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Territorial analysis
Interreg NEXT Black Sea Basin Programme 2021-2027

- December 2020 -



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Acronyms

AER	Assembly of European Regions
BSB	Black Sea Basin
BSC	Black Sea Commission
BSEC	Black Sea Economic Cooperation
BSS	Black Sea Synergy
BBSC	Balkan and Black Sea Commission
CBC	Cross Border Cooperation
CMA	Common Maritime Agenda
EC	European Commission
EEA	European Environmental Agency
EEAS	European External Action Service
ENI	European Neighbourhood Instrument
ENPI	European Neighbourhood and Partnership Instrument
CPR	Common Provision Regulation
CPMR	Conference of Peripheral Maritime Regions
EaP	Eastern Partnership
EUSDR	European Union Strategy for the Danube Region
EUSAIR	European Union Strategy for the Adriatic and Ionian Region
FDI	Foreign Direct Investments
FRONTEX	European Border and Coast Guard Agency
GDP	Gross domestic product
GII	Global Innovation Index
ICBSS	International Centre for Black Sea Studies
IMF	International Monetary Fund
ILO	International Labour Organization
IOM	International Organization for Migration
ISO	Interreg Specific Objective
MS	Member States
MSFD	Marine Strategy Framework Directive



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NGO	Non-Governmental Organisation
NUTS	Nomenclature of Units for Territorial Statistics
OECD	Organisation for Economic Cooperation and Development
PO	Policy Objective
R&D	Research and development
RF	Russian Federation
ROM	Results-Oriented Monitoring
SMEs	Small and medium enterprises
SRIA	Strategic Research and Innovation Agenda
TEN-T	Trans-European Transport Network
UNDP	United Nations Development Programme
SWOT	Strengths, Weaknesses, Opportunities and Threats (Analysis)
UNDP	United Nations Development Programme
UNECE	United Nations Economic Commission for Europe (UNECE)
UNESCO	United Nations Educational, Scientific and Cultural Organisation
UNEP-GIWA	United Nations Environment Programme - Global International Waters Assessment
UNEP-WCMC	United Nations Environment Programme - World Conservation Monitoring Centre
UNHCR	United Nations Refugee Agency
USAID	United States Agency for International Development
WHO	World Health Organisation



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Introduction

The following territorial analysis identifies the main joint challenges and needs of the Black Sea Basin area, taking into account economic, social and environmental aspects, as well as current trends and priorities (e.g. blue economy, innovation, smart specialisation, governance, sustainability, digitalization, climate change).

In addition, the analysis considers the current challenges faced by the cooperation area due to the COVID 19 pandemic, which is a disruption of the world we used to live in and it obliges us to change the perspectives for the future.

The territorial analysis represents the first input to the development process of the Interreg NEXT Black Sea Basin Programme 2021-2027 and provides factual evidence for the programme partners, including the Joint Programming Committee, which, as the decision-making body, will select the Policy Objectives and Specific Objectives of the future programme.

To facilitate the decision-making process, the analysis is structured on chapters according to objectives formulated by the Joint paper on Interreg NEXT Strategic Programming¹:

- Policy Objective (PO) 1 meaning “A smarter Europe and its neighbourhood”;
- Policy Objective (PO) 2 meaning “A greener low-carbon Europe and its neighbourhood”;
- Policy Objective (PO) 3 meaning “A more connected Europe with its neighbourhood”;
- Policy Objective (PO) 4 meaning “A more social Europe and its neighbourhood”;
- Policy Objective (PO) 5 meaning “Europe and its neighbourhood closer to their citizens”.

Interreg specific objectives (ISO):

- Interreg Specific Objective ISO 1 meaning “A better cooperation governance for Europe and its neighbourhood”;
- Interreg Specific Objective ISO 2 meaning “A safer and more secure Europe and its neighbourhood”.

Each of these chapters, developed in dependency of the available data and information, is further divided according to the specific objectives of each policy objectives and covers the main challenges and needs for policy intervention, followed by a SWOT analysis and a conclusion.

The analysis is based on the information obtained from rendering the statistical data provided by international, national and local sources, further complemented by the study of different documents relevant for the respective policy objective.

¹ Which are based on the ERDF policy objectives and Interreg specific objectives indicated in the draft ERDF and Interreg Regulation post-2020



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Chapter 1 - General characteristics of the programme area

1.1 Cooperation area

Black Sea, Russian and Bulgarian Chernoye More, Ukrainian Chorne More, Turkish Karadeniz, Romanian Marea Neagră, is a large inland sea. It is bordered by Ukraine to the North, Russian Federation to the North-east, Georgia to the East, Turkey to the South, and Bulgaria and Romania to the West.

The roughly oval-shaped Black Sea occupies a large basin strategically situated at the South-eastern extremity of Europe but connected to the distant waters of the Atlantic Ocean by the Bosphorus (which emerges from the sea's south-western corner), the Sea of Marmara, the Dardanelles, the Aegean Sea, and the Mediterranean Sea. The Crimean Peninsula thrusts into the Black Sea from the North, and just to its East the narrow Kerch Strait links the sea to the smaller Sea of Azov.

The Black Sea is a unique sea basin, rich in biodiversity and heritage, but also where an exceptional combination of natural and human induced stressors co-occurs. Among its main features, it can be noted:

- * 4,869 km of coastline
- * 421,638 km total area
- * 10 large rivers flowing to the sea
- * Rich in energy sources (wave, currents, offshore wind, hydrogen sulphide, gas hydrates)
- * 18 major sea ports

Through the Joint Paper on Interreg NEXT Strategic Programming 2021-2027², 10 countries were invited to participate in the Black Sea Basin Interreg NEXT Programme:

- **Bulgaria, Greece and Romania** (EU Member States);
- **Armenia, Azerbaijan, Georgia, Republic of Moldova and Ukraine** (partner countries³);
- **Turkey** (candidate country);
- **Russian Federation.**

Subsequently, the countries were invited by the European Commission to confirm the geographical coverage of the programme and by the decision of Joint Programming Committee from 14th October 2020 the following countries or NUTS II (or equivalent) territorial units form the eligible programme area:

² Joint paper on Interreg NEXT Strategic Programming 2021-2027, European Commission 20 January 2020

³ As listed in Annex I of Regulation (EU) no. [...] establishing the Neighbourhood, Development and International Cooperation Instrument



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COUNTRY	ELIGIBLE REGIONS
❖ Romania	- Sud-Est
❖ Bulgaria	- Severoiztochen - Yugoiztochen
❖ Greece	- Kentriki Makedonia - Anatoliki Makedonia Thraki
❖ Turkey	- TR10 (İstanbul) - TR21 (Tekirdağ, Edirne, Kırklareli) - TR42 (Kocaeli, Sakarya, Düzce, Bolu, Yalova) - TR81 (Zonguldak, Karabük, Bartın) - TR82 (Kastamonu, Çankırı, Sinop) - TR83 (Samsun, Tokat, Çorum, Amasya) - TR90 (Trabzon, Ordu, Giresun, Rize, Artvin, Gümüşhane)
❖ Russian Federation	- Rostov Oblast - Krasnodar Krai - Adygea Republic
❖ Ukraine	- Odessa - Mykolaiv - Kherson - Zaporizhzhia - Donetsk ⁴ (Bakhmut, Kramatorsk, Volnovakha, Mariupol, Pokrovsk)
❖ Republic of Moldova	(whole country)
❖ Georgia	(whole country)
❖ Armenia	(whole country)

⁴ According to the decision of Ukraine submitted in the context of confirmation of the geographical coverage of the programme with a view to prepare the implementing act setting out the future programme, the following districts from Donetsk are eligible: Bakhmut, Kramatorsk, Volnovakha, Mariupol, Pokrovsk.



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Map no. 1 - Black Sea Basin programme area

1.2 Territory and demography

A statistical overview of the Black Sea Basin programme eligible area in terms of territory and population is provided in the table below:

COUNTRY	ELIGIBLE REGIONS	TERRITORY (km ²)	POPULATION (thousands)	URBAN (%)	RURAL (%)	DENSITY (people/km ²)
ARMENIA	(whole country)	29,743	2,958	63%	37%	99
BULGARIA	Severoiztochen	14,487	925	73%	27%	64
	Yugoiztochen	19,798	1,024	73%	24%	52
GEORGIA	(whole country)	69,700	3,720	59%	41%	53
GREECE	Kentriki Makedonia	19,146	1,874	n/a	n/a	98
	Anatoliki Makedonia Thraki	14,157	600	n/a	n/a	42
REPUBLIC OF MOLDOVA	(whole country)	33,846	2,658	43%	57%	79



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ROMANIA	Sud- Est	35,762	2,396	53%	47%	67
RUSSIAN FEDERATION	Rostov Oblast	100,800	4,202	68%	32%	42
	Krasnodar Krai	76,000	5,648	55%	45%	74
	Adygea Republic	7,800	455	47%	53%	58
TURKEY	İstanbul (TR10)	5,196	15,519	100%	-	2987
	Tekirdağ, Edirne, Kırklareli (TR21)	18,665	1,831	89%	11%	98
	Kocaeli, Sakarya, Düzce, Bolu, Yalova (TR42)	20,184	3,962	93%	7%	196
	Zonguldak, Karabük, Bartın (TR81)	9,493	1,043	62%	38%	110
	Kastamonu, Çankırı, Sinop (TR82)	26,435	793	64%	36%	30
	Samsun, Tokat, Çorum, Amasya (TR83)	37,524	2,830	84%	16%	75
	Trabzon, Ordu, Giresun, Rize, Artvin, Gümüşhane (TR90)	35,174	2,690	85%	15%	76
	UKRAINE	Odeska	33,300	2,377	67%	33%
	Mykolaiv	24,585	1,120	69%	31%	46
	Kherson	28,500	1,028	61%	39%	36
	Zaporizhzhia	27,200	1,687	77%	23%	62
	Donetsk (districts ⁵ : Bakhmut, Kramatorsk, Volnovakha, Mariupol, Pokrovsk)	26,517	4,132	91%	9%	156
TOTAL		714,012	65,472	77%	23%	92

Table no. 1 - Overview of the Black Sea Basin eligible areas⁶

⁵The statistical data available is for the entire Donetsk Oblast and it was used as such in this document.

⁶Source for the territory data: Joint Operational Programme Black Sea Basin 2014-2020.

Source for the population data: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>, 2019 - for Armenia, Georgia, Republic of Moldova; National Statistical Institute - for Bulgaria; Eurostat - for Greece, except for breakdown urban / rural, not available; National Institute of Statistics, <http://statistici.insse.ro:8077/tempo-online/#/pages/tables/insse-table> - for Romania; Federal State Statistic Service, <https://eng.gks.ru/territorial> - for the Russian Federation; Turkish Statistical Institute - for Turkey; State Statistical Service - for Ukraine



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1.2.1 Territory

The Black Sea Basin programme eligible area occupies a territory of 714,012 sq. km. and includes a population of 65, 4 million people.

The share of the countries' eligible territory in the overall programme area, as well the share of the countries' population from the eligible territory in the total population of the programme area are shown in the following figures. The largest parts of the eligible area lie in the territory of the Russian Federation, Turkey and Ukraine. The distribution of population is, generally, similar to the share of territory, with few cases where population density changed this pattern (e.g.: Turkey eligible area has the higher number of inhabitants among the participating countries' eligible area, however, it does not lead in the share of the eligible territory in the total eligible area. The situation is opposite in case of Russian Federation, leading in terms of eligible territory, but not of population share as well).

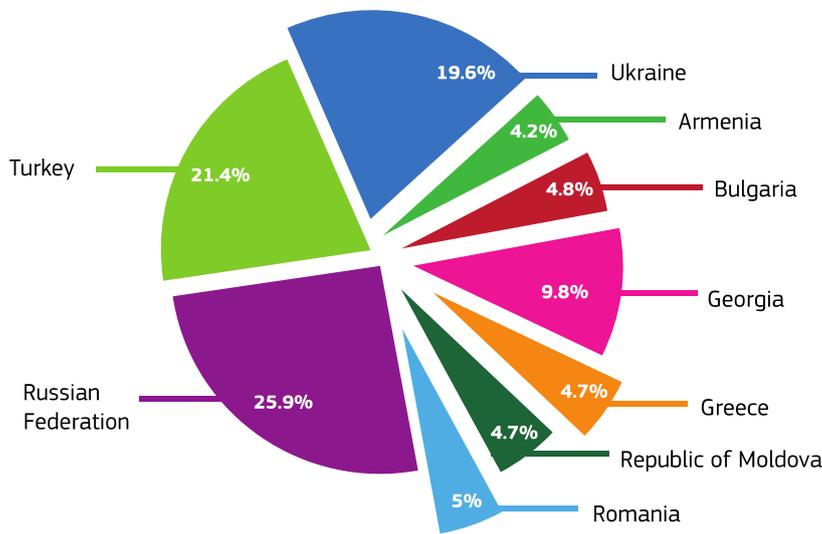


Figure no.1 - Share of the countries' eligible territory (%) of total programme area

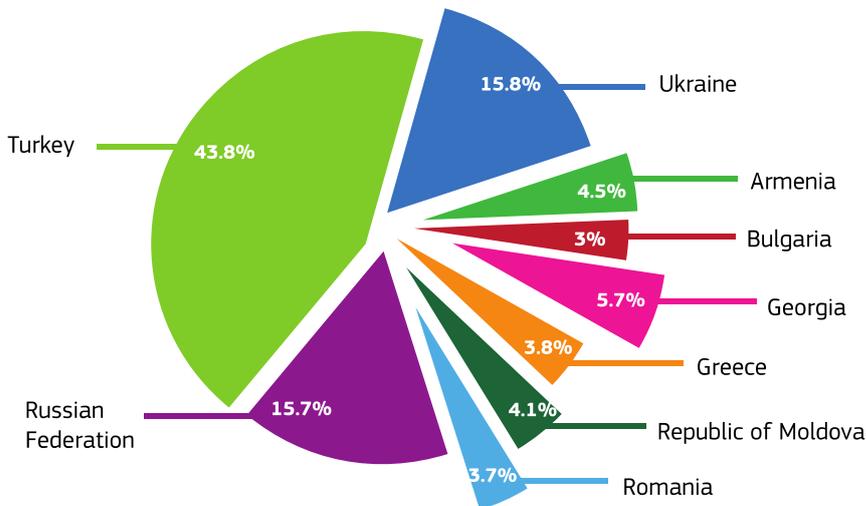


Figure no.2 - Share of the countries' population from the eligible territory (%) of total population of eligible area



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1.2.2 Demography

The programme area has a population of 65,4 million people.

The population density is 92 people/km² on average, below EU average⁷ of 109 people/km². It ranges from almost 3000 people/km² in strongly urbanised Istanbul to 30 people/km² in Kastamonu (Turkey), revealing huge discrepancies in territorial development. Aside from Istanbul, the average density in the Black Sea programme area is 70 people/km².

The overall growth in the eligible area population reveals nonetheless highly disparate demographic trends among participating countries (see figure no. 3 below).

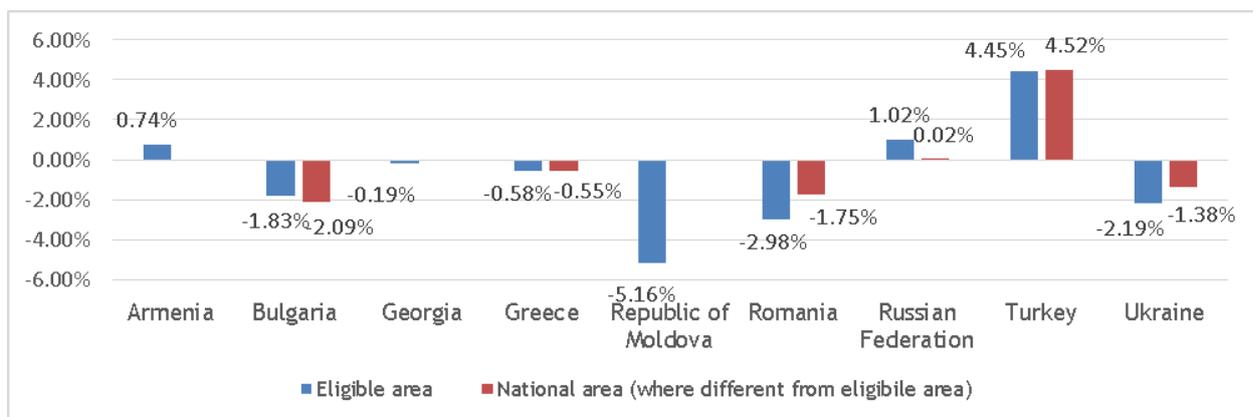


Figure no. 3 - Population trend (%) per country eligible area and per country area (where different from eligible area), 2016-2019⁸

While on one hand in Turkey, the Russian Federation and Armenia the population grew over the period 2016 - 2019, with the greatest increase in Turkey (of 1,2 million inhabitants), on the other hand the other countries recorded population losses in the eligible area, with significant decrease in the Republic of Moldova (around 145,000 inhabitants), Romania (around 74,000 inhabitants) and Ukraine (around 209,000 inhabitants). Both the uneven fertility rates - only 2 countries, Turkey and Georgia, having over 2 births per woman on average⁹ - and the migration trends¹⁰ explain these disparities.

⁷ Source: Eurostat - <https://ec.europa.eu/eurostat/databrowser/view/tps00003/default/table?lang=en>

⁸ Source for regional data: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators> - for Armenia, Georgia, Republic of Moldova; National Statistical Institute - for Bulgaria; Eurostat - for Greece; National Institute of Statistics - for Romania; Federal State Statistic Service, <https://eng.gks.ru/territorial> - for Russian Federation; Turkish Statistical Institute - for Turkey; State Statistical Service - for Ukraine

Source for national data: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

⁹ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

A total fertility rate of around 2.1 live births per woman is considered to be the replacement level for industrialised countries: in other words, the average number of live births required to keep the population size constant in the absence of inward or outward migration. Source: Eurostat, *Demographic statistics for the European Neighbourhood Policy-East countries, 2019 edition*,

<https://ec.europa.eu/eurostat/documents/4031688/9684146/KS-01%E2%80%9119%E2%80%91056-EN-N.pdf/c3f8811c-3793-48aa-befa-b8ad753f1131>

¹⁰ For details on migration, see Chapter 8 - A safer and more secure cooperation area (ISO2) of this territorial analysis.



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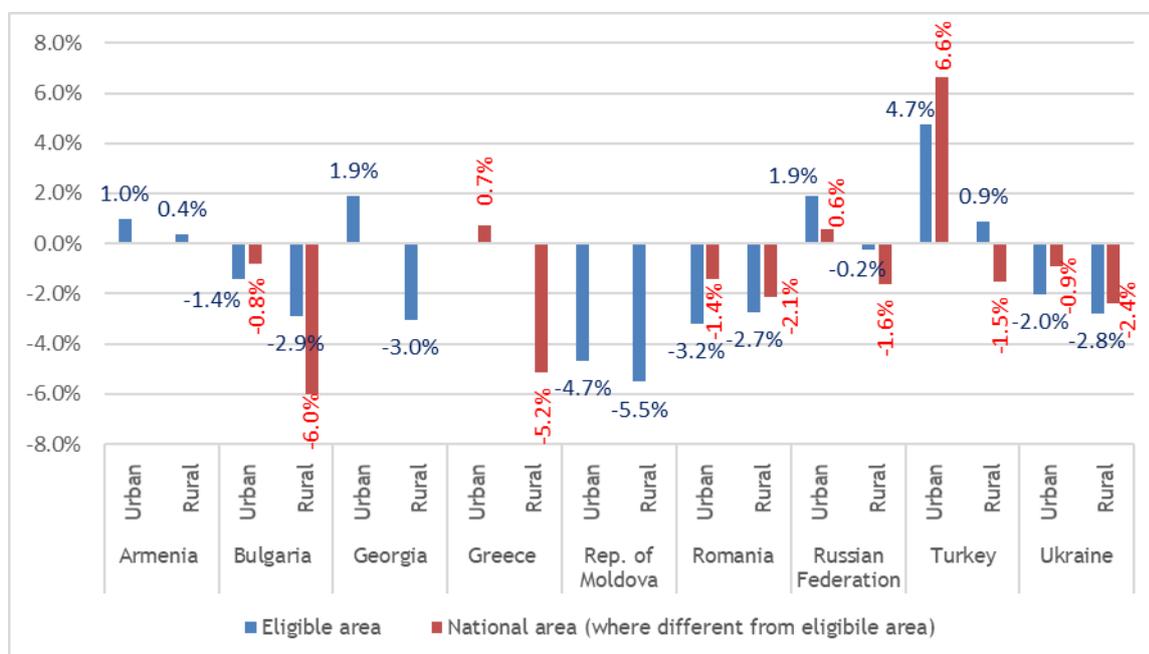


Comparing the average trend in the eligible area (1.30 %) with the average trend at national level (0.74%), in the period 2016-2019, a more intensive growth (or a less intensive decline) is revealed in the eligible area. A few exceptions are registered, such as in Romania and Ukraine, where the population in the eligible regions decreased in a significant higher degree than the population of the country. On the other side, the population growth in the eligible regions of the Russian Federation was more accentuated than at national level.

