Regions for the implementation of ocean policies for each EU Marine Ecosystem/Region: a EU Marine
Ecosystem/Region Committee for the overall management of each EU Marine Ecosystem/Region by nations and EU, in a process that couples both the EU and Maritime Policies. Regions, organized in a Council of Regions of their respective EU Marine Ecosystem are enabled to participate on its management, focusing on the development of their ICZM plans, and ensuring coherency between ICZM plans and the development of offshore activities.

- The participation of all partners and stakeholders for marine and maritime affairs on the EU Marine and Maritime policies to assess progress and debate further action.

Regions’ added value relies on knowing better realities and needs on the ground and mastering regional strategic planning while coordinating communities’ needs into concrete actions. Thus, regions are a centrepiece for the effectiveness of the EU and national marine and maritime policies. More than stakeholders, regions are legitimate partners in the EU Maritime Policy, and no less participation regions expect in this new and challenging process.

2.7 SUMMARY

This paragraph identifies strengths and weaknesses, opportunities and threats that must be faced by maritime activities.

Strengths and weaknesses

(i) Geostrategy

Strengths

- Europe’s geographical configuration (a large, fairly indented peninsula with a coastline that, at approximately 68,000 km, is longer than that of the USA or Russia). The length of the coastline and its distribution on the shores of four seas and two oceans forms the basis for extensive assets and a diversity of ecosystems and resources that represent outstanding potential for the continent’s development;
- The enormous area of sea under the jurisdiction of EU Member States, which is larger than the terrestrial area of the continent, makes Europe an international maritime power;
- The presence of many islands, especially in the Caribbean and Indian Ocean, widens the Exclusive Economic Zone (EEZ) of EU States and strengthens their position compared to other major geopolitical blocks.

Weaknesses

- Vulnerability are vulnerable because of the length, the indentation and the remoteness of European coasts (extremely remote areas);
- The proximity to areas of conflict, especially in the Mediterranean;
- The remoteness and isolation of certain European regions, especially the extremely remote areas.

(ii) Economy and Employment

Strengths

- The size of the European EEZ, the diversity of the heritage and marine resources and their potential for economic exploitation;
- Europe’s strong international position in maritime transport, either from the point of view of companies or from the point of view of the fleet. The three largest shipping companies in the world are European;
- The importance of shipping for internal and external trade in, to and from the EU: approximately 90% of external trade and more than 40% of its internal trade are carried out by ship;
- The European fishing industry has international scope. It is highly diversified and is developing on a global scale;
- Ports with a dynamic international dimension;
- Good international position of maritime manufacturing industries, insurance and financial services, high-tech services in businesses that generate high added value such as offshore energy, specialist shipbuilding, boatbuilding, the manufacture of underwater cables, the manufacture of marine and harbour equipment and renewable energy technologies;
- The importance of coastal tourism, which highlights the major natural and cultural advantages of the coastal regions. The EU is the world’s primary holiday destination and approximately one-third of visitors head for coastal areas;
- Maritime activities with high added value maintain or increase the number of jobs;
- The development of several regional maritime clusters is based on industry and R&D. Chapter II.1 in volume 1 shows several examples of regional maritime clusters with fairly different backgrounds and organisational structures. They support the competitiveness and internationalisation of the respective regions but are very competitive and ensure that the various regions are present on the international market. As an example, there are the clusters in More og Romdal, Schleswig-Holstein, Nord-Pas de Calais, Valencia, Aquitaine and South-West of England.

**Weaknesses**

- The difficulty of adapting port infrastructures to the demands of container traffic. Intermodal systems are required if this type of transport is to develop. The ports are often faced with problems of available space and conflict with other urban activities over its use.
- Overfishing of existing stocks and the difficulty of maintaining fishing fleets. This problem more severely affects a few maritime regions whose main activity is fishing and it then endangers the communities round about. Given this situation, small-scale fishing is becoming a specific problem which should be dealt with from a local socio-economic point of view.
- The increase in tourism poses problems for a few coastal regions that are being subjected to strong pressures as a result of human activity and unplanned property developments. Moreover, in certain regions, marine pollution (approximately 80% of marine pollution comes from the land) is affecting quality of life and the development of the tourist industry.
- Certain regions are also suffering as a result of the decline in traditional maritime activities. They are faced with stiff competition from other economic areas in the world. This is especially true of the shipbuilding sector where competition from countries in the Far East, mainly China and South Korea, is having a deleterious effect on traditional shipbuilding because of competitive labour costs.
- Working conditions on board ship are fairly hard, in both commercial shipping and the fisheries industry, and there is a need for the introduction and implementation of more restrictive legislation in order to improve operating and safety conditions. This aspect is becoming a key condition if young, more highly-qualified people are to be attracted to these sectors of activity.

*(iii) Maritime transport*

**Strengths**

- The very important role of shipping in the EU’s global trade: approximately 90% of international trade and 40% of trade within the EU is carried out by sea;
- The seaboards are well serviced, with approximately 1,200 European ports;
- Significant progress has been made in a number of ports as regards competitiveness;
- The comparative advantages of shipping compared to road haulage from the environmental point of view.

**Weaknesses**

- Shipping is used for relatively low value goods;
- Inadequate physical infrastructures of some ports;
- Costly administrative procedures;
- Non efficient rules in labour port services;
- Lack of availability of global package insurance for multimodal transport;
- High costs imposed on SSS icebreaking service;
- To concentrate cargoes is a difficult but necessary task namely on peripheral regions;
- Insufficient transport links to/from ports;
- Need to develop intermodality and logistics mainly on peripheral regions

These several points constrain the development of the MoS. Marco Polo program is insufficient to sustain viable operation. The selection of ports to integrate in MoS is also a very delicate process.

