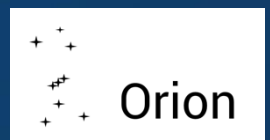




Repositioning of the European Union Strategy for the Adriatic and Ionian Region (EUSAIR)

Final report of the initial study
on a new “brand identity” for EUSAIR

Orion
November 2021



EUROPEAN COMMISSION

Directorate-General for Regional and Urban Policy

Directorate D - European Territorial Cooperation, Macro-regions, Interreg and Programmes Implementation I
Unit D.1 — Macro-regions, Transnational/Interregional/External Cooperation, Enlargement

Contact: *Klaudia Feurle*

E-mail: REGIO-TRANSNATIONAL-AND-INTERREGIONAL-COOPERATION@ec.europa.eu

*European Commission
B-1049 Brussels*

Repositioning of the European Union Strategy for the Adriatic and Ionian Region (EUSAIR)

Final report of the initial study
on a new “brand identity” for EUSAIR

Manuscript completed in November 2021

1st edition

The European Commission is not liable for any consequence stemming from the reuse of this publication.

Luxembourg: Publications Office of the European Union, 2021

© European Union, 2021



The reuse policy of European Commission documents is implemented based on Commission Decision 2011/833/EU of 12 December 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39). Except otherwise noted, the reuse of this document is authorised under a Creative Commons Attribution 4.0 International (CC-BY 4.0) licence (<https://creativecommons.org/licenses/by/4.0/>). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.

For any use or reproduction of elements that are not owned by the European Union, permission may need to be sought directly from the respective rightholders.

PDF ISBN 978-92-76-45990-3 doi:10. 10.2776/193396 KN-01-21-533-EN-N

Foreword and acknowledgements

This report was commissioned by the European Commission’s Directorate-General for Regional and Urban Policy, and more specifically by its Unit D1 which focuses on Macro-Regions, Transnational and Interregional Cooperation.

The works which led to this report were coordinated by a project team composed of members of Unit D1: Gilles Kittel, Astrid Aulnette, Giuseppe Di Paola, Klaudia Feurle, and Nadine Lakhal.

The report itself was produced by Bertrand Bénichou and Benjamin Djiane, independent consultants specialized in brand strategies and communication strategies.

The project to review EUSAIR’s positioning and its “brand identity” benefitted from the support of Slawomir Tokarski, Director D with DR REGIO (European Territorial Cooperation, Macro-regions, Interreg and Programmes Implementation I). It relies on guidance provided by Jean-Pierre Halkin, Head of Unit D1, and by Elina Hakonen-Meddings, Deputy Head of Unit D1, and from various inputs from the members of EUSAIR’s Governing Board.

Importantly enough, this project was able to build on previous works, in particular those undertaken in 2019 on the topic of communication at the initiative of EUSAIR’s Facility Point. The two workshops held in September and November 2019, to address the communication issues that had already been identified, resulted in a diagnosis which paved the way to further works on the topic of EUSAIR’s positioning.

We have relied on an important bibliography, including many communications and analyses from the Commission’s services, and several reports produced by external sources, such as the 2019 report from OECD on EUSAIR’s governance.

Besides this starting material, ideas developed in this report are essentially based on inputs gathered during many interactions with the project team, and with EUSAIR stakeholders, both within EUSAIR’s internal stakeholders and with personalities not directly involved in the Strategy on a daily basis. A vast series of bilateral interviews were conducted to gather information; several interactions took place with the community of EUSAIR’s stakeholders; and a couple of meetings also took place with representatives of EUSAIR’s Thematic Steering Groups.

We would like to warmly thank all these contributors for their time and for the very valuable inputs that they shared with us during our meetings, and in particular the following:

- Nathalie Verschelde (EU Commission, DG REGIO)
- Giannantonio Ballette (EU Commission, DG REGIO)
- Colin Wolfe (EU Commission, DG NEAR)
- Wojciech Kowalski (EU Commission, DG NEAR)
- Alain Baron (EU Commission, DG MOVE)
- Madalina Ivanica (EU Commission, DG ENV)
- Staša Mesec, Olga Abram, and Ines Grenc (EUSAIR Facility Point)
- Baiba Liepa (Interact Programme)
- Petra Balazic (Regional Cooperation Council)
- Andreja Jerina (Slovenian EUSAIR Presidency)
- Lusia Chiodi (Osservatorio Balcani e Caucaso Transeuropa)
- Matteo Tacconi (freelance journalist, works on the EUSAIR Stakeholders’ platform newsletter)
- Laurent Geslin (journalist, *Courrier des Balkans*)
- Dirk Buschle (Energy Community)
- Matej Zakonjsek (Transport Community)
- Ioannis Firbas (National Coordination Authority for ESIF, Greek Government)
- Miroslav Veskovc (EU Commission, Joint Research Centre)

- Stefano Dominioni (Council of Europe)
- Silvia Mangialardo (UNI ADRION)
- Eleonora Tramannoni (Forum of Chambers of Commerce)
- Sanja Vukorep (Forum of Cities)

Disclaimer: *The information and views set out in this report are those of the authors and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this study. Neither the Commission nor any person acting on the Commission's behalf may be held responsible for the use which may be made of the information contained therein.*

Table of Contents

Foreword and acknowledgements	5
Executive Summary	9
1. Introduction	15
1.1. Content of this report	15
1.2. Reminder on the objectives of the project.....	16
2. SWOT analysis of EUSAIR’s brand	17
3. A new brand identity for EUSAIR	19
3.1. Short reminder on the structure of a brand platform	19
3.2. Recommendations on EUSAIR’s repositioning:.....	19
3.2.1. An initial diagnosis confirmed by more recent works	19
3.2.2. EUSAIR, an MRS unlike the others.....	20
3.2.3. EUSAIR needs a meaningful purpose.....	20
3.2.4. Core values and convictions	22
3.2.5. Brand personality	22
4. A few thoughts on EUSAIR’s governance	24
5. Alignment with the Commission’s priorities	27
6. Conclusion on EUSAIR’s new positioning	28
7. Roadmap for building synergies with other multilateral initiatives in the macro-region	29
8. Potential next steps for EUSAIR’s repositioning	31
9. Appendix 1 – Preliminary findings report	32
9.1. Reminder on the objectives of the project.....	32
9.2. Where we stand in the project	33
9.3. Our understanding of EUSAIR’s scope and ambitions	34

9.4. Our understanding of EUSAIR’s stakeholders	38
9.5. How is EUSAIR perceived by its stakeholders?	40
9.6. An ambiguous positioning: EUSAIR’s original sin.....	44
9.7. Governance and organization.....	47
9.8. Communication.....	48
9.9. The broader picture: three major political trends for the ten years to come 49	
9.10. Reflections for the next steps	50
9.11. ANNEX – list of interviews performed.....	52
10. Appendix 2 – Benchmark of multilateral initiatives active in the Adriatic-Ionian macro-region	53
10.1. EUSAIR – its actual contribution.....	53
10.2. The Berlin Process	56
10.3. The Regional Cooperation Council.....	58
10.4. Energy Community	60
10.5. Transport Community	62
10.6. The Economic and Investment Plan for the Western Balkans (EIP)....	65
10.7. The Adriatic and Ionian Initiative (AII).....	67
10.8. The Central European Initiative	69
10.9. Cooperation between China and Central and Eastern European Countries ("17+1").....	71
10.10. Cultural routes of the Council of Europe – Routes4U	73
10.11. South East European Cooperation Process	75
10.12. French Strategy for the Western Balkans	77
10.13. Conclusion – synthesis on potential synergies	79

Executive Summary

Introduction: the scope and objectives of EUSAIR's (re-)positioning

In August 2020, the European Commission's DG REGIO launched a project aiming at the repositioning of the European Union Strategy for the Adriatic and Ionian Region (EUSAIR).

EUSAIR is one of the four “macro-regional strategies” adopted by the European Commission and endorsed by the European Council. Launched in 2014, the Strategy was jointly developed by the Commission and the Adriatic-Ionian Region countries and stakeholders, with the objective to jointly address areas of common interest for the benefit of each country and the whole region.

After six years of existence for EUSAIR, the assessment made by DG REGIO and shared by a majority of its stakeholders, is that EUSAIR is insufficiently known by its “target audience”, and that it lacks a proper positioning – i.e., a positioning that would be in the same time authentic, understandable by stakeholders, and compelling. In a context where many regional initiatives coexist, trying to achieve different – but somehow similar – goals, with significant overlaps both in their agenda and participating countries, EUSAIR has so far failed to stand out and still lacks awareness and prestige among its target audience. It has yet to define a “brand territory” making it visible and understandable by all target audiences, conveying clearly to these audiences what specific value it delivers to the macro-region. In marketing terms, EUSAIR's “brand identity” is both blurred and weak.

To progress in this regard, EUSAIR needs to clarify its positioning, articulate its specific vision, and formulate its mission with a stronger expression. Beyond expression, EUSAIR needs to differentiate and strengthen its identity, with the objective to achieve, by doing so, a greater complementarity with other regional initiatives.

The objective of this project was therefore to help EUSAIR rethink its “brand identity”, in order to increase its notoriety and prestige among its target audience, and to find its right place in the institutional landscape of the macro-region, in complementarity with the other initiatives.

The present report presents our recommendations on possible re-positioning options for the Strategy, and sketches potential next steps for the repositioning of EUSAIR. Considering the amplitude of the transformation that a full repositioning of EUSAIR requires, this report should not be construed as its final point, but rather as the end of the first phase of a broader program.

Diagnosis: EUSAIR's stakeholders and their perception of the Strategy

The first part of the project allowed us to confirm the diagnosis made by DG REGIO: the awareness about EUSAIR, about what it is and what it wants to achieve is insufficient with regards to its ambition.

In order to perform the analysis of the perception of EUSAIR's stakeholders, we identified **4 groups of relevant stakeholders**:

- The “**insiders**”: EUSAIR's internal stakeholders
- The “**Brussels influencers**”: not directly involved in EUSAIR, but wielding some influence on it
- The “**locals**”, generally referred to as “the stakeholders” in EUSAIR's terminology.
- The “**coopetitors**”, i.e., the other regional processes and initiatives active in the macro-region.

Our **main findings on how EUSAIR is perceived by its stakeholders** are the following:

- There is a huge disparity in the answers we have collected, on most of the topics discussed. This illustrates that the perception of EUSAIR by its stakeholders is blurred.
- The awareness on what EUSAIR is and does is relatively low, and insufficient with regards to its objectives, and to its legitimate ambition.
- In our opinion, one of the common root causes for the two points above is that the Strategy is pursuing very numerous objectives, of very different nature, both tangible and intangible.
- Beyond that, stakeholders' understanding of EUSAIR's positioning and objectives are very contrasted. It is even more the case regarding what their views of what these should be.
- Many stakeholders, in all the groups identified, find that EUSAIR's actual, concrete achievements have so far been limited.
- EUSAIR has proved, however, to be an efficient framework for dialogue.
- EUSAIR's governance is a central point in the stakeholders' appreciation of EUSAIR's actual contribution. While many stakeholders find the governance redundant and inefficient, most of them also consider that its high level of inclusiveness is very precious and has yielded very positive political results.
- Most of the stakeholders expressed a positive appreciation of EUSAIR's actual contribution.

Diagnosis: an ambiguous positioning, EUSAIR's original sin

Embracing too many dimensions, covering a highly complex and heterogeneous geography, and pursuing too many goals, EUSAIR's positioning appears as its original sin, hindering the progress of its brand and its ability to be understood properly by its stakeholders. The fact that its name is a rather cryptic acronym does not help the Strategy clarify what it is.

EUSAIR simultaneously pursues too many objectives of very different natures, and this contributes to blurring EUSAIR's positioning. Very few of the interviewed stakeholders were able to give a clear answer on what EUSAIR is about, and what makes it unique as a process.

To use a marketing analogy, we could say that EUSAIR is a "brand" with a weak "identity" and a weak "awareness", addressing different "markets" without having neither a "competitive advantage" nor a clear leadership in any of them.

Analysis: EUSAIR's actual contribution

While many multilateral initiatives with different geographical and thematic scopes coexist in the macro-region, EUSAIR has brought some unique contributions to cooperation within the region, and to its future integration into the EU and its institutions.

EUSAIR has brought significant progress in several dimensions directly linked to the Strategy's 4 pillars, in particular for maritime issues and the environment. Overall, the strategy's objectives on its Four Pillars seem to have been properly integrated in local priorities by national and subnational authorities. In this regard, the ongoing embedding process is a big step ahead.

EUSAIR has contributed to the stability of the macro-region, by nurturing a peaceful political and administrative dialogue on common issues between countries of the macro-region. This appears to be true not only at the political level, but also to some extent for civil society, through forums of the cities, of universities and chambers of commerce. Through this dialogue and these interactions, EUSAIR contributes to economic, social and especially territorial cohesion and thus to the convergence of the different countries.

EUSAIR's very inclusive governance, which puts all countries on an equal footing, both IPA countries and member states, is a differentiating feature that sets EUSAIR apart from most other EU processes. It is a very democratic governance, which has proven to be complex, maybe not very efficient in itself, but nevertheless very effective in promoting European values.

Through its complex, multi-levels governance and its initiatives toward civil society institutions, EUSAIR plays a role of connection platform between local stakeholders, those who work on the ground and know the local specificities, and the European experts, civil servants and politicians, who frame the big picture. This unique position has, so far, insufficiently been exploited.

EUSAIR has also pushed some of the non-EU countries to build up their administrative capacity, and to effectively learn the 'rules of the game' of how EU institutions are managed.

Last but not least, EUSAIR has fostered a sense of belonging together, the sense of a "shared we".

Overall, EUSAIR has brought a unique contribution to the convergence between countries of the macro-region, and to the preparation of the enlargement of the EU in the Western Balkans.

However, many stakeholders also believe that EUSAIR has so far delivered very few concrete achievements – or at least, not many visible, tangible, quantifiable results. Many share the view that *"EUSAIR's main achievement so far is establishing itself"*.

Analysis: benchmark of other multilateral initiatives active in the macro-region

Several opportunities exist to establish synergies with other multilateral initiatives in the region. Technical cooperation should be pursued with the Energy Community, the Transport Community, and the Council of Europe's Cultural "Route4U" project. General coordination could be developed with several other multilateral initiatives such as the RCC. There also appears to be a profound convergence of purposes between EUSAIR and the AII, and a stronger integration of their structures would help them reassert their role as the main political driving forces in the region.

Beyond these, EUSAIR could play a unique role in the implementation of the EIP, thus confirming its vocation to bring a decisive support to the EU's enlargement strategy.

At the other side of the spectrum, the "17+1" initiative led by China appears as the real competition for EUSAIR, as it promotes a fundamentally different vision of the world, and a different model of society. Even if "17+1" appears to have been losing momentum during the last couple of years, other initiatives may come, and China has quasi-infinite financial resources to develop her influence.

In more general terms, the threat of foreign powers actively trying to develop their influence, and weaken the EU's cohesion or its enlargement process, needs to be taken very seriously. It is one more reason to look for as many synergies as possible among macro-regional initiatives that share the same goals, and promote the same vision for Europe. One more reason also to streamline the overall setup, actively look for synergies, and make the best use possible of available resources.

As an example, a strong partnership between EUSAIR and DG NEAR teams, around the implementation of the Commission's strategy for the Western Balkans, can combine the proximity to local stakeholders patiently built by EUSAIR, and the financial resources brought by the EIP; and both features are necessary to succeed in the macro-region.

Lastly, cooperation with the civil society initiatives created in the framework of the Berlin Process seems interesting but more far-fetched, and would probably require much more work and political traction to implement.

Analysis: EUSAIR's distinguishing features

Several dimensions – political, maritime, environmental, and cultural – appear as ‘competitive advantages’ for EUSAIR, setting it apart from other multilateral initiatives of the macro-region.

The following features of EUSAIR appear as being really specific to the Strategy:

- It is delivering a real contribution to **creating a sense of belonging** in the macro-region;
- It has a real **political added-value for WB non-EU countries**, which are treated on a level playing field;
- It has led these countries to **significant capacity-building efforts**;
- It has led to real progress on **environmental protection, coastal and port management, tourism...**
- It has a **strong cultural dimension**, as the Tourism pillar revives the rich history of the macro-region;
- Its **focus on the seas**, and on all **maritime issues**, is quite unique.

These features, if EUSAIR succeeds in strengthening them, are strong bases on which a new positioning for the strategy could rely, giving it a unique place in this landscape.

Recommendations on EUSAIR's new brand identity

EUSAIR needs a meaningful purpose: clarifying what is EUSAIR's fundamental purpose (i.e., what is the most important thing it is trying to achieve) is the first thing that EUSAIR needs to do. It is a highly strategic choice, and it will be a foundational step in defining its new positioning.

Is EUSAIR's purpose to manage the two sea basins, with all associated dimensions? It is to increase regional cooperation and prosperity? Or is it to support the enlargement of the EU to the whole region?

Our recommendation is for EUSAIR to adopt, as its central purpose, to be the visible supporter of the European enlargement to the macro-region and to help IPA countries in this process. Such a bold, clear positioning would give EUSAIR more appeal for its target audience; and a very strong narrative could be built around this purpose, emphasizing the “brand story” of the macro-region itself.

Core values and convictions: EUSAIR's identity rests on strong values and beliefs, widely shared among its stakeholders. These values include peace, cooperation and dialogue, inclusion, solidarity and cohesion, a deep belief in the value of European integration, the protection of the environment as a shared duty...

EUSAIR's new positioning should uphold these values and convictions, put the youth and the environment at the core of the Strategy's priorities, and also to assert more strongly the attachment to the founding European values (freedom, democracy, the rule of law...), and optimism for a shared future.

Brand personality: the brand personality describes the “look and feel” of the brand, the feeling that it stirs in its stakeholders. There is often a discrepancy between the perception of the brand owners (here, those who run the Strategy) and that of external stakeholders.

Those who run the Strategy would like EUSAIR to be perceived as:

Humble, Patient, Hardworking, dedicated, Meticulous, Inclusive, Idealist, Open

But many stakeholders mostly perceive the shortcoming associated to these qualities:

Technocratic, Slow, Inefficient, Punctilious, Lacking leadership, Naïve, Indecisive

EsUSAIR’s new positioning should retain the former as aspirational, and try to strengthen them... while being aware that stakeholders’ perceptions may, in some cases, be different.