1.2.2.1 Urban and rural population

The programme area is characterized both by the inclusion of large rural areas and by the inclusion of 5 cities (including 2 capital cities) of over 1 million inhabitants: Istanbul (Turkey), Rostov-on-Don (Russian Federation), Yerevan (capital of Armenia), Tbilisi (capital of Georgia) and Odessa (Ukraine)¹¹.

The urbanisation process registered in the previous programming period continued in the analysed period (see figure no.4 below). The breakdown urban / rural of 71% vs. 29% registered in the 2014-2020 programme changed to 77% vs. 23% in 2019. There is an obvious more intensive growth (or a less intensive decline) in the urban population across the countries, both in the eligible area (average of 2.3% increase), and in the national area (average of 1.8% increase), with a strong impact in Turkey, as Istanbul itself grew by over 0.7 million inhabitants over the analysed period. The only exception is in the eligible area of Romania, where the urban population decreased in a greater extent than the rural population.



¹¹ Source: United Nations, Department of Economic and Social Affairs, Population Division (2018). *The World's Cities in 2018 - Data Booklet* (ST/ESA/SER.A/417), https://www.un.org/en/events/citiesday/assets/pdf/the_worlds_cities_in_2018_data_booklet.pdf



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Figure no. 4 - Urban / rural population trend (%) per country eligible area and per country area (where different from eligible area), 2016-2019¹²

The urbanisation process gives rise to common environmental and socio-economic challenges to ensure sustainable urban development.

Another feature of the programme area is the increase of population in the coastal zones during the summer season due to tourism, creating economic opportunities, but also putting additional strain on local infrastructure and the environment.

1.2.2.2 Population structure by age

Demographic trends within the programme countries reveal disparate dynamics in regard to the population age structure and its related socio-economic challenges. Greece, Bulgaria and Romania register significant values of ageing population, with people of 65 years old and above representing around 30% of their working age population (see figure no.5 below), leading to specific health and pension-financing issues. To a lesser extent, also Ukraine, Georgia and the Russian Federation have an ageing population, of almost 25% of their working age population.

On the other hand, Turkey (13%) has more dynamic demographics and a younger population - e.g. about 22% of the population of Istanbul is under 14¹³, giving rise to related challenges of education and integration into the labour market.

The elderly dependency ratio has increased as compared with the previous programming period and the trend over the period 2016-2019 shows continuous increase for all the countries.

¹² Source for regional data: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators> - for Armenia, Georgia, Republic of Moldova; National Statistical Institute - for Bulgaria; Eurostat - for Greece (only national data available); National Institute of Statistics - for Romania; Federal State Statistic Service, <https://eng.gks.ru/territorial> - for Russian Federation; Turkish Statistical Institute - for Turkey; State Statistical Service - for Ukraine
Source for national data: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

¹³ Source: Turkish Statistical Institute, Regional Statistics, <https://biruni.tuik.gov.tr/bolgeselistatistik/degiskenlerUzerindenSorgula.do?durum=acKapa&menuNo=249&altMenuGoster=1&secilenDegiskenListesi=>



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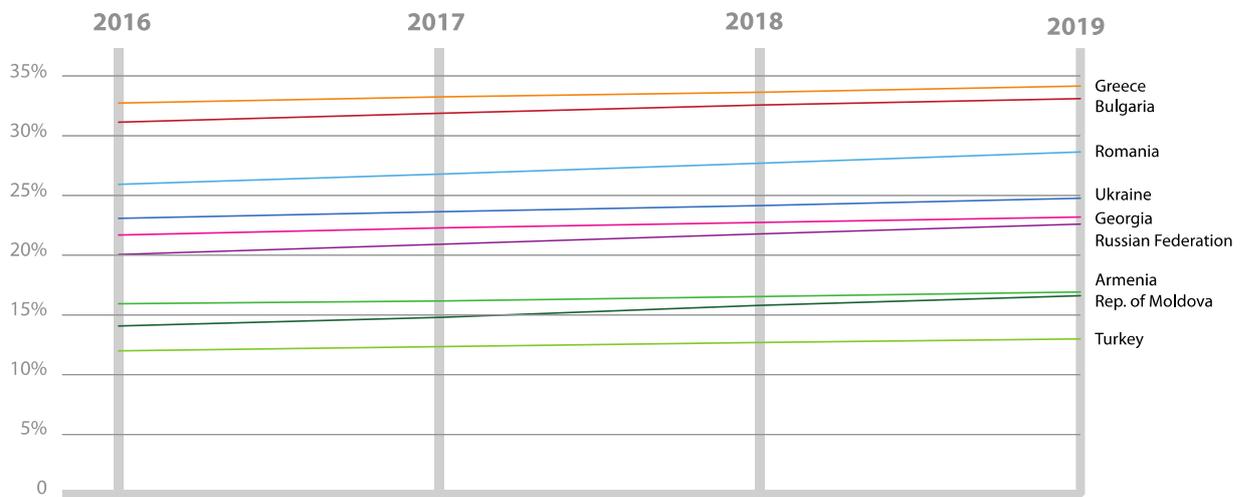


Figure no.5 - Elderly dependency ratio: ≥ 65 years old as a % of working age population (15-64 years old), 2016-2019¹⁴

The population trends (urbanisation, ageing, migration and labour emigration) represent a cross-cutting issue that needs to be considered when developing public policies (social, sustainable development etc.).

1.3 Economic structure

In the last years, the Black Sea Basin countries enjoyed economic growth based on foreign direct investment inflows, credit growth, increases in domestic demand and in service sector. The sea is an important source of economic activity for the region, including in the areas of transport, tourism and energy.

The region is located in the vicinity of large markets including the rest of European Union, Russian Federation and Turkey and benefits from a vast area of agricultural land and considerable energy and natural resources. Although the pace of structural reform varies from one country to another, the region as a whole is on a trajectory of economic transformation, shifting progressively away from a growth model based on large enterprises specialised in intermediary outputs and commodity transformation, towards a more diversified and open economic structure.¹⁵

Nonetheless, important challenges remain. Importantly, the still-weak business climate and corruption constrain the economy's capacity to grow sufficiently rapidly to tangibly reduce poverty and unemployment. Moreover, some countries experienced strong currency depreciation. Therefore, the economy of the Black Sea Basin countries continues to be vulnerable to external shocks such as increased global trade tensions, turbulence in global financial markets and regional geopolitical tensions.

¹⁴ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

¹⁵ Source: Eastern Partner Countries 2020 Assessing the Implementation of the Small Business Act for Europe <https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1600772864&id=id&accname=guest&checksum=7AEEF0D17FD80A0716B3430A8EAD6FFB>



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The economies of some of the Black Sea Basin countries depend heavily on investment and support from their nationals from abroad.

Armenia, a landlocked and mountainous country, is the smallest of the Black Sea Basin countries. Its economy is driven mainly by the industrial and agricultural sectors, which in 2017 accounted for 25.3% and 14.9% of GDP, respectively, with ores and metal accounting for nearly 40% of exports in 2017. The country is highly reliant on Russian Federation both in terms of trade (roughly a quarter of total exports in 2018) and in terms of remittances (64% of total received in 2017). The country became a member of the Eurasian Economic Union (EAEU) in January 2015. Following near-stagnation in 2016, Armenia saw real GDP growth accelerate to 7.5% in 2017 before moderating in 2018¹⁶.

Bulgaria is a mostly service-oriented economy – IT services and tourism are doing particularly well – along with mainly for export light manufacturing and food and beverages. Construction activity also recovered after a long and deep decline. In Bulgaria the most dynamic industrial sectors are textile, pharmaceutical products, cosmetic products, the mobile communication and the software industry¹⁷.

Georgia's economy is based on a relatively small industrial sector and on agricultural processing, which accounted respectively for 22.6% and 6.8% of GDP in 2017. The country imports most of its natural gas and oil products. Georgia is located at the centre of an important regional transit corridor, and transport services accounted for 24.6% of commercial service exports in 2017. New transport infrastructures -with the Anaklia Deep Sea Port scheduled for 2021 completion and the recent signature of trade agreements with the EU and China - are expected to transform the country into a logistics hub. In 2018, the EU became the first export destination of Georgian products, accounting for 22%, while exports to Russian Federation represented 13% of total exports¹⁸.

Rising exports, tourism revenue and domestic consumption continued to support Greek economy in 2019. Traditionally, Greece's economy has been based on agriculture. The main crops are tobacco (third largest European producer, 23rd worldwide) and cotton. Greece also has an important sheepherding industry and the fishing industry is well developed in the coastal regions. Main sectors of industry are electronics, transport equipment, clothing manufacturing and construction. Greece has the largest maritime fleet in the world. Tourism provides an essential source of income and on its own contributes to 17.1% of GDP¹⁹.

Moldova relies heavily on exports of basic agricultural products such as vegetables. These make up 27% of the total export basket, making the country particularly vulnerable to variations in food prices in key exports markets, such as the EU, to which nearly 70% of exports were directed in 2018. The Moldovan economy is highly dependent on remittances (20.16% of GDP in 2017), particularly from Russian Federation (32% of total remittances in 2017)²⁰.

¹⁶ Source: Eastern Partner Countries 2020 Assessing the Implementation of the Small Business Act for Europe: <https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1600772864&id=id&accname=guest&checksum=7AEEF0D17FD80A0716B3430A8EAD6FFB>

¹⁷ Source: <https://www.bstbd.org/Country%20Strategy%202019-2022%20Bulgaria.pdf>

¹⁸ Source: Eastern Partner Countries 2020 Assessing the Implementation of the Small Business Act for Europe: <https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1600772864&id=id&accname=guest&checksum=7AEEF0D17FD80A0716B3430A8EAD6FFB>

¹⁹ Source: <https://www.nordeatrade.com/en/explore-new-market/greece/economical-context?>

²⁰ Source: Eastern Partner Countries 2020 Assessing the Implementation of the Small Business Act for Europe: <https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1600772864&id=id&accname=guest&checksum=7AEEF0D17FD80A0716B3430A8EAD6FFB>



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In recent years there was an increase in the share of exports with other product categories than those mentioned above, namely: (IV) Food; alcoholic beverages, non-alcoholic vinegar; tobacco; (XI) Textiles and textile articles; (XVI) Machinery and equipment, electrical equipment and parts thereof; equipment for recording or reproducing sound and images.

Thus, about 47% of the total exports of the Republic of Moldova, in 2019, constituted finished products, with high added value. At the same time, the analysis of the evolution of the export of goods falling under the category of machines and appliances, electrical equipment and parts thereof; devices for recording or reproducing sound and images, denotes a significant increase in the last 4 years (about 8%). These trends indicate that the local industry (light industry, food, machinery/ technical equipment production) is developing and modernizing progressively, and domestic products are becoming increasingly competitive on foreign markets.

Also, the volume of exports of ICT products and services exceeded in 2019 the figure of 5 billion lei, qualitatively changing the structure of exports of the Republic of Moldova. Only IT exports have increased more than 3 times - from 1.1 billion lei in 2015 to 3.5 billion lei in 2019, considerably exceeding traditional export categories, such as exported wines (with over 400 million lei).

It is essential to note that the balance between these two sub-sectors - digital content and communications infrastructure - speaks of a qualitative change of this sector from consumption of networks and Internet access services to IT products and services with the highest added value, export-oriented.

Also, the dependence of the MD national economy on remittances is diminishing, a substantial decrease being registered in 2018 compared to 2017, the GDP being fed from other sources of financing.

Romania's GDP growth was driven by private consumption and an investment rebound. Investment rose strongly, growing at 17.8 percent year-on-year (y-o-y), owing to strong performance in construction. Exports grew by 3.5 percent, reflecting weaker demand in major export markets, while imports remained buoyant (up 7.2 percent). Construction (up 16.8 percent) and information and communications technology (ICT) (up 8.1 percent) were the main drivers of production²¹.

Russian Federation has significant natural resources. It is the world's second largest producer of natural gas and the third largest producer of petroleum, but also one of the main producers and exporters of diamonds, nickel and platinum. Despite its large area, Russian Federation has relatively little arable land due to unfavourable climatic conditions. Agriculture contributes 3.1% of the national GDP and employs around 6% of the total working population. Industry accounts for 32.1% of Russian Federation's GDP and employs 27% of the workforce. The country inherited most of the industrial bases of the Soviet Union. The most developed sectors are chemistry, metallurgy, mechanics, construction and defence²².

In 2019, the economic growth of the Russian Federation was supported by continued retail credit expansion and increased government spending; consumer demand became the main engine of growth.

²¹ Source: World Bank: <https://www.worldbank.org/en/country/romania/overview#3>

²² Source: According to: [https://www.nordeatrade.com/fi/explore-new-market/Russian Federation/economical-context](https://www.nordeatrade.com/fi/explore-new-market/Russian-Federation/economical-context)



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Turkey is an upper-middle income economy and the world's 19th largest economy in terms of nominal GDP. Turkey's economy is dominated by industry and services, while the agricultural sector contributes to about 6.4% of GDP and accounts for 18.2% of total employment. The manufacturing sector concentrates 12.5% of all enterprises as for 2018, and focuses mainly on low- and medium-technology products. However, the tradable sector has improved its performance in many areas over the past decade: the share of medium-to-high and high-technology goods in total manufactured exports reached 39.4% in 2019. Vehicles other than railway or tramway rolling-stock, parts thereof slightly decreased (by 2%), year-on-year basis in 2019 but still preserve its substantial share in total exports, which is 15%. This illustrates Turkey's progress in transitioning to medium-to-high technology manufacturing. On the other hand, the economy remains dependent on imports - especially of primary goods.

Despite the unresolved conflict in the east of the country, Ukraine remains the largest Eastern Partnership (EaP) economy, generating over 45% of the region's GDP. Industry and agriculture continue to drive the Ukrainian economy and represented 24% and 10.2% of GDP. GDP contracted by 16% in 2014-15 and the subsequent recovery has been modest, though gaining in strength. Growth in 2018 reached 3.3%, with aggregate GDP in real terms still almost 15% below the peak recorded in 2008. The country possesses 30% of the world's richest black soil, giving its agricultural industry a huge potential. Key trade partners are the EU and Russian Federation, which respectively received 43% and 8% of Ukrainian exports in 2018²³.

As a general remark, in all the BSB countries, services represent the main economic sector, followed by industry and agriculture.

The economic structure of the Black Sea Basin countries still shows overall a larger share of agricultural and industrial sectors than the EU average. In terms of economic structure, the countries have in common a long-term decline of the agricultural sector, the rapid growth of the services sector, and the fact that on the expenditure side the private sector accounts for most of the incremental economic growth, led notably by consumer demand²⁴.

²³ Source: Eastern Partner Countries 2020 Assessing the Implementation of the Small Business Act for Europe
<https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1600772864&id=id&accname=guest&checksum=7AEEF0D17FD80A0716B3430A8EAD6FFB>

²⁴ Source: Commission on the Black Sea - *The Current State of Economic Development in the Black Sea Region, Policy Report, 2010*



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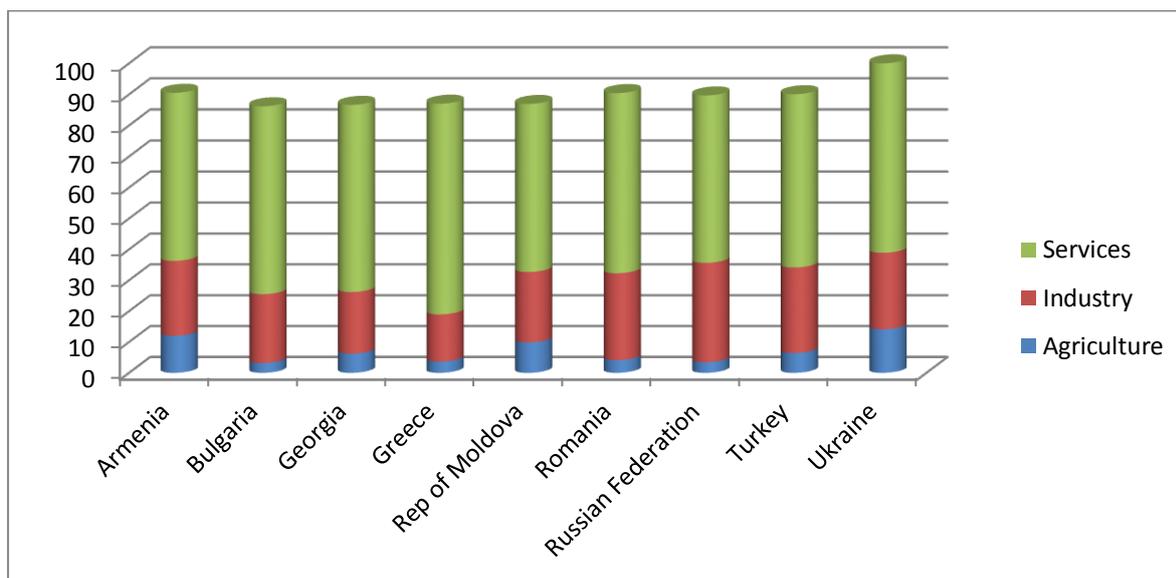


Figure no.6 - Economic structure of the BSB countries by sectors in 2019 as percentage²⁵

The economic situation of the Black Sea Basin countries is illustrated by the key index of economic development, i.e. gross domestic product per capita.

Significant differences in terms of GDP per capita exist between EU Member States and partner countries²⁶, ranging from 3.660 USD for Ukraine to approximately 19,583 USD for Greece. The average is more than five times lower than the EU average GDP per capita and it corresponds to an upper middle-income level according to the World Bank classification.

GDP per capita (USD)	2016	2017	2018	2019
Armenia	3.591,83	3.914,50	4.220,49	4.622,73
Bulgaria	7.545,79	8.331,06	9.423,56	9.737,60
Georgia	4.062,17	4.357,00	4.722,79	4.769,19
Greece	18.116,46	18.930,22	20.324,31	19.582,54
Republic of Moldova	2.880,44	3.509,69	4.234,00	4.498,52
Romania	9.567,13	10.807,80	12.408,60	12.919,53
Russian Federation	8.704,90	10.720,33	11.370,81	11.585,00
Turkey	10.820,63	10.513,65	9.370,18	9.042,49
Ukraine	2.187,73	2.640,68	3.096,82	3.659,03

Table no. 2 GDP per capita (USD)²⁷

²⁵ Source: Economic structure of the BSB countries by sectors in 2019; source: www.statista.com for the BSB countries, but for Ukraine. For Ukraine the data is available for 2018 on <https://www.nordeatrade.com/fi/explore-new-market/ukraine/economical-context>

²⁶ Joint paper on Interreg NEXT Strategic Programming 2021-2027, 20 January 2020, Orientation for Interreg NEXT Black Sea Basin Cooperation

²⁷ Source: According to World Bank: <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD>



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At regional level, in 2018, the region of Kentriki Makedonia from Greece is the region with the highest GDP per capita with 30,452 USD and Zaporizhzhia from Ukraine, the region with the lowest GDP per capita with 1,165 USD.

