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Context

In its recent Blue Growth Communication[1], the European Commission affirmed the role of the seas as a common resource and potential source of new jobs and growth (i.e. 'blue growth').

Translated into the Black Sea context, the EU has stepped-up its efforts to advocate for increased coordination and targeted synergies between the different sectors reliant on the sea (i.e. 'blue economy').

In October 2011, the EU organized a Brainstorming event[2] on the Black Sea (BS) with public authorities and stakeholders from Romania and Bulgaria. As a follow up to this event, the European Commission, in cooperation with the Romanian Ministry of Foreign Affairs, held a first Black Sea Stakeholders conference[3] in Bucharest in 2014 to discuss maritime affairs and fisheries with stakeholders from all six coastal countries, including the Republic of Moldova, and to advocate for stronger sea-basin cooperation on areas of common interest for the countries.

Meanwhile, the EU has supported many actions within the scope of different programmes and projects, dealing with a large range of maritime issues (transport, fisheries, environment such as [4] the European Neighbourhood Instrument (ENI) Black Sea Cross Border Cooperation Programme, projects/programmes in the fields of transport in the Black Sea countries that are financed through the European Neighbourhood and Partnership Instrument and European Neighbourhood Instruments (i.e. Transport Corridor Europe Caucasus Asia (TRACECA)), Environmental Monitoring in the Black Sea (EMBLAS, phase I and II), Marine Strategy Framework Directive Guiding Improvements In The Black Sea Integrated Monitoring System project (MISIS), Monitoring and Information Systems for Reducing Oil Pollution (MONINFO) Also activities and/or working arrangements of EU agencies in the fields of maritime policy (i.e. European Maritime Safety Agency (EMSA)) and activities in cooperation with the General Fisheries Commission for the Mediterranean (GFCM) should be mentioned.

Due to the variety of frameworks, most of these projects/programs do not involve all coastal countries in the Black Sea.

Studies have been carried out recently to increase knowledge about the blue economies of the Black Sea littoral states, to identify areas for enhanced cooperation and to explore the potential for maritime clusters.

[1] http://ec.europa.eu/maritimeaffairs/policy/blue_growth/index_en.htm.
[2] http://ec.europa.eu/maritimeaffairs/events/2011/10/events_20111014_en.htm.
[3] http://ec.europa.eu/maritimeaffairs/events/2014/01/events_20140130_01_en.htm.
[4] see a short presentation of these actions at http://ec.europa.eu/maritimeaffairs/events/2014/01/doc/background-document_en.pdf.

EU IMP – Blue Growth

The EU integrated maritime policy (IMP) has been launched in 2008, as a recognition of the importance of the many economic, environmental, social and geopolitical maritime assets of the EU.

The EU IMP aims to provide a general policy framework for sectoral and cross-cutting policies related to the sea, to marine resources, maritime activities and marine environment, and to develop the relevant instruments for efficiently implementing this policy framework at all relevant levels and scales.

Within the IMP context, the **Blue Growth** communication[5] highlights the large economic potential related to the development of maritime activities; aquaculture, biotechnologies, marine and coastal tourism, marine renewable energy and deep-sea mining have been identified as priorities for the EU.

The EU IMP doesn't substitute sectoral policies, but it aims to complete them with the elements which are needed in order to build a consistent policy framework:

- common high level objectives and principles;
- cross-sectoral and multi-level governance schemes involving all stakeholders,
- common planning schemes,
- instruments for pooling and sharing knowledge, marine monitoring and maritime surveillance.

Therefore, the main fields of the EU IMP are governance, shared knowledge, integrated maritime surveillance, and planning of sea space. The policy in these fields is developed through Communications and legislative instruments[6].

Beyond its specific objectives, the IMP also supports the development of other important EU policies such as the implementation of the Marine Strategy Framework Directive (MSFD), the European Neighbourhood Policy (ENP), the European Cross-Border Cooperation (CBC) and the EU Maritime Security Strategy (EUMSS).

Regional strategies are defined in order to foster cross-border cooperation in regions sharing the same maritime situation and concerns, such as the Adriatic and Ionian region.