Recommendations on EUSAIR’s governance

EUSAIR’s governance is both a key competitive advantage for the Strategy and a limit to its impact. While its inclusiveness has delivered a significant political added value, decision-making appears diluted in complex governance organs, with too many people on board.

To be more efficient, EUSAIR needs more leadership, more ownership, more involvement. A strategic reflection should be initiated and assess the relevance of:

- The creation of an executive decision-making body, to run the Strategy on a day-to-day basis;
- The strengthening of EUSAIR’s project management role, to properly oversee the tactical duties linked to the Strategy, and support this new executive body.

Recommendations on the alignment with the Commission’s political priorities

The repositioning of EUSAIR is an opportunity for the Strategy to increase its alignment with the Commission’s political priorities, and more specifically:

- Put more emphasis on the European fundamental values
- Further the delivery of the European Green Deal in the macro-region
- Give more weight to the digital transition in EUSAIR’s connectivity agenda
- Put civil society, and in particular the youth, at the core of EUSAIR’s priorities
- Further develop EUSAIR’s cultural dimension, and the ties of the macro-region with the rest of Europe.

Conclusion on EUSAIR’s new positioning

Repositioning a complex institution like EUSAIR, and re-defining its brand identity, is an ambitious project, which touches upon highly sensitive, political issues. While some dimensions of our recommendations, such as those dealing with the “personality” of the new brand, should be easily accepted by most of EUSAIR’s stakeholders, other will require further work and discussions with EUSAIR member countries and implementors. These include:

1. **EUSAIR’s governance:** should it be modernized and improved? Would another governance body make sense? Does EUSAIR need a stronger project management role?

2. **EUSAIR's purpose:** what is the fundamental, far-reaching objective pursued by the Strategy? How do we characterize the Strategy? Is it the maritime dimension? Is it the promotion of coordination? Or the promotion of European integration?
3. **EUSAIR's alignment with the EU Commission's priorities:** should EUSAIR focus more on European fundamental values? Should it increase its environmental dimension? Put more focus on the Digital transition? On caring more for the youth?

The best way to address these 3 dimensions, would be a round of consultations with EUSAIR's Governing Board, with representatives of member countries and with implementors, to understand their opinion on each of these dimensions, and their expectations from EUSAIR's new positioning. This would provide essential inputs for revising the strategy.

Recommended next steps for EUSAIR's repositioning

Five different works streams could be conducted to follow up on EUSAIR's repositioning:

1. **Clarifying EUSAIR's positioning:** this means agreeing on what should the "brand idea" for EUSAIR's new identity, meaning what is EUSAIR's main focus. This stream will build on works done under this project.
2. **Finalizing EUSAIR's new brand platform:** once the "brand idea" is validated, more detailed works will produce a detailed brand platform, and review EUSAIR's communication plans.
3. **Rolling out EUSAIR's new identity:** when the new brand is finalized, "selling" it internally to all stakeholders should be done with great care, and methodology.
4. **Deeper transformation of EUSAIR:** reviewing EUSAIR's governance, and the way EUSAIR is managed as a project, amounts to a deep transformation of the Strategy. It will require a lot of concertation with all involved stakeholders.
5. **Implementing synergies with other initiatives:** contacts with other multilateral initiatives could be initiated right away to further assess the potential synergies mentioned hereabove.

In any case, if EUSAIR is to make a significant contribution to the development of the region, the status quo is definitely not an option.

1. Introduction

1.1. Content of this report

In August 2020, the European Commission's DG REGIO issued a call for tenders inviting consultants to bid for a project aiming at the repositioning of the **European Union Strategy for the Adriatic and Ionian Region (EUSAIR)**. Having been selected at the outcome of this competitive process to lead this project, ORION's project team began its work mid-November, as the project was formally kicked off on November 17th, 2020.

Finalized in October 2021, this report wraps up the project, sums up the conclusion that the project team has reached, and sketches potential next steps for the repositioning of EUSAIR. Considering the amplitude of the transformation that a full repositioning of EUSAIR requires, this report should not be construed as its final point, but rather as the end of the first phase of this program.

This report heavily relies on the two reports previously submitted in the framework of this project:

- The "Preliminary findings report", dated February 3rd, 2021;
- And the "Benchmark of multilateral initiatives active in the Adriatic-Ionian macro-region", dated April 20th, 2021.

These two documents are included as Appendixes to the present report.

Building on a deeper analysis of EUSAIR's actual contribution, of its competitive advantages compared to other multilateral initiatives, and on what we perceive as its essential features, this report is structured as follows:

- SWOT analysis of EUSAIR's brand, and potential strategies derived from this analysis
- Short reminder on the structure of a brand platform
- Recommendations on EUSAIR's repositioning:
 - o Core purpose and main focus
 - o Core values and convictions
 - o "Brand personality"
 - o Governance
 - o Alignment with Commission's priorities
- Roadmap for establishing synergies with other multilateral initiatives
- Potential next steps for EUSAIR's repositioning

1.2. Reminder on the objectives of the project

EUSAIR is one of the four “macro-regional strategies” adopted by the European Commission and endorsed by the European Council. Launched in 2014, the Strategy was jointly developed by the Commission and the Adriatic-Ionian Region countries and stakeholders, which agreed to work together on the areas of common interest for the benefit of each country and the whole region.

After six years of existence for EUSAIR, the assessment made by DG REGIO in the specifications of the project, and shared by a majority of its stakeholders, is that EUSAIR is insufficiently known by its “target audience”, and that it lacks a proper positioning – i.e., a positioning that would be in the same time authentic, understandable by stakeholders, and compelling. In a context where many regional initiatives coexist, trying to achieve different – but somehow similar – goals, with significant overlaps both in their agenda and participating countries, EUSAIR has so far failed to stand out and still lacks awareness and prestige among its target audience. It has yet to define a “brand territory” making it visible and understandable by all target audiences, conveying clearly to these audiences what specific value it delivers to the macro-region. In marketing terms, EUSAIR’s “brand identity” is both blurred and weak.

To progress in this regard, EUSAIR needs to clarify its positioning, articulate its specific vision, and formulate its mission with a stronger expression. Beyond expression, EUSAIR needs to differentiate and strengthen its identity, with the objective to achieve, by doing so, a greater complementarity with other regional initiatives.

The objective of this project was therefore to help EUSAIR rethink its “brand identity”, and the present report presents our recommendations on possible re-positioning options for the Strategy.

It is important to note that the COVID pandemic has created adverse conditions for such a project. Travel restrictions have in particular prevented the consultants from meeting face-to-face with EUSAIR’s stakeholders and from going on the ground, in the Adriatic-Ionian Region itself. We have therefore extensively used videoconferencing as a privileged way to collect information and to meet with stakeholders.

2. SWOT analysis of EUSAIR's brand

This SWOT analysis was conducted during a workshop held in June 2021 with the project team, which assembled the consultants and representatives of DG REGIO.

The team tried to analyze the Strengths, Weaknesses, Opportunities and Threats for EUSAIR's brand, in the perspective of the ongoing re-positioning. This transformation being an ongoing process, most of the inputs collected relate with EUSAIR's current brand and positioning, but some are also connected with the new orientations being considered for EUSAIR's new brand identity. This is mostly true for the "Strengths" and "Opportunities", which are essentially prospective considerations.

The main outcomes of this analysis are summarized hereunder.

Strengths of EUSAIR's brand identity (mostly prospective):

- A re-focused positioning
- A powerful narrative on the macro-region ("the cradle of European civilization")
- A strong vision for what EUSAIR should be
- An emotional identity, relying on the seas and on the historical/cultural features it conveys
- Cooperation on a level playing field between countries
- An inclusive multi-level governance
- A strong orientation towards civil society

Weaknesses of EUSAIR's brand identity (mostly relating to current identity):

- Insufficient involvement of local administrations
- Insufficient involvement of civil society organizations
- Discrepancies in administrative capacity
- Insufficient funding, no proper funds directly managed by EUSAIR, and insufficient influence on the managers of potential funding sources.
- Lack of leadership
- Inefficient multi-level governance

Threats to EUSAIR linked to its brand identity:

- Influence of foreign powers, such as Russia and China
- Disconnection between political and implementation levels
- Cumbersome and complex governance
- Lack of political commitment from governments, lack of resources
- Unsolved political issues between some countries
- Difference of approach with the EU Economic and Investment Plan for the Western Balkans
- Lack of concrete outcomes so far
- Attitude of major EUSAIR countries towards EUSAIR's repositioning?

Opportunities for EUSAIR linked to its brand identity:

- Enlargement is a political priority of the new Commission
- Momentum created by EU Economic and Investment Plan for the Western Balkans
- Huge cultural and environmental heritage
- Interreg programs in the region
- Contribution to the European Green Deal through pillar 2 (Environmental Quality)
- Contribution to sea-related topics through pillar 1 (Blue Growth)
- Alignment of brand with the ambition for the macro-region
- COVID 19 recovery plan
- Appeal to stakeholders' emotions / aspirations of the new brand identity
- Attitude of major EUSAIR countries towards EUSAIR's repositioning?
- Ongoing 'embedding process', which could increase the funding for EUSAIR-tagged projects

Potential strategies for EUSAIR derived from this analysis:

- Develop involvement of Interreg Programs
- Use IPA funds to improve capacity at national and sub-national levels
- Work closely with DG NEAR to make the best possible use of EIP funds
- Be the visible supporter of the enlargement
- Position EUSAIR as a force for greater cohesion facing foreign influence
- Assert more strongly European founding values
- Assert more strongly EUSAIR's orientation toward civil society, and promote a more horizontal way for regional cooperation
- Assert EUSAIR's maritime dimension
- Focus on a few promising areas only, for which macro-regional cooperation represents a real benefit or which require territorial cooperation to be successful
- Onboard countries for new brand identity and strategy for EUSAIR
- Connect more strongly political level with implementation
- Simplify the multi-level governance and make it more efficient
- Address civil societies to go around potential conservatism of political leadership
- Communicate more on concrete outcomes and on EUSAIR's actual contributions

3. A new brand identity for EUSAIR

3.1. Short reminder on the structure of a brand platform

In the classic conceptions of corporate marketing, a brand platform is composed of several complementary components. The list of these components can vary slightly from one source to another, and the name used for some of these elementary bricks can vary from one author to another.

The components that Orion retains to describe a brand identity – be it a corporate brand, an institutional brand, the brand of a place or even a personal brand – are as follows.

Purpose statement (or “raison d’être”): a short, compact formulation of who/what the owner of the brand is, of what wakes them unique, and of the essential objective they pursue. The purpose statement is sometimes referred to as the “brand concept”, insofar as a proper purpose statement really captures the essence of the brand. It is its “raison d’être”.

Core values: the values, convictions and beliefs that are foundational to the identity of the owner of the brand, that underpin its identity and motivate its strategy and actions.

Brand “personality”: the personality traits that the brand evokes. These traits relate to the “look and feel” of the owner of the brand, to their behaviors and to the impressions they stir.

Mission statement: a short narrative about what the owner of the brand tries to achieve. The mission statement is about what they do, while the purpose statement – is about why they do it.

Brand narrative: a longer text, telling the whole story of the brand. This narrative must present all the fundamental elements of the brand platform, in particular the purpose and the mission statements. The narrative should evoke the core values and reflect the brand personality; or at least, be consistent with them.

3.2. Recommendations on EUSAIR’s repositioning:

3.2.1. An initial diagnosis confirmed by more recent works

In our “First findings report”, published in February 2021, a few weeks into the project, the authors had expressed their insights about what appeared as the core of EUSAIR’s difficulties in being understood by its target audience:

“Embracing too many dimensions, pursuing too many goals, EUSAIR’s positioning appears as its original sin, today hindering the progress of its brand and its ability to be understood properly by stakeholders.”

Works performed in the latter phases of the project have only confirmed this intuition. Unlike the 3 other Macro-Regional Strategies, EUSAIR’s name very improperly describes what the Strategy is really about, and can therefore be judged misleading. And, when one takes a closer look, it appears that EUSAIR lacks a real, explicit, compelling purpose.

The Strategy is sitting at a strategic crossroad. If EUSAIR wants to increase its consistency and its understandability, it must make a strategic choice on its identity, rethink and explicitly formulate what is its main purpose, and realign its missions with what it really wants to achieve – no less!

This section of the report will develop this analysis and make recommendations on how to progress in these essential dimensions.

3.2.2. EUSAIR, an MRS unlike the others

Each of the 3 other Macro-Regional Strategies (the “Alpine”, “Danube” and “Baltic” Strategies) has been designed around:

- A geographical feature (the Alps Mountain Range, the Baltic Sea, the Danube River) shared by the countries participating to the Strategy;
- And common issues (pollution, water flows, threats to biodiversity...) to tackle, linked to this shared asset, and requiring multilateral cooperation.

Most (if not all) dimensions embraced by these 3 MRS are directly linked with this geographical asset (how to preserve it, how to promote it...) As a consequence, jointly managing the shared feature is really at the core of their purpose.

Conversely, EUSAIR’s name, referring to the two sea basins central to the macro-region, is misleading. Indeed, EUSAIR is not – not only – about managing common issues linked to the seas; and not all dimensions embraced by EUSAIR are directly linked to the seas. If anything, it is mostly about increasing cooperation among member countries, and prosperity in the region.

Of course, EUSAIR also has another distinguishing feature: it is only one not only comprised of member states, also counting IPA countries among member countries. While this feature is foundational to EUSAIR’s identity, it has never been explicitly formulated as such. For example, in the mission and vision statements adopted by the Governing Board in 2020, the reference to a “*harmonised, integrated and sustainable region*” can be construed as a reference to this fact, and to a potential integration into the EU; but these statements (mission and vision) can hardly be described as bold, assertive, and compelling – when they should be.

3.2.3. EUSAIR needs a meaningful purpose

In order to increase its understandability and awareness, the first thing that EUSAIR needs to do is clarify what is its fundamental purpose; in other words, what is **the most important thing it is trying to achieve**.

Is it really about **managing the two sea basins, with all associated dimensions**, ranging from environmental issues, maritime transportation, biodiversity, blue growth, sustainable tourism, and even the shared cultural and historical legacy?

It is about **increasing regional cooperation and prosperity within a macro-region still scarred by the conflicts** of the end of the 1990’s?

Or is it about **supporting the enlargement of the EU to the whole macro-region**, helping IPA countries build up their administrative capacity, and fostering an effective convergence on the ground?

While several goals can be pursued, combining several of these dimensions, adopting a clear end-game and a sufficiently ambitious purpose would greatly help EUSAIR build a stronger identity.

Our recommendation would be to adopt this last objective as the Strategy’s core purpose, and **to make EUSAIR the visible supporter of the European enlargement to the macro-region**, the go-to institution helping IPA countries build their administrative capacity and converge with neighbouring EU countries. Strengthening the maritime dimension of EUSAIR would bring it closer to the other MRS, but it would also drive EUSAIR away from the specificities of the macro-region, and thus from what gives the strategy its meaning. Increasing regional cooperation and prosperity goes in the right direction... but in a manner that is too down-to-earth, too narrow, too shy, falling short of what a meaningful purpose should be.

To the contrary, the authors believe that promoting European integration would give EUSAIR a bold and meaningful positioning, completely aligned with the intentions that animate most of its stakeholders. It would definitely create an emotion, an aspiration among EUSAIR’s target audience.

We believe that a very strong narrative could be built around this purpose, embedding and emphasizing the “brand story” of the macro-region itself, which is incredibly rich and powerful.

Indeed, the macro-region comprises Greece and Italy, which saw the rise of two great civilizations, among the first to have emerged on the continent and which have laid the foundations for the European culture as we know it; the macro-region can therefore be seen as the “Cradle of Europe”. Integrating the macro-region into the EU would somehow amount to Europe fulfilling its purpose, and the grand promise of unifying the continent. **Such an enlargement, which now appears as a political priority of the new Commission, would be one of these moments “when history meets geography”.**

Furthermore, the promotion of European integration is a vast “macro-concept”, that could embrace most, if not all, of the objectives currently pursued by EUSAIR, including its 4 pillars. For example, Pillar 3 “Environmental quality” can be directly linked to the European Green Deal; Pillar 1 “Blue Growth” sits at the crossroad between economic development, the promotion of a more sustainable economy, and increased coordination between member states – all of which are goals of the EU.

It would give even more meaning to some of EUSAIR’s dimensions:

- Bridging existing gaps between people, cultures, economies... and organizing their convergence;
- Building and sharing prosperity, across the macro-region and also at the scale of the continent;
- Honoring a shared past, common roots and their legacy;
- Promoting cooperation and dialogue, through an effective platform.

It would also be an opportunity for EUSAIR to be more directly aligned with European values and with the Commission’s priorities. We will elaborate on this aspect in a further section of this report.

Lastly, we believe EUSAIR is fully legitimate to be the champion of European integration. Indeed, enlargement is a long process, which requires patience, humility, which are both values that we feel in EUSAIR’s DNA (see next sections). It requires action on the ground, coordination with local authorities, civil society. Pursuing visible projects with large budgets is not enough! Starting from the ground, working with local authorities, with civil society, is EUSAIR’s added value.

EUSAIR can build on the political capital it has built by putting all its members – member states and IPA countries – on an equal footing. Standing for equality, it is already helping IPA countries level up for entering EU institutions.

Clarifying what is the main focus of EUSAIR is a strategic choice that the Strategy needs to make. It will be an essential, foundational step in defining its new positioning.

Our recommendation is for EUSAIR to adopt, as its central purpose, to be the visible champion of European integration, and to prepare the enlargement of the EU to the macro-region. We believe that this bold, clear positioning would give EUSAIR a much stronger narrative and more appeal for its target audience.

3.2.4. Core values and convictions

Throughout our work, we have been very attentive to the values, convictions and beliefs that are foundational to the identity of EUSAIR. And it must be said that, while some aspects of EUSAIR’s brand identity can be found weak or insufficient, the Strategy rests on very strong values, which seem to be shared by most of its stakeholders.

We have identified in particular the following values and beliefs as cornerstones of EUSAIR’s identity:

- Peace
- Cooperation and dialogue
- Inclusion
- Solidarity, cohesion
- Deep belief in the value of European integration, for the whole continent
- Protection of the environment as a shared moral duty
- The will to honor the macro-region’s common roots and its shared past

Whether these values are successfully conveyed in all of EUSAIR’s processes and activities, whether they are reflected in every touchpoint with every stakeholder is, however, another issue.