In a number of countries in the area, the growth outlook was relatively stable in the 2016-2019 period, but unaddressed challenges keep growth below potential²⁸. The economic growth for the Black Sea Basin countries was on average 1,85% in 2018, 4,11% in 2017, 3.41% in 2018 and 3.32% in 2019 and it outperformed the EU average growth in almost the entire reference period (2% in 2016, 2,6% in 2017, 2% in 2018 and 1,5% in 2019)²⁹.

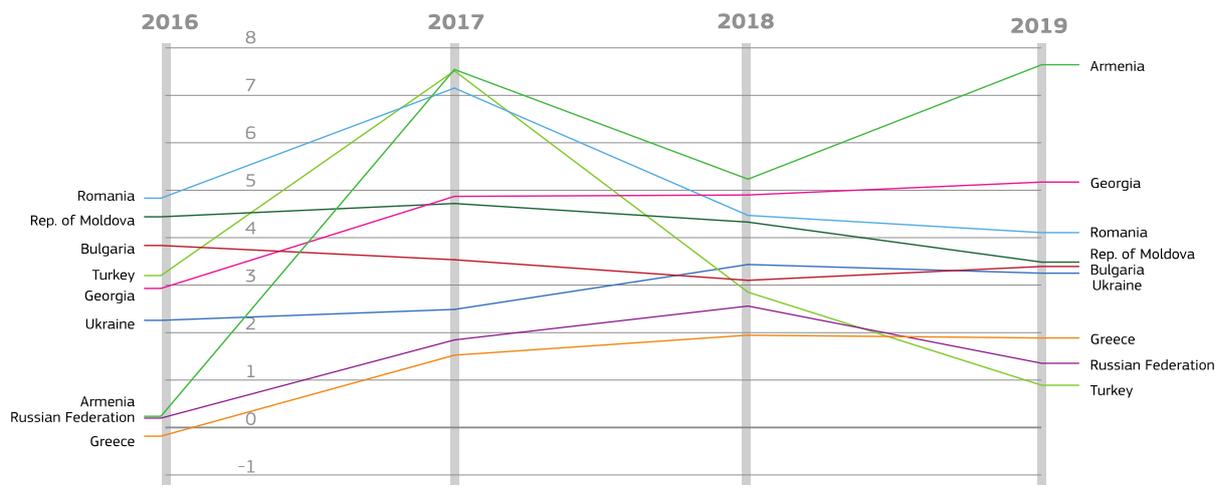


Figure no.7³⁰: GDP Annual Growth Rate %

As far as the inflation (consumer price index) is concerned, the rates fluctuate from one country to another. In most of the countries, the inflation is under control, but an ascendant trend was noticed in the last years, reaching 2 digits rates in Turkey and Ukraine.

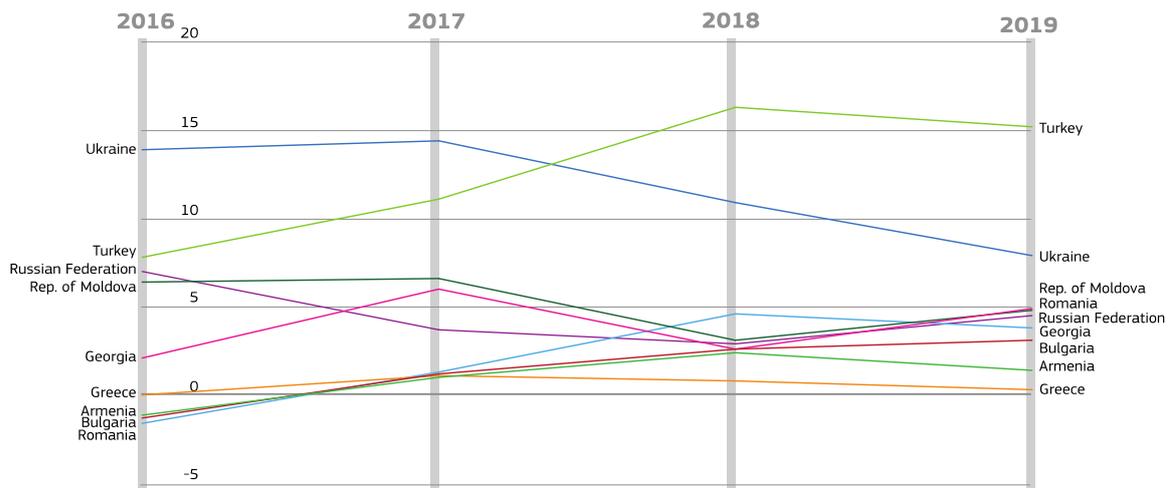


Figure no.8³¹: Inflation, consumer prices, (annual %)

²⁸ Joint paper on Interreg NEXT Strategic Programming 2021-2027, 20 January 2020, Orientation for Interreg NEXT Black Sea Basin Cooperation

²⁹ Source: <https://ec.europa.eu/eurostat/databrowser/view/tec00115/default/table?lang=en>

³⁰ According to World Bank : <https://data.worldbank.org/indicator/NY.GDP.MKTP.CD>



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The EU is an important economic and trading partner for the countries of the Black Sea region. Through its bilateral and regional activities, the EU supports the efforts of the countries of the region to improve their regulatory framework and overall business environment. The EU has been supportive of efforts by regional cooperation organisations aimed at furthering trade liberalisation. It will be important in the period ahead to ensure compatibility with existing commitments, including in the EU and WTO contexts.

In 2019, the average exports of the Black Sea Basin countries represented 41.45% of GDP and imports 44.9% of GDP. Most of the BSB countries have trade deficits, as it can be observed from the table below.

³¹ According to International Monetary Fund:
<https://www.imf.org/external/datamapper/PCPIEPCH@WEO/OEMDC/ADVEC/WEOWORLD>



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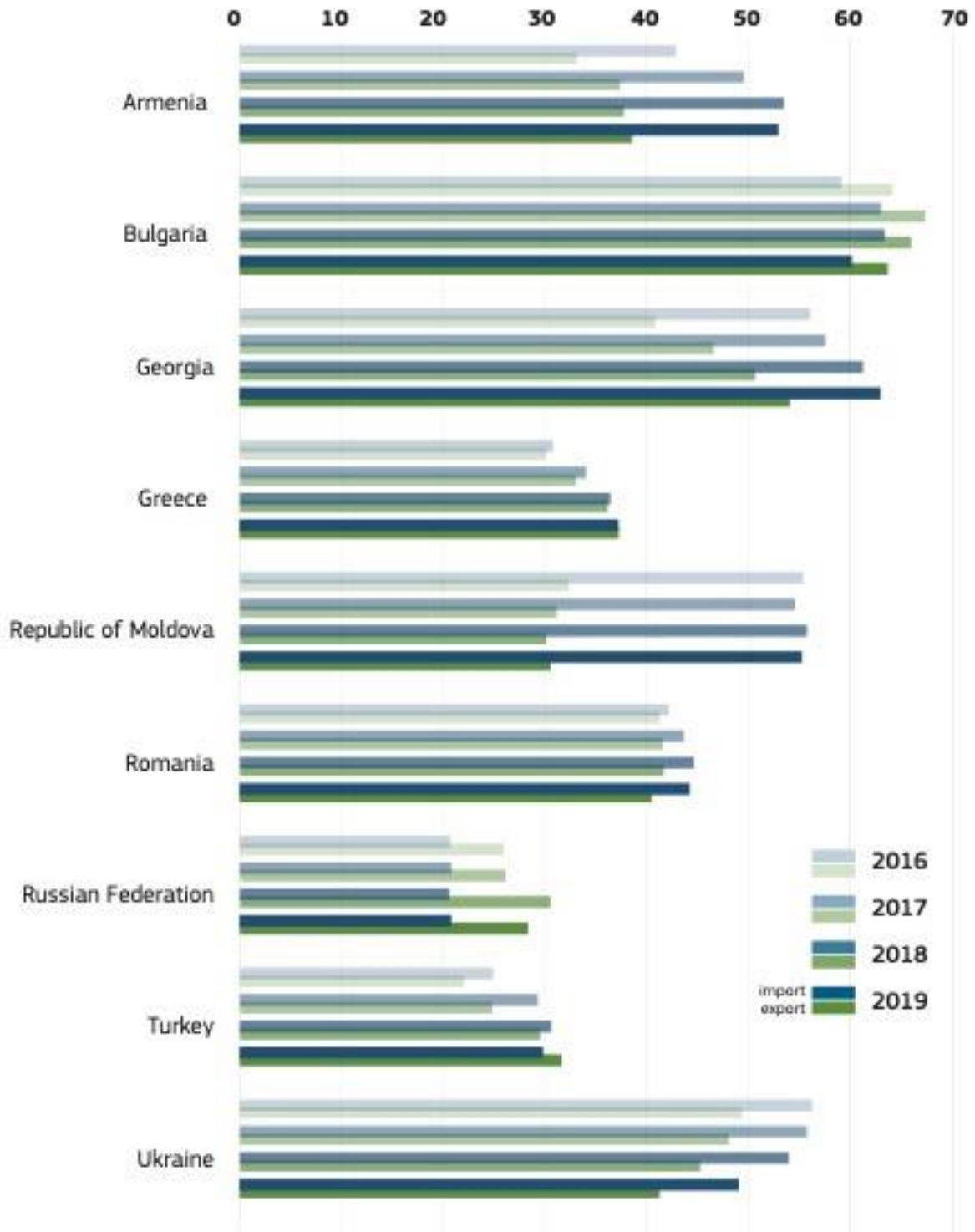


Figure no.9³² Exports and Imports of goods and services (% of GDP) during 2016-2019

The political condition of the BSB countries is not homogeneous: Bulgaria, Greece and Romania are the EU member states, Turkey is negotiating its accession to the EU, the Russian

³² According to World Bank: <https://data.worldbank.org/indicator/BX.GSR.GNFS.CD>



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Federation is implementing its own social-economic policy, Georgia and Ukraine have declared an intention to the accession to the EU.

Therefore, it might be concluded that the socio-economic environment of BSB countries is dependent on the strategically political decisions taken by their governments and by the international context.

1.4 The impact of COVID-19 crisis

Besides the huge impact on the health sector, the COVID-19 outbreak is bringing considerable socio-economic disruption. The effects of the current crisis are affecting the cross-border dynamics and will certainly influence the socio-economic perspectives of all cooperation areas.

On the 27 of May 2020, the European Commission observed that the economic outlook for Eastern and Southern neighbourhood countries has radically changed following the global spread of the coronavirus in early 2020. Previous forecasts were for a continued good or improving performance relative to 2019, with growth generally expected to strengthen in 2020. The spread of the coronavirus has brought an abrupt deterioration of the outlook: all neighbours appear to be set for a recession this year, while its duration and severity are still difficult to estimate. In order to alleviate the burden of the crisis on the economy and population, most authorities have announced a number of health-related, fiscal and monetary policy measures. However, more funding is likely to be needed. Therefore, several countries in the region will be in need of additional financial support from external partners to provide liquidity, sustain macroeconomic stability and avoid adverse fiscal dynamics.³³

The impact of COVID-19 on gross domestic product for 2020 is estimated to be significant in the countries of BSB area, with an average of -4,79% decrease. According to the International Monetary Fund (IMF) forecasts, the more affected countries seem to be Ukraine -7.7% and Greece -10%³⁴.

³³ Commission Staff Working Document: Identifying Europe's Recovery Needs Accompanying the Document Communication from the Commission to the European Parliament, the European Council, the Council, the European Economic and Social Committee and the Committee of the regions Europe's moment: Repair and Prepare for the Next Generation https://ec.europa.eu/info/sites/info/files/economy-finance/assessment_of_economic_and_investment_needs.pdf

³⁴Source: https://ec.europa.eu/info/business-economy-euro/economic-performance-and-forecasts/economic-performance-country_en



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Figure no.10- The impact of COVID-19 on GDP³⁵ based on IMF forecasts

However, for 2021 the IMF estimates that all the BSB countries will recover from the economical point of view, with an average recovery rate of 3.97% of the GDP.

Also, the COVID-19 pandemic represents an unprecedented disruption of the world trade and BSB countries are no exception. However, rapid government responses tempered the contraction suffered during the 2020 spring confinement period.

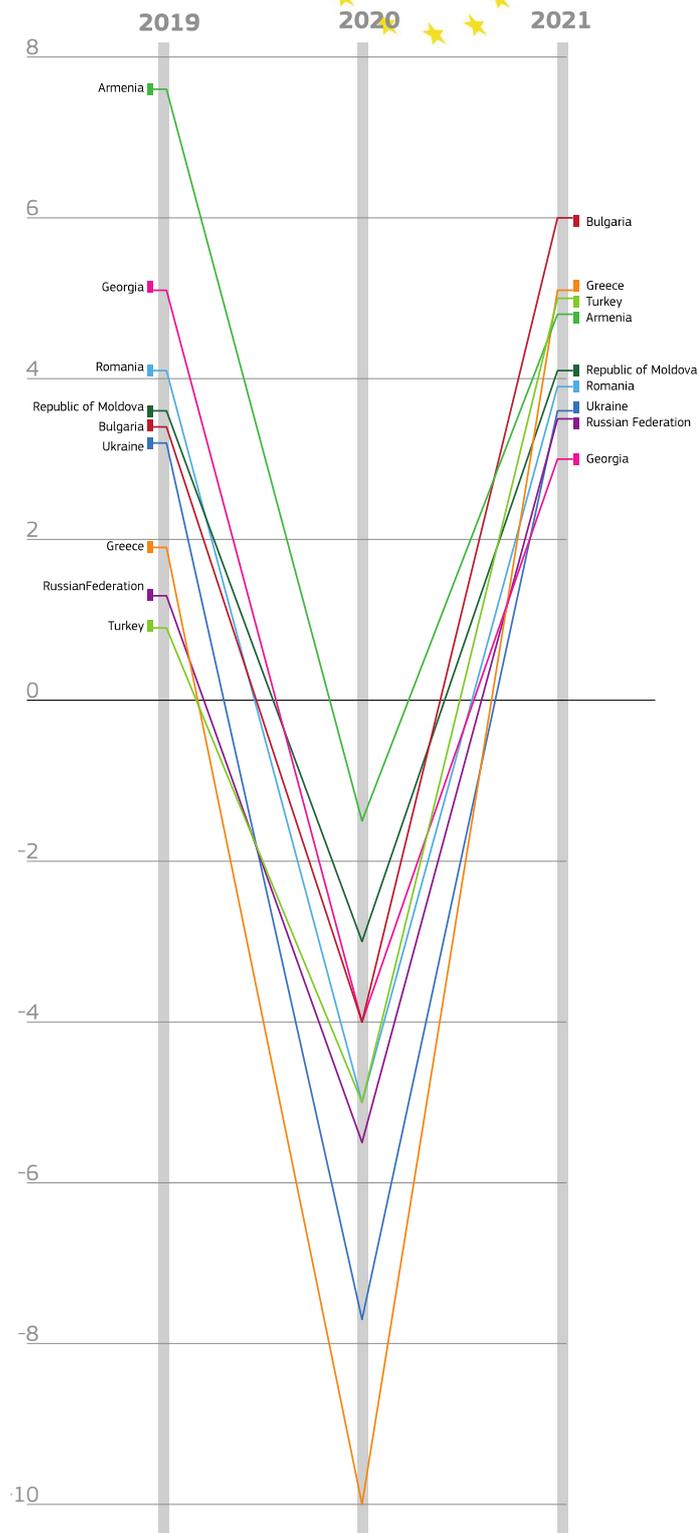
The economic sectors most affected by the COVID-19 outbreak in the BSB cooperation area were tourism (accommodation, catering, transportation, travel agencies and tour operators' activities), and cultural and entertainment activities.

The transport industry was also highly affected in all the BSB countries as maritime and air traffic was almost completely shut down during the first months of confinement.

Also, other industries suffered an economic slowdown: the automobile sector (RO and MD, TR) the manufacture industry in (AM, MD) and shipping industry (GR).

Currency fluctuations were registered in most of the BSB countries especially at the beginning of the pandemic; however, the National Banks intervened to smooth excessive volatility and stabilize the exchange rate in order to protect financial stability.

Regarding the measures taken to mitigate with the COVID-19 pandemic impact, at the EU level, on 21 July 2020, EU leaders agreed on a package of €1 824.3 billion which combines the multiannual financial framework (MFF) and an extraordinary recovery instrument, Next Generation EU (EUR 750 billion). The package will help the EU to rebuild after the COVID-19 pandemic and will support investment in the green and digital transitions. Bulgaria will receive EUR 15 billion, Greece will receive EUR 33 billion, and Romania will receive EUR 33 billion from the Next Generation EU recovery Instrument.



³⁵ Source: IMF - World Economic Outlook



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Additionally, the governments in the BSB countries³⁶ delivered a series of stimulus packages and taken various measures to curb impact of the pandemic on the economy while preserving employment and keeping business activity on flow and encouraging growth, which included: facilities for loans for small and medium enterprises (RO, AM, TR, GE, MD, GR, BG) , introduction of regional and national programmes to support SMEs (RF), reallocation of the expenses for federal programmes and other activities (RF), suspension or reduction of VAT and other tax obligations' payments (GR, UA, RO, MD), various economic incentives to support national tourism (BG, GR, RO, MD), subsidies for transport companies and other sectors (RF).

In 2020, the labour market in the BSB countries underwent a considerable deterioration induced by the COVID-19 pandemic, with a higher growth of unemployment in the EU member states. The measures taken to contain unemployment included: regulation of the remote work (in almost all the BSB countries), technical unemployment partially paid by the state (RO, UA, BG, GR) different subsidies for employers (GE, MD), facilities for hiring unemployed persons (RO), and extension of the regular unemployment benefit payment (GR)

Other social measures include: facilities for persons with disabilities (BG, MD, GE, and AM), loan payments suspension (RO), or extension of deadlines for taxpayers(RF), utilities subsidy for households (GE, AM),extension of deadlines for rent payment (RF), income support for low-income families and workers losing their job (TR, MD, RF), increasing the pensions (GE, MD), special financial assistance for elderly people and families who have children, unemployed citizens (RF).

Many of the measures taken by the BSB states strengthen the resilience of their health systems and prevention programmes: improvement of healthcare infrastructure to accommodate COVID patients (GE, MD, RO, TR, GE) building temporary hospitals dedicated to COVID -19 patients (RO, TR), additional funds allocation for the medical personnel working for patients with COVID 19 (RO, UA, MD, GR).

Also, the governments in the BSB area took several decisions to ensure the functionality and continuity of educational process: regulations regarding distance learning, purchase of laptops and tablets for teachers and students (RO, MD), distance learning training for teachers (MD, AM), broadcast at the national television of the curriculum standard lessons (RO, GE, TR, MD).

The economic consequences of the crisis do not necessarily mirror the epidemiological damage caused by the pandemic and although the negative economic impact is perceived in all BSB countries, the effects are felt differently by each region and population group.

As consequence of COVID-19 pandemic, poverty is estimated to increase in the BSB area, as all around the world, given the job losses and growing vulnerabilities associated with the crisis. The poor are more likely to suffer from income losses as a result of quarantines and the disruptions in economic activity.

Nevertheless, a virus that knows no borders creates a shared challenge and makes a strong and urgent case for international cooperation and common solutions.