(iv) RDI

**Strengths**

- The large potentials and diversity of disciplines of marine science and technology within the UE;
- Networks of excellence and some large integrated projects in marine science and technology;
- Large number of marine research institutes and the relevance of their research works (government laboratories, universities, consultancies, private companies);
- The add value of outermost regions; their specific, diverse and, in some cases, unique ecosystems, open relevant opportunities and fields for RDI and the development of new maritime technologies.

**Weaknesses**

- The funding for marine science and technology projects constitute only 2.5% of the total budget of FP6
- There isn’t a specific theme covering marine and maritime issues in FP 7. Nevertheless EC stated that “special attention will be paid to priority scientific areas which cut across them, such as marine science and technology”. This point raises the question on how and by which mechanisms coordination of research planning and implementation will be carried out. Thus some problems of integration and coordination of marine and maritime RDI still remain to be solved. States and regions must work together in a shared LME to achieve a good coordination of priorities, projects and funding.

(v) Environment

**Strengths**

- The richness of the coastal environment and marine resources.
- The importance of European political guidelines and the draft directives on maritime problems, in particular ICZM, the marine environment and the Common Fisheries Policy (CFP).
- The experiences and best practices in sustainable development in coastal zones (especially as a result of the application of the LIFE programmes) are yet to be circulated and shared.

**Weaknesses**

- Terrestrial pollution from agriculture, industry and urban areas;
- Increased coastal urban development;
- High exposure to accidents at sea because of the low level of crew qualifications, the condition of the ships and an inadequate incident management scheme;
- The inefficiency of ICZM;
- A drop in biodiversity;
- Pressure on fish stocks;
- Lack of integration between the shore line /the littoral zone and the management of marine resources is one of the major threats to ICZM across Europe;
- Conflicts of interest between players, leading to a need for the implementation of a sustainable fisheries policy;
- Despite recent work by the European Environment Agency (EEA), there is still data on the condition of the environment in coastal zones (littoral and coastal waters) and its organisation in each individual maritime basin.
(vi) Governance

**Strengths**

- High degree of motivation and awareness regarding the need on developing and implementing maritime policies and coastal zone management, as regions and cities have to deal with these issues on the ground;
- In despite of the diversity of situations regarding decentralisation within the EU member States, the sub-national levels play, in any case, relevant roles concerning maritime affairs at their own initiative. For instance some partners of the project like Nord Pas de Calais, PACA, Aquitaine, Bretagne, Schleswig-Holstein, Region of central Macedonia, Astúrias, Múrcia, Abruzzo, Toscania, More and Romsdal, Azores, Cornwall have important experiences on the formulation of regional maritime strategies, ICZM, maritime clusters, coastal erosion protection, maritime safety.
- Some European States are launching national strategies for the ocean, namely Norway, France, UK, Portugal, Spain.
- There is a diverse set of interregional cooperation projects in marine and maritime issues namely in the Baltic Sea, North Sea and Atlantic.
- Available accumulated knowledge and experience at the regional seas level.

**Weaknesses**

- Most European states have not yet developed national ocean policies. Therefore, there are no real institutions, nor formal processes, for the coordination nor integration of maritime policies;
- Lack of vertical integration In general, regions lack clear roles and mandates to develop and implement maritime policies on the ground. On the other hand, the articulation between policy development at national level and regions is poor: The sub-national levels are not usually consulted in the definition of policies concerning maritime affairs. Their participation is often ad hoc and scattered;
- Fisheries issues usually are not included in regional seas conventions for the protection of marine environment, constituting a major difficulty to achieve or maintaining ecosystem’s equilibrium;
- Lack of long-term financial means to develop and implement integrated ocean and coastal management: financial programmes follow a sectoral approach;
- Widespread lack of multidisciplinary understanding of oceans and its specificities for management (at the various levels of government);
- Lack of human resources with specific skills for integrated/collaborative processes management of seas and oceans;
- EU is not a member of IMO. IMO conventions do not accept regional organisations. Therefore several agreements affect the EU in what concerns shipping, marine safety and coastal assets.

**Threats and Opportunities**

The trends towards socio-economic development on a global scale and changes in the natural environment are both threats rather than opportunities for the development of the maritime regions and they are feeling the first effects of this situation.

**Main threats:**

- The globalisation process is threatening the viability of traditional activities, in particular shipbuilding which is suffering from strong competition from Far Eastern shipyards. Europe’s shipyards, which are already finding it difficult to manufacture products with higher added value, will have even more difficulty surviving in a highly competitive environment;
- Globalisation and concentration on a large scale activities are threatening livelihoods, artisanal activities and cultural heritage of local communities;
- Climate change and its impact on either the marine environment (biodiversity) or the ocasts (increased sea level, erosion) are threatening maritime regions and, more especially, island regions;
- New traffic in illegal immigrants and narcotics, and the threats of terrorism are making maritime regions particularly vulnerable.

Main opportunities:

- Up-grade of European shipbuilding to focus on activities with high added value, more technology and greater demands as regards boat design;
- The development of marine research and maritime technologies, particularly operations linked to the discoveries of deep-sea hydrothermal ecosystems, offer new opportunities for balanced exploration of the sea’s resources;
- The EC initiative aimed at the drafting of an integrated maritime policy for Europe could encourage the exploitation and exploration of the sea and its potential, based on the principles of sustainable development. This will improve the conditions of governance;
- Certain European directives on maritime problems, in particular ICZM, the directive on the marine environment and the CFP.