Cooperation with non-EU countries in regional seas around the EU is considered an important component of the EU IMP. Hence, cooperation has been developed in the Baltic Sea, the Mediterranean Sea and the Atlantic. This cooperation concerns both capacity

[5] http://ec.europa.eu/maritimeaffairs/policy/blue_growth/.
[6] http://ec.europa.eu/maritimeaffairs/policy/index_en.htm.

building at national level in coastal countries, and cooperation at regional scale and level on maritime issues.

Recent developments of the EU IMP in the Black Sea

Blue economy

Studies have been carried out to:

- increase knowledge about the blue economies of the Black Sea littoral states,
- identify areas for enhanced cooperation (Study to Support the Development of Sea Basin Cooperation in the Mediterranean, Adriatic and Ionian, and Black Sea[7])
- explore the potential for maritime clusters : the "Study on maritime clusters in the Mediterranean and the Black Sea" [8] aims to provide policy makers at the EU and sea-basin levels an updated analysis of the current status and potential development of maritime clusters in the Mediterranean and Black Sea area.

Marine knowledge

Over 12 organisations from the Black Sea littoral states are working together in order to make their marine data more accessible, interoperable and useful to end-users under the framework of the European Marine Observation and Data Network[9] (EMODNet). Data is now available through a single web portal, and a low-resolution sea-bed map of all EU waters, including the Black Sea, will be prepared by 2016, and progressively improved in resolution by 2020.

Environment

The EU Member States in the Black Sea have to apply the Marine Strategy Framework Directive[10], which aims to achieve to achieve or maintain good environmental status in the marine environment by 2020. This directive applies to all the EU marine waters, including Exclusive Economic Zones.

The EU Member States in the Black Sea have reported on initial assessment, determination of Good Environmental Status for their marine areas, environmental targets, and now they are reporting on their monitoring programme.

Research and innovation

Under the EU Framework Programme for Research and Innovation HORIZON 2020 (2014-2020), a targeted call amounting to EUR 1,5 million was launched in 2014. Among the applications, a project (Black Sea Horizon[11]) aiming to create a (self-sustained) network of research institutes, academia, think tanks and implementation agencies of the region was awarded.

[7] https://webgate.ec.europa.eu/maritimeforum/node/3539
[8] https://webgate.ec.europa.eu/maritimeforum/en/node/3648
[9] http://www.emodnet.eu/secretariat
[10] http://eur-lex.europa.eu/legal-content/EL/TXT/PDF/?uri=CELEX:32008L0056&from=EN
[11] http://ec.europa.eu/maritimeaffairs/policy/sea_basins/black_sea/black-sea-horizon_en.htm

The main objectives of this project are:

- stimulate and enhance the cooperation between researchers from the Union and those of the regional partners in question, including and in particular through Horizon 2020 and the partner's funding programmes;
- eliminate remaining obstacles to cooperation between researchers from the Union and its international regional partners.

The Black Sea Horizon will be implemented in the next 36 months.

Spatial planning

In 2014, EU Member States agreed to go beyond single sea-related sectors and start developing and implementing coherent processes to plan human uses of their maritime space (maritime spatial planning), and to establish appropriate cross border cooperation. A directive has been adopted in 2014 (Directive 2014/89/EU establishing a framework for maritime spatial planning).

The EU is supporting this process in the Black Sea by launching a dedicated call for proposals for a cross-border cooperation project between Bulgaria and Romania, which is also open to participation by other, non-EU countries in the sea-basin to ensure consistency of ecosystem-based maritime spatial planning across borders.

Surveillance

Since 2007, the EU has supported measures to develop standards to allow interoperability between maritime surveillance systems. With the Common Information Sharing Environment (CISE), the EU is building a key pillar of the new EU Maritime Security Strategy.

Scoping Study

One of the deliverables of the 1st Black Sea Stakeholders conference in Bucharest in 2014 was the commitment by the European Commission to set in motion a *dedicated follow-up project* that will be open to the coastal states and their administrations interested in integrated maritime policy approaches and its tools, and offer targeted support at national, regional and local level on how to reap the economic benefits of the sea in a sustainable manner, and how to build on opportunities for cross-border cooperation thereto. In fact, a project with similar objectives called IMP-MED exists already in the Mediterranean Sea and assists in particular Southern Mediterranean countries setting up better maritime governance schemes.