Looking forward to the future and to the Strategy’s new brand identity, our recommendation would be to continue to uphold these values and convictions, and also to assert more strongly the following ones:

- ***Attachment to the founding European values: freedom, democracy and the rule of law***
- ***Optimism for our shared future***
- ***Putting the youth and the environment at the core of the Strategy’s priorities***

3.2.5. Brand personality

The brand personality describes the feeling that the brand stirs in its stakeholders, the impression with which it leaves them. These traits relate to the “look and feel” of the brand.

In this regard, it is interesting to compare how the brand owners (in this instance, those who run the Strategy, the “implementors”, the members of the Governing Board, the Facility Point...) sees the brand, from the inside, and also how other, more external stakeholders see the brand.

And, in this case, it appears that there is a significant discrepancy between both perceptions.

Based on our interviews, here is how those who run the Strategy would like EUSAIR to be perceived:

- Humble
- Patient
- Hard working, dedicated
- Meticulous
- Inclusive
- Idealist
- Open

Yet, for all these traits, there also is another side to the coin, which is the associated shortcoming to each of these qualities. In many cases, it is this other side that is perceived by many of EUSAIR's stakeholders (and sometimes even by stakeholders deeply involved in running the Strategy):

- | | | |
|---------------------------|----|--------------------|
| - Humble | -> | Technocratic |
| - Patient | -> | Slow |
| - Hard working, dedicated | -> | Inefficient |
| - Meticulous | -> | Punctilious |
| - Inclusive | -> | Lacking leadership |
| - Idealist | -> | Naive |
| - Open | -> | Indecisive |

This discrepancy should be seen as an input, in itself, for the reflection on EUSAIR's brand identity, on its positioning, and beyond that, on how the Strategy is run, and how it interacts with its stakeholders.

In order to be more successful and to rally and inspire more stakeholders, EUSAIR must definitely work on "building up its character".

As nothing feels more comfortable than genuine authenticity, we believe that EUSAIR should do so by trying to push to the good side all of these traits, the ones listed on the left side of this list, which reflect what the Strategy aspires to be.

Looking forward, we therefore recommend to retain these traits for the aspirational personality of EUSAIR's new brand identity, and try to strengthen them, while also being aware that stakeholders' perceptions may, in some cases, be closer to the negative side of these traits.

4. A few thoughts on EUSAIR's governance

Works conducted during throughout the project have confirmed our initial diagnosis: **EUSAIR's governance is both a key competitive advantage for the Strategy and a limit to its impact.**

While today, decision-making appears diluted in numerous and complex governance organs, with too many people on board to be effective, a more effective leadership setup would provide an invaluable contribution to the efficiency of the Strategy, and in fine to its success.

Governance may appear as completely dissociated from the topical core of this project (EUSAIR's brand identity), but EUSAIR's governance actually contributes to what defines its essence. And when comparing EUSAIR to other multilateral initiatives active in the macro-region, governance is definitely a distinguishing feature for the Strategy.

EUSAIR's governance is highly inclusive, putting EU member states and IPA countries on an equal footing. For example, all countries, regardless of being a member of the EU or not, are eligible to chairing the Strategy through its rotating presidency. This feature also sets the Strategy apart from other cooperation mechanisms with the EU, and from the usual bilateral relations between the Commission and IPA countries.

Being multi-level, it involves the national political level, the administrations at national and subnational levels, and also civil society. This also appears quite unique.

This highly inclusive approach has delivered a significant political added value, and probably contributed to increased coordination within the macro-region. It has contributed to building and keeping a sense of belonging to a community, to a broader 'we'.

For some Pillars, it has also led to valuable outputs in terms of regional coordination and master-planning.

However, EUSAIR's governance, which has made its success, has also become an important limit for its efficiency and its ability to have an impact. A competitive advantage often has an associated downside; and **the inclusiveness of EUSAIR's governance seems to induce a lack of efficiency and of leadership for running the Strategy.**

The Governing Board plays its role and provides overall strategic steering, as it should; but it is not an executive body able to manage the Strategy on a day-to-day basis.

In corporate governance, there is often a dissociation between, on the one hand, the Board of Directors, which represent the shareholders, i.e., the real owners of the company; and on the other hand, the Executive Committee (the "ExCom", which is a team of top executives effectively running the company on a day-to-day basis. While the Board provides strategic guidance, sets the objectives for the company and makes high-level decisions, it is the Executive Committee that "executes" the strategy, making dozens of short-term decisions compliant with the Board's guidance, and designed to reach the objectives the Board has set. The ExCom is generally a relatively small team, with no more than a dozen people, and meets frequently (every week, or every other week).

Making an analogy between this framework and EUSAIR's governance, one could say that the Governing Board effectively plays the role of a Board of Directors; but **the Strategy lacks the**

equivalent of an executive committee, a body able and legitimate to effectively run the Strategy and make day-to-day decisions.

The Thematic Steering Groups (TSGs), which involve lots of representatives from many countries and entities, are effective bodies to stir coordination and dialogue; but they do not provide effective leadership for the domains that they cover. There are just too many people on board to allow efficient decision-making, and a classic pitfall in such configurations is to always seek consensus, resulting in an indecisive and slow leadership, often lacking ambition and settling for the smallest common denominator. Typically, TSG do not seem able to make arbitrations in any situation where conflicting interests exist between stakeholders.

In other words, **TSGs are very useful for concertation and coordination, but they are not designed to result in concrete outcomes.**

One representative example of the downside of inclusiveness is the coordination of each Pillar: the multiplicity of coordinators for each Pillar probably has political upside, but it also leads to a lack of ownership. So many coordinators are in charge for each domain, that no one really feel that they “own” the topics. As an illustration, in the course of this project, we tried to organize thematic interviews on each Pillars. For each Pillar, we wrote to the whole group of Pillar coordinators, and only had answers (even from a subgroup of these coordinators) for 2 pillars out of 4.

The heart of the issue is a classic phenomenon of behavioral psychology, described in the story of Everybody, Somebody and Nobody:

“Everybody was sure that Somebody would do it. Anybody could have done it, but Nobody did it. Because it was Everybody’s job, Everybody thought Anybody could do it, but Nobody realized that Everybody wouldn’t do it. It ended up that Everybody blamed Somebody when Nobody did what Anybody could have.”

We therefore believe that **EUSAIR’s governance should be improved to become more efficient, while preserving its inclusiveness.**

Regarding day-to-day management, it also seems that **the Strategy needs a stronger project management role, to oversee the “tactical duties” related to the Strategy.** According to the standards of project management, key responsibilities of such a role include:

- Coordinating the works of the Strategy’s contributors,
- Making sure sufficient resources are allocated to each task, according to its importance,
- Reporting and delivering updates on progress and on possible obstacles, to communicate with the team and key stakeholders
- Taking initiatives and preparing decision-making by relevant governance bodies (for example, it should help to define the Strategy’s goals and deliverables),
- Managing and resolving issues as they arise and identifying potential risks and creating plans if they occur,
- Keeping the Strategy on track for meeting its objectives and deadlines.

While some of these responsibilities fall in the scope of the Facility Point team, it appears that not all of these tasks are being performed today, probably due to a lack of resources (in particular human resources). To be more specific, good performance in such a role requires a combination of legitimacy, competence in project management, and – last but not least – enough time dedicated to this activity, which is very time-consuming.

Two solutions exist to fill this gap. Either the Facility Point should be given more resources (either internal or external) to fulfill this role of project manager for the Strategy; this means more time dedicated to this activity, more people, with profiles oriented toward project management skills. Or, another entity could step in to play this role, ideally an entity with sufficient legitimacy and competence in project management.

To be more efficient, EUSAIR needs more leadership, more ownership, more involvement. This report therefore recommends the launch of a strategic reflection on EUSAIR's governance. All parties involved in EUSAIR (member countries, the Commission, and other relevant stakeholders) should be involved in this reflection.

This works stream should in particular assess the relevance of the following evolution of the governance:

- To create an **executive decision-making body**, able and legitimate to effectively run the Strategy on a day-to-day basis;
- To strengthen EUSAIR's **project management role**, in order to properly oversee the tactical duties linked to the Strategy, to support this new executive body, and to act as an efficient transmission belt between this body and the other levels of the governance.

5. Alignment with the Commission's priorities

The undergoing repositioning of EUSAIR is an opportunity for the Strategy to **increase its alignment with the Commission's political priorities**; this would make all the more sense if the Strategy chooses to embrace the European integration as its core purpose.

It would only be fair for a process created under the umbrella of the EU; and would definitely put EUSAIR in a stronger position to benefit from increased financing from EU funds, as the EU is more likely to invest where it finds resonance with its values.

While realignment with the Commission's priorities and with European values appears as a natural and meaningful political move, it will require a consensus among EUSAIR member countries, and this consensus may necessitate some time to build up.

Firstly, EUSAIR could choose to **put more emphasis, in its DNA, on the European fundamental values, and the partnership principles**: cooperation, democracy, inclusion, independent justice, fair elections, separation of powers, the rule of law, human rights, protection of minorities...

These values could be more strongly at the core of EUSAIR processes.

In connection with these European values, EUSAIR could **further develop its cultural dimension**: to revive the shared history, the shared "we" between the countries of the macro-region, and also its deep ties with the rest of Europe. Throughout history, the borders of countries and empires have vastly moved, and most countries of the macro-region were part of larger political entities that played a central role in Europe's history: the Ancient Kingdom of Macedonia, the Roman Empire, the Holy Roman Empire, the Austro-Hungarian Empire...

But the political priorities of the Commission also include more concrete dimensions, such as **the digital transition**. EUSAIR could include a bigger focus on digital in its Connectivity agenda. This would be directly connected to the broader idea of convergence within the macro-region, as bridging the digital divide is a major issue for bringing people together.

Similarly, **the European Green Deal** is high on the Commission's political agenda. While addressing environmental issues is already a strong component of EUSAIR's identity, this dimension could be further strengthened, and more explicitly connected to the Green Deal.

Lastly, **putting the youth at the core of EUSAIR's priorities**, in all of its dimensions, would contribute to align the Strategy with the Commission's priorities

6. Conclusion on EUSAIR's new positioning

As this project comes to an end, we have tried to wrap up in this report where we stand on EUSAIR's repositioning, and to formulate recommendations on all the different aspects of this repositioning. While some of these dimensions (such as underlying "personality" and values of the new brand) should be easily accepted by most of EUSAIR's stakeholders, we are well aware that **other dimensions will require further work and discussions with EUSAIR member countries and implementors**. These include:

4. **Governance:** should it be modernized and improved? Would another governance body make sense? Does EUSAIR need a stronger project management role?
5. **Purpose – main focus and positioning:** what is the fundamental, far-reaching objective pursued by the Strategy? How do we characterize the Strategy? Is it the maritime dimension? Is it the promotion of coordination? Or the promotion of European integration?
6. **Alignment with the EU Commission's priorities:** should EUSAIR focus more on European fundamental values? Should it increase its environmental dimension? Put more focus on the Digital transition? On caring more for the youth?

We believe that the next steps of EUSAIR's repositioning should focus on these 3 dimensions. A round of consultations with EUSAIR's Governing Board, with representatives of member countries and with implementors, would be the best way to understand their opinion on each of these dimensions, and what they would expect from EUSAIR's new positioning. This would provide essential inputs for revising the strategy.

In our opinion, clarifying EUSAIR's purpose should come first. Having a clear position on the relevance of a stronger alignment with the EU Commission's priorities is also a prerequisite for further works, as it will be an important determinant of EUSAIR's new identity. On the more concrete side of things, improving EUSAIR's governance will be key for EUSAIR to increase its impact – and will therefore determine what ambition should EUSAIR embrace.

In any case, if EUSAIR is to make a significant contribution to the development of the region, **the status quo is definitely not an option.**

7. Roadmap for building synergies with other multilateral initiatives in the macro-region

In the benchmark on other multilateral initiatives in the macro-region produced in the framework of this project, we had established that EUSAIR had opportunities to build synergies with several of them. This section of the report makes a few suggestions on how to pursue these potential synergies.

Increased coordination with the Adriatic and Ionian Initiative

There appears to be a profound convergence of purposes between EUSAIR and the AI; a greater coordination of their actions, and even perhaps a stronger integration of their structures, would help them reassert their role as the main political driving forces in the region. In order to further assess the potential synergies and their feasibility, it would be appropriate to begin by sounding out the intentions of participating countries for the future of the AI. The national representatives for EUSAIR seem natural points of contacts to initiate this dialogue.

Next step: open a dialogue on the future of the AI with national representatives of participating countries.

Coordination with the Commission's European Investment Plan

Active on the ground since numerous years, working closely with national and subnational administrations and with civil society, EUSAIR could play a unique role in the implementation of the EIP, thus confirming its vocation to bring a decisive support to the EU's enlargement strategy. A strong partnership between EUSAIR and DG NEAR teams, around the implementation of the Commission's strategy for the Western Balkans, can combine the proximity to local stakeholders patiently built by EUSAIR, and the financial resources brought by the EIP. Both are necessary to succeed in the macro-region.

Next step: reinforce the dialogue between DG REGIO and DG NEAR to determine how such cooperation could be instrumented.

Technical cooperation with the Energy Community, the Transport Community, and the Council of Europe's Cultural "Route4U" project

We had found that these 3 initiatives had a certain overlap of objectives with EUSAIR, each one on a narrow part of EUSAIR's broad scope, and we believe that cooperation on this scope could be mutually beneficial. During our interviews, we had the impression that our interlocutors (Dirk Buschle for the Energy Community, Matej Zakonjsek for the Transport Community, and Stefano Dominionini for the Council of Europe) shared this opinion and had a genuine interest in establishing tighter relations with EUSAIR. These could take the form of regular coordination meetings at management level, to give each other more visibility on each initiative's actions, information sharing between operational teams...

Next step: open a dialogue between the relevant TSG coordinators for EUSAIR, and the interviewed interlocutors (Dirk Buschle for the Energy Community, Matej Zakonjsek for the Transport Community, and Stefano Dominioni for the Council of Europe)

General coordination with the Regional Cooperation Council (RCC)

The RCC shares with EUSAIR an interest for common topics (tourism, environment, connectivity, digital transition...) Its modus operandi seems a bit different, more focused on the upstream stages of policy shaping and not on concrete projects, which could make both initiatives complementary.

Today, little communication if any exist between both initiatives. According to the interlocutor that we interviewed (Petra Balazic), the RCC would be willing to establish communication with EUSAIR, to be better informed on its activities and to receive regular updates on its working programs and on its events. What could come out of this increased coordination is not clear... but deserves to be investigated.

Next step: resume contact with the interviewed interlocutor (Petra Balazic) and try to establish a dialogue at the appropriate management level to discuss potential coordination mechanisms.

Cooperating with the civil society initiatives of the Berlin Process

Pursuing similar goals, and acting at different levels (both at the political level and in interaction with civil society), the Berlin Process and EUSAIR appear rather complementary. However, several interviewees have suggested that the Berlin Process would be stopped in the short to medium term. What will happen to the created dialogue and related institutions involving civil society and businesses (RYCO, WBCIF, WBF...) if and when the Berlin Process phases out, is not clear at this stage.

Therefore, if direct synergies with the Berlin process are likely to be short-lived, and should not be a priority, indirect synergies – with RYCO, WBCIF and WBF – could prove more relevant, and more lasting. If an end is brought to the Berlin Process, to which multilateral process will these civil society frameworks be attached? EUSAIR would be legitimate to claim a role in their future, and the 3 of them seem interesting for EUSAIR, as they address some of EUSAIR's essential stakeholders. Our recommendation would therefore to look for synergies and cooperation with these institutions.

Next step: initiate a dialogue, at the right management level, with representatives of RYCO, WBCIF and WBF, to better understand what are their plans for the future, and how EUSAIR could work with them to further involve civil society.

As a conclusion, we believe that **synergies that should be investigated in priority are with the All and with the EIP**, as these could yield **great leverage and huge political benefits** to EUSAIR. The **technical cooperation with the Energy Community, the Transport Community, and the Cultural Routes of the Council of Europe**, are also **win-win, no-regret moves**, which in our view should come next in the order of priority. **General coordination and exchange of information** with initiatives like the **RCC** seem interesting, but less decisive. Lastly, **cooperation with the civil society initiatives created in the framework of the Berlin Process** seems interesting but more far-fetched, and would probably require much more work and political traction to implement.

8. Potential next steps for EUSAIR's repositioning

We see 5 different works streams to conduct to follow up on EUSAIR's repositioning.

6. **Clarifying EUSAIR's positioning:** this means agreeing on what should the "brand idea" for EUSAIR's new identity, meaning what is EUSAIR's main focus. This stream will build on works done under this project, and should in priority assess whether championing the EU enlargement would be. This could be done by a new round of bilateral interviews, and / or through a workshop involving most important EUSAIR's stakeholders.
7. **Finalizing EUSAIR's new brand platform:** once the "brand idea" (i.e., the main focus of EUSAIR's new positioning) has been validated and confirmed, more detailed works need to take place to produce a detailed brand platform, and review EUSAIR's communication plans.
8. **Rolling out EUSAIR's new identity:** when the new brand will be finalized, EUSAIR's repositioning will only be halfway on the road to success. "Selling" it internally to all stakeholders and having them adopt the new brand should be done with great care, and methodology.
9. **Deeper transformation of EUSAIR:** this report recommends reviewing EUSAIR's governance, and the way EUSAIR is managed as a project. This amounts to a deep transformation of the Strategy, which will require examining the relevance of the creation of a new executive body, and that of a stronger project management role. It will also require a lot of concertation with all involved stakeholders. This is also, in itself, a separate workstream, which should be started as soon as possible.
10. **Implementing synergies with other initiatives:** contacts with other multilateral initiatives could be initiated right away to further assess, and discuss about, the potential synergies identified in the course of this project. To be noted, if these discussions can be initiated without delay, they should only be finalized when EUSAIR's repositioning has been completed, in order to be sure that the articulation with other initiatives is optimally designed and implemented, in the target vision of what EUSAIR should be.

9. Appendix 1 – Preliminary findings report

This report was published on February 3rd, 2021.

In August 2020, the European Commission's DG REGIO issued a call for tenders inviting consultants to bid for a project aiming at the repositioning of the **European Union Strategy for the Adriatic and Ionian Region (EUSAIR)**. Having been selected at the outcome of this competitive process to lead this project, ORION's project team began its work mid-November, as the project was formally kicked off on November 17th.