The strengths and weaknesses identified, the effect of threats and the opportunities for development diverge from one peripheral maritime region to another. Their ability to take a positive, pro-active approach to globalisation and their capacity to cope with the threats identified depend as much on their production systems as on their strategic guidelines where the sea is concerned.

3. PRIORITIES FOR THE BUILDING OF A EUROPEAN MARITIME STRATEGY

A maritime policy is defined in terms of a purpose, a set of basic principles and developmental guidelines. The advantages indicated above are levers for Europe’s development, advantages that should be maximised within a European maritime policy that is a direct consequence of the Lisbon and Gothenburg objectives. The purpose of the European maritime policy, given the current economic and political context, must be to guarantee sustainable development of the seas, oceans and coastal zones. Because of its advantages and potential and because of the sensitivity and vulnerability of its ecosystems, the sea is a complex area which cannot but benefit from the implementation of an integrated approach combining increased competitiveness, social cohesion and environmental protection.

Given this framework, a European maritime policy must take account of three basic principles:

- **Subsidiarity** i.e. action must be undertaken at the most appropriate echelons of power in order to guarantee conditions of efficacy for policies while always giving precedence to the level closest to citizens.

- **Cooperation** between players on the various echelons of power and between players on the same echelon in order to create the conditions of involvement and partnership that are vital for good governance.

- **Social responsibility** i.e. the actions of individuals and all the socio-economic players must take account of the collective interest.

This being so, the results of assessment highlight a number of guidelines for the building of this policy:

- Greater growth and competitiveness in maritime activities based on a sustainable development model;

- Maximisation of maritime employment and safety and security at sea;

- Greater protection and better enhancement of the marine ecosystems and coastal zones;

- Effective governance of the various policies and echelons of administration, and guaranteed participation of stakeholders in this strategy.
3.1. GREATER GROWTH AND COMPETITIVENESS IN MARITIME ACTIVITIES

The advantages of the maritime activities discussed above constitute major potential for economic growth and employment and this should be maximised within a European maritime policy. Europe must not underestimate the maritime economy and the strong contribution that it can make to the Lisbon objectives. The thematic reports on the project (volume I) identify seven key guidelines to increase the competitiveness of maritime activities:

(i) **Research, Development and Innovation (RDI)** in marine sciences and maritime technology is a driving force for the competitiveness of maritime economic activities. The major role of research and innovation is valid for both the traditional sectors such as shipbuilding (development of high-tech boats and innovative design for the safer, more efficient and cleaner transport of products with high added value) and for emerging sectors such as biotechnology and offshore renewable energy. Thanks to its additional resources FP7 offers opportunities in this respect despite the absence of any specific marine and maritime research theme. The setting up of platforms to interconnect and coordinate projects then becomes an essential condition for effectiveness. The spread of RDI must be accompanied by the circulation of results among bodies in the economic world and among society in general. It becomes a key for sustainable development and lifelong learning.

(ii) **The development and consolidation of maritime clusters** thanks to increased exchanges and synergies between activities must enable players in the maritime economy to make progress in production while protecting them against competition as regards labour costs (social dumping). The strengthening of clusters is one of the conditions for the development of maritime regions but this reinforcement requires support from the relevant territorial and sectoral policies, especially the learning/training policy. Education is of prime importance for the success of clusters.

(iii) **The qualifications of the work force**, especially in activities with a high added value (new skills associated with the modernisation and development of maritime activities and with redeployment in traditional activities), must be a priority objective for employment and learning policies at regional, national and European levels.

(iv) **The development of the port system and the improvement of effectiveness and efficiency of the entire transport chain** is vital. The development of shipping and the introduction of the Motorways of the Sea, based on the recommendations in the White Paper, is a developmental issue for peripheral maritime regions. However, this objective is very slow to achieve because of technical and administrative difficulties which limit the effectiveness of intermodal systems combining maritime, river, road and rail transport. Road haulage predominates for many categories of freight because of its flexibility, especially for goods with added value. The logistics chain must improve intermodal effectiveness and this requires investment and European standardisation, especially with regard to technical standards.

This being so, the competitiveness of maritime regions depends on strategic decisions correlated with the European economy as a whole. Coordinated efforts are required between pairs of regions, preferably within the framework of the Motorways of the Sea, to produce reliable, safe, JIT logistics. This implies action on a commercial level (identification of appropriate goods), a physical level (improvements to the fluidity of road haulage to/from ports and consolidation/deconsolidation storage near ports), an organisational and administrative level (electronic data system accessible to port operators, ships and terrestrial transport firms, for the rapid transfer of containers or trailers and regulations relaxing the inspections of intra-Community traffic). Regulation lies outside the competence of regions; it must be undertaken by Member States and the European Union. However, it is just as important as the other areas for the achievement of overall effectiveness. The regions can exercise political lobbying of the States and European Commission to show that they are ready to do their part and to demand consideration for their point of view from higher levels of administration.
What remains to be developed is the action required to ensure that maritime transport can deliver a service of a quality equal to that supplied by road transport.

(v) **Sustainable management of fishing**, which depends on controlling fishery activity and on the quality of the marine environment. The development of fish farming is increasingly important as a means of compensating for a fall in offshore catches.