³⁶ Data provided by participating countries



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Chapter 2- Strategic Framework

2.1 Macro-regional strategies and sea basin strategy

In accordance with article 15, paragraph 3 of the Draft 2021-2027 Interreg Regulation, where a transnational programme covers the same geographical area as a macro-regional or sea basin strategy, at least 80% of the EU financing shall be programmed on the objectives of that strategy.

Therefore, the Interreg NEXT Black Sea Basin Programme 2021-2027 shall be drafted in line with the goals of the main strategies concerning the programme area:

- Black Sea Synergy (BSS)
- Common Maritime Agenda for the Black Sea (CMA)
- EU Strategy for the Danube Region (EUSDR)
- EU Strategy for the Adriatic and Ionian Region (EUSAIR)

The EU macro-regional strategies offer a platform for multi-sectoral, multi-country and multi-level governance, also open to non-EU countries. They play a substantial role in helping these countries to strengthen their links with the EU³⁷.

There are four EU macro-regional strategies³⁸, out of which the EU Strategy for the Danube Region and the EU Strategy for the Adriatic and Ionian Region are of relevance for the Black Sea Basin programme area.

The strategies do not come with new EU funds, legislation or formal structures: they rely on coordination and synergy. This means optimal use of all existing financial sources (EU, national, regional, private, etc.), better implementation of existing legislation, and better use of existing institutions at all levels.

The governance of the strategies is supported by the transnational cooperation programmes operating in the same cooperation area (“Interreg V-B Danube”³⁹ for the EU Strategy for the Danube Region and “Interreg V-B Adriatic-Ionian”⁴⁰ for the EU Strategy for the Adriatic and Ionian Region).

The strategies are accompanied by a rolling action plan to be regularly updated in light of new, emerging needs and changing contexts. The priorities / actions included therein need to be taken into consideration when drafting the relevant operational programmes. This embedding process is closely followed by the European Commission⁴¹.

³⁷ Joint paper on Interreg NEXT Strategic Programming 2021-2027, 20 January 2020

³⁸ The EU Strategy for the Baltic Sea Region (2009), the EU Strategy for the Danube Region (2010), the EU Strategy for the Adriatic and Ionian Region (2014) and the EU Strategy for the Alpine Region (2015)

³⁹ Source: <http://www.interreg-danube.eu/>

⁴⁰ Source: <https://www.adrioninterreg.eu/>

⁴¹ Report from the Commission on the implementation of EU macro-regional strategies COM(2019) 21 final



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2.1.1 Black Sea Synergy (BSS)

The Black Sea Synergy initiative⁴² is the key political framework for the European Union’s engagement and enhanced cooperation in the region. It was launched in 2007 for developing deeper regional cooperation involving 10 countries: Armenia, Azerbaijan, Bulgaria, Georgia, Greece, Romania, Republic of Moldova, Russian Federation, Turkey and Ukraine.

BSS develops cooperation within the Black Sea region and between the region and the European Union, based on the common interests. It also intends to enhance synergies with existing regional initiatives linking the region to the EU, such as the EU Strategy for the Danube Region, and with existing international organisations active in the region.

BSS Fields of cooperation ⁴³
❖ Blue Growth, with particular focus on the integrated maritime policy, marine research and innovation
❖ Fisheries
❖ Environmental protection and climate change
❖ Cross-border cooperation - Black Sea basin programme 2014-2020
❖ Civil society engagement, democracy and human rights
❖ Education, research and innovation (beyond marine), culture and tourism
❖ Energy and transport
❖ Employment and social affairs
❖ Trade

The third implementation report of the BSS initiative, “Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018”⁴⁴, highlights the progress made and lessons learnt under the fields of cooperation:

- » Important progress was noted in the fields of blue growth, environmental protection and climate change, fisheries, civil society engagement, cross-border cooperation and research and innovation.
- » The fields with less progress, but receiving great interest from the partners, were education, culture, tourism, energy and transport.
- » Fields of cooperation with no significant registered progress were employment, social affairs and trade.

⁴² Communication from the Commission COM(2007) 160 final

⁴³ As presented in the third implementation report of the BSS initiative

⁴⁴ Joint Staff Working Document SWD(2019) 100 final, <https://data.consilium.europa.eu/doc/document/ST-7119-2019-INIT/en/pdf>



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In its conclusions on EU’s engagement to Black Sea regional cooperation of 17 June 2019⁴⁵, the Council recalled that the Black Sea Synergy initiative remains the basis for the EU’s engagement in the region and welcomed the third implementation report which confirms the practical value and positive contribution of the initiative to regional cooperation in the Black Sea area. The European Commission is encouraged to give due consideration to the Black Sea Synergy in the future programming of financial and technical cooperation. Also, an enhanced EU engagement on regional cooperation in the Black Sea area should build upon the lessons learned during the implementation of the Black Sea Synergy.

The Council encourages better links between the Black Sea Synergy and other EU policies and strategies relevant for the region, in particular with the EU Strategy for the Danube Region.

2.2.2 Common Maritime Agenda for the Black Sea (CMA)

The Common Maritime Agenda⁴⁶ is an important reference document and it is the first of its kind concerning the Black Sea area. It was endorsed, in May 2019, by ministers of the six coastal countries: Bulgaria, Georgia, Romania, Russian Federation, Turkey, Ukraine and also of the Republic of Moldova. Its adoption is an important milestone in implementing the BSS initiative and it resulted from a process initiated and backed by the European Commission.

With this, the Black Sea region joins the rest of the sea basins bordering the EU in setting a basin-wide initiative for more, and more sustainable, economic growth.

In its conclusions on EU’s engagement to Black Sea regional cooperation of 17 June 2019, the Council welcomed the Common Maritime Agenda for the Black Sea, as a significant step towards an enhanced regional cooperation in the Black Sea on maritime affairs and fisheries, with focus on blue economy. The Council encourages the concerned states to take into account the priorities of the Agenda for their transnational, cross-border and national programmes.

CMA is a valuable tool for the participating countries, the European Commission and other international donors to align available funding with the priority areas identified by the participating countries. It contains concrete priorities and actions for the development of, *inter alia*, a sustainable blue economy⁴⁷ in the Black Sea region.

CMA Goals	CMA Priorities
❖ Healthy marine and coastal ecosystems	<ul style="list-style-type: none"> - Ensure protection and sustainability of marine ecosystem - Address marine pollution and plastic litter - Support sustainable fisheries and aquaculture - Support innovative marine research infrastructures - Encourage production, management and sharing of marine and coastal environmental knowledge

⁴⁵ Council Conclusions on the EU’s engagement to the Black Sea regional cooperation, Outcome of proceedings 10219/19, <https://www.consilium.europa.eu/media/39779/st10219-en19.pdf>

⁴⁶Source: https://ec.europa.eu/maritimeaffairs/press/black-sea-ministers-endorse-common-maritime-agenda_en

⁴⁷ Blue economy represents all economic activities related to oceans, seas and coasts. Blue economy covers a wide range of interlinked established and emerging sectors. (“The 2018 Annual Economic report on EU Blue Economy”, issued by the EC)



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<ul style="list-style-type: none"> ❖ A competitive, innovative and sustainable blue economy 	<ul style="list-style-type: none"> - Foster innovative business models, stimulate research and innovation, and sustainable growth and up-to-date jobs - Promote transport and digital connectivity - Promote blue skills and blue careers as an engine for innovation and competitiveness
<ul style="list-style-type: none"> ❖ Fostering investment 	<ul style="list-style-type: none"> - Improve access to financial resources and promote sustainable investment in the blue economy - Promote maritime entrepreneurship and clusters

50 actions are envisaged under the CMA priorities.

Project ideas were suggested during the two workshops organised under the CMA umbrellas in 2019⁴⁸ and also during the Regional Stakeholder Seminar on Blue Economy towards a Common Maritime Agenda for the Black Sea held in March 2019⁴⁹.

2.2.3 The EU Strategy for the Danube Region (EUSDR)

The EU Strategy for the Danube Region⁵⁰ is the largest and most diverse EU macro-regional strategy. It was adopted by the European Commission in 2010 and endorsed by the European Council in 2011 and it involves 14 countries⁵¹.

The Black Sea Basin programme area is partially covered by the strategy, namely the eligible regions from Bulgaria, Romania and Ukraine and the Republic of Moldova.

EUSDR Pillars	EUSDR Priority areas
<ul style="list-style-type: none"> ❖ Connecting the Region 	<ul style="list-style-type: none"> - Waterway mobility - Rail-Road-Air Mobility - Sustainable Energy - Culture and Tourism, People to People
<ul style="list-style-type: none"> ❖ Protecting the Environment 	<ul style="list-style-type: none"> - Water quality - Environmental risks - Biodiversity and landscapes, quality of air and soils
<ul style="list-style-type: none"> ❖ Building prosperity 	<ul style="list-style-type: none"> - Knowledge Society

⁴⁸ Source: https://blackseablueeconomy.eu/sites/default/files/event_report_varna_workshop.pdf
https://blackseablueeconomy.eu/sites/default/files/event_report_romania_workshop_vwebsite_0.pdf

⁴⁹ Source: https://blackseablueeconomy.eu/sites/default/files/rs_final_conclusions_0.pdf

⁵⁰ Communication from the Commission COM(2010) 715 final - the strategy; Commission Staff Working Document SWD(2020) 59 final - revised Action Plan: <https://danube-region.eu/>

⁵¹ Nine EU Member States (Austria, Bulgaria, Croatia, Czech Republic, parts of Germany, Hungary, Romania, Slovakia, Slovenia), three Accession Countries (Bosnia and Herzegovina, Montenegro, Serbia) and two Neighbouring Countries (Moldova, parts of Ukraine)



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	<ul style="list-style-type: none"> - Competitiveness of enterprises - People and skills
❖ Strengthening the Region	<ul style="list-style-type: none"> - Institutional Capacity and Cooperation - Security

In total, the above 12 priority areas have defined 85 actions in the revised Action Plan of the strategy. In order to facilitate the process of embedding of the EUSDR into the relevant EU funding programmes, a shortlist of three strategic topics by each priority area was established⁵².

The actions under the programme need to take into account and contribute, where relevant, to the EUSDR objectives and be in line with its Action Plan. This is particularly relevant for issues such as cleaning of the Danube River and its basin, having impact on the pollution of the Black Sea.⁵³

2.2.4 The EU Strategy for the Adriatic and Ionian Region (EUSAIR)

The EU Strategy for the Adriatic and Ionian Region⁵⁴ is a macro-regional strategy adopted by the European Commission and endorsed by the European Council in 2014 and it involves 9 countries⁵⁵.

The Adriatic and Ionian Region is a functional area primarily defined by the Adriatic and Ionian Seas basin. The Black Sea Basin programme area overlaps to a small extent with the area covered by this strategy, namely only with the eligible regions from Greece.

The strategy promotes sustainable economic and social prosperity and growth in the region by improving its attractiveness, competitiveness and connectivity.

EUSAIR Pillars	EUSAIR Topics
❖ Blue Growth	<ul style="list-style-type: none"> - Blue technologies - Fisheries and aquaculture - Maritime and marine governance and services
❖ Connecting the Region	<ul style="list-style-type: none"> - Maritime transport - Intermodal connections to the hinterland - Energy networks

⁵² Source: <https://danube-region.eu/projects-and-funding/aligning-eusdr-esif/>

⁵³ Joint paper on Interreg NEXT Strategic Programming 2021-2027, 20 January 2020

⁵⁴ Communication from the Commission COM(2014) 357 final - the strategy; Addendum to the Communication from the Commission COM(2020) 132 final - inclusion of the Republic of North Macedonia; Commission Staff Working Document SWD(2020) 57 final - revised Action Plan: <https://www.adriatic-ionian.eu/>

⁵⁵ Four EU Member States (Croatia, Greece, Italy, Slovenia) and five Accession Countries (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, Serbia)



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❖ Environmental Quality	<ul style="list-style-type: none"> - The marine environment - Transnational terrestrial habitats and biodiversity
❖ Sustainable Tourism	<ul style="list-style-type: none"> - Diversified tourism offer (products and services) - Sustainable and responsible tourism management (innovation and quality)

The Action Plan provides project examples under each above mentioned topic, with the aim to stimulate further initiatives.

As regards the overlapping of the Black Sea Basin programme eligible area with the geographical area of macro-regional and sea basin strategies, it is important to highlight the following:

Macro-regional / sea basin strategy	Geographical coverage of BSB programme eligible area by strategies' areas
❖ Black Sea Synergy (BSS)	<p>Entirely (100% of the total BSB programme eligible area):</p> <ul style="list-style-type: none"> - Armenia (whole country) - Bulgaria - Severoiztochen, Yugoiztochen - Georgia (whole country) - Greece - Kentriki Makedonia, Anatoliki Makedonia Thraki - Republic of Moldova (whole country) - Romania - South-East - Russian Federation: Rostov Oblast, Krasnodar Krai, Adygea republic - Turkey - TR10 (İstanbul), TR21 (Tekirdağ, Edirne, Kırklareli), TR42 (Kocaeli, Sakarya, Düzce, Bolu, Yalova), TR81 (Zonguldak, Karabük, Bartın), TR82 (Kastamonu, Çankırı, Sinop), TR83 (Samsun, Tokat, Çorum, Amasya) and TR90 (Trabzon, Ordu, Giresun, Rize, Artvin, Gümüşhane) - Ukraine - Odessa, Mykolaiv, Kherson, Zaporizhzhia and Donetsk (Bakhmut, Kramatorsk, Volnovakha, Mariupol, Pokrovsk)
❖ Common Maritime Agenda (CMA)	<p>Partially (91% of the total BSB programme eligible area):</p> <ul style="list-style-type: none"> - Bulgaria - Severoiztochen, Yugoiztochen - Georgia (whole country) - Republic of Moldova (whole country)



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	<ul style="list-style-type: none"> - Romania - South-East - Russian Federation - Rostov Oblast, Krasnodar Krai, Adygea republic - Turkey - TR10 (İstanbul), TR21 (Tekirdağ, Edirne, Kırklareli), TR42 (Kocaeli, Sakarya, Düzce, Bolu, Yalova), TR81 (Zonguldak, Karabük, Bartın), TR82 (Kastamonu, Çankırı, Sinop), TR83 (Samsun, Tokat, Çorum, Amasya) and TR90 (Trabzon, Ordu, Giresun, Rize, Artvin, Gümüşhane) - Ukraine - Odessa, Mykolaiv, Kherson, Zaporizhzhia and Donetsk (Bakhmut, Kramatorsk, Volnovakha, Mariupol, Pokrovsk)
❖ EU Strategy for the Danube Region (EUSDR)	<p>Partially (19% of the total BSB programme eligible area):</p> <ul style="list-style-type: none"> - Bulgaria - Severoiztochen, Yugoiztochen - Republic of Moldova (whole country) - Romania - South-East - Ukraine - Odessa
❖ EU Strategy for the Adriatic and Ionian Region (EUSAIR)	<p>Partially (5% of the total BSB programme eligible area):</p> <ul style="list-style-type: none"> - Greece - Kentriki Makedonia, Anatoliki Makedonia Thraki

Table no. 3 - Geographical coverage of BSB programme eligible area by regional and macro-regional strategies' areas (%)

2. 2. Complementarities and synergies

Complementarity of support is essential to ensure the best use of resources and the results for the eligible regions and stakeholders. In this respect, the BSB programme will continue to seek for complementarities with other key cooperation frameworks within the BSB region and by other donors, such as:

Black Sea Economic Cooperation (BSEC)

The Black Sea Economic Cooperation is aiming at fostering interaction and harmony among its members, as well as to ensure peace, stability and prosperity, encouraging friendly and good-neighbourly relations in the Black Sea region, today BSEC serves as a forum for cooperation in a wide range of areas for its 12 Member States: Albania, Armenia, Azerbaijan, Bulgaria, Georgia, Greece, Moldova, North Macedonia, Romania, Russia, Serbia, Turkey and Ukraine.

Agriculture and agro-industry, banking and finance, combating organized crime, culture, customs matters, education, emergency assistance, energy, environmental protection, exchange of statistical data and economic information, healthcare and pharmaceuticals,



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information and communication technologies, institutional renewal and good governance, science and technology, SMEs, tourism, trade and economic development and transport are among the main fields of cooperation within the framework of the Organization⁵⁶.

Conference of Peripheral Maritime Regions (CPMR) & Balkan and Black Sea Commission (BBSC)

The CPMR Balkan and Black Sea Commission (BBSC) currently brings together 22 Regions from Greece, Turkey, Romania, Bulgaria, Ukraine, Albania, and Republic of Moldova. It represents a useful tool and way to address specific issues that are common to the members of the geographical area which are then voiced at the highest European level.

The objective of the Balkan and Black Sea Commission is to encourage dialogue and cooperation between sub-state spheres of government. The aim is to constitute a lasting institutional framework to support the integration in the EU in the context of enlargement and - beyond - contribute to efficient and peaceful neighbourhood relationships.

Strengthening interregional cooperation and developing joint projects in sectors such as tourism, Integrated Maritime Policy, transport and accessibility, and environment are ways Participation via consultations and proposals to inter-state structures of the wider Balkan and Black Sea area⁵⁷.

Assembly of European Regions (AER)

With member regions from 30 countries, AER is the voice of regional authorities since 1985 and has played an important role in recognising regions as key players in the European construction⁵⁸.

The objectives of the Assembly of European Regions are promoting regional interests in Europe and beyond and fostering interregional cooperation to promote the exchange of experience and the development of regional policy.

Commission for the Protection of the Black Sea against Pollution (Black Sea Commission or BSC)

The Commission for the Protection of the Black Sea against Pollution (BSC), with a permanent Secretariat in Istanbul, acts as the coordinating mechanism for the implementation of the Convention on the Protection of the Black Sea against pollution and was adopted in 1992 by six countries: Bulgaria, Georgia, Romania, Russian Federation, Turkey and Ukraine. BSC implements the Black Sea Strategic Action Plan for the environmental protection and rehabilitation of the Black Sea (updated in 2009). The BSB programme may build upon the experience accumulated within BSC and look for synergies with its ongoing activities, in particular under PO 2.

⁵⁶ Source: <http://www.bsec-organization.org/bsec-at-glance>

⁵⁷ According to: <https://cpmr-balkan-blacksea.org/who-we-are/>

⁵⁸ According to: <https://aer.eu/aer-largest-independent-network-regions-wider-europe/>



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Other international donors, active mostly in partner countries are United Nations Development Programme (UNDP), German Federal Enterprise for International Cooperation (GIZ), United States Agency for International Development (USAID).

The Eastern Partnership (EaP)⁵⁹

The Eastern Partnership is a joint policy initiative which aims to deepen and strengthen relations between the European Union (EU), its Member States and its six Eastern neighbours: Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine.

The four main priority areas of the Eastern Partnership are:

- Stronger Economy (economic development and market opportunities);
- Stronger Governance (strengthening institutions and good governance);
- Stronger Connectivity (connectivity, energy efficiency, environment and climate change);
- Stronger Society (mobility and people-to-people contacts).

Cooperation then takes place both at bilateral (with individual partners: Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine) and at regional level, depending on the nature of the action.

Eastern neighbours also participate in initiatives open to all Neighbourhood countries - such as Erasmus+, TAIEX, Twinning, SIGMA and the Neighbourhood Investment Facility - and in Cross-Border Cooperation programmes.

2.3 Black Sea Basin as a functional area

The approach to focus on the territorial features of the programme areas through the delimitation of functional areas when building the programmes is not a new one in the context of the EU regional policy⁶⁰. The so-called territorial approach has been introduced in the EU regional policy since 2009 following studies which showed the weaknesses of the sectoral approach and the benefits of a new focus on the use of specifics of individual territories⁶¹.