Six weeks into the project, this first interim report aims at **sharing first insights** gathered through research and through the interviewed performed with EUSAIR's stakeholders designated by the DG REGIO project team. It focuses in particular on:

- Describing how we perceive EUSAIR's scope and ambition
- Providing feedback on how EUSAIR is perceived by its stakeholders
- Delivering a critical analysis of EUSAIR's current positioning, governance and communication
- Sharing some thoughts about possible evolutions of EUSAIR's positioning

9.1. Reminder on the objectives of the project

EUSAIR is one of the four "macro-regional strategies" adopted by the European Commission and endorsed by the European Council. Launched in 2014, the Strategy was jointly developed by the Commission and the Adriatic-Ionian Region countries and stakeholders, which agreed to work together on the areas of common interest for the benefit of each country and the whole region.

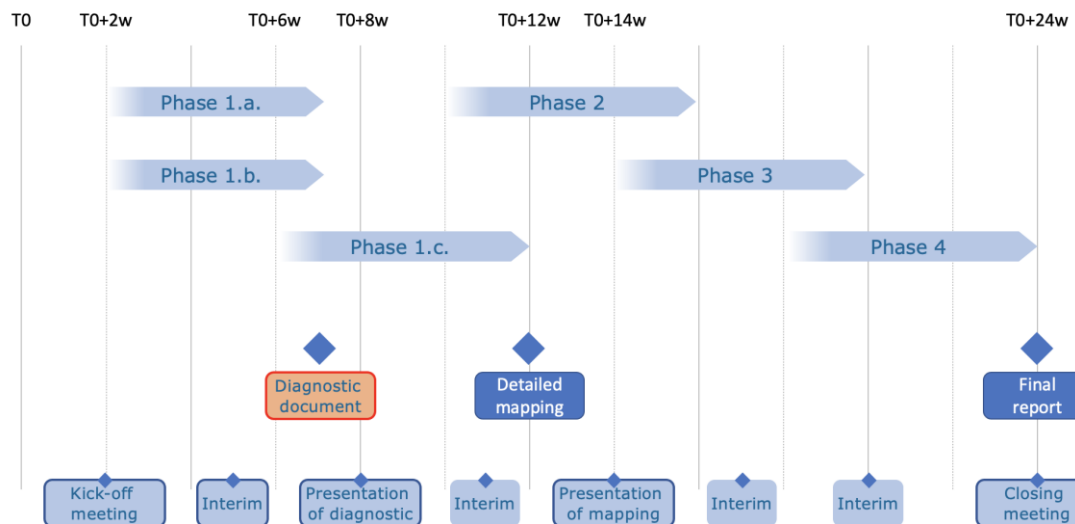
After six years of existence for EUSAIR, the assessment made by DG REGIO in the specifications of the project is that EUSAIR is insufficiently known by its stakeholders, and lacks a proper positioning – i.e., a positioning that would be in the same time authentic, understandable by stakeholders, and compelling. In a context where many regional initiatives coexist, trying to achieve different – but somehow similar – goals, with significant overlaps both in their agenda and participating countries, EUSAIR has so far failed to stand out and still lacks notoriety among its target audience. It has yet to define a "brand territory" making it visible and understandable by all target audiences, conveying clearly to these audiences what specific value it delivers to the macro-region. In marketing terms, EUSAIR's "brand identity" is both blurred and weak.

The objective of this project is therefore to perform a critical review of EUSAIR's current positioning, and to make recommendations on possible re-positioning options for the Strategy. The project must help to clarify EUSAIR's positioning, to articulate its specific vision, and to formulate its mission with a stronger expression. Beyond expression, EUSAIR needs to differentiate and to strengthen its identity, and try to achieve by doing so a greater complementarity with other regional initiatives. The purpose of this project is therefore to help **EUSAIR to rethink its "brand identity"**.

9.2. Where we stand in the project

As a reminder, the project has been structured with the following phases:

- 1.a. **Mapping of relevant stakeholders** (internal, external, target audience)
- 1.b. Analysis of **how EUSAIR is perceived** within its target audience
- 1.c. Mapping of **other regional initiatives** and relative **benchmark**
2. **Assess EUSAIR’s contribution** to regional cooperation and IPA countries’ European integration
3. Review **EUSAIR’s positioning** and **brand identity**
4. Review **EUSAIR’s communication strategy**



This findings’ report forecloses the first two phases (1.a. and 1.b.) of the project. We have also begun to work, in parallel, on the assessment of the **concrete and specific achievements of EUSAIR and of the alternative regional processes**, and of their contribution to regional cooperation and integration, which are the objects of tasks 1.c and 2.

The bulk of the work performed so far consisted in an intense discovery process through interviews and desk research.

15 interviews were conducted with stakeholders identified by DG REGIO’s core project team; another one is scheduled in January. 14 other stakeholders have been approached and have yet to propose convenient timeslots to the project team. The details of the interviews conducted can be found in Annex.

As to the desk research, it relied heavily on the extensive documentation provided by DG REGIO's project, on the analysis of the Commission's successive communications to European institutions concerning the progress of the MRS's and more specifically on that of EUSAIR, on the documents accessible on EUSAIR's website, on several reports produced by third parties (OECD, external consultants) and on several articles published in the press.

It is important to note that the COVID pandemic has created adverse conditions for such an investigative work, preventing the project team from meeting face-to-face with EUSAIR's stakeholders and from going on the ground, in the Adriatic-Ionian Region itself. As a consequence, the inputs which we have collected, and on which the present report is based, are essentially declarative.

Another limit of the methodology we have used is linked to the very important number of relevant stakeholders for EUSAIR. Despite the very numerous interviews that we have conducted, we still have not been in contact with any Pillar Coordinator, and with only one country coordinator, and many more interviews would be necessary to have an exhaustive understanding of all of EUSAIR's dimensions.

Despite these limits, and thanks to the support of DG REGIO's project team, we believe we have managed to gather enough relevant inputs to assess a reasonable "confidence interval" and base our first findings, and to pursue the next steps of the project.

9.3. Our understanding of EUSAIR's scope and ambitions

The Adriatic and Ionian region: a highly strategic region for the European Union

The geographic scope covered by EUSAIR (i.e., the Adriatic and Ionian region) is **a highly strategic region for the European Union**. It has **a strong symbolic intensity** as it encompasses five of the remaining countries candidates for accession (Albania, Bosnia and Herzegovina, Montenegro, Serbia, and since 2020, North Macedonia), some of the most recent member states to have joined the EU (Croatia, Slovenia), one of the founding states of the Treaty of Rome (Italy), and one emblematic country often considered, alongside Italy, as the cradle of Western civilization: Greece.

It is also a region with **a tragic history**: in a very recent past, the Balkan countries have been scarred by ethnic, religious, and territorial conflicts. While the region has been at peace for almost two decades now, the sad legacy of these conflicts is still very present in some countries of the region¹.

The integration of this region is therefore **essential for the stability and the cultural unity of Europe**: the accession of all Balkan countries, should or when it happens, will be a decisive moment when finally, History meets geography.

By their geographic situation, by their culture and by their history, the Western Balkans also constitute **a bridge between the East and the West**. At the outer border of Europe, adjacent to

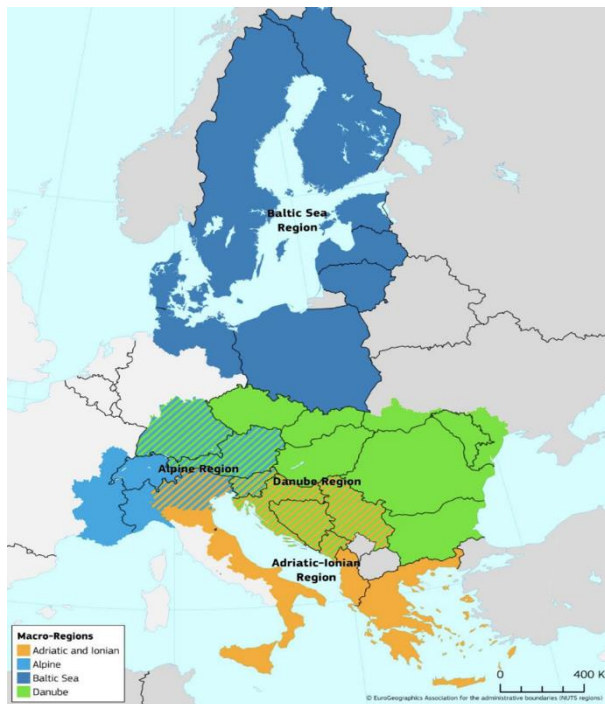
¹ See article from French newspaper Le Monde: « *Bosnie : vingt-cinq ans après, la « génération perdue » de l'accord de Dayton* » dated December 11th, 2020.

Turkey and located on some of the migration roads from the Middle East and Africa, this area is rich with geopolitical challenges for Europe.

The region also has **important economic and environmental stakes** for Europe: for example, the seas that border the region represent **a significant share of Europe’s maritime resources**. Another example is the Trans Adriatic Pipeline, which crosses the region, bringing natural gas from Central Asia to Europe. Due to a recurrent lack of investment, both public and private, the region’s potential for economic development is, to a significant extent, untapped. For example, it has a huge potential in terms of clean energy development, and of energy efficiency. This represents **a huge opportunity to advance the European Green Deal**.

EUSAIR: a collaborative framework to address common challenges of the macro-region

Formally launched in 2014, after first steps such as the Ancona Declaration in 2000 and, in 2006, the creation of the Adriatic-Ionian Euroregion, EUSAIR is **one of the 4 macro-regional strategies** initiated by the EU.



As for the other MRS’s, its objective is “to **address common challenges faced by a defined geographical area** encompassing both Member States and third countries located in the same geographical area, which thereby benefit from **strengthened cooperation** contributing to achievement of **economic, social and territorial cohesion**.”

As opposed to the other MRS’s, the Adriatic and Ionian macro-region has the specificity of encompassing **both current member states and candidate countries** for EU accession. Therefore, EUSAIR has specific objectives of **developing the region’s integration** and of **strengthening effective solidarity bonds**, both at local and national levels.

As highlighted in the report on *The European Union’s Strategy for the Adriatic and Ionian Sea Region* presented in October 2015: “*The vast potential of the Adriatic and Ionian region can be exploited only if all the countries of the region combine and coordinate their efforts, and if local and regional authorities are concretely involved*”.

Thematic scope

The strategy has been structured around specific objectives through **a four pillars approach**: Blue growth, Connecting the Region, Environmental quality and Sustainable tourism.



The actions and projects related to each pillar are coordinated by a specific Thematic Steering Group.

Internal organization and governance

EUSAIR has adopted a **three-level governance system**:

- A **political level**, consisting of Ministers for EU Funds and/ or Ministers of Foreign Affairs of eight participating countries taking strategic decisions at the EUSAIR Annual forums' ministerial meetings;
- A **coordination level**, represented by a Governing Board which convenes at least a couple of times per year;
- And an **implementation level**, represented by the 4 Thematic Steering Groups.

Each country has nominated two **National Coordinators** to represent it in the Governing Board, and make decisions in its name.

Each TSG is also coordinated by a tandem of **Pillar Coordinators**, representing two countries, one EU member state and one non-EU state.

Operational support to both levels is provided by the **EUSAIR Facility Point** strategic project (co-funded by INTERREG ADRION).

Interestingly enough, **EUSAIR's Governing Board was co-chaired by the Commission and the country holding the rotating EUSAIR Presidency, during the first three years** after the creation of the Strategy. After three years, the Commission stepped back, leaving full chair responsibility to the EUSAIR Presidency, so as to align with the practices in force in the other MRS, and to enhance ownership on the side of the rotating Presidency.

A certain overlap with other initiatives for the Adriatic and Ionian Region

EUSAIR is **one of many regional initiatives** trying to achieve different – but somehow similar – goals, involving different sets of participants, with significant overlaps in both domains (agenda and participating countries). From an outsider's point of view, these initiatives have so far failed to find a setup where they would act in perfect complementarity; instead, they appear to have developed some form of competition for local stakeholders' attention, and for key implementors's time and energy.

Some of the most prominent diplomatic initiatives and cooperation frameworks in the region include:

- **The EU Commission’s strategy for the Western Balkans:** an official approach of the EU, focused on preparing the accession of 5 candidate states (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, Serbia) to the Union.
- **The Berlin process:** multilateral diplomatic process initiated by Germany, in coordination with many EU member states (Austria, Croatia, France, Italy, Slovenia, the UK). Its objectives are to step up regional cooperation in the Western Balkans and to aid the integration of these countries into the European Union. It includes the five candidate states participating to EUSAIR, plus Kosovo.
- **The Adriatic and Ionian initiative:** diplomatic process initiated by Italy, aiming at strengthening regional cooperation, at promoting political and economic stability, with the final objective of creating a solid base for the process of European integration.
- **The Central-European Initiative** is another diplomatic initiative led by Italy, with the purpose of promoting regional cooperation for European integration. It encompasses a broader geographic scope extending to countries outside the Balkans (Belarus, Bulgaria, Czech Republic, Hungary, Poland, Romania, Slovak Republic...)
- **The South East European Cooperation Process:** brings together Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Greece, Moldova, Montenegro, North Macedonia, Romania, Serbia, and Turkey, with the common goal since 1996 to improve cooperation and to promote stability in South East Europe.
- **The Regional Cooperation Council,** another cooperation framework engages participants from South East Europe (SEE) and members of the broader international community on subjects which are important and of interest to the SEE, with a view to promoting and advancing the European and Euro-Atlantic integration of the region.
- The **Transport Community** and the **Energy Community,** both created by specific treaties, and focusing on thematic cooperation between the European Union and its neighbors, with the objective to extend the EU internal market rules and principles to countries in South East Europe, the Black Sea region and beyond.
- **The Economic and Investment Plan for the Western Balkans** recently launched by the Commission therefore to spur long-term economic growth of the Western Balkans and to and bring them closer to the EU Single Market, with a focus on a green and digital transition.

This list is a preliminary tentative to map relevant initiatives, and will be developed further in the next steps of the project.

9.4. Our understanding of EUSAIR's stakeholders

Embracing many dimensions in its positioning, EUSAIR also tries to address and engage **a huge number of stakeholders**. Indeed, the number and diversity of EUSAIR's targeted audiences match the dispersion of its explicit and implicit objectives; they also reflect the ambiguity of EUSAIR's positioning.

Looking at the big picture, there appears to be essentially **4 groups of relevant stakeholders**:

1. The **"insiders"**: EUSAIR's internal stakeholders, i.e., the people and institutions who are actively and effectively running the Strategy. This group includes all those referred to as "implementors", in EUSAIR's terminology, but also the members of the Governing Board and all those directly involved with the Strategy.
2. The **"Brussels influencers"**: these encompass all the players not directly involved in EUSAIR on a day-to-day basis, but that wield some kind of (direct or indirect) influence on the Strategy.
3. The **"locals"**, generally referred to as "the stakeholders" in EUSAIR's terminology.
4. The **"coopetitors"**, i.e., the other regional processes and initiatives active in the macro-region, which can be seen both as competitors and as potential partners.

As we will show hereunder, there can be some overlap between these groups.

The **"insiders"** group includes:

- Pillar coordinators
- Members of the Governing Board
- Ministers involved in the political level of EUSAIR's governance
- National coordinators
- The Facility Point
- Some units of the EU Commission (DG REGIO in particular)
- National administrations and authorities
- Sub-national administrations and authorities

While these are **already engaged within the Strategy**, we are under the impression that **their level of commitment can be variable**, due to an important workload and numerous solicitations, and perhaps also the **lack of a shared, strong vision of EUSAIR's objectives**, and of **awareness about the concrete benefits** that they, and they entity they represent, can derive from the Strategy. The efforts deployed in the recent period to **improve internal communication** are certainly very positive in strengthening their engagement; we believe however that, so far, these have not been sufficient.

The **"Brussels influencers"** group include most European institutions.

- The European Commission (units not directly involved in the Strategy)
- The European Parliament
- The European Council
- The Committee of the Regions
- Think tanks (e.g., Bruegel)

These stakeholders, although they appear as very important for EUSAIR, seem to be **insufficiently aware** of its existence and goals. During the interviews conducted, the project team was struck to

see that, **even within the European Commission** (and even within units dealing with the enlargement process), the awareness about EUSAIR was quite low.

The **“locals”** group is perhaps the most difficult to grasp, being multiform and incredibly vast. Considering the objectives pursued by EUSAIR and its ambition, one could say that **almost any institution and all citizens of the macro-region** is, indeed, a relevant stakeholder.

Local stakeholders explicitly targeted by EUSAIR include:

- National and sub-national administrations and authorities
- National and, most importantly, regional newspapers
- Universities
- Businesses
- Entities managing the ports, which are particularly relevant for Blue Growth
- All intermediate bodies that federate players of the civil society, such as Chambers of Commerce, networks of mayors and city officials, federations of universities...
- Associations
- The greater public

Significant efforts have been made to engage the civil society, through the EUSAIR Fora organized by the Facility Point, and these seem to have been successful in raising awareness and stirring meaningful conversations.

Conversely, it seems that **regional newspapers are so far insufficiently addressed**, while they would constitute **very efficient sources of influence** to relay EUSAIR’s messages to the greater public.

The **“coopetitors” group** include the initiatives above mentioned (in the section *“A certain overlap with other initiatives for the Adriatic and Ionian Region”*).

At this stage of the project, we believe that they should be considered as **a full-fledged group of stakeholders** to address and to engage with, being active in the same region and sometimes the same domains as EUSAIR, and having a potential for synergies with the Strategy.

Our impression is that, as of today, **this group of stakeholders has insufficiently been addressed by EUSAIR**. Indeed, some of the interviews which have been conducted have shown that there is **insufficient awareness** among these institutions or processes about what EUSAIR is, what objectives it pursues, what is its action plan, etc.

These interviews also suggest that there is **a potential for synergies** for several of them, and that some of the players actively contributing to running these initiatives would really be **open to an increased coordination**, so as to find better complementarity and increase their impact. Those that we have interviewed do not seem to view EUSAIR as being in competition with them, but rather as a potential partner, with which **the opportunity has not yet been seized to establish synergies**. It is only through **continued dialogue** that these synergies can be achieved.