(vi) **The development of the energy sector**, in particular renewable energies (offshore wind turbines, wave power) in accordance with Community guidelines on the diversification of sources of energy.

(vii) **Tourism** is a major source of income for Europe’s maritime regions but it also puts pressure on the occupancy of coastal zones. In the interests of economic, environmental and social balance in these zones, and with a view to the long-term competitiveness of European tourism, it is vital to regulate flows of tourists. Given the estimated growth in entries (cf. supra), Member States and maritime regions will inevitably have to manage the dispersion of flows on a geographical and temporal basis. Future competition on the international market requires European regions to provide higher quality of service in order to justify higher prices, and a diversified range of services (in particular taking advantage of conditions for environmental and cultural tourism). Such progress implies an increasing level of training for service personnel.

### 3.2. IMPROVED LIVING AND WORKING CONDITIONS ON BOARD SHIP

The various analyses undertaken on social aspects raised a number of issues which must be dealt with by a European maritime policy i.e. inconsistency between the CFP and European legislation on working conditions, difficulties resulting from the heterogeneity of the international registers used in Member States, inadequate control of compliance with social conventions in ports and difficulties arising from States that supply flags of convenience. The scope of these problems justifies the existence of a specific objective regarding living and working conditions on board ship:

(i) **Ascribing greater value to maritime employment and improvements to safety at sea.** This requires concerted action by EU States and the EC in favour of the defence of working and safety conditions for those working in the fisheries sector, shipping and offshore platforms. The actions required in the fisheries sector must, as a priority, target the modernisation and replacement of ships in order to improve living and working conditions on board. However, a reduction of the fleet is not necessarily compatible with this objective.

As far as shipping is concerned, most intracommunity trade is undertaken by ships registered outside the EU and, while ships registered in EU Member States are subject to international regulations and European regulations that are particularly strict as regards living and working conditions, only international regulations apply to ships not registered within the EU, through Port State Controls which do not actually monitor living and working conditions on board. This means that there is a vital need for standardisation of international registers. This aspect raises the question of the communitarisation of international agreements and the application of the regulations.

The development of training also has an important role to play in the production of the professional skills required to enrich functions and improve the quality of employment in the sectors discussed. In conclusion, general improvements to working conditions and the development of training in maritime activities (fisheries, transport, fish farming, tourism etc.) are ends in themselves, and an essential element in strengthening the attractiveness of maritime careers.

### 3.3. PROVIDING BETTER PROTECTION AND ENHANCEMENT OF MARINE ECOSYSTEMS AND COASTAL ZONES

The marine and coastal ecosystems are being put under pressure as a result of population density, pollution and the pressure of economic activity on coastal zones, especially tourism. These pressures endanger the
balance and, therefore, the very existence of these fragile environments. A number of EC directives and draft directives on these environments (marine environment, coastal zones, water etc.) exist but, for the moment, lack coordination.

The protection and enhancement of marine and coastal ecosystems necessitates reconsideration of the following points:

(i) Monitoring safety conditions on board ship. Despite recent changes introduced by the Erika packets directive in response to major accidents at sea along the European coastline, there are still a number of areas that require progress e.g. more effective monitoring of ships sailing under a European flag or improvements to crew qualifications. At the same time, greater surveillance of degassing offshore is necessary. Given the geographical dispersion and the dynamic character of agents, high levels of efficiency in surveillance and inspection can only be achieved through selective actions based on the intelligent use of information collected during such selective actions. All this implies (1) an integrated system of storage for inspection and surveillance reports on a European level, managed by the European Agency for Maritime Safety, (2) tools to integrate the information (feed-back) in the grades attributed not only to ships but also to captains and classification companies, and (3) changes to the frequency of inspections and the volume of authorised traffic using the aforesaid grading.

(ii) Formatting of accident management plans, based on the conditions in the Erika packets, is becoming a vital condition for preventive action in case of disaster. These plans must not be limited to the identification of ports providing shelter but must also include the conditions required for intervention in case of accident and the consequent coordination mechanisms. The monitoring of short sea shipping is also essential and it should comply with the Erika 3 packet.

(iii) More in-depth research and technology for the marine and coastal environment, in particular the new deepwater marine ecosystems. Research and technology are also required for flora, fauna, cartography and habitat in which an assessment of climatic risks gives greater insight into marine ecosystems, coastal zones and their development. This would improve their preservation and their sustainable use. The link between marine research and the protection of fish stocks is a relevant issue here. Safeguarding these stocks requires political decisions on catch quotas based on recommendations from scientists so that non-threatened species are not taken into account. The recently-created RACs may be an appropriate forum for discussion between the various interested parties but coordinated, cooperative action by the various European research bodies is necessary given the high levels of investment that these research activities involve. Although opportunities seem to be arising through the new FRDP, mechanisms by which R&D can be integrated and coordinated still remain to be defined.

(iv) Introduction of Integrated Coastal Zone Management (ICZM) with the active involvement of regions. The design and implementation of these strategies constitute an appropriate field of cooperation and integration. Coastal zones are currently covered by several sectoral and territorial policies and responsibility is shared by various agencies at different administrative levels. As to ICZM, it presupposes a high degree of integration and coordination of the various policies. ICZM then becomes a functional tool for cross-border and interregional cooperation since the dynamics of coastal zones cannot be limited to a single, given region. Several neighbouring regions are involved. The responses to the questions and problems common to all of them should be provided at a supra-regional level. ICSM is a complex field that is particularly demanding as far as governance is concerned. Given the distribution of competence across the European regions and the principle of subsidiarity, ICZM must be able to count on proactive involvement at infra-national levels as regards design and implementation. The national strategies proposed by Member States must be adequate to allow for the formulation of regional guidelines with the specific aim of ensuring consistency between local or interregional plans for coastal management. A European ICZM strategy should explicitly provide for the introduction, by maritime regions, of regional guideline plans that reflect national strategies while taking account of regional characteristics and remaining
aligned with the other such plans. This would ensure that coastal management became a tool for European integration.