Nevertheless, for cross-border and transnational cooperation, the use of functional areas as a strategic frame for cooperation represents a new approach, as for the period 2021-2027 the European Commission has sought to promote a more territorial approach to future Interreg programmes, particularly when it comes to cross-border cooperation.

The aim of creating functional areas is to enable cooperation in areas for which no formal governance structures exist, but for which cooperation is needed, based on shared geo-socio-

⁵⁹ According to https://ec.europa.eu/neighbourhood-enlargement/neighbourhood/eastern-partnership_en

⁶⁰ Barska, A., Jedrzejczak-Gas, J. (2016) - *The concept for the development of a functional area illustrated by the case of the functional area of Oder communes* (<https://www.semanticscholar.org/paper/The-Concept-for-the-Development-of-a-Functional-by-Barska-J%C4%99drzejczak-Gas/de1fd1a61c1a0174939b0adab6ae78c64f225a12>)

⁶¹ Barca, F. (2009) - *An agenda for a reformed cohesion policy. A place-based approach meeting European Union challenges and expectations*: (https://ec.europa.eu/regional_policy/archive/policy/future/pdf/report_barca_v0306.pdf)



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economic area challenges and functional territorial relations, by joining forces under the form of joint strategies and investment actions⁶².

A functional area is generally characterized by interdependencies or links within territories, where functional connections either unite or isolate territories and areas influenced by them. The transition from an area with territorial potential to a functional area starts with the delimitation within a territory of subdivisions (categories of territories) / areas with different structural features: rural, disadvantaged areas, urban agglomerations, metropolitan areas, etc. based on a series of delimitation criteria. For a region where one or more common phenomena connect settlements to a functionally organized whole, the concept of functional region is applied⁶³. Functional regions are based more on common challenges than on similarities and flows.

The functional areas and the delimitation criteria to be taken into account when defining functional areas do not have a definitions in the regulatory framework, quite often being identified with a geographical feature (a mountain chain, a river, a sea). However, there are regions sharing economic, social and cultural features rooted in a common history (even without a common physical element). Territorial coherence goes well beyond physical features, therefore functional areas should be defined following a holistic (yet rigorous and coherent) approach, i.e. considering shared economic features, flows of goods and people beyond borders, shared societal challenges⁶⁴.

For example, for transnational cooperation programmes, delimitation criteria could be flows of people and goods (natural, economic, knowledge, environmental, trades, energy etc.), historic background as well as transport/mobility. Moreover, expected and existing challenges, the culture of cooperation and difficulties to measure the abovementioned flows should be considered.

In the ESPON workshop on cross-border functional areas, the benefits of considering the approach to functional areas in the upcoming 2021-2027 CBC programmes have been highlighted in the ESPON workshop on cross-border functional areas,⁶⁵:

- it enables the projects to be more effective as they can build on the experience of a wider range of relevant partners and as they can be located where the impact is bigger;
- it clearly shows that Interreg is a policy tool supporting projects to improve the situation and not a mere funding tool for the benefit of local authorities sharing a budget;
- it avoids that programmes re-create new borders outside the programme geography⁶⁶.

⁶² Interact (2017) - *Ideas for Interreg post-2020 - Transnational Programmes. Input paper*

⁶³ Ministry of Regional Development, Public Administration and European Funds, Romania (2017) - *Technical conference on functional areas, European conference of ministers responsible for spatial/regional planning Bucharest, 30 May 2017* (<https://www.mlpda.ro/uploads/articole/attachments/5dcaa903378a4543147226.pdf>)

⁶⁴ Interreg Central Europe (2018) - *Workshop Reinforcing territorial coherence. Functional areas vs functioning regions: views from the heart of Europe*, Brussels, 19 June 2018, (https://ec.europa.eu/regional_policy/sources/conferences/etc2018/ws1_luca_ferrarese.pdf)

⁶⁵ ESPON (2019) - *Seminar The role of functional areas for territorial cohesion*, Iasi, Romania, 19-20 June 2019 (<https://www.espon.eu/iasi>)

⁶⁶ ESPON (2019) - *Seminar The role of functional areas for territorial cohesion*, Iasi, Romania, 19-20 June 2019 (<https://www.espon.eu/iasi>)



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Nevertheless, challenges in creating a functional area arise, especially when establishing which criteria make an area “functional” and at which territorial level. As the definition of functional areas is not given anywhere in the draft Regulations, programme partners may very well develop their own ideas on the types of functional integration that would help to address the issues, opportunities or challenges they focus on. In addition, transnational programmes face several challenges when responding to functional areas objectives such as differences regarding legislative framework, territorial capacity, politics and administration and multilevel governance. Overlapping cannot be avoided as a territory can be included in several functional areas⁶⁷. Different barriers to functional co-operation were also raised in the ESPON seminar “The role of functional areas for territorial cohesion”, for instance the lack of willingness and culture of participation and limited awareness of the potential for more efficient pooling of financial resources. The benefits of functional cooperation are still not sufficiently recognized and mainstreamed and it is paramount that ESPON, OECD and others research-oriented institutions highlight the benefits in order to encourage functional cooperation.

When it comes to maritime cooperation, in general, the sea basin itself is a functional area, in particular when it comes to natural assets and environmental questions, including climate change. It may be said that the sea is the “territorial glue” that brings these regions closer together⁶⁸. Furthermore, taking into account the unique dimension of cooperation with partner countries, with its own specificities, the large geographical coverage of the Interreg NEXT BSB programme, the draft regulatory requirements on thematic concentration for programmes covering the territory of a macro-regional strategy or a sea-basin strategy, according to which at least of the 75% of programme funds shall be programmed on the objectives of that strategy in view of embedding cooperation, the EC guiding principles for drawing the Orientations for the Interreg NEXT Black Sea Basin cooperation which include coherence with other programmes and EU strategies, contribution to the major policy goals and the thematic concentration principle, without focusing on the territorial approach, the Black Sea is considered the leading territorial feature of the area and all the regions around its basin represent a functional area⁶⁹.

However, the general functional approach described above also means that the cooperation area should not be strictly limited to the administrative borders of the Interreg NEXT Black Sea Basin, but should allow for some topics to find better or more effective solutions, by involving partners from outside the programme area (e.g. to have a good applied research project on the blue economy, one may need to involve a university outside the programme area).⁷⁰

⁶⁷ Interreg Transnational Programmes - *Workshop on the future of Interreg transnational cooperation* (10/10/2018)

⁶⁸ European Commission (2019) - *Cross-Border Cooperation in the Mediterranean area* (http://interreg-maritime.eu/documents/197474/1516563/MOP_122019/4d799c45-68f8-4598-ae68-92f04d86ca43)

⁶⁹ European Commission (2020) - *Joint paper on Interreg NEXT Strategic Programming 2021-2027. Interreg NEXT programmes on EU external borders with the neighbouring partner countries - Annex IV Orientations for the Interreg NEXT Black Sea Basin cooperation*

⁷⁰ European Commission (2019) - *Cross-Border Cooperation in the Mediterranean area* (http://interreg-maritime.eu/documents/197474/1516563/MOP_122019/4d799c45-68f8-4598-ae68-92f04d86ca43)



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Chapter 3 - Smarter cooperation area (PO1)

The sea and coasts are drivers of the economy. Because of their outward-looking geography, ports and coastal communities have traditionally been centres for new ideas and innovation⁷¹.

In the Joint Paper on Interreg NEXT STRATEGIC Programming 2021-2027, the European Commission underlined that a smarter cooperation area should be achieved through innovation, digitalisation, economic transformation and support to small and medium-sized businesses in both Member States (MS) and partner countries.

Actions include both enhancing research and innovation capacities as well as uptake of advanced technologies in countries participating in the Interreg NEXT programmes. Furthermore, the objective aims to reap the benefits of digitalisation for citizens, companies and governments in both EU and partner countries, enhancing growth and competitiveness of their SMEs or development of skills for smart specialisation, industrial transition (also towards a circular economy) and entrepreneurship⁷².

All these actions are in line with the objectives of the blue economy.

3.1 Blue economy and competitiveness of the business environment

The notion of blue economy has gradually been gaining acceptance among the states of the BSB area in the last decade, driven by the perception that the sea is a treasure and people should benefit from it only through a sustainable development strategy.

The Common Maritime Agenda and the Strategic Research and Innovation Agenda for the Black Sea are the main initiatives which promote blue growth and economic prosperity of the Black Sea region.

The blue economy in the sea basin is strongly dependent on the established maritime sectors, such as transport, shipbuilding, fisheries/ aquaculture and tourism. These sectors continue to grow but still need to be modernised⁷³ through digitalization and research and innovation.

As previously mentioned, the blue economy aims to accelerate the sustainable development of SMEs and to increase the competitiveness of the business environment.

There is a high level of diversity in terms of business conditions and business growth throughout the region. In terms of new business density - i.e. number of new businesses registered per 1,000 people aged 15-54 - the average density across the EU28 is 4.8%. Within the programme eligible area three countries exhibit higher rates of density: Bulgaria with 10.9%, Georgia with 8.4% and Romania with 5.6%. These countries also experienced marked

⁷¹ Blue Growth Opportunities for marine and maritime sustainable growth Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions: https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/docs/publications/blue-growth_en.pdf

⁷² European Commission: Joint Paper on Interreg NEXT STRATEGIC Programming 2021-2027

⁷³ The Common Maritime Agenda: https://ec.europa.eu/maritimeaffairs/press/black-sea-ministers-endorse-common-maritime-agenda_en



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growth in business density over the period 2010-2017. All other countries have a business density level below 2, ranging from Turkey (1.2) to Republic of Moldova (1.8)⁷⁴.

The overwhelming majority of firms in the BSB area are small and medium-sized enterprises (SMEs⁷⁵). Small and medium enterprises in the partner countries still play a relatively modest role when it comes to contributing to employment and GDP, compared to those in the EU⁷⁶, although they represent up to 99% of all firms. The vast majority of SMEs in the partner countries are subsistence micro-entrepreneurs operating in low-value-added sectors and with limited propensity for export.⁷⁷

Regarding the partner countries, SMEs generate about half of total business-sector value added in the region, and they account for slightly more than half of total business-sector employment. The countries still have much to do to fight corruption and to ensure business integrity, competitive neutrality and equal access to inputs and markets for all firms, regardless of size or ownership⁷⁸.

The partner countries have made significant progress in building a more SME-friendly business environment. The governments have designed strategies for SME development and building strong institutions that can help deliver tangible results and translate policies into action. They have acknowledged the crucial role of a responsive government and effective institutions in promoting SME development, encouraging investment, and reducing informality and corruption - laying the foundation for a healthy business environment in which enterprises of all sizes and ownership types can thrive.⁷⁹

A comparison of business regulations for small and medium-size enterprises in Black Sea Basin countries reveals discrepancies, as well as a large potential for exchange of good practices among countries. Some countries have made significant progress in improving the regulations that enhance business activity and now rank among the most business-friendly environments worldwide such as Georgia, which is in the 7 position out of 190 economies that have been analysed in the Doing Business 2020⁸⁰.

The World Bank Group publication is a series of annual studies measuring the regulations that enhance business activity and those that constrain it and presents quantitative indicators on

⁷⁴ European Commission: Joint Paper on Interreg NEXT STRATEGIC Programming 2021-2027, Orientation for the Interreg Next Black Sea Basin Cooperation

⁷⁵ SMEs : <250 employees, < €50 m turnover or <€43m balance sheet total (as defined by the EC)

⁷⁶ Investing in SMEs in the Eastern Partnership

https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1600772864&id=id&accname=guest&checksum=7AEEF0D17FD80A0716B3430A8EAD6FFBhttps://www.euneighbours.eu/sites/default/files/publications/2019-07/eu4business_annual_report_2019_0.pdf

⁷⁷ Eastern Partner Countries 2020 Assessing the Implementation of the Small Business Act for Europe
<https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1600772864&id=id&accname=guest&checksum=7AEEF0D17FD80A0716B3430A8EAD6FFB>

⁷⁸ SME Policy Index: Eastern Partner Countries 2020 Assessing the Implementation of the Small Business Act for Europe: <https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1602230508&id=id&accname=guest&checksum=2F531E6C32EDA70E8355FF375A92EBE8>

⁷⁹ Eastern Partner Countries 2020 Assessing the Implementation of the Small Business Act for Europe:
<https://www.oecd-ilibrary.org/docserver/8b45614b-en.pdf?expires=1600772864&id=id&accname=guest&checksum=7AEEF0D17FD80A0716B3430A8EAD6FFB>

⁸⁰ Doing Business 2020: <https://www.doingbusiness.org/en/reports/global-reports/doing-business-2020>



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business regulations and the protection of property rights that can be compared across world economies.

Doing Business 2020 covers 10 areas of business regulation: starting a business, dealing with construction permits, getting electricity, registering property, getting credit, protecting minority investors, paying taxes, trading across borders, enforcing contracts, and resolving insolvency.

As general remarks, the study notices that: those economies that score well on Doing Business tend to benefit from higher levels of entrepreneurial activity and lower levels of corruption and while economic reasons are the main drivers of reform, the advancement of neighbouring economies provides an additional impetus for regulatory change.

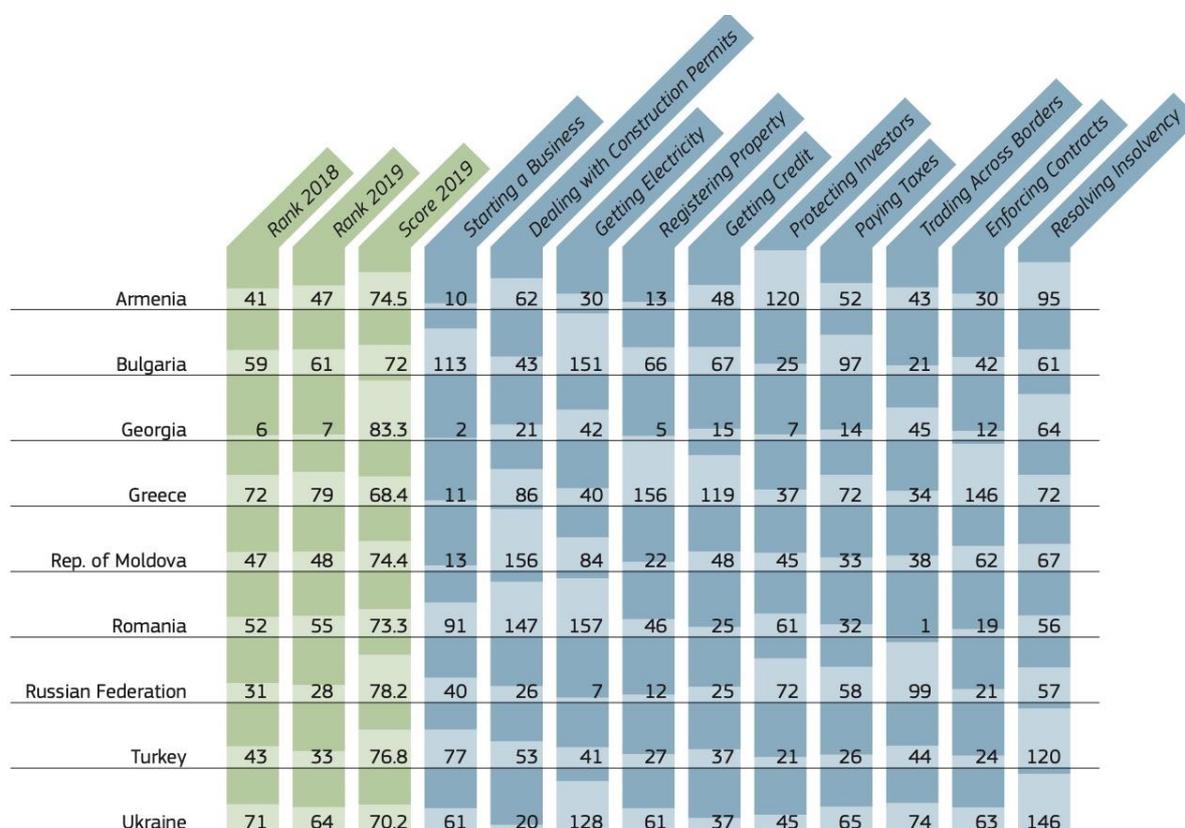


Figure no.11⁸¹Doing Business overall ranking 2020 (ranking out of 190 countries)

Increasing the competitiveness of the economic sector should represent a goal of the governments of the BSB countries.

The 2019 Global Competitiveness Index⁸² is based on 12 pillars: (1) Institutions, (2) Infrastructure, (3) ITC adoption, (4) Macroeconomic stability, (5) Health, (6) Skills (7) Product market, (8) Labour market, (9) Financial market development, (10) Market size, (11) Business dynamism, (12) Innovation capability.

⁸¹ Doing Business 2020: <https://www.doingbusiness.org/en/reports/global-reports/doing-business-2020>

⁸² Global Competitiveness Report 2019: <https://www.weforum.org/reports/how-to-end-a-decade-of-lost-productivity-growth>



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Most of the countries ranked similar position as in the previous year. According to the 2019 Global Competitiveness Index, the most competitive economy of the Black Sea Basin area was the Russian Federation.

Generally, the Black Sea Basin countries main competitive assets are the availability of a healthy and skilled workforce and a stable macro-economic environment, while the innovation capability remains the weakest point for all countries.

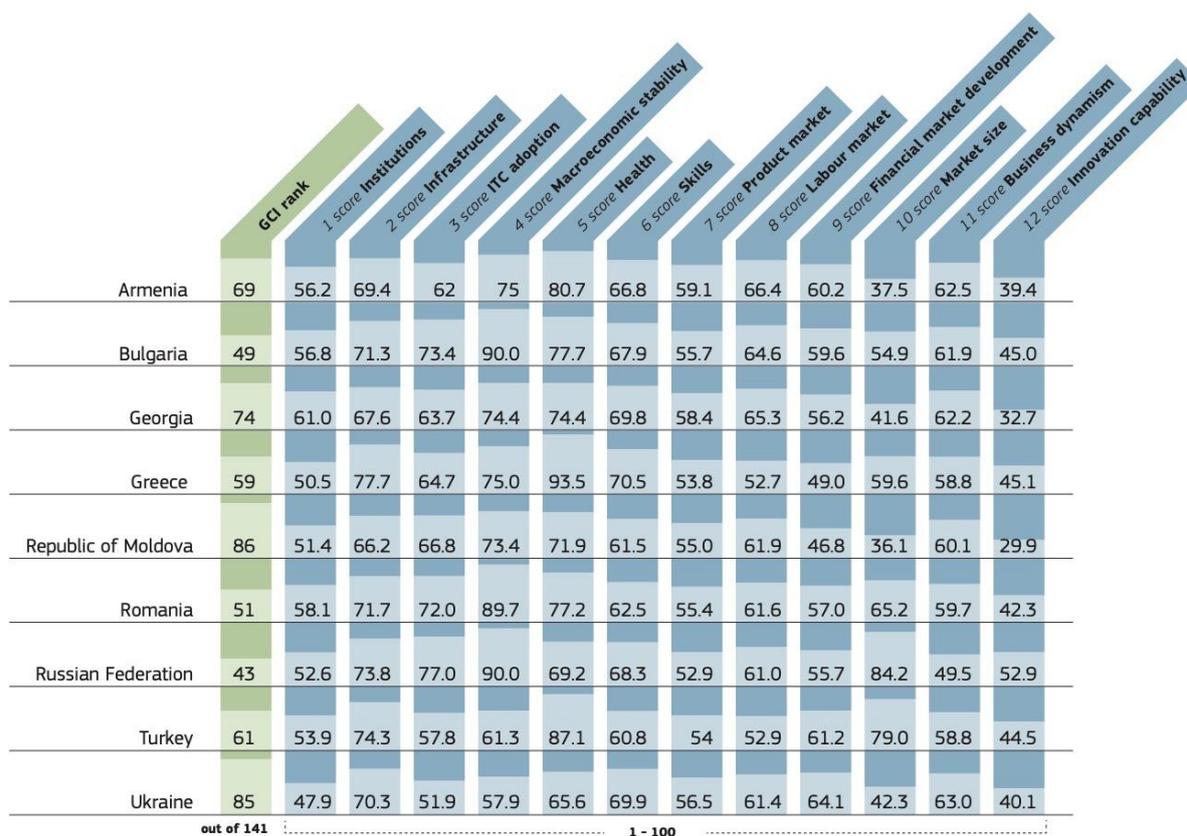


Figure no.12- . Global Competitiveness Index (CGI) in 2019, ranking (out of 141 countries) and scoring (from lowest 1 to highest 100), overall and for each of the 12 pillars

3.2 Tourism and cultural heritage

The Black Sea region, with its diverse and unique landscape, cultural wealth, historic heritage and wide variety of opportunities for leisure, stands among world's most beautiful tourist destinations, attracting millions of tourists from around the world⁸³.