9.5. How is EUSAIR perceived by its stakeholders?

One preliminary remark that the project team would like to make before addressing this essential question deals with the limits of the methodology employed, and of the limited times and resources deployed to gather the feedback that follows.

As stated in the previous section, the group of stakeholders that EUSAIR addresses is huge, very diverse. Investigating properly about their awareness and perception about EUSAIR would require huge means, like for example constituting panel groups and conducting hundreds of interviews. In the course of this project, we have only had access to a very small sample of this targeted audience, through a limited number of interviews (about 20).

We nevertheless believe that relevant and very actionable insights can be derived from this sample.

Our **main findings on how EUSAIR is perceived by its stakeholders** are the following:

- There is a huge disparity in the answers we have collected, on most of the topics discussed.
- The awareness on what EUSAIR is and does is low, and insufficient with regards to its objectives, and to its legitimate ambition.
- In our opinion, one of the common root causes for the two points above is that the Strategy is pursuing very numerous objectives, of very different nature, both tangible and intangible.
- Beyond that, stakeholders' views on EUSAIR's actual positioning and objectives are very contrasted. It is even more the case regarding what they should be.
- Many stakeholders find that EUSAIR's actual, concrete achievements have so far been limited.
- EUSAIR has proved, however, to be an efficient framework for dialogue.
- Some very interesting suggestions regarding EUSAIR's potential (re-)positioning have been made, nurturing the reflexion which will be conducted in the next phases of this project.

These findings are developed in the following paragraphs.

What is EUSAIR?

It was quite astonishing to see the disparity of the answers collected for this basic question.

The most common answer, unfortunately, was that the interviewee was not familiar with EUSAIR. Most of them had heard about EUSAIR, but could not really define what the Strategy is, nor elaborate on its objectives. Some interviewees knew of the 4 EU macro-regional strategies, and knew that EUSAIR was one of them, but did not know of EUSAIR's specificities.

For those who tried to provide more precise answer, there was a wide disparity in how they view EUSAIR: for some, *"it is a process"*, for others, *"it is a policy-making framework"*, *"a political platform"*, *"a policy-shaping framework"*.

For others still, *"it is a unique cooperation platform between the countries of the Balkans"*.

One of the answers seemed to capture a good part of the complexity of what a macro-regional strategy is: *“A strategy is also about working group, discussions, governing boards... it is easier to explain a project! A strategy is more like a cloud”*

The following answer dives with more details on how this ‘cloud’ operates: *“Macro-regional strategies serve as open and agile platforms for long-term strategic coordination and practical networking on shared priorities and actions. Strategies connect policy work, funding and actions that are implemented on the ground.”*

Lastly, one interviewee provided an answer that highlights beautifully the Strategy’s noble objectives: *“It is a regional project with the objective to create a common space, to strengthen what was destroyed during the 20th century.”*

What objectives is it pursuing? What should be its objectives?

Here again, many interviewees had to recognize that their knowledge of EUSAIR’s objectives was very limited. For the others, there was a vast disparity in the answers we have collected, which we quote hereunder, as they essentially speak for themselves.

“Creating a cooperation platform allowing to address issues which can only be dealt with at macro-regional level.”

“There is a great added value in bringing together EU member states and IPA countries. Often WB6 countries are treated completely apart.”

“Arranging for member states and non-member states to speak on a level-playing field is very important in itself.”

“EUSAIR is definitely contributing to the enlargement policy.”

“Is the implementation of projects the real objective? Or is it more about creating a platform for dialogue?”

“Cooperation is the main objective. It is very important in this period.”

“Building and keeping a sense of community. Usually, the Commission has a bilateral relation with the IPA countries, but here it’s really about bringing people together.”

“EUSAIR should be the bottom-up process tagging the right projects to fund with Programs’ resources”

What should be EUSAIR’s focus?

Here again, the answers collected were increasingly diverse. It is worthy to note that many stakeholders expressed very strong views on this topic, which in itself is a good sign: the proof of a real interest for what EUSAIR could deliver.

These views cover many different dimensions that EUSAIR has embraced so far, from thematic focuses (on energy, transport, maritime issues) to broader views on reconciliation, on integration into the EU, and, interestingly enough, on the cultural dimension of the Strategy.

“EUSAIR should be focused on providing a framework to shape policy”

“EUSAIR is focused on the sea! Very recognizable character, the main one.”

“EUSAIR should refocus on the seas, as a vector of social and economic cohesion for the region”

“Connectivity: used to be a fashionable term for energy, now it is outdated and the focus is decarbonization, and digitalization...”

“The integration of renewable energy and phasing out coal are now the main challenges for the region.”

“EUSAIR is a strategy for the Balkans. It is really about helping them level up, and integrate in the region, with the help of two senior member states.”

“EUSAIR should create on being a dialogue framework for experts from energy and transport communities, financing institutions, people from the ground, national and subnational stakeholders...”

“We are those who know the ground and who connect local stakeholders, including civil society, with global experts.”

“EUSAIR should focus on smaller, less visible projects, less rewarding but very necessary; smaller projects are often easier and faster to implement”.

“Projects where a high level of coordination is required could also be an interesting niche for EUSAIR”

“Strengthening the common culture of the macro-region, like with the Olive Trees Route”

“Nurturing and valorizing the region’s common heritage. Speaking to the soul of the region’s peoples”

As interesting as these inputs are, they raise important questions on EUSAIR’s positioning. In particular, should EUSAIR continue to pursue to many objectives, to embrace so many dimensions, or should it somehow ‘specialize’?

What have been EUSAIR’s concrete achievements?

As mentioned in the introduction of this section, many stakeholders believe that EUSAIR has so far delivered very few concrete achievements, but that it has proved to be an efficient framework for dialogue.

Several of them came up with this answer, formulated as a joke but which seems to be more serious than it seems: *“EUSAIR’s main achievement so far is establishing itself!”* Considering the complexity of the Strategy’s setup, one must recognize that it is indeed quite a feat to have established it successfully.

“There has been lots of governance issues, lots of policy issues, but not a lot of real outputs. Some hate this strategy because of this lack of concrete results.”

In terms of the concrete objectives pursued through the four pillars: *“The strategy’s priorities have been integrated in local priorities by national and subnational authorities.”*

“EUSAIR has had a positive impact on the management of environmental issues”

On another point of view, EUSAIR has obviously contributed to establishing a peaceful, political and administrative dialogue between the countries of the regions, to discuss common challenges, which is already an important progress.

“The strategy has contributed to the enlargement policy, and to increasing the stability of the region. That is a lot!”

“Through EUSAIR, representatives of Balkan countries sit together and discuss about other topics than immediate concerns.”

Even more importantly, *“EUSAIR has contributed to a sense of belonging to a macro-region, to a broader ‘we’.”* This appears to be true both at the political level, but also to some extent for some parts of civil society: *“Forums of the cities, of universities and chambers of commerce have done a good job.”*

Another aspect which appears very significant is that being part of EUSAIR – and, even more so, assuming its Presidency – has pushed some of the non-EU countries to build up their administrative capacity, and to effectively learn the ‘rules of the game’ of how EU institutions are managed. It has thus been an efficient preparation for the integration into the European institutions.

“Some IPA countries have managed to successfully run the strategy during their Presidency. This is a very important success in terms of capacity building, and in the preparation of integration in EU institutions.”

In conclusion, we have found the following quote, issued from the Commission Staff Working Document accompanying the Report from the Commission on the implementation of EU MRS (29/01/19), to be particularly relevant and representative of the feedback we have collected:

“Accordingly, while the Strategy has now been in existence for four years, results visible to external stakeholders remain few. Internally, however, in addition to fully operational governance bodies, noteworthy progress has been achieved as regards understanding of potential benefits of strengthened collaboration and networking, not to forget a growing sense of community when broaching common concerns at a wider policy level.”

What would make EUSAIR more efficient?

While some interviewees have expressed their belief that “EUSAIR is working well so far”, with a subtle balance that needs to be kept, most of them (at least, those being part of the “insiders” group) have voiced frustration at the lack of efficiency of the existing setup.

Some of the obstacles met by the Strategy appear structural, and will only change over time:

“The lack of administrative capacity of some countries is making very difficult to achieve effective progress.” “The commitment of the different countries is very unequal. Some countries are not engaged and this makes it much more difficult for the others.”

And, conversely: *“Italy is very heavily involved in the strategy. It does not leave much room for others.”*

Among the most specific recommendations formulated: *“Simplifying the governance would go a long way!”* and *“Clarifying the strategy’s scope would be good.”*

Another point related to the Strategy’s governance relates to leadership, and in particular to the Commission’s potential role as an effective sponsor of the Strategy: *“More leadership from the Commission!! You have to have someone who is the boss, and not just a project leader.”*

There also appears to be gaps between the Strategy’s ambition and its capacities: *“There needs to be specialized officers, and a press office able to engage with regional newspapers.”*

Several suggestions were made regarding coordination with other initiatives active in the macro-region, calling for *“Structured cooperation, regular coordination meetings with other initiatives.”* *“Maybe a steering committee of all multilateral initiatives in the region”*

Lastly, a recurring theme was the need for: *“A narrative which would be more emotional, more connected to a purpose.”* In other words, there is a need for a clearer positioning, expressed through a compelling narrative, which the Strategy has so far failed to deliver.

9.6. An ambiguous positioning: EUSAIR’s original sin

Embracing too many dimensions, pursuing too many goals, EUSAIR’s positioning appears as its original sin, today hindering the progress of its brand and its ability to be understood properly by stakeholders.

A cryptic name lacking evocative power

The acronym EUSAIR does not refer directly to any clear geographical reality in comparison to the three other macro regional strategies: the Baltic is a sea, Danube is a river, the Alps are a mountain range. EUSAIR is... EUSAIR.

Besides, EUSAIR is often surrounded by other acronyms such as Interreg or Adrion which, by the way, are appearing on the EUSAIR website homepage very close to the EUSAIR logo, leading to an unclear message. **EUSAIR is like many acronyms of which EU institutions are fond: empty of meaning.**

On the contrary, symbols that would refer to a glorious past and a common history are deeply needed to bring people together and create a cultural unity, especially in a region that has suffered, and still suffers, from so many divisions and tensions. We can easily agree on the fact that acronyms are powerless when it comes to build and strengthen a shared, common identity.

It is interesting to note, for our current reflection, that the EUSDR MRS differs from the other strategies in terms of naming and visual identity. The combined use of the name “Danube Region Strategy” instead of EUSDR, and that of a stylized river on the logo, undoubtedly yields a stronger evocative power.

A complex geographic scope

One of the difficulties EUSAIR has to face is that of the unity among its 9 member countries, which is not a given. There is still a long way to go before the region can be considered as a consistent and coherent area.

Indeed, EUSAIR does not cover a single sea basin but **a basin with two interconnected seas with substantial geographical and environmental specificities**, with a diversity of landscapes and coasts. The region is also home to **remarkably diverse cultural influences** (Slavic, Mediterranean...) and to **different religions**. It is worth noting that during the interviews, some of our interlocutors have clearly pointed out the differences between the “countries in the North” and the “countries down in the South”.

In the region, we can find some **strong bilateral relationships** (Italy with Albania, or Croatia with Slovenia), which could possibly promote or, on the contrary, hinder a more collective dynamic. Some countries have a coast, and some countries belong to the hinterland (Serbia and Macedonia have no access to the sea, and Bosnia Herzegovina has a very tiny one). There are also **strong economic disparities** between the 95 million inhabitants of the region: Italy’s GDP per capita is four times that of Montenegro, and Slovenia’s GDP per capita is four times that of Serbia.

Finally, the WB6 countries do not have the same relationship to the EU. Some (Slovenia, Croatia) are already members, the 4 others (+ Macedonia) are still in the waiting room. For how long?

The limits of a multi-objective strategy

There is also an ambiguity on the scope and purpose of the strategy. The multi-purpose dimension makes EUSAIR singular, as compared to other macro-regional strategies. For instance, the Baltic strategy or the Danube strategy have focused, since the beginning, on one specific and very clear objective that has not changed over the time.

The question is then: **to what extent can a strategy be multi-purpose?** Is it a factor of strength or a factor of weakness to be all at once, i.e., a sea basin strategy, an enlargement strategy, an economic development strategy, and a reconciliation strategy? Can a strategy be looking on the same time for concrete impact and policy making? Can it be simultaneously a promoter of high-level political dialogue and specific projects on the ground? Can it manage on the one hand very large and visible flagship projects, and on the other hand small but concrete incremental changes?

To answer those key questions, it might be useful to consult the *Communication from the commission concerning the European Union Strategy for the Adriatic and Ionian Region* (June 2014). This document, published when EUSAIR was launched, wanted to build on lessons learnt from the existing macro-regional strategies. It insisted on the fact that a key success factor is “*to focus on a limited number of common challenges and opportunities*”.

Complementarity or duplication?

The ambiguity also applies to the 4 pillars approach chosen by EUSAIR. EUSAIR does not have a niche positioning, but a multisectoral approach, in areas of highly competitive intensity already dealt with by other DG’s or organizations with stronger financial power or legitimacy (for example, connectivity is already addressed by the Energy Community and the Transport Community).

If EUSAIR could be part of a **structured cooperation with good complementary**, this can positively lead to an increase of efficiency. Difficulties arise when duplication becomes obvious. Our first interviews have suggested a potential risk of duplication, in particular for the connectivity pillar. As the Transport Community and The Energy Community have a very clear mission, more attention seems necessary to avoid doing the same things twice.

As a provisional conclusion, we would like to stress that **pursuing too many, and too different objectives simultaneously is somehow blurring EUSAIR's positioning**. In this regard, it is very revealing that among the stakeholders who were interviewed to describe what EUSAIR is about, and what makes it unique as a process, very few were able to give a clear answer focusing on obvious specificities.

To use a marketing analogy, we could say that **EUSAIR is a "brand" with a weak "identity" and a weak "awareness", addressing different "markets" without having neither a "competitive advantage" nor a clear leadership in any of them**. Consequently, there is a lack of materials on which to build a common narrative for both internal and external stakeholders (see below Communication).

The mission and vision formulated in 2020 are a positive first step (but only that...)

In September 2020, a project led by the Facility point with the support of an external consultant was a first step in a good direction. However, we consider that the resulting vision and mission statements are not yet meeting the requirements.

The mission statement, as it is formulated: "Connecting people and institutions to build a common understanding of cooperation for a harmonized, integrated and sustainable region" appears too general, and could easily work for... any region in the world!

The vision statement: "Joint multi-level solutions for common challenges towards a stronger Adriatic and Ionian region" does not sufficiently express the "future we want" for the region.

While we appreciate the difficulties of reaching consensus on a common wording, with a vast number of stakeholders and through complex processes such as that of the EUSAIR 'cloud', one could also find the result to be precisely that: consensual, abstract... and a bit 'cold'.

In order to work and be effective, EUSAIR's mission and vision statements should be more evocative, more compelling, and convey stronger emotions.

9.7. Governance and organization

A highly complex organization, hindering efficiency

The Governance is based on three different levels working together: the political level, the coordination level, and the implementation level, which can all rely on the Facility point. Those key elements of governance are the same for the three other MRS, with apparently, in the case of EUSBSR, EUSALP and EUSDR, a better efficiency. So, why is the functioning of EUSAIR more difficult? The various interviews we have conducted helped us to highlight some of the points that were already underlined by the latest OECD report.

First, there seems to be a significant **disconnection between the political level and the technical level in some countries**, which results in implementation difficulties. It can be mainly explained by the fact that, at the political level, EUSAIR is monitored only by the national Ministries of Foreign Affairs and Ministries in charge of European funds. The inter-ministerial level should also be involved, so as to guarantee that decisions are transformed into concrete public policies.

There also seems to be some **overlap of competences between the coordination level and the TSG's**, with a “who does what?” issue.

Moreover, the **mobilization of subnational (mainly regional) entities is not strong enough**, because for many countries, especially among the WB6, the **administration on the ground is not sufficiently robust** or simply does not exist. Finally, there are constant tensions between national priorities (which most of the times prevail for national policy makers) and transnational issues.

Despite those difficulties the strategy may somehow be effective. Some **maritime projects** such as Integrated Coastal Management or Port management are on their way. The **protection of the environment** also shows some results with the implementation of a coherent network of Marine Protected Area. The launch of **several cultural roads** is also a great step forward for Tourism.

A huge difference in administrative capabilities among the countries

All EUSAIR countries do not have the same political or administrative background. If Italy and Greece have relatively stable governments and strong, skilled administrations, most of WB6 countries are facing a high political instability due to recurring elections, and a high turnover of both political and administrative staff, which leads to a shorter-term political vision.

Besides, the 9 member countries do not have the same capacity for engagement: the 5 non-member states have limited national funds to finance the macro regional projects; they are logically waiting for EU funds to support their own development.

As a consequence: a lack of ownership

The very complex organization, the lack of administrative capacity, and the lack of concrete results on which capitalize may explain a low or irregular degree of involvement in the TSG's. In many cases, some of the implementors are described as “overwhelmed” by a very high workload, and have little incentives to prioritize EUSAIR over other responsibilities.

Also, several persons that we interviewed, with a good knowledge of macro regional strategies, insisted on a **lack of ownership of the strategy**. Even though the existence of the Facility Point has

made things significantly easier for the organization to work, its role seems, most of the time, to be that of an operational project leader. **EUSAIR currently lacks a real sponsor, a strategic project leader able to make daily decisions effectively, and to be accountable for them.**

9.8. Communication

A need to further improve external communication tools

Over the last years, thanks to the work and support of the Facility Point, many communications tools have been implemented: a website is online, a YouTube channel has been launched, a Twitter account has been created, a newsletter is regularly circulated... **Those achievements illustrate a willingness to communicate widely.**

Yet, our analysis is that **progress could be made to improve the quality and the efficiency of these tools.** The graphic design and the visual content of the website could be more engaging. And sometimes, which is more critical, the contents (especially the videos) have an amateurish look which can be confusing. The social media lack regular update; there is a need for more content sharing to boost the number of followers.

The fact that **two newsletters are being circulated** (one edited by the Facility point and the other by the Marche region) is on our opinion not a good thing: it is time and money consuming, and actually weakens the messages that EUSAIR wants to deliver. We also think that a special attention should be given to local media, and websites dealing with local news; it is crucial so as to raise public awareness. In this regard, **the creation of a full-time press office could be useful** to boost media relations.