A scoping mission has been set to investigate the conditions for such action and suggest adequate architecture, taking into account the realities in the Black Sea and specifically in

Bulgaria, Georgia, Moldova, Romania, the Russian Federation, Turkey and Ukraine, and building on their national issues, needs and interest.

It is called to evaluate the feasibility of a cross-sectorial cooperation project on Integrated Maritime Policy in the Black Sea. It will provide decision makers in the EU with input for a coherent proposal to support the follow-up project. Further, the mission results will help to assess the relevance of such project in the context of the EU IMP and the current political environment at national and sea-basin level.

Ultimately, the scoping mission will give sufficient background information and justifications to enable the European Commission to make an informed decision on specific objectives and implementation modalities of the project.

State of the play

The study started in December 2014 and is expected to end in June 2015. It is leaded jointly by the Directorate General European Neighbourhood Policy and Enlargement Negotiations (DG NEAR) and the Directorate-General for Maritime Affairs and Fisheries (DG MARE).

The first phase of the study has been completed:

- Desktop study: information about maritime assets and maritime situation in the Black Sea countries has been collected by national experts.

- Visits and meetings with stakeholders by the core team with support of the national experts, aimed to collect missing information (policies, projects, issues, concerns), to raise awareness about the IMP and Blue Growth, identify the main maritime issues for each country and the national priorities.

All seven countries have been visited. In each country, meetings were arranged with several administrations with maritime responsibilities or interests, with other maritime stakeholders, in several cases both in the capital town and on the coast.

Initial assessment

From this first phase, it will be possible to get a general picture of the maritime situation in the Black Sea. The first preliminary findings are presented below:

In all countries, there is:

- Strong interest for the concept of “Blue Growth” and for the IMP in general;
- General awareness of the maritime and coastal potential of the Black Sea;
- General awareness of the potential benefits of cross-sectoral cooperation;
- Various levels of integration of maritime policies, depending on countries, some at high level with coordination structure, integrated policy and implementation strategy, while in other ones coordination for maritime affairs is at more basic and sectoral level.

The team also observed:

- General support to the development of maritime cooperation in the Black Sea from riparian states and from existing cooperation institutions (BSEC, BSC) and organizations (maritime business stakeholders and NGOs);
- Good level of cooperation in some fields such as research, science, or between the Coast Guard departments of all six coastal countries.

Common themes of interest

Coastal and maritime tourism and cruises

There is general agreement on the fact that the Black Sea region has an interesting touristic potential, and on the fact that, *presently, the Black Sea is not very visible* as a touristic destination (compared for instance to the Mediterranean). The expert team found real interest for potential cooperation for developing the concept of "*Black Sea Identity*" in order to make more visible the maritime assets of the region for tourism:

- Cruises;
- Coastal tourism;
- Recreation and sport (diving, boating, etc.);
- Valorisation of natural and cultural maritime and coastal heritage.

There is also shared interest for addressing, in a coordinated way, some of the challenges related to the present situation, such as:

- Restoration of degraded coastal and marine environment;
- Improvement of port management, better coordination of regulations.

Maritime transport

Safety, security, integrated surveillance, contingency planning and 'motorways of the sea', including harmonisation of port procedures are key items of interest around the Black Sea.
Maritime safety improvement will contribute to eliminate sub-standard shipping, increase the protection of passengers and crews, prevent accidents and reduce the risk of environmental pollution. Integrated surveillance and monitoring will help to increase the efficiency and reduce the cost. Contingency planning will, from a policy point of view, enable countries to organize cooperation to respond to accidental marine pollution and to effectively assisting each other in case of emergency. The promotion of 'motorways of the sea' and transport corridors will improve the main transport and traffic management systems, providing integrated high-speed routes, but also providing more transparency on safety risks.

Environment

Despite institutional agreements (Bucharest Convention), most of the Black Sea stakeholders consider that existing programs are not sufficient given the degradation of the

marine and coastal environment in the Black Sea. There is need for assessing the possibilities for integration with tourism and fishery.
Climate change, sea level rise, coastal erosion and relations to tourism are common concerns in all countries, and should be addressed in a coordinated way.