The tourism industry constitutes today an important source of revenues for most Black Sea countries. The Black Sea is being shaped as a cohesive region and an attractive tourist destination not only for foreign visitors but for its own people too⁸⁴.

⁸³ Zefi Dimadama, Georgia Chantzi A New Era for Tourism in the Black Sea Area: https://iacudit.org/journal/volumes/v1n2/v1n2_23-29.pdf

⁸⁴Black Sea Economic Cooperation Regional Cooperation in the Black Sea: https://www.bstdb.org/Regional_Cooperation_in_the_Black_Sea.pdf



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Promoting all kinds of tourism - leisure and business, as well as synergies between inland, coastal and maritime tourism, between sun-related, leisure and sport related and cultural tourism, is one key priority of the Common Maritime Agenda. Promote further exploring of underwater cultural heritage itineraries and the development of the cultural dimension of tourism; cruising including small-scale cruising/yachting; fishing tourism and nature tourism⁸⁵.

The Black Sea countries possess remarkable cultural and ethnic diversity, rich historical and architectural heritage and diverse natural resources, aspects which are blended over the millennia to shape unique communities, languages, religions and trades, a namely distinctive and attractive match to travellers. Realizing the aforementioned, tourism protrudes not only as a great chance for regional sustainable development, but also as a motivation for closer regional cooperation in every field.⁸⁶

Several indicators related to heritage and tourism are analysed below in order to assess the extent to which tourism sector could be developed in the Black Sea Basin area.

3.2.1 Cultural heritage

The rich natural and cultural heritage brings communities together and builds shared understandings of the places people live in. It is also a very useful resource that can enhance social cohesion, employment and economic growth.⁸⁷

Thus, outstanding universal value has been recognised by UNESCO for 19 cultural places in the Black Sea Basin area, including historical cities, religious architecture and archaeological sites. In addition, 3 natural/mixed sites from the Black Sea eligible area are included on the UNESCO World Heritage List⁸⁸, as presented in *map no. 2* and *table no. 4* below.

⁸⁵ The Common Maritime Agenda: https://ec.europa.eu/maritimeaffairs/press/black-sea-ministers-endorse-common-maritime-agenda_en

⁸⁶ Dimadama Z., Chantzi G. (2014), A New Era for Tourism in the Black Sea Area
https://www.researchgate.net/publication/279841144_A_New_Era_for_Tourism_in_the_Black_Sea_Area

⁸⁷ Source: <https://ec.europa.eu/environment/nature/natura2000/management/pdf/Nature-and-Culture-leaflet-web.pdf>

⁸⁸ Source: <https://whc.unesco.org/en/list/>



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Map no. 2 - UNESCO heritage sites in the Black Sea Basin programme area

Country	No. of cultural sites	No. of cultural sites in eligible area	No. of natural sites/mixed* sites	No. of natural sites/mixed* sites in eligible area
Armenia	3	3	0	0
Bulgaria	7	2	3	0
Georgia	3	3	0	0
Greece	16	3	2*	1*
Rep. of Moldova	1	1	0	0
Romania	6	0	2	1
Russian Federation	18	0	11	1
Turkey	16	4	2*	0
Ukraine	5	0	1	0
Total	75	16	21	3

Table no.4- Cultural and natural sites on the UNESCO World Heritage list⁸⁹

⁸⁹ Source: <https://whc.unesco.org/en/list/>



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Table no. 4 above indicates that the Black Sea Basin is rich from the heritage point of view, as more than one quarter from all UNESCO cultural sites of the nine countries, some of them with large territories, are located in the eligible area of the Programme. Nevertheless, 14% of the UNESCO natural sites⁹⁰ of the nine countries are located in the eligible area of the Programme.

As such, there are churches monasteries and a cathedral, in Armenia, an ancient city and an old knight sculpture curved into a cliff in Bulgaria, a monastery, churches and medieval-type villages in Georgia, remains of an/the ancient capital and walled city, churches and an old spiritual centre in Greece, a struve geodetic arc in Rep. of Moldova and two cities, historic areas of a transcontinental old city and a mosque in Turkey. Furthermore, there are the largest and best preserved of Europe's deltas in Romania and one of the few large mountain areas of Europe that has not experienced significant human impact in Russian Federation.

The number of culture heritage sites shows important values, both at national level and at the level of the eligible area. Also, underwater culture heritage sites are present. Generally, with the exception of Greece, most or all of the culture heritage sites are open for public/tourism (see table no. 5 below).

National level	Number of culture heritage sites (including underwater)	Open for public / tourism	Regional level (where applicable)	Number of culture heritage sites (including underwater)	Open for public / tourism
Armenia	24,221	18,935	n/a	n/a	n/a
Bulgaria	137, out of which underwater: 11	137	Severoiztochen and Yugoiztochen	48, out of which underwater: 11	48
Georgia	n/a	n/a	n/a	n/a	n/a
Greece	11,888, out of which underwater: 143	573	Kentriki Makedonia and Anatolikli Makedonia Thraki	1,490, out of which underwater: 5	85
Republic of Moldova	9,800	9,800	n/a	n/a	
Romania	18,752, out of which	18,750	South-East	2,677, out of which	2,675

⁹⁰ Additional natural assets in the Black Sea Basin are included in Chapter 3 - Greener cooperation area (PO2), section 3.6 Biodiversity and resources



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	underwater: 2			underwater: 2	
Russian Federation	n/a	n/a	Rostov, Krasnodar and Republic Adygea	30,157, out of which underwater: 29	9,798 (Rostov)
Turkey	131,276	131,276	n/a	n/a	n/a
Ukraine	n/a	n/a	Kherson, Zaporizhzhia and Donetsk	24,765	22,210 (Mykolaiv, Kherson, Zaporizhzhia and Donetsk)

Table no. 5 - Number of culture heritage sites (total, underwater, open for public/tourism), at national and regional (where applicable) level⁹¹

This wealth of heritage variety offers considerable opportunities for cooperation.

Culture, through cultural heritage and creativity, is the crosscutting thread that runs through the social, economic and environmental dimensions needed to make them sustainable.⁹² In the same time, cultural heritage and the specific cultural industries are recognized as major assets for social and economic sustainable development, as well as for meeting the challenges that our societies are facing in a changing world.⁹³

Cultural heritage and natural resources represent two significant pillars of the tourism's sustainable development: that is why the development of tourism based on the cultural heritage and natural resources could provide a consistent support for increasing the competitiveness of countries as tourist destinations⁹⁴.

3.2.2 Tourism

Black Sea Basin area comprises both established and emerging tourism locations with varying degrees of infrastructure development, connectivity and brand strength. Tourism is a major economic pillar in some mature destinations, such as Greece and Turkey, while in merging ones the potential for growth is still huge⁹⁵.

⁹¹ Source: Data provided by the participating countries. Data was unavailable for Georgia, the Russian Federation (national level), Turkey (regional level) and Ukraine (national and, partially, regional level).

⁹² Source: https://collaboration.worldbank.org/content/sites/collaboration-for-development/en/groups/culture-heritage-and-sustainable-tourism-ksb-community/calendar.event.html/unesco_bbl_-_culture-zFaW.html

⁹³ Source: <http://www.bsec-organization.org/areas-of-cooperation/culture/action-plan>

⁹⁴ Dugulan D., Balaure V., Popescu I. C., Veghes C. (2010), Cultural heritage, natural resources and competitiveness of the travel and tourism industry in Central and Eastern European countries <http://www.oeconomica.uab.ro/upload/lucrari/1220102/26.pdf>

⁹⁵ Tourism in the BSEC region: <https://www.e-unwto.org/doi/epdf/10.18111/9789284419524>



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As a general overview, the region⁹⁶ welcomed 115 million international tourists (overnight visitors) in 2016, equivalent to 9% of the world’s total or 19% of Europe’s arrivals and the overall earnings reached a total of EUR 51 billion, an estimated 5% of global receipts.

In terms of earnings from tourism in 2016 Turkey (US\$ 19 billion) is the top earner of tourism receipts in the region, followed by Greece (US\$ 15 billion), the Russian Federation (US\$ 8 billion) and Bulgaria (US\$ 4 billion)⁹⁷.

The overall number of tourist arrivals in the countries involved has substantially increased during the 2016-2019 period. Turkey is the country that receives most tourists, respectively 80,866,762 in 2019.

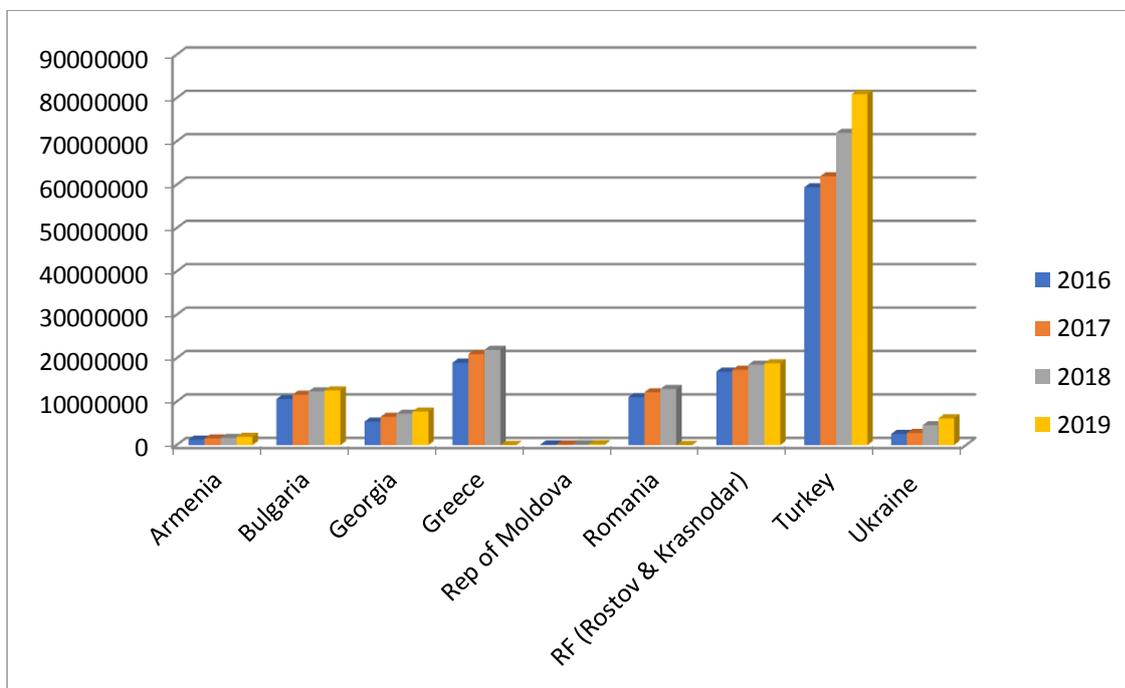


Figure no.13⁹⁸ Number of tourist arrivals in the BSB countries

A practical obstacle that should also be put into consideration for the relatively low number of international tourists in some BSB countries is the visa restrictions that do not allow Black Sea citizens to easily visit and collaborate with each other. Visa facilitation would also encourage foreign tourists to visit the Black Sea Region whilst combining travelling to more than one country.⁹⁹

Also, the capacity of tourist accommodation (number of establishments) at national level increased during the 2016-2019 period in all the BSB countries, except for Ukraine.

⁹⁶ Region: refers to BSEC countries which includes Albania and Serbia plus the 10 participating countries to the Black Sea Basin Programme.

⁹⁷ Tourism in the BSEC region, <https://www.e-unwto.org/doi/epdf/10.18111/9789284419524>

⁹⁸ Data provided by participating countries (gathered by Joint Programming Committee country representatives)

⁹⁹ Black Sea Synergy:

the way forward: https://icbss.org/wp-content/uploads/2020/09/1977_original.pdf



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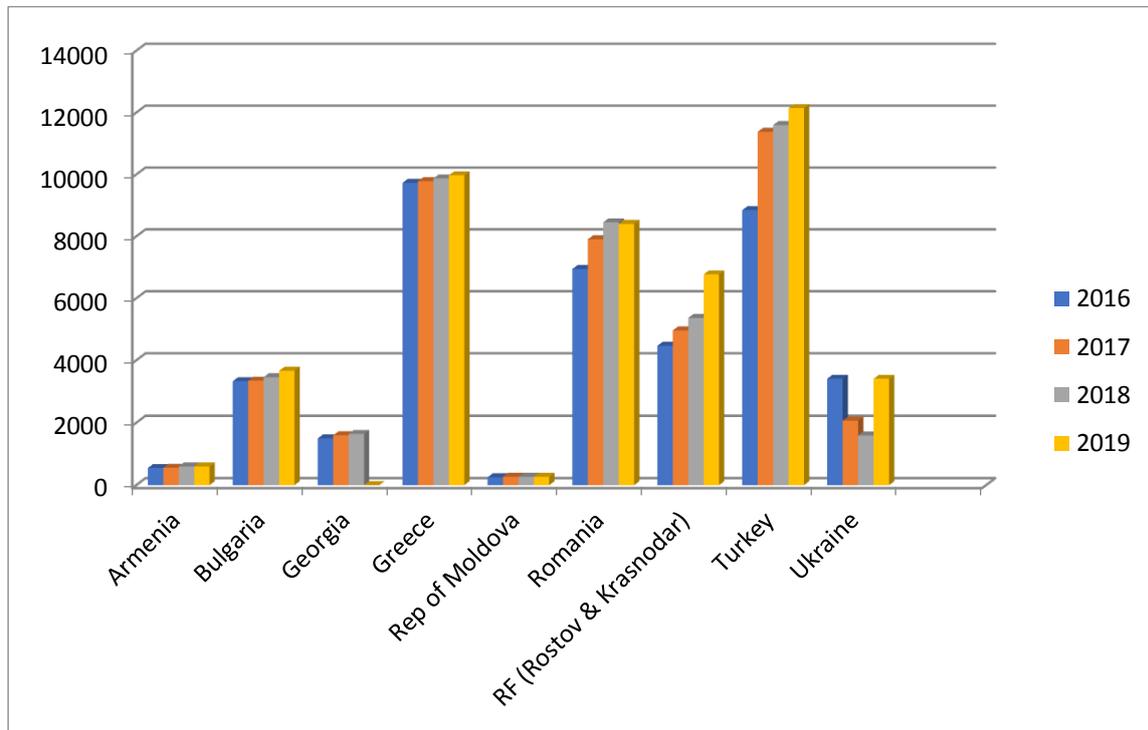


Figure no. 14¹⁰⁰. Capacity of tourist accommodation (number of establishments)

Similarly, the capacity of tourist accommodation in terms of number of beds in tourist establishments, at national level enlarged during the 2016-2019 period in all the BSB countries, except for Ukraine.

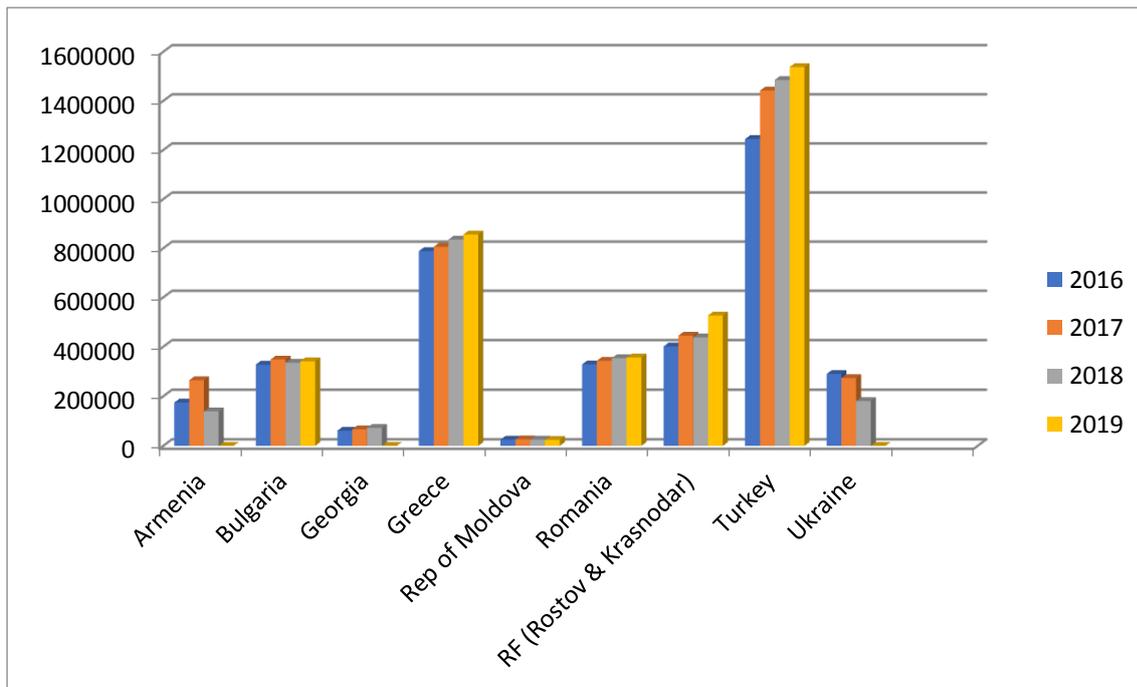


Figure no. 15¹⁰¹- Capacity of tourist accommodation (number of bed places, national level)

¹⁰⁰ Source: Data provided by participating countries (gathered by Joint Programming Committee country representatives)



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The BSB area enjoys a certain number of leisure ports (sea, river, lake) which could lead to the development of associated economic activities such as the development of yachting and marinas, as well as cruise tourism.

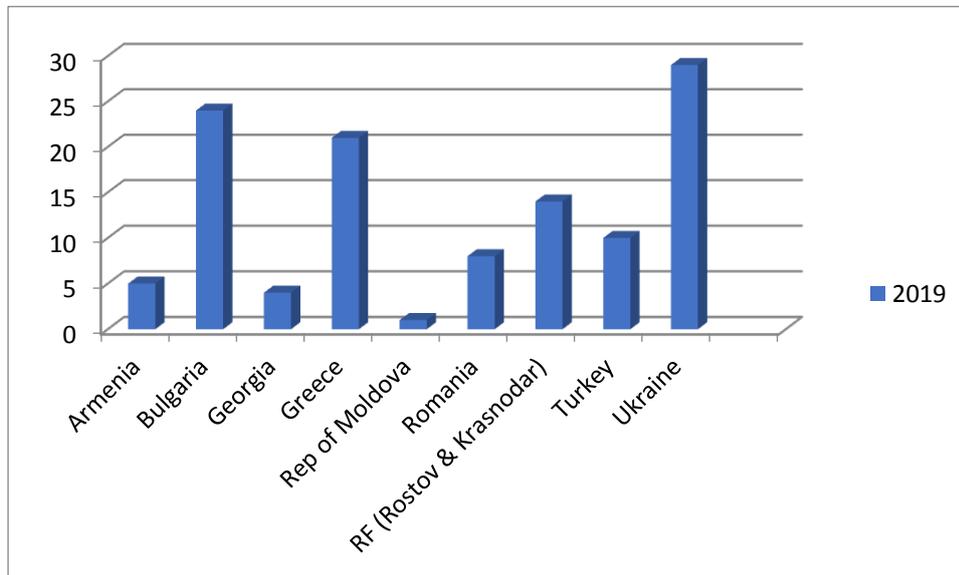


Figure no.16¹⁰²- Number of leisure ports (sea, river, lake)

Cruise tourism is a relatively new industry and is almost non-existent in the Black Sea. Barriers to the growth of this industry include the lack of coordination between ports, the absence of know-how to develop their cruise potential. The marina activity mainly centres on the Aegean Sea; there is no marina on the Black Sea coast. The main drivers are the competitive labour force, the technical expertise in yacht building and the government-supported projects. The concentration of the marina activity in the Aegean Sea and the Sea of Marmara is probably the main barrier to future growth¹⁰³.