(v) **Ensuring the protection and enhancement of cultural heritage in coastal zones.** Coastal zones have their own identities based on very close ties to the sea. These ties have created common values and traditions, expertise and know-how. The values keep alive the links between European peoples and the sea, a key element in European culture and identity. The enhancement of the heritage specific to coastal zones is a necessary condition to safeguard the quality of life in local communities and to maintain the local economy. In this way, it is an advantage for the development of coastal zones and this is an aspect that cannot be ignored by maritime policies.
3.4 Real Governance for an Efficient, Effective European Maritime Strategy

Making the above dimensions compatible with the creation of a dynamic, virtuous balance between economic exploitation and the principle of sustainable development (as part of the major international conventions, especially UNCLOS) remains central to the governance dimension. The thematic report (volume 1) defines the concept of maritime governance in these terms: “Ocean governance refers to the architecture of make-up of the regime used to govern behaviour, public and private to an ocean (or seas), and the resources and activities contained” (Cicin-Saint & Kneckt, 1988).

Based on the conclusions to the thematic reports, the key topics for governance are as follows:

(i) Marine ecosystems as ocean management units. An analysis of international experience shows the relevance of marine ecosystems to the management of marine areas. The draft directive on the marine environment envisages an approach that gives preference to vast marine ecosystems which would then be subdivided into smaller areas i.e. regional seas. Awareness of marine ecosystems is vital when organising a system of governance. These ecosystems must be an integral part of the interconnection between marine environment and coastal zones. The dynamic relationship of the interface between marine and terrestrial environments also creates a dimension that is complex to manage and requires coordination between European, national, regional and local levels.

(ii) Links between marine ecosystems in the EU, Regional Advisory Councils (RACs), and interregional cooperation areas. Various directives and/or guidelines have shaped different geographical divisions with a view to implementing distinct strategies. They were established on the basis of specific approaches, without any link between them, yet a flexible link between the various divisions with a view to the integration and coordination of policies appears to be appropriate for the implementation of a European maritime strategy.

(iii) The regions and local authorities become major stakeholders in maritime governance. Given the situation described above, the regional and local levels have a significant role to play (especially as regards ICZM) since offshore activities can affect the development of coastal zones as much as the management of ports and their links with cities. It then becomes necessary to define the mechanisms that will ensure the involvement of the regions and other local authorities in the design, implementation, monitoring and assessment of policies for the sea, in conjunction with the other national and European levels of administration. For reasons of proximity, the infranational echelons must be given precedence in the promotion of the maritime dimension in civil society. They are the most appropriate levels to ensure that the voices of the population and socio-economic players are heard by national and international bodies. Strengthening the role of the regions and cities in a European system of maritime governance is therefore essential.

(iv) The mechanisms that link sectoral and territorial policies are now central to the governance of the oceans, seas and coastal zones. These “environments” are currently covered by several distinct sectoral and territorial policies. The link between, and coordination of, these policies is becoming a major issue with regard to the formulation of a maritime policy. The link is echoed at every European, national, regional and local echelon and it is important in terms of ICZM. Moreover, a number of more advanced international experiences reveal the relevance of ocean policies at a national level but involving a number of different sectors and various echelons in the administration based on the principle of subsidiarity. The EU can draw inspiration from these experiences when setting up such policies jointly with Member States, based on the same principle.

(v) The information system used to support the implementation and monitoring of a maritime policy remains fairly incomplete, heterogeneous and sector-based. Moreover, the level of territorial and sectoral breakdown of regional data is insufficient; the data is often only available on a national level. Finally, the available economic information does not provide an overview of changes in regional maritime clusters. Databases on the state of coastal zones are yet to be completed and linked to the economic data. Efforts must continue to give the EC information systems that are sufficient for
the design, introduction and monitoring of a European maritime strategy. In this respect, the ORATE programme could be given greater depth to include a specific field of study of the treatment of maritime issues.

(vi) **The development of interregional cooperation in maritime-related fields** is an important condition for the strengthening of European governance. Interregional cooperation is appropriate for the management of the marine environment and the development of marine RDI (in accordance with the division of regional seas), for fishing, for integrated coastal zone management, for the development of shipping (especially the Motorways of the Sea) and for the enhancement of the environmental and cultural heritage of coastal zones.

A European maritime strategy based on the objectives proposed above would make a significant contribution to the implementation of the objectives established in the Lisbon and Gothenburg agendas i.e. economic growth, employment and sustainable development.

What contribution could a European maritime strategy make to the objectives set out in the Lisbon and Gothenburg agendas?