Fisheries
Fisheries management in the Black Sea is considered a concern by most of the riparian countries, and many studies have been carried in this field, but there is no consensus on the way this issue should be addressed.

Integrated maritime surveillance
Most countries are very aware of the interest of integration of maritime surveillance, which could benefit many sectors (e.g. transport, fisheries, safety, environment) and reduce regulations' costs supported by coastal States.

Marine and coastal protected areas (MPA)
There is general interest for ecological network development and for developing coastal and marine protected areas as a way to protect and restore the environmental assets and to support sustainable tourism and fisheries.

Sustainable economic development
There is a general demand for inclusive assessment of the coastal and marine assets in light of sustainable economic development.

Next steps
Based on desktop studies, country dossiers, country visits and stakeholders meetings in each country, the team will assess the feasibility of a possible project of cooperation supported by the EU, with long-term perspectives, but with short-term concrete outcomes.

Contribution of the scoping study to the panel discussions

Panel 1: Connecting business
"Being the backbone of the blue economy, maritime transport is a source of innovation and can also be a key driver for associated economic activities such as coastal tourism, development of yachting and marinas, etc. It is also crucial for linking up economic activities on land and at sea. Integrate the development of emerging areas of blue growth, creating necessary security for investments and ensuring environmental sustainability of maritime spatial planning are all the challenges this panel will explore."

There is general demand for a shared strategic vision of the future of the "blue economy" in the Black Sea that will support development of infrastructures and projects. Additional profit

for the region can be gained from smarting transport and transport services. There is a potential for the 'motorways of the sea' concept to be developed on a large scale.
Maritime spatial planning can support the development of new maritime activities requiring maritime space and infrastructures (e.g. fixed cages off the shore). Allocating dedicated spaces, or priority in some spaces, can reduce legal uncertainty and conflicts with other activities (e.g. maritime transport or fishing) and attract investors. It can also contribute to protecting major maritime routes (maritime highways) from competition with growing and powerful sectors (oil and gas, marine renewable energy). Shared offshore infrastructures and ships can reduce operations' and maintenance cost. Maritime spatial planning can be the basis for a strategic impact assessment (SEA), structurally reducing cumulative impacts and risks, and alleviating procedures for project licensing. Maritime spatial planning can reduce potential conflicts between maritime activities, allowing, for example, tourism to develop in areas free from industrial development and concentrating industrial activities in less sensitive areas where the costs of infrastructure, risk management and monitoring can be pooled between several stakeholders.

Marine aquaculture is a prospective sector in a growing market. Suitable areas should be defined and harmonized with marine protected areas and other users like transport, fishery and energy.

There is a demand for a common shipping strategy in the sea basin, including an environmental one. Shipping, however, is shaped by business needs and follows the trade streams. Increase in trade can be found in an enhanced transfer of goods (market enlargement) or in the added value of the transport service. The latter is hardly developed around the Black Sea. Smart port development and harmonisation of procedures will result in short transfer times, increased transparency and safety of transport, but also in enhanced attractiveness of the Black Sea transport service, especially when it goes hand in hand with an increased communication between entry points of trade (Mediterranean and Caspian sea).

Panel 2: Fishing for tourists

"The fact that coastal tourism is the biggest maritime activity in terms of jobs, makes it also an engine of the blue economies across the Black Sea. Fishing, in turn, is still important in many areas. Both activities, however, clearly depend on a healthy marine environment. Clean seas are a crucial asset to strengthen fishing communities by providing other sources of income, such as pesca-tourism, and new touristic destinations can showcase the natural and cultural heritage. The panel will discuss innovative methods and ideas to use the Black Sea in a more sustainable manner."

Black Sea tourism is mainly relying on the beach, which is a resource under pressure of sea level rise, pollution and erosion. Diversification of coastal tourism offer and products is the key to its sustainability. The Black Sea is offering a great cultural heritage. It is time to

recover this ancient historical treasure. This will not only serve tourism but also the trade around the Black Sea as a hub between east and west.
Diversification is also needed to compensate the shorter tourism season in comparison with the Mediterranean.
There is a need for developing a new touristic model for the Black Sea, which should be different from the model in the Mediterranean, and based on specific maritime and coastal assets, natural and cultural ("*Black Sea Identity*").
Fishery could also serve tourism, focusing on quality fishery.