Another aspect that should be mentioned is the seasonality¹⁰⁴ of tourism in the Black Sea Basin countries, reaching in 2019, in Rostov & Krasnodar (Russian Federation) 73.5%, Georgia 36%, Romania 26.88%, Bulgaria 18.52%, Armenia 14.7% and Moldova 11%. This shows that the Black Sea coast is mostly attractive during the summer season. During the rest of the year, the statistics show a worrying decrease, indicating a lack of policies for supporting extra-seasonal tourism.

The worldwide outbreak of COVID-19 has brought the world to a standstill, and tourism has been the worst affected of all major economic sectors.

¹⁰¹ Source: Data provided by participating countries (gathered by Joint Programming Committee country representatives)

¹⁰² Source: Data provided by participating countries (gathered by Joint Programming Committee country representatives)

¹⁰³ Report: Black Sea - Identification of Elements for Sea Basin: Cooperation:

<https://webgate.ec.europa.eu/maritimeforum/system/files/Report%203%20%28Task%204%29%20Final%20final%2014-4-14.pdf.pdf>

¹⁰⁴ % of tourists in high season compared to grand total



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3.3 Aquaculture

Another key component of the blue economy is aquaculture.

Aquaculture is the production of fish and other aquatic organisms like molluscs and crustaceans under controlled conditions; it is an alternative to catching wild fish and takes place both inland and in marine areas.

The Black Sea is a sea basin with important potential, but also challenges with regard to sustainable use of its marine resources. The marine aquaculture has been one of the fastest growing activities in the last years and is considered as having a great future potential.

The marine aquaculture is characterised by the production of European sea bass, mussels, oysters, sea trout and turbot. Turkey is the most important producer in the area: the Aegean coastline houses more than 96 % of Turkish farming of sea bass and sea bream, while the Black Sea farms primarily produce trout, but on a much lower scale¹⁰⁵. Greece produced a little over one half of the EU's production of gilthead sea bream and European sea bass in 2017¹⁰⁶.

In general, aquaculture plays a major role in the countries around the Black Sea, where sea-fishing is generally carried out using small-scale. This helps explain why aquaculture activity plays a relatively large role in the respective fisheries industries of Greece (about two-thirds), Romania (57.3 %) and Bulgaria (53.5 %)¹⁰⁷.

Regarding the size of aquaculture production area (ha.), in 2017 there were 95,115 ha in Ukraine, 17,500 ha. in Moldova, 17,077 ha. in Greece, 12,209 ha. in Romania, 4,309 ha. in Georgia, 2,200 ha. in Armenia, 960 ha in Bulgaria¹⁰⁸.

The volume of fish caught, wild or farmed, in aquaculture plants in the Black Sea Basin countries in 2017 is 447,032 tones¹⁰⁹.

¹⁰⁵ Report: Black Sea - Identification of Elements for Sea Basin: Cooperation:
<https://webgate.ec.europa.eu/maritimeforum/system/files/Report%203%20%28Task%204%29%20Final%20final%2014-4-14.pdf.pdf>

¹⁰⁶ Eurostat: Agriculture, forestry and fishery statistics 2019 edition:
<https://ec.europa.eu/eurostat/documents/3217494/10317767/KS-FK-19-001-EN-N.pdf/742d3fd2-961e-68c1-47d0-11cf30b11489>

¹⁰⁷ Eurostat: Agriculture, forestry and fishery statistics 2019 edition:
<https://ec.europa.eu/eurostat/documents/3217494/10317767/KS-FK-19-001-EN-N.pdf/742d3fd2-961e-68c1-47d0-11cf30b11489>. No data available for the rest of the BSB countries

¹⁰⁸ Source: Data provided by participating countries (gathered by Joint Programming Committee country representatives). No data is available for, Turkey and Russian Federation.

¹⁰⁹ Except and Russian Federation only with Rostov & Krasnodar



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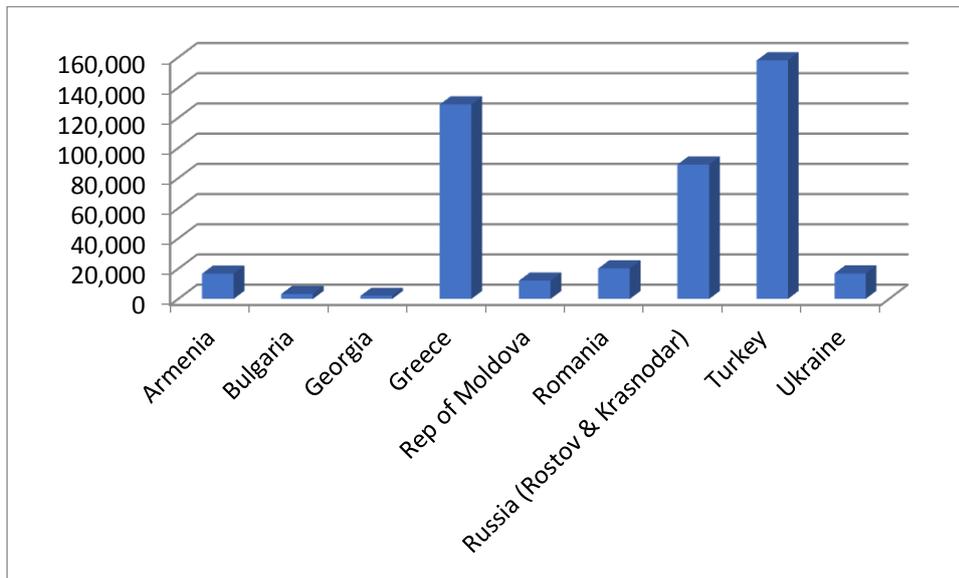


Figure no. 17 ¹¹⁰- The volume of fish caught, wild or farmed, in aquaculture plants, in tons in 2017

The **Common Maritime Agenda** supports the sustainable fisheries and aquaculture in the Black Sea and observes that enhanced multilateral cooperation among the Black Sea states is an important element of the new dynamics, which promotes sustainable and rational exploitation of living marine resources and the sustainable development of aquaculture. The implementation of regional joint actions will bring the added value needed to promote advancements on fisheries and aquaculture in the Black Sea, to maximize the economic benefits and to ensure the sustainable development of the sector and coastal communities.

3.4 Research and development (R&D) and innovation

Understanding the Black Sea and its fragile ecosystems requires robust data collection and continuous monitoring and observation, ideally based on uniform standards. State-of-the-art research infrastructures are becoming more complex and more costly. No single country has enough resources to support all the research infrastructures it needs¹¹¹.

The countries in the BSB area have low levels of innovation infrastructure and investment. However, investment is increasing in a number of countries, alongside an increase in people working in R&D and growth in high-tech export capacity¹¹².

The European Commission together with the Republic of Bulgaria, Georgia, Romania, the Russian Federation, the Republic of Turkey, Ukraine and the Republic of Moldova launched on

¹¹⁰ Source: Data provided by participating countries (gathered by Joint Programming Committee country representatives)

¹¹¹ The Common Maritime Agenda: https://ec.europa.eu/maritimeaffairs/press/black-sea-ministers-endorse-common-maritime-agenda_en

¹¹² European Commission: Joint Paper on Interreg NEXT STRATEGIC Programming 2021-2027



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the 18 May 2019, in Bucharest, the Strategic Research and Innovation Agenda for the Black Sea (SRIA)¹¹³.

The SRIA aims to advance a shared vision for a productive, healthy, resilient and sustainable Black Sea by 2030, while considering the special and unique ecosystem characteristics of it. In particular, its unique biodiversity, cultural heritage sites and the new local, national and transboundary policy measures. It will focus on four key areas: to address fundamental Black Sea research challenges; to boost the Black Sea Blue Economy; to develop innovative infrastructures and to enhance blue workforce through education for new marine and maritime jobs and engaging citizens.

The Strategic Research and Innovation Agenda (SRIA) will guide stakeholders from academia, funding agencies, industry, policy and society to address together the fundamental Black Sea challenges, to promote blue growth and economic prosperity of the Black Sea region, to build critical support systems and innovative research infrastructure and to improve education and capacity building. It is one of the pillars of the Common Maritime Agenda for the Black Sea.

SRIA identified four main pillars on which a new set of research and innovation actions can be developed in the Black Sea:

- Addressing fundamental Black Sea research challenges - Black Sea Knowledge Bridge;
- Developing products, solutions and clusters underpinning Black Sea Blue Growth - Black Sea Blue Economy;
- Building of critical support systems and innovative Infrastructures - Key Joint Infrastructure and Policy Enablers;
- Education and capacity building - Empowered Citizens and Enhanced Blue Workforce.

As previously mentioned, research and innovation are a key element of smart economic growth and sustainable development and has an impact both on companies and citizens' life through increasing productivity, better quality goods produced and exported, higher revenues and incomes. The capacity of a territory to attract investments and increase the added value of its economy's products and services is closely linked to its capacity to both ensure strong and constant technological transfer or innovation.

Innovation can be fostered through different mechanisms and can take place in many institutional arrangements (private, public, public-private), following different paths, such as scientific research, or applicative research and innovation (connecting the scientific research and the productive sector).

Therefore, universities and research institutes, together with the large private companies located in the Black Sea Basin countries act as sources of talented and qualified human capital willing to engage in innovative activities. Also, several networks for researchers were created in the area in the last years, such as the International Centre for Black Sea Studies

¹¹³ Black Sea Strategic Research and Innovation Agenda (SRIA):
<https://blackseablueeconomy.eu/sites/default/files/black-sea-strategic-researchpdf.pdf>



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(ICBSS)¹¹⁴, Black Sea Universities Network (<https://bsun.org/>) which already has the capacity to implement research projects.

So far, research cross border projects in the Black Sea Basin were mainly implemented in the marine research field, such as:

- COCONET (Towards COast to COast NETworks of marine protected areas (from the shore to the high and deep sea), coupled with sea-based wind energy potential) - EU Framework Programme for Research and Development (FP7)- (<https://www.msp-platform.eu/projects/coconet-towards-coast-coast-networks-marine-protected-areas-shore-high-and-deep-sea>);
- DANUBIUS-RI: The International Centre for Advanced Studies on River Sea Systems - EU Framework Programme for Research and Development ([https://www.danubius-ri.eu/HORIZON 2020](https://www.danubius-ri.eu/HORIZON%2020));
- EMBLAS-PLUS: Improving Environmental Monitoring in the Black Sea- Selected Measures - EU / UNDP (<http://emblasproject.org/>);
- PEGASO - People for Ecosystem-based Governance in Assessing Sustainable development of Ocean and coast - EU Framework Programme for Research and Development (FP7) (<https://cordis.europa.eu/project/id/244170>);
- ERANet SEAS-ERA Towards Integrated Marine Research Strategy and Programmes - EU Framework Programme for Research and Development (FP7) ERA-NET (<https://cordis.europa.eu/project/id/249552>);
- MASRI Infrastructure for sustainable development of marine research linked to the membership of Bulgaria in Euro-Argo EU infrastructure (<http://masri.io-bas.bg/>);
- ANEMONE, Assessing the vulnerability of the Black Sea marine ecosystem to human pressures, financed by the Joint Operational Programme Black Sea Basin 2014-2020 (<http://anemoneproject.eu/>);
- REEFS Research and Restoration of the Essential Filters of the Sea financed by the Joint Operational Programme Black Sea Basin 2007-2013 (<https://blacksea-cbc.net/wp-content/uploads/2015/12/20120828-Priority-2-REEFS-86.pdf>);
- BSB-NetEco Research networking for the environmental monitoring and mitigation of adverse ecological effects in the Black Sea Basin financed by the Joint Operational Programme Black Sea Basin 2007-2013 (<https://blacksea-cbc.net/wp-content/uploads/2015/08/fact-sheet-MIS-1443.pdf>).

Researchers in R&D are professionals engaged in the conception or creation of new knowledge, products, processes, methods, or systems and in the management of the projects concerned. From all the BSB countries, in 2018 Greece is the country which has most

¹¹⁴ ICBSS is an independent research and training institution focusing on the wider Black Sea region, and b) as a related body of the Organisation of the Black Sea Economic Cooperation (BSEC)



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researchers, ranking 21st place in the world. Unfortunately, during the 2016-2018 period, a decreasing trend can be noticed in the number of researchers in the BSB countries, except Greece and Bulgaria.

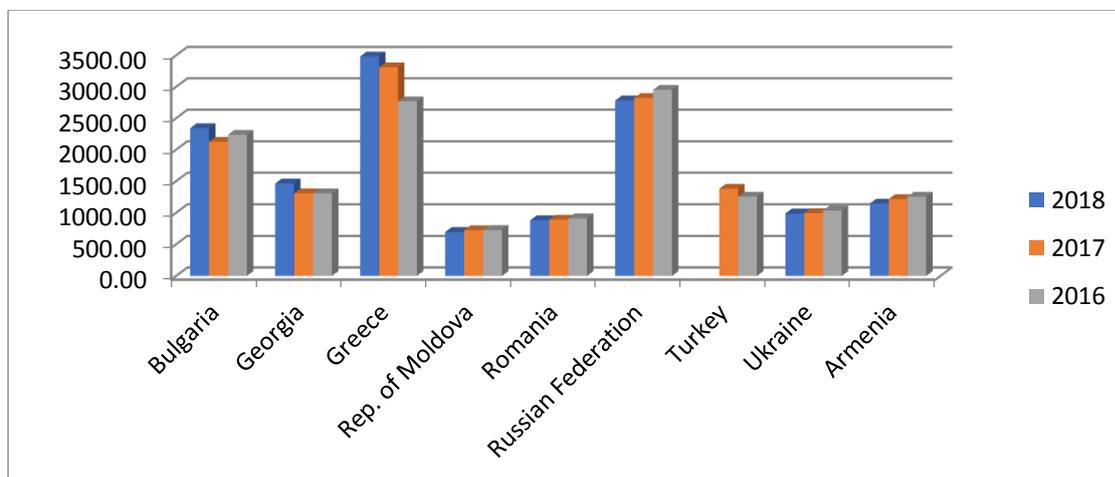


Figure no. 18 ¹¹⁵ number of researchers in Black Sea Basin countries in 2016-2018 period

In terms of investments in R&D as a percentage of GDP, all the BSB countries are below the European average (EU28) of 2%. Levels of investment range from 0.2% in Armenia to 1% in Greece. Increasing levels of investment can be observed between 2014 and 2016 in Georgia (+13%), Greece (+4.8%) and Romania (+6%). At a regional level, all the regions involved in the BSB area where data is available (i.e. not Turkey) have levels of investment that are lower than the respective national average¹¹⁶. In 2016 the average allocation of R&D of the GDP was 0,53%, in 2017 was 0,56% and in 2018 was 0,53%.

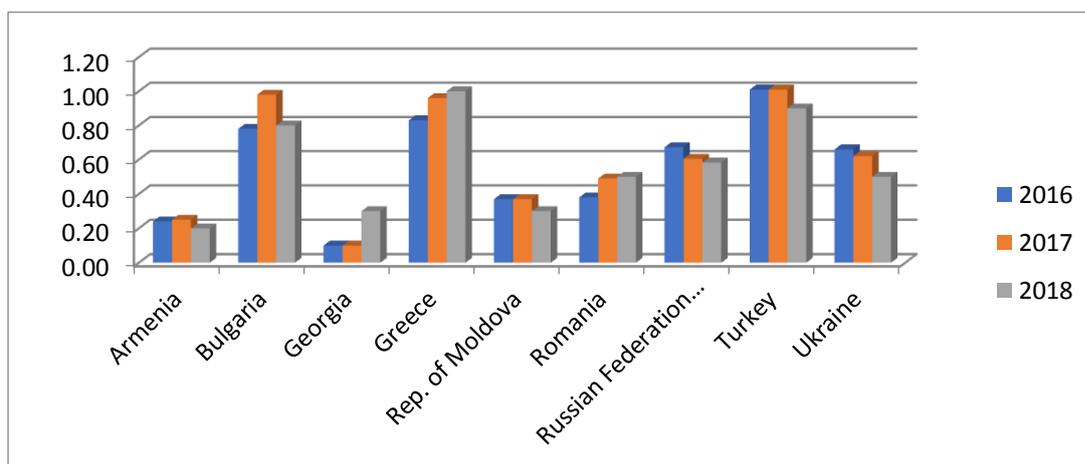


Figure no. 19 ¹¹⁷ % GDP expenditure on R&D

¹¹⁵ Source: <https://knoema.com/atlas/topics/Research-and-Development/RandD-personnel/Researchers-in-RandD> for all the BSB countries, <http://uis.unesco.org/en/country/am?theme=science-technology-and-innovation> for Armenia ; no data available for 2018 for Turkey

¹¹⁶ European Commission: Joint Paper on Interreg NEXT STRATEGIC Programming 2021-2027

¹¹⁷ Source: <https://knoema.com/atlas/topics/Research-and-Development/RandD-personnel/Researchers-in-RandD> for all the BSB countries, except for Russian Federation (the data was provided by Joint Programming Committee country representatives from Russian Federation)



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The Global Innovation Index (GII) is an annual ranking of countries by their capacity for, and success in, innovation and it is computed by taking a simple average of the scores in two sub-indices, the Innovation Input Index and Innovation Output Index, which are composed of 7 pillars: Institutions, Market sophistication, Knowledge & technology outputs and Creative outputs, Human capital and research, Infrastructure and Business sophistication.

According 2020 Global Innovation Index, which analysed 131 countries, the BSB countries are situated in the middle of the ranking, having Bulgaria on the 37 position and Georgia on the 63 position.

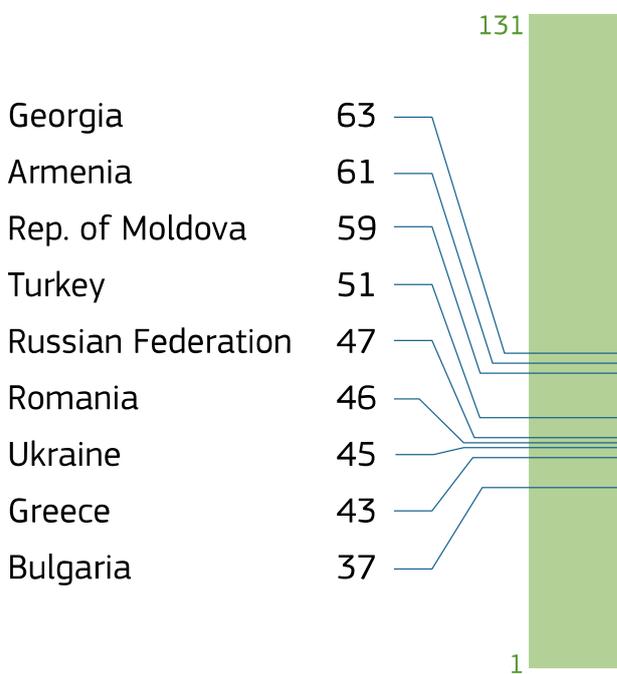


Figure no.20¹¹⁸-Ranking according to Global Innovation Index 2020

The **Black Sea Basin area** has a rich **scientific potential** although it faces difficulties such as researchers' migration and rather low research and development expenditures. **Research and Innovation is therefore another potential area for cooperation.**

3.5 Smart specialisation strategies

Smart specialisation (RIS3) is an innovative approach that aims to boost growth and jobs, by enabling each region to identify and develop its own competitive advantages. Through its partnership and bottom-up approach, smart specialisation brings together local authorities,

academia, business spheres and the civil society, working for the implementation of long-term growth strategies supported by EU funds. These partners identify strengths in their region, and prioritize support based on where local potential and market opportunities lie (the "Entrepreneurial Discovery Process" - EDP). To help with this process, RIS3 seeks to improve governance at regional and national level, concentrate resources, build critical mass, and accelerate the uptake of new ideas¹¹⁹.