<table>
<thead>
<tr>
<th>Objectives Maritime Policy</th>
<th>Job creation</th>
<th>Lifelong learning</th>
<th>Encouraging entrepreneurship</th>
<th>Promoting R&amp;D</th>
<th>Production of renewable energies</th>
<th>Development of environment-friendly transport modes</th>
<th>Biodiversity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reinforcement of maritime clusters</td>
<td>+</td>
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<tr>
<td>Workforce skills</td>
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<tr>
<td>Development of maritime transport and transport chain efficiency</td>
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<tr>
<td>Ship safety control</td>
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<tr>
<td>Incident management schemes</td>
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<tr>
<td>Marine RDI and maritime technologies</td>
<td>+</td>
<td>+</td>
<td>+</td>
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<tr>
<td>ICZM</td>
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</table>

As an example, the table shows the main relationships between certain objectives in the maritime strategy and the objectives put forward at the Lisbon and Gothenburg summits. The link is obvious, especially for maritime clusters, the qualification of the work force, marine RDI and maritime technologies. The advance towards the implementation of a European maritime strategy is one step on the path towards the objectives of economic growth, employment and competitiveness while taking account of the need for sustainable development.

Such a European maritime policy would also contribute to European integration and economic and social cohesion because of the increased role it would give to maritime regions. In fact, everything that affects cooperation between regional maritime clusters, the standardisation of safety conditions on board ships, the
development of short sea shipping and the efforts made to improve the qualifications of the labour force is aimed at this objective.

4. REGIONS AND CITIES, LEGITIMATE PLAYERS IN A EUROPEAN STRATEGY FOR THE SEA

There are a number of widely-diverging models of maritime governance in Europe. Generally speaking, maritime affairs tend to be dealt with on a national level and be dependent on sectoral policies implemented by various ministries. The regions have very little involvement in the decision-making phase yet the regions have a legitimate claim to become involved. They are affected by the impacts of maritime policies and play an important role in their introduction. The sectors in which the regions have, albeit limited, competence are as follows:

- Maritime infrastructures;
- Fisheries and fish farming;
- Tourism;
- ICZM;
- Education;
- Social development.

A number of regions have decided to define their own maritime strategy in the hope of achieving good intersectoral and vertical links with other echelons of the administration and with other regional stakeholders. Here are a few examples that were mentioned in the responses to the survey carried out among partners in the project:

- Introduction of integrated maritime strategies for Provence Alpes Côte d’Azur (PACA), Toscana and Abruzzo;
- Development of conditions for competitiveness and environmental quality of ports in the Nord-Pas de Calais, Comunidad Valenciana, PACA, and Central Macedonia;
- Risk management and prevention, surveillance and monitoring of the maritime domains, regions of Murcia and East Macedonia;
- ICZM for the Asturias, Nord-Pas de Calais and Abruzzo;
- Fighting marine and terrestrial pollution in PACA, Abruzzo, East Macedonia and Pays de la Loire;
- Sustainable tourism and the enhancement of the marine, cultural and environmental heritage in PACA, Västerbotten, the Azores, Madeira, Schleswig-Holstein and Bretagne;
- Initiatives in favour of the development of the maritime industry, particularly support for the development of maritime clusters, for example in the regions of Schleswig-Holstein, Brittany/PACA, More og Romsdal, South-West England, Nord-Pas de Calais, Toscana and Aquitaine.

The maritime dimension is also central to a number of interregional cooperation projects, especially within the framework of Interreg programmes. This is proof of the essential role of cooperation in fields connected to the maritime world:

- In the Baltic Sea, the regions are closely involved in maritime safety, maritime transport, security and fisheries;
- In the North Sea, the regions are continuing to cooperate on work on ICZM, fisheries, maritime security and shipping;
- In the Atlantic, regions are becoming increasingly involved in the subjects of maritime security, shipping and ICZM, since island regions are much more attracted to the topic of maritime transport and ICZM.

The maritime dimension directly affects the interests of peripheral maritime regions. Despite this, a set of factors place a fairly strong constraint on the development of these policies:
- Inadequate competence in the regions;
- Interests that are still often conflictual as regards the use of maritime zones;
- Difficulties of discussion and coordination between the public and private sectors;
- Difficulties of coordination with other echelons of power;
- Difficulties of coordination within regions, especially between regional and local authorities;
- Inadequate funding.

The results of the survey carried out among regions are convergent and they meet the main political priorities proposed in the previous point. The regions consider that the main priorities for a maritime policy are as follows:

(i) Secure, efficient, sustainable maritime transport, with particular attention being paid to the following:

- Strengthening of port-hinterland connections and improved competitiveness of ports to encourage MoS development;
- Risk management as it relates to shipping;
- Fight against pollution from ships;
- Inspections of ships in ports.

(ii) A competitive maritime industry on a global level, in particular through the development of RDI and maritime technologies and by the strengthening of maritime clusters;

(iii) Sustainable fisheries management since this is essential for the health of the marine environment and ecosystems, sustainable management of fish stocks and the development of fish farming;

(iv) Development of the energy sector and sustainable sources of energy;

(v) Development of maritime and coastal tourism;

(vi) Education, training and the promotion of employment in the sector, making it more attractive;

(vii) Promotion of interregional cooperation within maritime basins.

The future European maritime policy must therefore recognise and enhance the role of regional and local powers, based on the principle of subsidiarity. These authorities are the best-placed to encourage citizen involvement in maritime affairs. Maritime regions are strongly affected by the maritime dimension and are integrating it more and more in their own regional development strategies. Regions and cities must play a more proactive role in decision-making at national and EU levels. Their experience and their closeness to the problems and the people may make a significant contribution to the effectiveness of a maritime policy.
5. CONCLUSIONS AND RECOMMENDATIONS FOR THE INTRODUCTION OF A EUROPEAN MARITIME STRATEGY

5.1 IMPROVE COORDINATION BETWEEN COMMUNITY POLICIES TO CREATE A EUROPEAN MARITIME POLICY

The design and introduction of a European maritime policy are guided by a number of sectoral and terrestrial policies and extend to the various levels of administration, from European to local. This point attempts to link the main structural dimensions of a maritime policy (in accordance with the guidelines and objectives described in the previous point) and the main European policies concerned.