The status of fish resources in the Black Sea is not very good, due to both environmental conditions and pressure from fishing industry. These resources are not sufficient to support the development of a fishing industry in each coastal country. Turkish vessels and the Turkish fisheries industry are by far the most important in the region. But even with better environmental conditions, it is likely that the fisheries in the Black Sea will stay at small scale and will not contribute significantly to food supply of the growing coastal population.
Given this, it seems that it could be interesting to develop new approaches of fisheries, aimed not to maximizing the catches, but to maximizing the value (economic and social) for each kg of fish. Linking fisheries to tourism could for example:

- Bring benefits in the part of the chain where there are usually costs (catching the fish);
- Develop touristic industry centered on fishing (hotels, restaurant, etc.);
- Develop new trade (recreational fishing gears…);
- Support multi-activity for fishermen;
- Develop synergies with marine protected areas (controlled recreational fishing by/in MPAs);
- Increase the part of the value on the coast (e.g. fish consumed by tourists on the coast, rather than exported);
- Re-focus to valuable coastal fish could be stimulated by habitat reconstruction of coastal lakes, limans and deltas.

Fishermen could also benefit from other "blue economy" activities, such as part-time contribution to marine environmental monitoring, or by being associated from the beginning to the development of some activities ("blue tourism", biotechnologies, operation and maintenance of offshore infrastructures).

All this could be combined with the development of active nautical tourism based on the (underwater) cultural heritage.

The coastal habitats, marine mollusc beds and sea grass field are closely related with the fish stock. Restoring the habitats will increase the valuable coastal fish stock and increase the value of fishery with tourism.

Quality programmes like Blue Flag, Quality Coast and Green Destination will support more sustainable coastal development, promote coastal tourism and indirectly[12] stimulate better environmental conditions of the Black Sea, also favourable for aquaculture and other sectors.

Panel 3: Creating business opportunities
"Recognising that appropriate governance and legislative structure offer ideal conditions for business incubation and development, maritime stakeholders and entrepreneurs need to be pro-active and flexible partners in the definition and planning of maritime strategies. Smart partnerships, maritime clusters and networks have the potential to increase competitiveness, promote maritime sectors, and enhance coordination between the business-research-government 'triangle' to spur innovation in transport, shipbuilding and blue energy exploitation. This panel aims to explore how we can better employ human capacities to nurture a smart and blue economy in the Black Sea."

The innovating triangle between business, administration and science is still weak or lacking in the Black Sea. There is generally no governance framework for exchanges between these stakeholders, which could support the timely development of innovative regulations (cooperation between business and administrations) or close links between science and business (innovation). There is general need for more business-university exchanges and better understanding of each other's needs and ideas.
Poly-techno platforms/ maritime clusters could be supported as both interfaces between science and business (stimulation) and as supports for common projects (joint ventures) between companies and universities.

The level of maritime education in the Black Sea should be increased to enable innovation. Maritime universities could shift from educational institutes towards research. Increased cooperation between the Black Sea universities could stimulate this.
Bringing the research labs closer to the industry in smart industry areas will stimulate the exchange with business and create smart partnerships, advancing blue growth. Specialisation of universities, each offering specific qualities, increasing the mobility of students, combined programmes with universities of western and southern Europe for high-tech studies like modelling, remote sensing and data analysis will increase the scope and quality of science. Focusing instruments like Tempus and Erasmus on Integrated Maritime Policy could be very effective. There is also need to support common research programmes, bringing science, business and administration together in innovation.

Algae's and other marine products are increasingly used as components for the cosmetic and health industry. The Black Sea has an old tradition in this field (e.g. lavender and rose oil production and trade), which could be extended to new marine resources, stimulating at the same time a better marine condition.

[12] Quality programmes are increasing the awareness of the stakeholders, their efforts to improve the quality of the environment but also increasing their requirement to other stakeholders to improve the environmental conditions.