From a single language to a multilingual communication

Up to now, English is the only language used for external communications, which may exclude some people from accessing a complete and clear information. Although using all the languages of the region requires an extra effort, it will certainly be a way to reach a great deal of targets, in particular the actors on the ground.

Additional efforts are needed for internal communication

One of the recurring feedbacks collected through the interviews of stakeholders from the “insiders” group, is the insufficiency of internal communication. Here again, **many efforts were deployed in the recent period, successfully improving internal communication, but a lot remains to be done.**

There is also a **lack of mutual information** between the three governance levels, and a same lack across the 4 pillars and the TSG's, which can only foster a natural tendency to work in silos.

The **annual forum seems to have been successful** in gathering stakeholders, stimulating networking, knowledge transfer and the exchange of best practices. This event must be replicated in the coming years in the different countries.

The **recent creation of the stakeholders' platform is a success**. However, it appears **a bit complex, perhaps too technical in its use** (e.g., difficulty to find information and to interact), it does not stimulate sufficiently the macro-regional dialogue among users.

Lastly, the report on the project led by the Facility Point to address communication issues ("*Final report – capacity building for EUSAIR communication, January 2020*") brings light to a more fundamental difficulty. It shows how participants to the workshops, which were all part of this "insiders" group, were absolutely unable to speak in common terms of the purpose of the Strategy, of its mission and essential objectives. **Despite the efforts deployed by the Facility Point, our interviews suggest that even the "insiders" group still lacks, today, a common language to talk about the essence of EUSAIR.**

The priority: a shared vision of what EUSAIR wants to achieve.

Internal communication is about making people working better together. It is thus about **putting forward common goals and values, and promoting a shared vision**. Those elements are essential, and still insufficiently developed and owned across the "insiders" group. Defining them should be the priority before setting up any new internal communications tools.

The reflection led with the Council of Europe: an important and overlooked asset

Starting with a common work on cultural routes, a very interesting work was conducted jointly by the Council of Europe and the Commission. Besides cultural routes, and so as to better identify them, it investigated the question of **a brand identity for the Adriatic and Ionian Region (AIR)**, and is of great interest when EUSAIR is reflecting on the same question for itself. The image analysis and SWOT analysis performed as part of the brand audit are particularly interesting. The conclusions of this work must contribute to the reflection on a possible new branding for EUSAIR, and appear to have been, so far, overlooked.

9.9. The broader picture: three major political trends for the ten years to come

To be effective, EUSAIR'S positioning must take into the three major trends that will shape European public policies in the next ten years.

Environment and climate change are on all the agendas

The growing impacts of climate change in our daily life and the acceleration of its pace have placed environmental and climate change issues at the center of all political agendas. On December 11th 2019, President Ursula von der Leyen set a very clear direction when she presented the *European Green Deal for making EU's economy sustainable*: "*We are determined to succeed for the sake of this planet and life on it, for Europe's natural heritage, for biodiversity, for our forests and our seas.*"

There is no doubt that, from now on, this Green Deal has become the new growth strategy for Europe. On January 14th 2020, the *Green Deal Investment plan* was presented: € 1 trillion of

investments over the next decade. On May 20th, the *EU Biodiversity strategy for 2030* was revealed, and on November 19th, the *Offshore Renewable Energy* strategy was announced. Restoring biodiversity, cutting pollution, boosting the production of renewable and carbon-free energy, and providing healthy food for all are expected to be integral part of all policy areas.

Efficiency is not an option

Most institutions and public administrations across Europe have to cope with severe budgetary constraints, and are increasingly held accountable to citizens. In the context of the COVID (and post-COVID) economic crisis, demands of greater efficiency are all the more pregnant. Delivering on these demanding requirements will require administrations and institutions to deeply rethink their operating methods, so as to become more efficient with reduced means, in the same way that the private sector is doing.

The European Union is no exception. It is facing a double expectation: rationalization both in terms of political representation and of administrative functioning. Delivering on them will require an overall strategy. It is in this context that the European commission launched in 2015 the EU Budget Focused on Results. Similarly, the Parliament is promoting principles aimed at sound financial management. Taken together, all these evolutions indicate that to be better perceived, any initiative must demonstrate how it is acting in the sense of creating a maximum added value for EU citizens.

Citizen participation must be at the center of all decision-making process

This observation is not new: defiance against the EU is growing ever greater among European citizens who do not understand or see the concrete results of its actions. Strong reforms are thus needed to bridge the gap between the decision-makers and the citizens, at all levels. Europe can do much better in reconnecting with those who feel left out, and in providing better tools for participation in decision-making processes. This is more or less the conclusions of the report of the European Committee of the Regions (ECR) *“From local to European, putting the citizen at the center of the EU agenda”*, published in July 2019. Karl-Heinz Lambertz, President of ECR made his concern very clear: *“Europe needs not only sound financial investment and political unity, but new channels of dialogue that ensures the EU listens and responds to the wishes of its citizens”*.

This is a huge task, but our compass to identify and recognize the appropriate and transformative initiatives should be their potential to make Europe more collaborative, to increase transparency, and to strengthen democracy.

9.10. Reflections for the next steps

In the next steps of the project, we will deepen the benchmark between EUSAIR and the other regional initiatives of the region, and the reflection on the specificities of EUSAIR. Eventually, it will all come down to this fundamental question: what makes EUSAIR unique?

In marketing terms, one would ask: what are EUSAIR’s “key selling points”? And while this question is simple, it requires to have already addressed the underlying, more basic questions: what is the product that we are trying to sell? What service are you rendering?

This questioning will lead us to a better understanding of EUSAIR's purpose. While it may seem casual, discovering what is the true purpose of an institution is an essential and lengthy process, which often requires many iterations, to go deeper and deeper into the essence of said institution.

A proper purpose needs to be in the same time simple, differentiating, and authentic; only then can it be the solid cornerstone of a new brand identity.

So far, a few features of EUSAIR have struck the project team as being really specific to the Strategy:

- It is delivering a real contribution to **creating a sense of belonging**, a sense of a common “we” in the macro-region;
- It has a real **political added-value for Western Balkans non-EU countries**, which are full-fledged members of EUSAIR and are treated on a level playing field;
- It has led these countries to **significant capacity-building efforts**, in particular for their administrative capacity;
- It has led to real progress on **environmental protection, coastal and port management, tourism...**
- It has a **strong cultural dimension**, as the Tourism pillar addresses the need to revive the rich history of the macro-region;
- Its **focus on the seas**, and on all **maritime issues**, is quite unique, and is a good match with what appears as an essential component of the macro-region's identity.

At this stage, we have identified these dimensions – political, maritime, environmental, and cultural – to be potential ‘competitive advantages’ for EUSAIR. In the next weeks, the project team will seek to validate this insight, in particular through the benchmark.

The following step will be to determine **whether, and how, they can combine consistently into a powerful and authentic new positioning for EUSAIR.** While it is generally positive to have as many solid competitive advantages as possible, a strong brand identity requires clarity and consistency. It is therefore likely that some of these features will be more dominant than others in the resulting cocktail.

Once these questions are sorted out, we will begin **work on the fundamental bricks of EUSAIR's new ‘brand identity’** – in particular, the compelling narrative that it currently lacks –, and then address the “how”, i.e., **review the communication strategy** deployed to express this identity and engage with stakeholders.

9.11. ANNEX – list of interviews performed

The members of the project's core team, have been interviewed in priority:

- Gilles Kittel (EU Commission, DG REGIO)
- Giuseppe Di Paola (EU Commission, DG REGIO)
- Astrid Aulnette (EU Commission, DG REGIO)
- Klaudia Feurle (EU Commission, DG REGIO)
- Nadine Lakhall (EU Commission, DG REGIO)

On their recommendation, the following stakeholders have been interviewed so far:

- Jean-Pierre Halkin (EU Commission, DG REGIO)
- Nathalie Vershelde (EU Commission, DG REGIO)
- Colin Wolfe (EU Commission, DG NEAR)
- Wojciech Kowalski (EU Commission, DG NEAR)
- Alain Baron (EU Commission, DG MOVE)
- Petra Balazic (Regional Cooperation Council)
- Andreja Jerina (Slovenian EUSAIR Presidency)
- Staša Mesec, Olga Abram, Ines Grenc (Facility Point)
- Baiba Liepa (Interact Programme)
- Lusia Chiodi (Osservatorio Balcani e Caucaso Transeuropa)
- Matteo Tacconi (freelance journalist, works on the EUSAIR Stakeholders' platform newsletter)
- Dirk Buschle (Energy Community)
- Matej Zakonjsek (Transport Community)
- Ioannis Firbas (National Coordination Authority for ESIF, Greek Government)
- Miroslav Veskovic (EU Commission, Joint Research Centre)
- Stefano Dominioni (Council of Europe)

More interviews are scheduled in the coming weeks.

10. Appendix 2 – Benchmark of multilateral initiatives active in the Adriatic-Ionian macro-region

This report was published on April 20th, 2021.

This is the **second report** produced in the framework of the project “(Re)positioning of the EUSAIR” initiated by the European Commission – DG REGIO.

This report focuses on **the other multilateral initiatives active in the Adriatic and Ionian Macro-region**, which share some common features with EUSAIR. After a **reminder of what EUSAIR’s actual contribution** has been, according to the stakeholders that have been interviewed in the course of this project and to our own analysis, **the report benchmarks a selection of regional initiatives, with a focus on overlaps and potential synergies with EUSAIR.**

10.1. EUSAIR – its actual contribution

The general consensus on Macro Regional Strategies, as detailed in the COWI report of 2017 and reminded in the OECD report of 2019, is that they require at least 5 years to reach a sufficient level of maturity to deliver significant results. EUSAIR was initiated in 2014; in its September 2020 “Report on the implementation of EU macro-regional strategies”, the Commission staff assessed that **EUSAIR is now reaching the ‘Phase 2’ level of maturity**, where it “*is understood by external stakeholders and starts to operate – the focus [moving] more towards external stakeholders*”.

After interviewing **a panel of over 25 stakeholders**, representative of the different categories of stakeholders identified in the first phase of the project, and based on our own analysis, our assessment converges with that of the Commission. Even though it is still not very well understood by external stakeholders, **EUSAIR is currently starting to operate on concrete projects, and shifting its focus towards external stakeholders.** The existence of the current project is itself an illustration of that shifting focus.

Most of the stakeholders that we have interviewed have, to some extent, expressed **positive appreciation of EUSAIR’s actual contribution**, with the following points being recurrent in this feedback.

EUSAIR has contributed to the stability of the macro-region, by nurturing a **peaceful political and administrative dialogue** on common issues between all the countries of the macro-region. As one stakeholder put it: “*Through EUSAIR, representatives of Balkan countries sit together and discuss about other topics than immediate concerns.*” In itself, this is not a small thing considering the tragic recent past of the region. This appears to be true not only at the political level, but also to some extent for some parts of **civil society**, through **forums of the cities, of universities and chambers of commerce**, which seem to have done a good job in bringing relevant stakeholders together. This **increase in the interactions among stakeholders** in the Adriatic-Ionian region is a positive result to be credited to EUSAIR.

Through this dialogue and these interactions, EUSAIR also contributes to DG REGIO's main goal of economic, social and especially territorial cohesion and thus also to the **convergence of the different countries**.

Another positive point shared by most relates to **EUSAIR's governance, which puts all countries on an equal footing, both IPA countries and member states**. This is a differentiating feature that sets EUSAIR apart from all other processes associated with European institutions, and is strongly appreciated. EUSAIR has a **very inclusive governance**, that involves many different levels, from the political level to local stakeholders, on the ground. It is a **very democratic governance**, which has proven to be complex, maybe **not very efficient in itself**, but nevertheless **very effective in yielding positive political results**, and in promoting European values.

Another positive aspect shared by many stakeholders and which appears very significant is that being part of EUSAIR – and, even more so, assuming its Presidency – has pushed some of the non-EU countries to **build up their administrative capacity**, and to effectively learn the 'rules of the game' of how EU institutions are managed. It has thus been **an efficient preparation for the integration into the European institutions**: *"Some IPA countries have managed to successfully run the strategy during their Presidency. This is a very important success in terms of capacity building, and in the preparation of integration in EU institutions."*

We can therefore conclude that **EUSAIR has brought a unique contribution to the preparation of the enlargement of the EU** in the Western Balkans.

Several stakeholders have expressed that EUSAIR has brought **significant progress in several dimensions directly linked to the Strategy's 4 pillars**: it is the case in particular for **maritime issues** and **the environment**. The **maritime dimension of EUSAIR**, in particular, **is quite unique** among other regional initiatives, and EUSAIR could benefit by further strengthening its position on this "niche", which also happens to be very much connected to other dimensions of EUSAIR's priorities: for example, the creation of protected maritime zones (like has been done between Italy and Croatia) will benefit to the environmental quality of the sea basins, improve their fishing potential on the medium term, and benefit both to the region's circular economy and its tourism industry.



Overall, the strategy's objectives on its Four Pillars seem to have been properly **integrated in local priorities** by national and subnational authorities. In this regard, **the ongoing embedding process** is a big step ahead.

During the first phase of the project, when we discovered what EUSAIR really is and how it works, we were struck by the contrast between the **commonly-accepted vision that EUSAIR is essentially a top-down process**, and the reality we have discovered. In our view, **EUSAIR has managed** – through its complex, multi-levels governance – **to also be, to some extent, a bottom-up process**, and to be able to play this role of **connection platform between local stakeholders**, those who work on the ground and know the local specificities, and **the European experts, civil servants and politicians**, who frame the big picture. This unique position has, so far, insufficiently been exploited.

Last but not least, all stakeholders share the feeling that **EUSAIR has fostered a sense of belonging together, the sense of a “shared we”**. This is a huge political achievement, that definitely paves the way for the enlargement of the EU to the IPA countries of the macro-region.

However, many stakeholders also believe that EUSAIR, despite being an efficient framework for dialogue, has so far delivered **very few concrete achievements – or at least, not many visible, tangible, quantifiable results**. Many share the view that *“EUSAIR’s main achievement so far is establishing itself.”* Several of them came up with this answer, formulated as a joke but which seems to be more serious than it seems. Considering the complexity of the Strategy’s setup, one must recognize that it is indeed quite a feat to have established it successfully.

10.2. The Berlin Process

Nature of the initiative:

The Berlin Process is a political and diplomatic, high-level initiative, linked to the future enlargement of the European Union in the Western Balkans. Launched in 2014 at the initiative of Germany, it aims to boost both regional cooperation among the Western Balkan countries, and their European integration. To this end, regional and European decision- and opinion-makers gather at annual and interim Western Balkan Summits, Civil Society Forums, Business Forums and Youth Forums.

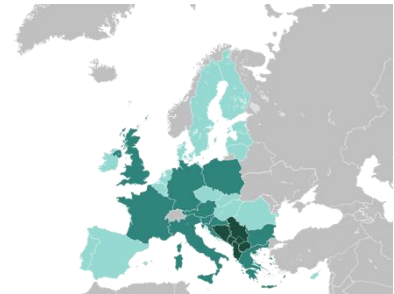
While a year-long process monitors the progresses made, the Berlin Process yearly summits are opportunities to reassert the Process's common ambition and renew top-down pressure.

Objectives pursued:

The goals of the Berlin Process are very much aligned with that of the convergence process which is preliminary to integration within the EU: *“to make additional real progress in the reform process, in resolving outstanding bilateral and internal issues, and in achieving reconciliation within and between the societies in the region”*, as well as to enhance *“regional economic cooperation and lay the foundations for sustainable growth”* (final Declaration of the 2014 Berlin Conference by the German Chair, Angela Merkel)

Geographical scope:

The Berlin Process involves six Western Balkan countries that are candidates for EU membership (Montenegro, Serbia, North Macedonia, Albania) or potential candidates (Bosnia and Herzegovina, Kosovo), and several EU member states: Austria, Bulgaria, Croatia, France, Greece, Germany, Italy, Poland, and Slovenia, plus the United Kingdom



Thematic scope: increased regional cooperation, connectivity, leveraging on the enlargement process, supporting reform. Its connectivity agenda is far-reaching, supporting initiatives and projects in the fields of transport and infrastructure, economic connectivity, youth cooperation and cooperation among businesses and among the civil societies of the Western Balkans.

Positioning:

The Berlin Process focuses on the political dialogue between the governments of EU member states and WB countries, whereby it puts a strong top-down pressure on governments of the latter to achieve reforms. It is fundamentally an intergovernmental, high-level process.

However, it has inspired the creation of several dialogue institutions involving civil society and businesses: the Regional Youth Cooperation Office (RYCO), the Western Balkans Chambers Investment Forum (WBCIF) and the Western Balkans Fund (WBF).

Overlaps with EUSAIR:

The Berlin Process is of a fundamentally different nature than EUSAIR. Therefore, there is no real competition between both initiatives. Pursuing similar goals, they rather appear as complementary.

Potential for synergies and cooperation:

Pursuing similar goals, and acting at different levels (both at the political level and in interaction with civil society), the Berlin Process and EUSAIR appear as rather complementary. However, several interviewees have suggested that the Berlin Process would be stopped in the short to medium term. What will happen to the created dialogue and related institutions involving civil society and businesses (RYCO, WBCIF, WBF...) if and when the Berlin Process phases out, is not clear at this stage.

Therefore, if direct synergies with the Berlin process are likely to be short-lived, and should not be a priority, indirect synergies – with RYCO, WBCIF and WBF – could prove more relevant, and more lasting. If an end is brought to the Berlin Process, to which multilateral process will these civil society frameworks be attached? EUSAIR would be legitimate to claim a role in their future, and the 3 of them seem interesting for EUSAIR, as they address some of EUSAIR's essential stakeholders. Our recommendation would therefore to look for synergies and cooperation with these institutions.

10.3. The Regional Cooperation Council

Nature of the initiative:

The Regional Cooperation Council (RCC) is “*an all-inclusive, regionally owned and led cooperation framework*”. Its main modus operandi is providing expert assistance to governments of South East Europe, to help them define and implement policies and monitoring tools, on topics connected to RCC’s agenda.



The EU Commission, one of RCC’s main financial contributors, is permanently involved in these actions.

Objectives pursued:

The RCC seeks to promote and advance “*regional cooperation, European and Euro-Atlantic integration of South East Europe*”, with the overarching objectives “*to spark development in the region to the benefit of its people*”.