<table>
<thead>
<tr>
<th>Policy</th>
<th>Reinforce maritime clusters</th>
<th>Develop maritime RDI</th>
<th>Promote workforce skills</th>
<th>Develop maritime transport</th>
<th>Improve ship safety control conditions</th>
<th>Set up incident management schemes</th>
<th>Implement ICZM strategies</th>
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</thead>
<tbody>
<tr>
<td>Environment policy</td>
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<tr>
<td>Transports policy</td>
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<td>Fishereies Policy</td>
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<tr>
<td>Industrial policy</td>
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<tr>
<td>Employment and training policy</td>
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<tr>
<td>R&amp;D policy</td>
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<tr>
<td>Regional policy</td>
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</table>

The above table illustrates the impact of these various policies on the maritime environment. The environmental policy, for example, is echoed in the objectives of ICZM, in the prevention and management of accidents or in the preservation of biodiversity. It also appears in the maritime transport development objective, even though the balance between the ports’ need to expand (and their links with the hinterland) and the preservation of the coastal ecosystem requires further consideration. The same comment can be made with regard to the balance between economic objectives such as the development of tourism and the conservation of the environment.

As far as transport policy is concerned, the assessment of the White Paper provides an opportunity to revise and overcome the obstacles to MoS development i.e. the efficiency of ports, the link between ports and the hinterland, the simplification of administrative procedures, marketing, assistance with project launches, insurance etc. All these are points on which it would seem wise to return at a future date. Conditions should also be created to encourage safety and security, especially the inspections of ships and training for crews.

Changes in the fisheries policy is unavoidable if we are to uphold the objectives of biodiversity, marine research, crew training and, more importantly, the introduction of more selective fishing practices that are better suited to the condition of the marine ecosystem. The fisheries policy is closely linked to the introduction of ICZM strategies. Non-industrial fishing is one of the many activities that must be included in a consistent approach to ICZM so that it can be organised in a way that enables it to exist side by side with, for example, sailing, tourism and fish farming.

Industrial policy also has a role to play in encouraging the development of activities that are part of the maritime economy and in strengthening maritime clusters. The promotion of eco-innovations, new maritime
technologies or assistance with the setting up of new companies in the maritime sector are also among the objectives to be taken into account in an industrial and energy policy.

Worker qualifications are central to the Lisbon objectives and a key condition for the success of most of its objectives. This issue ranges from increased competitiveness for maritime activities to the need for professional retraining for people affected by the crisis in traditional sectors. Qualifications are also important if we are to improve safety and security conditions for crews and greater account must therefore be taken of this point in the European Strategy for Employment and National Employment Programmes.

As to the R&D policy, FP7 is the main tool supporting maritime RDI. However, the absence of any specific maritime theme highlights the need for project integration and coordination. As to the corresponding mechanisms, they are yet to be defined.

Finally, the regional policy leaves plenty of scope for intervention. For Objectives 1 and 2 of the regional policy, possibilities have opened up to enhance the maritime dimension but decisions on this subject depend primarily on the action taken by States and regions in preparing the future Regional Programmes. On the other hand, the maritime dimension is one of the main priorities of the interregional cooperation programmes on Objective 3.

It is, then, imperative to provide a link and coordination between the various Community policies in order to draft a European maritime policy. Such intersectoral coordination must be accompanied by a strengthening of coordination between the various echelons of power and rely, in particular, on an increased role for maritime regions and cities.