Geographical scope:

The scope of interest is South East Europe, which covers the Western Balkans but also some EU member states, and extends to Turkey.

Participating countries include 46 members, including 13 SEE participants, many EU member states, but also the US, the UK, Switzerland, Turkey... It also includes many institutions, such as the UN, the World Bank, the EU, the OSCE, the Council of Europe, NATO, the EIB and the EBRD...

Thematic scope:

RCC’s scope of interest is based on five pillars: competitiveness, human capital, digital transformation, justice and home affairs, environment. These five broad domains translate into a number of specific topics: increased mobility, enhanced connectivity and improved competitiveness in SEE, better governance, improved functioning of the rule of law, and enhanced security in the region.

In time, RCC agenda has shifted to a more focused and result-oriented interventions in a restricted number of areas. Over the last couple of years, it has focused in particular on connectivity, a broad concept covering transport, energy infrastructures, but also economic integration. One of the main successes of RCC in this field has been the adoption of the “roam like at home” policy.

Its main focus will now shift to the Common Market agenda, in connection with the EU.

Positioning:

The RCC works closely with the EU commission, which finances 70% of its budget and which is generally involved in RCC initiatives. In turn, the Commission often relies on RCC experts for economic questions. Joint work with EU institutions is focused on enlargement and regional integration within WB6.

RCC's initiatives always aim transformation at a regional scale (i.e., with the 6 WB states). It claims to play a role of "*tiers de confiance*" guaranteeing that an initiative is not biased.

Among its differentiating features, with regards to other regional initiatives, the RCC has a focus on Atlantic integration, and the US are a part of the initiative. Another unique feature is its work on Security.

Overlaps with EUSAIR:

RCC shares with EUSAIR some common topics (tourism, environment, connectivity, digital transition), although its modus operandi seems a bit different, more focused on the upstream stages of policy shaping and not on concrete projects. This difference of approach could make both initiatives complementary.

Potential for synergies and cooperation:

RCC is willing to establish communication with EUSAIR, to be better informed on its activities and to receive regular updates on its working programs and on its events. What could come out of this increased coordination is not clear, and it does not allow this report to be more precise in its recommendations; but it appears to be worth investigating. Supporting the digital transformation of the Western Balkans could be a concrete field on which to test cooperation between EUSAIR and the RCC.

10.4. Energy Community

Nature of the initiative:

Created by a treaty in 2005, the Energy Community is an international organization which brings together the European Union and its neighbors to create an integrated pan-European energy market.

Objectives pursued:

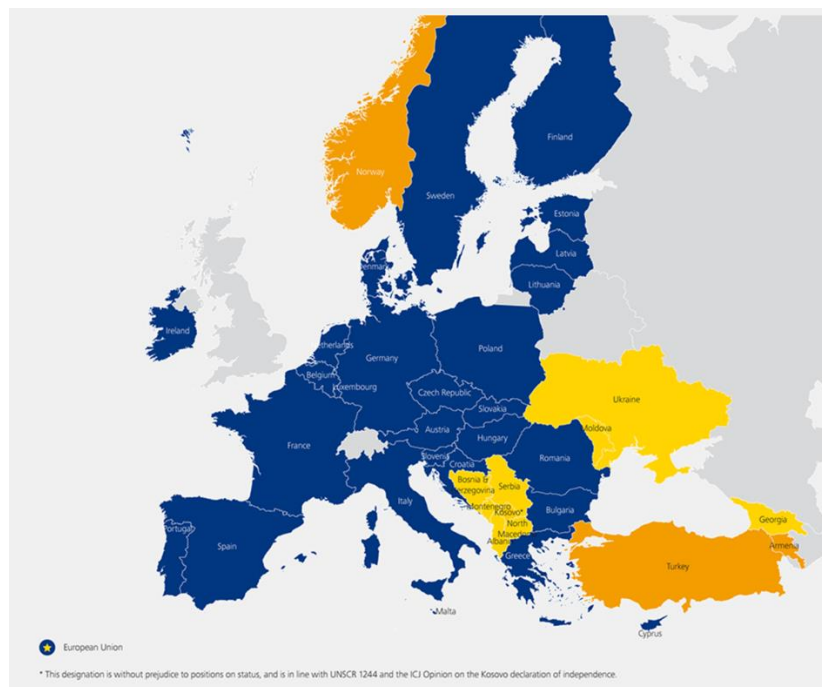
The key objective of the Energy Community is to extend the EU internal energy market rules and principles to countries in South East Europe, the Black Sea region and beyond, on the basis of a legally binding framework.

More specific objectives include:

- Establish a stable regulatory and market framework capable of attracting investment in power generation and networks;
- Create an integrated energy market allowing for cross-border energy trade and integration with the EU market;
- Enhance the security of supply to ensure stable and continuous energy supply;
- Improve the environmental situation in relation with energy supply in the region and foster the use of renewable energy and energy efficiency;
- Develop competition at regional level and exploit economies of scale.

Geographical scope:

Parties to the Treaty are the EU, Albania, Bosnia and Herzegovina, Georgia, Kosovo, Moldova, Montenegro, Northern Macedonia, Serbia and Ukraine. Norway, Turkey and Armenia are observers. Belarus applied for a status of observer in 2016.



- Contracting Parties
- Observer
- EU Participants

Thematic scope:

As its name explicitly suggests, the Energy Community is focused on energy-related matters.

Positioning:

The Energy Community is mostly a cooperation platform involving many different types of stakeholders involved in energy. It includes a political level (the Ministerial Council), a High-Level group that supports the Ministerial Council, a Regulatory Board with all entities in charge of regulating national markets in the Energy Community and beyond, and several fora where various stakeholders interact.

The Energy Community also includes a permanent Secretariat that supports its functioning, and provides technical assistance to the Contracting Parties.

Overlaps with EUSAIR:

Energy is one of the two sub-pillars of EUSAIR's connectivity pillar. Energy also has very direct connections with the environment, and the Energy Community will increasingly focus on decarbonization and digitalization of the energy industry. There are therefore common fields of interest between the Energy Community and EUSAIR.

Potential for synergies and cooperation:

The interview we had with Dirk Buschle, Deputy Director of the Energy Community, suggests that the Community would be interested in developing a stronger working relationship with EUSAIR, and that there are potential synergies, so far untapped.

Working closely with the Contracting Parties, the Community has more expertise than EUSAIR regarding energy-related projects, and perhaps also more awareness about local energy projects; the Community could help EUSAIR identify relevant projects matching both initiatives' common objectives (e.g. generation projects with renewable energy sources).

Conversely, EUSAIR is probably in a better position to identify potential funding sources for such projects, and to connect local stakeholders (national and subnational) with technical experts from the Energy Community and financing institutions, the final objective being to make sure that the right projects are properly funded.

This should be considered in particular in the perspective of the roll-out of the Economic and Investment Plan for the Western Balkans, which will provide very significant funding, and which will be seeking relevant projects to finance, like those promoting the energy transition, which is an important part of the Green Deal.

Also, EUSAIR and the Energy Community could work more closely together to make sure that the energy projects supported by European institutions really contribute to advancing Western Balkans countries in their accession process (i.e., aligning the acquis).

10.5. Transport Community



Nature of the initiative:

Created by a treaty in 2017, the Energy Community is a pan-European organization in the field of mobility and transport, consisting of 33 participants – the entire EU and the six Western Balkans regional partners. In a similar way as its older “cousin organization”, the Energy Community, the Transport Community helps Western Balkans countries adopt and implement the entire EU *acquis* so as to prepare enlargement.

Objectives pursued:

The Transport Community works on the integration of Western Balkans’ transport markets into the EU, by assisting the six Western Balkans partners to adopt and implement the EU legislation in the field of transport, and by supporting projects that are connecting Western Balkans regional partners among themselves and with the EU.

Geographical scope:

Parties to the Treaty are the EU, Albania, Bosnia and Herzegovina, Kosovo, Montenegro, Northern Macedonia, Serbia.

Thematic scope:

As its name explicitly suggests, the Transport Community is focused on transport-related matters. It applies in the field of road, rail, inland waterway and maritime transport.

Positioning:

The Transport Community is mostly a cooperation platform involving many different types of stakeholders involved in transport. It includes a political level (the Ministerial Council), a Regional Steering Committee responsible for the administration of the Treaty and its proper implementation, several technical committees and a Social Forum promoting the social dialogue in relation to the monitoring of the implementation of this Treaty and its effects.

The Transport Community also includes a permanent Secretariat that supports its functioning, acts as a Transport Observatory to monitor the performance of the indicative TEN-T extension of the comprehensive and core networks to the Western Balkans, and supports the implementation of the Western Balkans Six (WB6) Connectivity Agenda.

Overlaps with EUSAIR:

One of the Transport Community's core missions is to promote the implementation of the Western Balkans Six (WB6) Connectivity Agenda, it therefore directly overlaps with EUSAIR's connectivity Pillar.

Even though it seems that the Transport Community is in fact more focused on terrestrial transportation, the TCT has also a maritime strand. Conversely, if EUSAIR has been more active with maritime transportation, which intersects its Connectivity and Blue Growth pillars, there is also a strong focus on the interconnection with the hinterland. The fact that Serbia, North Macedonia and Italy, two of which are land-locked countries, coordinate the Connectivity pillars, is telling.

The points of views expressed during interviews (both with the Director of Transport Community and with DG MOVE) suggest that this overlap has led to frequent and collaborative interactions between both initiatives.

Potential for synergies and cooperation:

As mentioned above, the Transport Community is already engaged in cooperation with EUSAIR, but this is done in an unstructured way. The Community has expressed the will to develop a stronger relationship with EUSAIR, and in particular to increase coordination. This could be achieved through:

- Frequent, more structured meetings between the Community's Secretariat and EUSAIR's coordinators, to provide more visibility on each other's work programs;
- Regular coordination meeting when programming is done but not yet decided;
- Discussions on future plans for the medium and long term;
- Exchanges of information and data.

DG Move can support the implementation of such coordination, and help identify the good projects to support.

In a similar manner as with the Energy Community, EUSAIR and the Transport Community could work together to identify the right projects, that would deliver the greater impacts, and connect them with available funding sources like that of the Economic and Investment Plan for the Western Balkans.

On another point of view, EUSAIR could also seek a better complementarity with the Community by focusing on:

- Niches like maritime transportation, including connecting the hinterlands to the coasts;
- Smaller, less visible, but sound projects that are often overlooked, but that are really necessary and could deliver quick and significant impacts, and meet less resistance.
- Complex topics requiring more coordination, like logistics, multi-modality, digitalization...

An example of such complex projects, mentioned by DG MOVE, would be supporting Albania's project to improve its Vessel Traffic Monitoring & Information Systems (VTMIS). Albania is willing to progress but lacks funding, technical and administrative skills to carry out the project; and EUSAIR could help find both funding sources and technical assistance.

Similarly as with the Energy Community, EUSAIR and the Transport Community could work more closely together to make sure that the transportation projects supported by European institutions really contribute to advancing Western Balkans countries in their accession process (i.e., aligning the acquis).

10.6. The Economic and Investment Plan for the Western Balkans (EIP)

Nature of the initiative:

For the last couple of decades, the enlargement of the EU to the Western Balkans has been at the center of discussions between the WB countries and the EU Commission.



Enhanced EU engagement with the Western Balkans

Since 2017, it has become concrete perspective for the medium term, and the Commission has repeatedly asserted that the future of WB countries is within the EU. It has therefore engaged in accession negotiations with most of WB countries, nevertheless conditioning their accession to the adoption of EU's fundamental values, such as the rule of law, regional reconciliation, good governance, justice and fundamental rights.

The 2018 Communication from the Commission outlines a roadmap for this enlargement to be a credible perspective for the 2025 horizon. It has been accompanied by increased efforts from the EU to support WB countries in this process, and the *Economic and Investment Plan* announced in October 2020 within the “EU's communication for ‘A credible enlargement perspective for and enhanced EU engagement with the Western Balkans’” is the most recent form that this support has taken.

Objectives pursued:

The integration of WB countries into the EU is the end-game of the Commission's strategy for the Western Balkans. More specifically, the EIP's stated goals are “to spur the long-term economic recovery of the region, support a green and digital transition, foster regional integration and convergence with the European Union.”

It aims to create sustainable growth and jobs, “accelerate convergence with the EU and close the development gap between our regions, ultimately speeding up the process of EU integration”.

Geographical scope:

The scope is the 6 Western Balkans countries: Albania, Bosnia and Herzegovina, Kosovo, Montenegro, Northern Macedonia, and Serbia.

Thematic scope:

The EIP will mobilize up to €9 billion of funding for investment flagships in the areas of transport, energy, green and digital transition. It foresees actions around five pillars:

- Climate action, including decarbonization, energy and mobility,
- Circular economy, addressing in particular waste, recycling, sustainable production and efficient use of resources,
- Biodiversity, aiming to protect and restore the natural wealth of the region,

- Fighting air, water and soil pollution
- Sustainable food systems and rural areas.

Positioning:

The Economic and Investment plan is built on the foundations of a performance based and reform-oriented Pre-Accession Instrument. It is meant to foster public and private sector investment.

The EIP is unequivocally positioned as a part of the Commission's Strategy to pave the way for accession of the Western Balkans to the EU. It is meant to both trigger and support change and convergence between both regions.

Overlaps with EUSAIR:

EUSAIR and the EU Commission's strategy for the Western Balkans have strong overlaps. They share the same end-game objective, i.e. to increase regional cooperation and accelerate the integration of WB countries into the EU. And to some extent, EUSAIR was created to facilitate this convergence.

Unsurprisingly, both processes – which share a strong alignment with the Commission's overall strategy – also have overlaps in terms of thematics. In particular, both have a strong focus on connectivity and on the green transition. These should be seen as potential areas for tighter cooperation rather than overlaps creating competition.

Potential for synergies and cooperation:

Interaction between EUSAIR and the teams in charge of the Commission's strategy for the Western Balkans, in particular DG NEAR, has increased since the beginning of 2021, which should be seen as a very positive signal. There seems to be a growing, shared understanding of the very important, and so-far-untapped, potential for synergies between both processes.

In particular, the EIP will have access to very important funding, but and will certainly need support to identify and properly assess relevant projects to fund. EUSAIR, being much closer to the ground, in direct contact with local stakeholders, at national and subnational levels, and with global technical experts, is in an ideal position to bring a decisive contribution in this regard, in the domains where EUSAIR's and the EIP's priorities overlap. During interviews led for this project, managers from DG NEAR have expressed a strong interest for such cooperation mechanisms, and this interest was confirmed during contacts initiated since March 2021 between DG NEAR and DG REGIO.

10.7. The Adriatic and Ionian Initiative (All)

Nature of the initiative:

The Adriatic and Ionian Initiative results from the will of the Italian government, at the end of the 90's, after the Balkanic wars, to open up new prospects for cooperation among South-Eastern European countries. The involvement of the Greek government was also crucial in bringing to the same table – which was not an easy task – Albania, Bosnia and Herzegovina, Croatia, and Slovenia, and some years later Serbia and Montenegro. Since 2008, the All has a permanent Secretariat based in Ancona, Italy. The chairmanship rotates every year among the 9 countries. Over time, the role of the All has evolved: from finding common and concerted solutions to shared problems to the concrete implementation of a Macro-Region for the Adriatic and Ionian basin. The creation of EUSAIR owes much to the All. It has somehow paved the way, showing that strengthening cooperation was not only possible but necessary.



Objectives pursued:

The Ancona declaration signed on May 2000 underlined that “*Strengthening regional cooperation (would help) to promote political and economic stability, thus creating a solid base for the process of European integration*”. Since the beginning, the goal pursued by the All has always been very clear: facilitating the enlargement of the EU to the Western Balkans.

Geographical scope:

Same as EUSAIR.

Thematic scope:

Six themes are among the priorities for action. Five of them logically correspond to the shared issues identified for the region: Transports and Energy Connections, Sustainable Tourism and Culture, Inter-University Cooperation, Environmental and Civil Protection, Blue Growth and Maritime Cooperation. All's last priority for action is rather specific. It concerns the Parliamentary Dimension. The purpose is to involve the Parliaments of the Adriatic and Ionian region in the Macro-regional strategy.

Positioning:

The positioning of the All has changed over the years. At the beginning, the Initiative was the first draft of a regional cooperation program. It has now become an essential part of the facilitating process of the macro regional strategy it has anticipated. Through the Adriatic and Ionian Council (AIC), now merged with the EUSAIR political level, the All has established a permanent intergovernmental dialogue, underlining its role as a political driving force.

Overlaps with EUSAIR:

It is important to keep in mind that the All was, in more than one way, a precursor of EUSAIR; and in the current setup, both processes still share a lot of fields of interest. For example, both processes are equally run by their 9 member states. Real differences between both processes – in terms of their objectives, of their approaches, of their geographical scope... – are few; the main difference being that the All involves the parliaments of participating countries.

One could consider that there is redundancy between both initiatives; however, by multiplying the opportunities for exchange among the civil society across the region, their action can also be seen as somehow complementary.

Potential for synergies and cooperation:

As of today, synergies have been found at the inter-governmental level. Since 2016, the annual Adriatic Ionian Council and EUSAIR Ministerial Meeting are held simultaneously acting at the same time as the highest political level for both the All and the EUSAIR.

The strong alignment of EUSAIR's and All's priorities suggest that a stronger integration could lead to more synergies between both initiatives.

10.8. The Central European Initiative

Nature of the initiative:

The Central European Initiative (CEI) is a regional intergovernmental forum established in 1989, shortly after the fall of the Berlin wall. The end of the Iron Curtain was seen as an opportunity to join, in a same forum, countries close geographically but of different political orientations and economic structures. First named Quadragonale (1989), then renamed Pentagonale (1990), it became CEI in 1991. It is the largest and oldest forum of regional cooperation in Central, Eastern and South Eastern Europe. It has a permanent secretary headquartered in Trieste, Italy, and a rotating presidency. Italy contributes particularly to the funding of CEI programs with a dedicated CEI Fund at the EBRD.



Objectives pursued:

CEI describes itself as “a platform for political dialogue to create opportunities for regional cooperation and European integration”, with a final goal: “a united Europe with shared values embracing all countries, regions and people.”

Geographical scope:

17 Member States in Central, Eastern and South-Eastern Europe: Albania, Belarus, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Hungary, Italy, Moldova, Montenegro, North Macedonia, Poland, Romania, Serbia, Slovakia, Slovenia, Ukraine.

7 of these countries are participating to EUSAIR.



Thematic scope:

Through a combination of multilateral diplomacy and project management the CEI is involved in a large scope of areas: transport networks, innovation and entrepreneurship, climate resilience, clean energy, circular economy, smart communities, good governance, better health, intercultural cooperation, media, people empowerment, science diplomacy.

Positioning:

The initiative prides itself of being the largest and oldest forum of regional cooperation in Central, Eastern and South Eastern Europe. Created in 1989, its initial objective was to overcome the division in blocks by re-establishing cooperation links, among countries of different political orientations and economic structures. Today, it is promoting regional

cooperation and partnerships between EU countries and their non-EU neighbors, rather than enlargement.

Overlaps with EUSAIR:

With regard to geographical scope and thematic scope, the risk of overlaps seems relatively low. However, the recent choice of new areas of interest like “clean energy” and “transport networks” would require a further analysis.

Potential for synergies and cooperation:

Strengthening links with the CEI can be useful for EUSAIR. The funds allocated for networking, know-how transfer, technical assistance and capacity building are potential resources to help the countries of the region to implement the strategy.

10.9. Cooperation between China and Central and Eastern European Countries (“17+1”)

Nature of the initiative:

China-CEEC, also known as “17+1”, is an initiative by the Chinese Ministry of Foreign Affairs to promote business and investment relations between China and 17 countries of Central and Eastern Europe. This China-led multilateral cooperation format does not take the form of an international organization, but more of an international framework allowing the development of projects between these distant countries. It is an essential link in the construction of the “new Silk Roads”.

The 17+1 meet annually, generally in Europe, while the permanent secretariat is in Beijing.

Objectives pursued:

Its purpose has never been clearly articulated, China preferring loose concepts that can easily be promoted. An official objective pursued by “17+1” is to establish a framework allowing China to finance logistics and transport infrastructure projects. It also means to promote trade with, and investment in these European countries.

Many critical voices have described this initiative as an attempt by China to create a sphere of influence in Europe by using both soft and hard power. Addressing Europe’s “soft belly” – some participating countries are located at the periphery of Europe, some are close to Russian influence, and most are not as developed as the founding countries of the EU – the initiative has been described as China’s gateway into Europe, meant to gain an economic foothold on the continent, and to divide the Union.

Geographical scope:

Participants to the “17+1” initiative are: Albania, Bosnia and Herzegovina, Bulgaria, Croatia, the Czech Republic, Estonia, Greece, Hungary, Latvia, Lithuania, North Macedonia, Montenegro, Poland, Romania, Serbia, Slovakia, Slovenia, and China.

At the exception of Italy, all EUSAIR participants are therefore part of “17+1”.

Thematic scope:

The framework is mostly focused on economy, on logistical and transport infrastructure projects. It also has educational, cultural and touristic components, of a lesser importance.

Positioning:

While China lauds the initiative as a win-win cooperation for the countries involved, and for the EU, many voices have risen to denounce an assertive strategy of ‘divide and conquer’, designed to benefit China at Europe's expense. “17+1” has been criticized as

focused on the sole promotion of Chinese economic interests, in a somehow bullish manner, far from the stated objectives of local development and job creation.

Since a couple of years, the “17+1” initiative seems to be losing momentum. As an illustration, the last yearly summit, held through visio-conference in March 2021, only gathered a few heads of state to meet with M. Xi Jinping.

Several countries have expressed their disappointment towards the unkept promises of the initiative; and it is true that actual figures – investments made by China in participating countries, increase of trade flows... – are very modest. Estonia and Lithuania have been particularly vocal in their denunciation of a mechanism only benefitting China. Romania has also taken distances with China, and signed with the USA an MoU restricting Chinese companies’ ability to build 5G infrastructure.

The question of the future of “17+1”, which has been described as a zombie initiative, is therefore a question mark.

Overlaps with EUSAIR:

“17+1” have very little overlaps, being founded on very different approaches. One of the only common features is be their common interest in connectivity – building and financing terrestrial or maritime transportation infrastructure.

Potential for synergies and cooperation:

Pursuing opposite strategic objectives, promoting very different values, there seems to be little room for any synergy or cooperation between EUSAIR and the “17+1” initiative.

On the contrary, EUSAIR – as well as other EU institutions – needs to take full stock of China’s new approach, of its ambitions in the macro-region, and to take into account this competition. Even is “17+1” does seem to be losing momentum, China’s efforts to gain a foothold in Europe need to be taken very seriously.

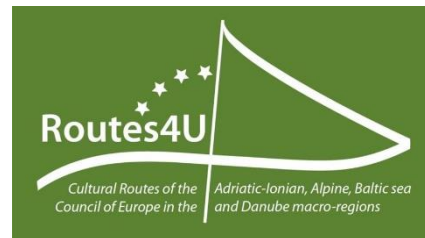
EUSAIR is the MRS most likely to be impacted by China’s influence, as South-East Europe is seen by China as its gateway to enter European playground. EUSAIR therefore needs to muster political support – of EU member states in particular – to counter this influence.

10.10. Cultural routes of the Council of Europe – Routes4U

Nature of the initiative:

Launched by the Council of Europe in 1987, the Cultural Routes program has been increasingly successful. To date, 33 routes have been certified through Europe and beyond. In December 2017, the specific 30-Month joint project “Routes4U” was initiated by the Council of Europe and the European Commission so as to develop Cultural Routes within the four macro-regional strategies. The implementation of the project (ended in July 2020) was monitored by a Steering Committee composed by representatives of the Council of Europe, the European Commission, EU macro-regional strategies and the Cultural Routes of the Council of Europe. The Adriatic and Ionian Region has benefited from two important developments: the extension of The Routes of the Olive Tree and the creation of the Roman heritage Route.

Cultural route
of the Council of Europe
Itinéraire culturel
du Conseil de l'Europe



Objectives pursued:

To promote growth, tourism and culture, and more generally to preserve and enhance a common heritage that builds a shared intercultural identity.

Geographical scope:

Same as EUSAIR.

Thematic scope:

Regional development and strengthening of the tourism industry and also promotion of fundamental European values: human rights, democracy, mutual understanding and preservation of cultural diversity.

Positioning:

“European values through space and times.”

Overlaps with EUSAIR:

No overlap identified. On the contrary, the initiative contributes to Pillar 4 Sustainable Tourism. It is one of the 5 flagships.

Potential for synergies and cooperation:

Even if the Cultural routes program is promoting specific touristic offers, it is a concrete tool to foster regional development and to promote the shared cultural legacy of the Adriatic-Ionian macro-region. It opens the way to a larger visibility for the Tourism industry in the region and extra-funding.

More generally, the work with the Council of Europe on the brand identity of the macro-region should be intensified. The study made by the COE on the Branding Strategy for the Adriatic and Ionian Region is a very rich and useful reflection on the region's identity and on the key cultural levers to be put forward.

10.11. South East European Cooperation Process

Nature of the initiative:

The South-East European Cooperation Process (SEECP) was launched in June 1996, in Sofia, upon Bulgaria's initiative. It was somehow a continuation of The Balkan Entente (1934) – original members were: Greece, Yugoslavia, Romania and Turkey – establishing a new political and diplomatic forum after the emergence of independent states on the territory of the former Yugoslavia. This inter-governmental process (heads of state and government or ministers of Foreign affairs) is coordinated by the presiding country which rotates every year among the members. All participants of SEECP are also participants of the RCC that can be regarded as its operational arm.

Objectives pursued:

As defined on the Charter on good-neighbourly relations, stability, security and cooperation, adopted in Bucharest in 2000 the main objectives of SEECP are: « *enhancement of political and security cooperation; fostering economic cooperation; enlargement of cooperation in the fields of human dimension, democracy, justice and combating illegal activities.* »

Geographical scope:

The SEECP includes 13 countries.

8 founding states: Albania, Bosnia and Herzegovina, Bulgaria, Greece, the Republic of North Macedonia, Romania, Serbia, Turkey.

Croatia joined in 2004, Republic of Moldova in 2006, Montenegro in 2007, Slovenia in 2010 and Kosovo in 2014.



4 participating countries are EU member states: Bulgaria, Greece, Romania and Slovenia.

Thematic scope:

The priority objectives are peace, stability, cooperation and Balkan's integration into EU institutions. Over time, other areas of interest have emerged with a recent focus on connectivity (particularly digital connectivity) and educated and skilled young people who are increasingly leaving the area.

Positioning:

SEECP presents itself as the only authentic initiative launched by the SEE countries themselves and consequently as a unique "voice of the region".

Overlaps with EUSAIR:

The geographical overlap is significant as 8 out of 9 EUSAIR members are also members of SEECP. But the last missing member is Italy, a major political force of EUSAIR. As a consequence, SEECP and EUSAIR can be considered as two different processes with very distinct political dynamics.

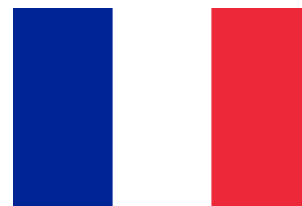
Potential for synergies and cooperation:

As they are both political initiatives promoting dialogue at the highest level between EU member states and candidate countries, EUSAIR and SEECP are complementary processes towards European integration. In that perspective SEECP is of special importance because it establishes a permanent dialogue with Turkey. SEECP remaining very much a political body, operational synergies are to be sought with the RCC.

10.12. French Strategy for the Western Balkans

Nature of the initiative:

In April 2019, during a summit on the Western Balkans held in Berlin, President Macron announced the setting of a French Strategy for the region. France considers the Western Balkans with great interest and aims at strengthening its ties with all the countries of the region within the framework of diplomatic bilateral relationships, but also through its action within the European Union, including the Berlin Process. Over the years, France has constantly pushed for EU to respond to the many challenges (strengthening the rule of law, economic development, unresolved disputes...) the area has had to cope with. Although the roadmap of the French Presidency of the EU has not been fully decided yet, France is determined to launch various initiatives regarding the Western Balkans during the first half of 2022.



Objectives pursued:

The French Strategy for the Western Balkans has three main priorities. First, the control of Southern Europe's external borders, that France regards as critical in terms of security (organized crime, human and firearms trafficking...) and for the control of illegal migrations. Second, to prevent the action of non-EU countries (in particular China through the 17+1 initiative) that use the region's great need for external investments to increase their influence, and distract the region from its European vocation. France has thus pushed for the EIB to be more active in the WB and to work more closely with the EBRD. Finally, as a founding member state, France intends to play an important role in the enlargement process so as to firmly anchor the Balkans to the EU project.

Thematic scope:

The main topics of the French Strategy are long-term stability, sovereignty, security, border control and protection, economic development, and the EU enlargement process.

Positioning:

France considers it has a historical responsibility in the region, as a sovereign nation and as a founding EU member state. As many other countries, it has developed a national strategy for the Western Balkans.

Overlaps with EUSAIR:

None.

Potential for synergies and cooperation:

Because France has experienced the benefits of MRS as a member of EUSALP, there is a great potential for cooperation between France and EUSAIR.

Some synergies could be found with the two French agencies:

- The *Agence Française de Développement* (AFD), which has recently extended the scope of its missions to the Western Balkans. Until now, the agency has only been working in non-European countries. This is a clear sign that France wants to strengthen its influence in the region. The AFD could support projects dealing with sustainable development, ecological and energy transition. AFD also supports the Regional Youth Cooperation Office (RYCO) for the Western Balkans.
- *Expertise France*, France's technical assistance operator, has also widened its action to the region within the framework of state-to-state agreements.

France can be a solid ally on sovereignty issues, because France has been a leader in drafting and implementing the EU framework for screening of foreign direct investment, thus preventing unwanted external influence on strategic and sovereign sectors.

10.13. Conclusion – synthesis on potential synergies

While many multilateral initiatives with different geographical and thematic scopes coexist in the macro-region, the first part of this report stresses that EUSAIR has brought some unique contributions to cooperation within the region, and to its future integration into the EU and its institutions. These features, if EUSAIR succeeds in strengthening them, are strong bases on which a new positioning for the strategy could rely, giving it a unique place in this landscape.

This report has also highlighted several opportunities to establish synergies with other multilateral initiatives in the region. Technical cooperation should be pursued with the Energy Community, the Transport Community, and the Council of Europe’s Cultural “Route4U” project. General coordination could be developed with several other multilateral initiatives such as the RCC. There also appears to be a profound convergence of purposes between EUSAIR and the All, and a stronger integration of their structures would help them reassert their role as the main political driving forces in the region.

Beyond these, EUSAIR could play a unique role in the implementation of the EIP, thus confirming its vocation to bring a decisive support to the EU’s enlargement strategy.

At the other side of the spectrum, the “17+1” initiative led by China appears as the real competition for EUSAIR, as it promotes a fundamentally different vision of the world, and a different model of society. Even if “17+1” appears to have been losing momentum during the last couple of years, other initiatives may come, and China can count on quasi-infinite financial resources to develop her influence.

In more general terms, the threat of foreign powers actively trying (now, like China, or potentially within the next decade, like Turkey or Russia might do) to develop their influence, and weaken the EU’s cohesion or its enlargement process, needs to be taken very seriously. It is one more reason to look for as many synergies as possible among macro-regional initiatives that share the same goals, and promote the same vision for Europe. One more reason also to streamline the overall setup, actively look for synergies, and make the best use possible of available resources.

As an example, a strong partnership between EUSAIR and DG NEAR teams, around the implementation of the Commission’s strategy for the Western Balkans, can combine the proximity to local stakeholders patiently built by EUSAIR, and the financial resources brought by the EIP. Several examples of failed initiatives prove that both features are necessary to succeed in the macro-region.

Which of these synergies should be sought in priority? How should they be initiated? What oversight mechanisms should be created to deliver and monitor these synergies?

This could be the matter of a new project. If DG REGIO confirms its will to pursue these synergies, we will work, during the last phase of the present project (“EUSAIR (re)positioning”), on propositions of a roadmap and of an action plan for such a project.

The table inserted in the following page provides an overall view of the outputs of this benchmark.

Synthetic view on benchmarked initiatives:

	Process maturity ¹	Overall positioning	Thematic				Systemic				Geographical coverage ²		
			Green Deal	Digital Transition	Youth	Reconciliation & Stability	Governance	Admin. Capacity building	EU Accession facilitator	Maritime dimension		Mobilisation of local authorities	Bottom-up vs top down
EUSAIR	2 - 3	Regional convergence	X	X	X	X	Parity	X	X	X	Both	Average	AL, BA, EL, HR, IT, ME, MK, RS, SI
Berlin Process	4	Political platform	X	X	X	X	Asymmetrical	X	X	X	Top-down	Strong	AL, AT, BA, BG, DE, EL, FR, HR, IT, ME, MK, PL, RS, SI, UK, XK
Adriatic and Ionian Initiative	4	Political platform	X	X	X	X	Parity	X	X	X	Both	Weak	Same as EUSAIR
Regional Cooperation Council	3	Policy shaping	X	X	X	X	Parity	X	X	X	Top-down	Strong	46 participants, incl. all EUSAIR countries + the EU, OECD, US, UK, UN,...
Energy Community	3	Policy nicher	X	X	X	X	Parity	X	X	X	Top-down	Strong	EU + WB6 (AL, BA, ME, MK, RS, XK) + GE, MD + observers : NO, TR, AM
Transport Community	2 - 3	Policy nicher	X	X	X	X	Parity	X	X	X	Top-down	Average	EU + WB6 (AL, BA, ME, MK, RS, XK)
EU Commission strategy / EIP for the Western Balkans	1	"Investment fund"	X	X	X	X	Asymmetrical	X	X	X	Top-down	Weak	EU + WB6 (AL, BA, ME, MK, RS, XK)
Routes4U - Cultural Routes of the Council of Europe	3	Niche "service provider"				X	N/A	X	X	X	Bottom-up	Strong	Same as EUSAIR
"17+1"	2	Foreign influence					Asymmetrical		X		Top-down	Weak	AL, BA, BG, CZ, EE, EL, HR, HU, LT, LV, ME, MK, PL, RO, RS, SI, SK + CN, X, HK
Central European Initiative	4	Regional convergence	X	X	X	X	Parity	X	X	X	Top-down	Weak	AL, BA, BG, BY, CZ, HR, HU, IT, MD, ME, MK, PL, RO, RS, SI, SK, UA
South East Europe Cooperation Process	3 - 4	Political platform	X	X	X	X	Parity	X	X	X	Top-down	Weak	AL, BA, BG, EL, HR, MD, ME, MK, RO, RS, SI, TR, XK
French Strategy for the Western Balkans	3	Sovereign diplomacy	X	X	X	X	N/A	X	X	X	N/A	Weak	FR + WB6 (AL, BA, ME, MK, RS, XK)

Color code: light green: cooperator; dark green: natural partner; red: competitor; blue: declining processes, parts of which could be brought closer to EUSAIR

1: Maturity is assessed on a scale adapted from the 2017 COWI report. 1: early set-up - 2: starting to operate - 3: full maturity - 4: in decline

2: Geographical coverage: bold fonts indicate members of EUSAIR; blue fonts EU member states, green fonts IPA member states, and black fonts third parties.

GETTING IN TOUCH WITH THE EU

In person

All over the European Union there are hundreds of Europe Direct information centres. You can find the address of the centre nearest you at:

https://europa.eu/european-union/contact_en

On the phone or by email

Europe Direct is a service that answers your questions about the European Union. You can contact this service:

- by freephone: 00 800 6 7 8 9 10 11 (certain operators may charge for these calls),
- at the following standard number: +32 22999696 or
- by email via: https://europa.eu/european-union/contact_en

FINDING INFORMATION ABOUT THE EU

Online

Information about the European Union in all the official languages of the EU is available on the Europa website at: https://europa.eu/european-union/index_en

EU publications

You can download or order free and priced EU publications at: <https://op.europa.eu/en/publications>. Multiple copies of free publications may be obtained by contacting Europe Direct or your local information centre (see https://europa.eu/european-union/contact_en).

EU law and related documents

For access to legal information from the EU, including all EU law since 1952 in all the official language versions, go to EUR-Lex at: <http://eur-lex.europa.eu>

Open data from the EU

The EU Open Data Portal (<http://data.europa.eu/euodp/en>) provides access to datasets from the EU. Data can be downloaded and reused for free, for both commercial and non-commercial purposes.