### 5.2 RECOMMENDATIONS IN FAVOUR OF THE BUILDING OF A EUROPEAN MARITIME STRATEGY

<table>
<thead>
<tr>
<th>GUIDELINES AND STRATEGIC OBJECTIVES</th>
<th>RECOMMENDATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater growth and competitiveness in maritime activities</td>
<td></td>
</tr>
<tr>
<td>(i) Development of research and innovation, and (ii) Reinforcement of maritime clusters</td>
<td>1. Within the actions aimed at cooperation in research for technological purposes as stated in the FRDP, to set up a line of funding specifically for maritime projects targeting the strengthening of cooperation between research organisation and the corporate sector, which would in turn reinforce support for maritime clusters.</td>
</tr>
<tr>
<td>(iii) Qualification of the work force</td>
<td>2. To improve the quality of training for crews; 3. To have a technological upgrade of the school certificates to make them harder to forge</td>
</tr>
<tr>
<td>(iv) Development of the port system and greater efficiency and effectiveness throughout the transport chain</td>
<td>4. To increase the land transport links to/from ports; 5. To create physical facilities in dock and terminals; 6. To facilitate administrative procedures to go through ports; a pilot experience launching a process for systematic simplification of administrative procedures intra EU SSS with voluntary adhesion of interested member countries (a multilateral agreement); 7. To increase financial support to most operation projects under a “traffic guarantee” concept rather then a grant concept; 8. To increase marketing efforts in favour of the maritime transport; 9. To increase the organisation of the transport system to achieve the concentration of cargoes; 10. To accelerate the acceptance of the 45” containers by the authorities;</td>
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<tr>
<td>(v) Tourism</td>
<td>11. Development of sustainable tourism plans as part of ICZM programmes;</td>
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<tr>
<td>(vi) Fisheries</td>
<td>12. Prioritisation of research that helps to achieve sustainability following an integrated approach involving many scientific disciplines</td>
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<tr>
<td><strong>in broad collaborative efforts;</strong></td>
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<tr>
<td><strong>13. To integrate fisheries with the reminder components of marine ecosystems</strong></td>
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<tr>
<td><strong>Improved living and working conditions on board ship</strong></td>
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<tr>
<td>(i) Enhancement of maritime jobs and improvements to safety and security at sea</td>
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<tr>
<td>14. Improved living and working conditions for fishermen, which implies the modernisation of ships (an objective to be given greater force within the European fisheries policy)</td>
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<tr>
<td>15. Improved monitoring of living and working conditions on board ship (maritime transport), through standardisation of the systems applied to ships registered in EU Member States and outside the EU.</td>
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<tr>
<td><strong>Providing better protection and enhancement of marine ecosystems and coastal zones</strong></td>
<td></td>
</tr>
<tr>
<td>(i) Monitoring safety and security conditions on ships</td>
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</tr>
<tr>
<td>17. National maritime authorities should request a full list of crew members and their qualifications before entry in territorial waters;</td>
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<tr>
<td>18. To create and diffuse a “grey listing” of captains; EMSA should establish a dynamic rating of classification societies based on safety performances;</td>
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<tr>
<td>19. Frequency of inspection of ships in ports would be random, but also variable, according to the rating of their classification;</td>
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<tr>
<td>20. The possibility of not giving right of harmless passage should be extended from the territorial waters to the economic zone.</td>
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<tr>
<td>(ii) Drafting of accident management plans</td>
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<tr>
<td>21. To involve regions in the preparation of plans at the sea basins scale; regions have no direct power in the issue but they are the first to suffer the impacts of accidents and mobilizing means.</td>
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<tr>
<td>(iii) Extending the range of research and technologies</td>
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<tr>
<td>22. To create regional ecosystem research agendas within FP 7 and FP 8 to fill gaps in knowledge environment for all LME, identifying important research tasks that would help to see new opportunities and to achieve sustainability of the marine ecosystem;</td>
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<tr>
<td>23. To increase the integration of the scientific side and the management side of R&amp;D, from large scale (the basin) to the finer scale (the coastal zones);</td>
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<tr>
<td>24. To coordinate mechanisms that facilitate the development of integrated marine and maritime RDI as a priority cross-cutting area in the EU FP 7</td>
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<tr>
<td>25. A goal should be set to achieve good knowledge of the European marine ecosystems (by the 2012 at latest) and a marine component of the FP8 should be one of the mechanisms to reach the goal.</td>
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<tr>
<td>(iv) Introducing integrated coastal zone management strategies</td>
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<tr>
<td>26. To progress on the implementation of ICZM; spatial planning is required to better regulate the various uses of these areas;</td>
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<tr>
<td>27. To exchange experiences and good practices for the sustainable development of coastal zones.</td>
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<tr>
<td>(v) Protection and enhancement of cultural heritage within coastal zones</td>
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<tr>
<td>28. Spatial planning is required to better regulate the protection and the put in value the cultural assets</td>
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<tr>
<td>29. To draft regional strategies to cope with climate change</td>
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<tr>
<td><strong>Real governance for an efficient, effective European maritime strategy</strong></td>
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<tr>
<td>(i) Marine ecosystems are key elements in the management of the sea</td>
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<tr>
<td>30. European marine ecosystems could be considered as the fundamental unit for the development and implementation of a European maritime policy. Member states are required to co-ordinate their actions around marine regions and sub-regions with the participation of the sub-national levels for a better implementation of the ecosystem approach. The creation of regional ecosystem commissions may support that coordination and integration.</td>
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<tr>
<td>(ii) Regions and local authorities are major stakeholders in the governance of the seas</td>
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<tr>
<td>31. To reinforce the participation of the sub-national levels namely in the following fields:</td>
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<tr>
<td>32. Coastal zone management; connection between watershed management and coastal waters; cooperation with adjacent regions;</td>
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<tr>
<td><strong>(iii) Links must be established between LMEs, CANs and areas of interregional cooperation</strong></td>
<td><strong>37. To integrate fisheries with the remaining components of marine ecosystems</strong></td>
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</tbody>
</table>
| **(iv) Mechanisms linking the sectoral and territorial policies and linking the various layers of power** | **38. To reinforce vertical integration between the international (regional areas), national and sub-national levels to improve the effectiveness of the maritime policy implementation.**  
39. To progress in the transversal integration of sectoral policies concerned by the sea at European, national and sub-national levels;  
40. To develop an evaluation system of policy, with the support of scientific institutions, ensuring mechanisms to assess progress and to adjust policy. The development of an observatory for the EU marine and maritime policies concentrating all marine and maritime information’s within EU is a key element to support the implementation of a maritime policy. |
| **(v) Development of interregional cooperation** | **41. To reinforce the interregional cooperation in the maritime dimension.**  
42. The preparation of the specific research agendas for each of the European LME would be launched within the framework of the interregional cooperation programs, under the responsibility of a network of research entities belonging to the same geographical cooperation area. |
| **(vi) Information system** | **43. To develop an evaluation system of policy implementation, with the support of scientific and public administration institutions, ensuring mechanisms to assess progress and to adjust policy (adaptative management). The review and assessment of policies should have clearly defined baseline information; targets and dates.** |