The smart specialization strategy concept was developed by the European Commission's high-level expert group "Knowledge for Growth" in 2005-2009, closely related to the concept of clusters¹²⁰, as in the EU cluster policies and cluster organizations are generally perceived as means to support the economic competitiveness of Small and Medium-sized Enterprises

¹¹⁸ According to Global Innovation Index 2020: https://www.wipo.int/edocs/pubdocs/en/wipo_pub_gii_2020.pdf

¹¹⁹ European Commission (2017) - *Commission staff working document accompanying the document Communication from the Commission to the Strengthening Innovation in Europe's Regions: Towards resilient, inclusive and sustainable growth at territorial level* available at https://ec.europa.eu/regional_policy/sources/docoffic/2014/swd_2017_264_2_en.pdf

¹²⁰ *Smart Guide to Cluster Policy* (2016) available at <http://ec.europa.eu/DocsRoom/documents/16903/attachments/1/translations/en/renditions/pdf>

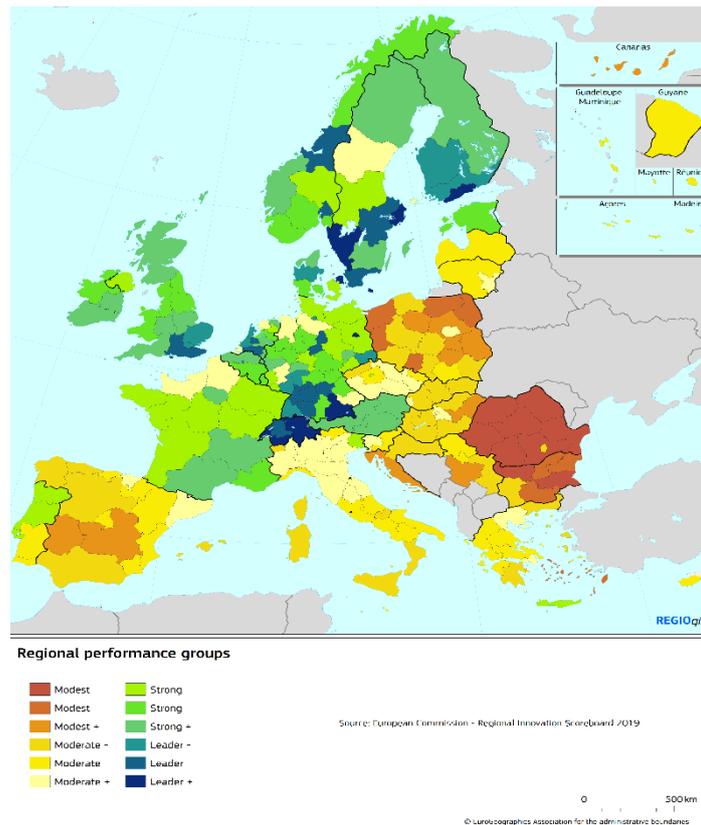


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(SMEs), the regional development and smart specialisation, and to enhance research and innovation¹²¹.

A decade later, according to the Regional Innovation Scoreboard (RIS) which provides a comparative assessment of performance of innovation systems across 238 regions of 23 EU Member States, the regions of Romania and Bulgaria participating in the Programme are ranked at EU level as modest innovators, while the Greek regions register a moderate level of innovation (see map no. 3 below)¹²².



Map no. 3 Regional performance groups

Smart specialisation strategies are of interest not only to EU member states, but also to non-EU countries willing to improve their innovation ecosystems. To support participatory and evidence-based processes in the EU Neighbourhood countries, the S3 Platform developed a pilot project that supports the early preparatory phases of the development of research and innovation strategies for smart specialisation in two of the EU neighbouring countries - Moldova and Ukraine¹²³. Exchange of good practices among the pilot targeted countries of the S3 Platform activities can provide additional insights for the development of RIS3 outside the EU.

¹²¹ Review of the state of development of clusters in EaP (2017) available at <https://s3platform.jrc.ec.europa.eu/documents/20182/190353/Clusters+in+the+EaP+Countries+3.17.pdf/716c89b7-1e19-4d71-b72e-7ab959566403>

¹²² Source :<https://interactivetool.eu/RIS/index.html>

¹²³ Smart Specialisation Platform - EU Neighbourhood available at <https://s3platform.jrc.ec.europa.eu/eu-neighbourhood>



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3.6 Digitalization

Nowadays, information processing, exchange and dissemination by means of information and communication technologies are a significant economic, social and cultural value and also an indispensable development factor.

In the Black Sea Basin countries there is wide access and an increasing trend of using Internet services by citizens. In 2016, only 63% of the population of the BSB countries used Internet, compared with 78,7% in 2019.

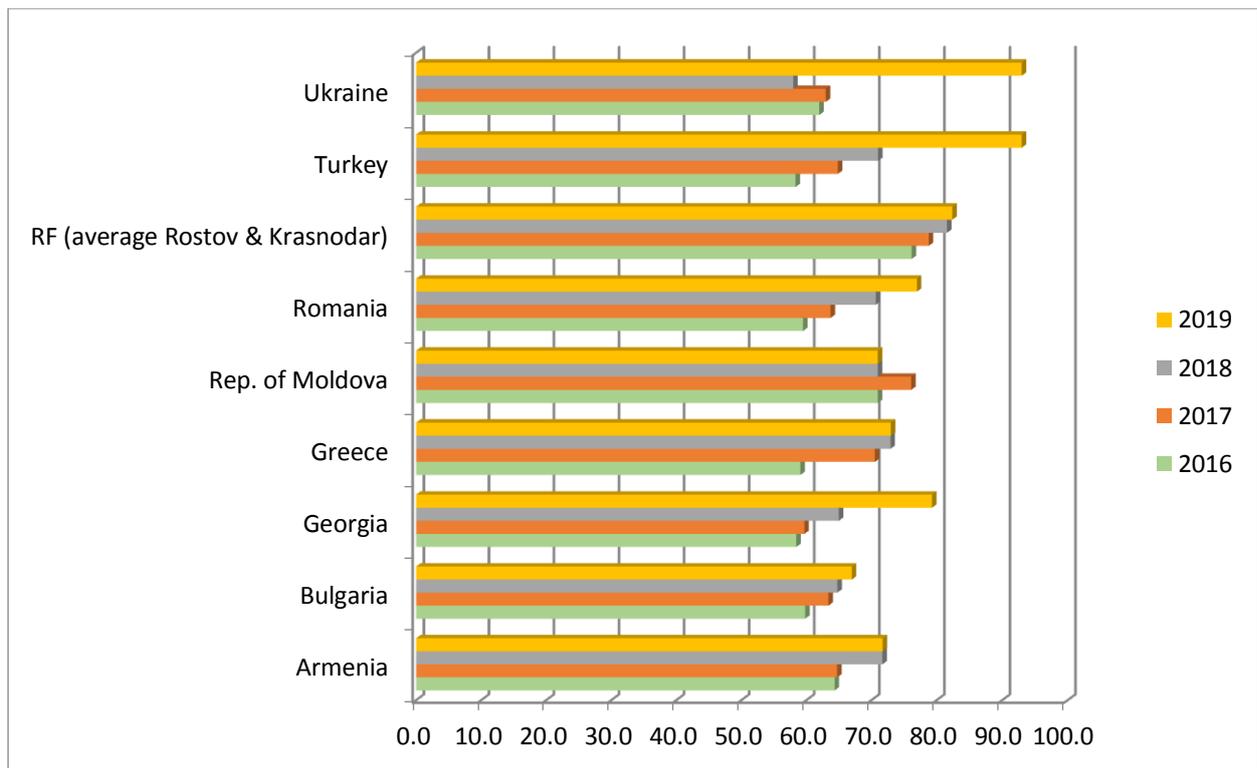


Figure no.21¹²⁴ -% use of Internet services by citizens (national level)

The current COVID-19 crisis is having an important impact on the use of internet services by citizens, every day, more and more people are getting familiarized with the new internet facilities. Generalised confinement translated into recurrent access to social media and entertainment platforms as well as to teleworking, e-commerce and e-government services.

The governments took immediate actions to minimise contagion and to support the health system, such as developing applications and platforms to facilitate telemedicine and to coordinate health resources. Measures to reinforce the digital infrastructure due to the strained demand were put in place. In many cases, the provision of online education resources and digital public services were developed or improved to promote digital inclusion. Likewise, the support to digitisation of businesses, particularly of SMEs, was accelerated in areas such as e-commerce, teleworking or online training. Cybersecurity and the fight against fake news or online shopping scams was also a priority. Efforts also

¹²⁴ Source: Data provided by participating countries (gathered by Joint Programming Committee country representatives)



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concentrated on the promotion and funding of research activities using advanced digital technologies and infrastructure¹²⁵.

3.7 SWOT analysis and preliminary conclusions

SWOT - A Smarter cooperation area	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • A high number of heritage sites, many of them open for public • Existence of underwater heritage sites • A high level of diversity in terms of conditions and business growth throughout the region; • Tourism has grown significantly across the majority of the region and is an important industry; • The availability of a healthy and skilled workforce and a stable macro-economic environment; • Wide access and an increasing trend of using Internet services by citizens; • Existence of functional researchers' networks in the BSB area, which already have the capacity to implement research projects. • The marine aquaculture has been one of the fastest growing activities in the last years 	<ul style="list-style-type: none"> • The cruise tourism is almost non-existent in the Black Sea; • Seasonality of the tourism in the Black Sea Basin countries; • Emerging sectors based on new technologies are not yet sufficiently developed and promoted both at national and regional level; • Limited research and innovation capabilities; • Ineffective transfer of knowledge into innovation; • Visa restrictions that do not allow Black Sea citizens to easily visit and collaborate with each other; • Difficulties to fight corruption and to ensure business integrity; • Researchers' migration • Rather low research and development expenditures.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Increase of public interest and access through digitalisation and online accessibility of culture heritage • A smarter cooperation area, as part of the blue economy is a key objective of the Common Maritime Agenda and of the Strategic Research and Innovation Agenda; 	<ul style="list-style-type: none"> • Decline of tourism and cultural and entertainment activities due to COVID-19 pandemic discourage investments in culture heritage • COVID-19 health crisis and its economic consequences; • Conflicts in the BSB area.

¹²⁵Digital Economy and Society Index (DESI) 2020 <https://ec.europa.eu/digital-single-market/en/desi>



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- The existence of 19 UNESCO cultural places in the Black Sea Basin area;
- 3 natural/mixed sites from the Black Sea eligible area are included on the UNESCO World Heritage List
- The previous ENI/ENPI Black Sea Basin programmes have already financed projects in the field of tourism, aquaculture, entrepreneurship, research and innovation and digitalization.

The programme area is rich in culture heritage, which brings great opportunities for tourism. In the context of COVID-19 pandemic, opportunities like digitalisation of culture heritage and online accessibility may be an option for preservation and promotion of culture heritage.

The small and medium enterprises' innovation potential and ability to adapt to fast-changing market conditions makes them an increasingly important source of entrepreneurial dynamism in the Black Sea Basin area, as well as an important pillar of blue economy.

It is obviously that tourism is one of the key sectors for the entire area. As the tourism industry is closely linked to infrastructure development, services, and visa issues it represents a field for joint programmes and projects. Ecotourism, cultural tourism such as cultural routes projects constitute such examples of current cooperation among the Black Sea countries¹²⁶.

Tourism in the Black Sea is under-developed across the sea basin as a whole compared to neighbouring sea basin areas such as the Aegean. There is a low level of knowledge and appreciation of Black Sea coastal areas and underdeveloped transport connections to facilitate tourism growth. This also has implications for the development of associated economic activities such as the development of yachting and marinas, as well as cruise tourism¹²⁷.

Nonetheless, the tourism and culture sectors benefited of a high interest for cooperation also under the previous programmes, priority 1.1 (Jointly promote business and entrepreneurship in the tourism and cultural sectors) in the 2014-2020 programme being a solid proof in this respect, in terms of number of projects (1/2 of total projects submitted), partners (approximately 1/2 of all project applicants) and in terms of funds requested, exceeding 14 times the allocated budget. The new Interreg NEXT programme could capitalize the joint work already carried out.

¹²⁶ Black Sea Economic Cooperation Regional Cooperation in the Black Sea:
https://www.bstdb.org/Regional_Cooperation_in_the_Black_Sea.pdf

¹²⁷ Report: Black Sea - Identification of Elements for Sea Basin: Cooperation:
<https://webgate.ec.europa.eu/maritimeforum/system/files/Report%203%20%28Task%204%29%20Final%20final%2014-4-14.pdf.pdf>



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Although sectors such as coastal and marine tourism, as well as fisheries and aquaculture are severely affected by the COVID-19 pandemic, the blue economy as a whole presents a huge potential in terms of its contribution to a green recovery¹²⁸.

In the Joint paper on Interreg NEXT Strategic Programming 2021 - 2027 the following potential cooperation actions in the BSB area are identified:

- Creation of joint or complementary research infrastructure;
- Exchanges or joint R&D programmes to increase cooperation between the universities and the R&D centres of the area;
- Creation of spin-offs able to operate at cross-border level;
- Creation of cross-border living labs, technology centres to support R&D and technology transfer;
- Cross border innovation advisory services;
- Develop sustainable fisheries and enhance food systems research including high tech and eco-friendly aquaculture;
- Foster biotechnology by exploring the potential of high value, innovative products from unique organisms inhabiting the Black Sea, along the whole value chain Cross border innovation advisory services;
- Creation or support to existing clusters or networks;
- Joint branding (e.g. at trade fairs);
- Networking and connectivity among tourism stakeholders;
Joint development of environment friendly and sustainable tourism strategies;
- Development of innovative joint sustainable coastal and maritime tourism products and services to promote synergies between coastal tourism and other activities (e.g. pesca-tourism, culture and underwater heritage, aquaculture);
- Development and joint marketing of innovative cross-border tourism products and transnational thematic itineraries, incl. underwater cultural heritage.

The above-mentioned actions are completed by the ones pointed out by the Common Maritime Agenda:

- Support for fisheries research projects, including fisheries research at national basis, and joint scientific surveys, including on climate change and the impact of invasive species on fisheries and incidental catch of vulnerable species;
- Support for aquaculture research and joint pilot projects - in private and public sectors, including the Black Sea aquaculture demonstration centres and demonstrative aquaculture modules;
- Organisation of workshops and seminars on fisheries sustainability and sustainable development of aquaculture;
- Support for the use of innovative marine technologies and IT monitoring tools for fisheries vessels, including small-scale fisheries;
- Foster capacity building and training activities on fisheries sustainability and sustainable development of aquaculture for stakeholders;
- Support for projects enhancing the valorisation of catches and diversification of activities to maximize the economic benefit of the fisheries sector, in particular for small-scale fisheries;

¹²⁸Blue Economy Report: the blue economy as a vehicle for economic recovery:

<https://www.clustercollaboration.eu/news/blue-economy-report-blue-economy-vehicle-economic-recovery>



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- Encourage matchmaking and networking events between employers and potential employees;
- Create, support and promote start-ups oriented towards the circular and blue economy in the Black Sea region;
- Promote investment opportunities via dedicated funding programmes, websites and annual events;
- Collaborate to train, build capacity and advise various stakeholders, public and private, on how to access available funds and apply for calls for projects linked to the blue economy;
- Identify, promote and advertise regionally, successful maritime projects.
- Voluntary sharing knowledge and experience to increase the capacity of the participating countries to analyze and organize human activities in marine areas in order to achieve common ecological, economic and social objectives. Promoting, through voluntary cooperation and where appropriate, the sustainable growth of maritime economies and regions;
- Clusters. Support existing maritime clusters, as well as new generation innovation clusters. This will improve the cooperation across the region and the implementation of the blue economy actions set in the Common Maritime Agenda;
- Encourage business hubs, business labs and accelerators, as well as regular events for networking, matchmaking between businesses;
- Create, support and promote start-ups oriented towards the circular and blue economy in the Black Sea region.

More than ever, the COVID-19 pandemic showed that all the digitalization aspects, such as connectivity (fixed broadband take-up, fixed broadband coverage, mobile broadband and broadband prices), human capital (Internet user skills and advanced skills, use of internet (citizens' use of internet services and online transactions), integration of digital technology (business digitisation and e-commerce) and digital public services (e-Government) should represent a key priority in the development of a blue economy of the BSB countries.

Notwithstanding the current tragedy, crises are often a source of creativity and innovation, and, at times, industrial renewal. The COVID-19 crisis has already catalysed innovation in many sectors, such as education, remote work, and retail. It might accelerate progress and industrial renewal more broadly. The opportunities for breakthrough technologies and innovation continue to abound¹²⁹.

All the above-mentioned aspects: increasing the competitiveness and the entrepreneurship spirit of the small and medium enterprises, developing sustainable tourism and aquaculture, increasing the research and innovation capabilities and digitalization will lead to a competitive, innovative and sustainable blue economy, as called for in the Common Maritime Agenda.

The SWOT analysis, as well as the data presented in this chapter, shows a large variety of cross border projects opportunities for the future programme. Also, a capitalisation of the projects financed in the previous two programming periods (2007-2013, 2014-2020) should offer a solid ground for future cooperation projects in this field, as similar activities have already been financed by the previous Black Sea Basin ENI/ENPI projects.

¹²⁹Global Innovation Index 2020: https://www.wipo.int/edocs/pubdocs/en/wipo_pub_gii_2020.pdf



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Therefore, the policy objective "A smarter Europe and its neighbourhood" offers clear potential for future projects in the Black Sea Basin area, which could involve the already created networks of cooperation.



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Chapter 4 - Greener cooperation area (PO2)

4.1 Introduction

The EU and its nearest neighbours stand at a critical juncture. Despite progress in reducing some environmental pressures in recent decades, Europe faces environmental and sustainability challenges of unprecedented scale and urgency, which it cannot successfully address alone. Overcoming these challenges is possible, but it will require a significant shift in the character and scale of Europe's responses and coordinated actions across society and internationally.¹³⁰

Strategic documents underline the urgent need to take sound measures in the rational use of environmental resources in the Black Sea Basin area.

The Marine Strategy Framework Directive (MSFD)¹³¹ remains the main instrument promoted by the EU for the protection of the Black Sea marine environment. The Directive encourages enhanced regional cooperation, building upon relevant existing programmes and activities developed in the framework of structures stemming from international agreements. Since 2013, the EU has financed the 'Improving Environmental Monitoring in the Black Sea' (EMBLAS) project. It provided support for strengthening policies, monitoring and capacity building in the region. The national pilot monitoring studies and two EMBLAS joint Black Sea surveys in 2016 and 2017 generated a critical amount of data. These provided the first results of the Black Sea environmental status assessment, according to MSFD requirements.¹³²

Coastal countries' activities in the field of environmental protection of the Black Sea are regulated under the Convention on the Protection of the Black Sea against Pollution (Black Sea Commission), its Protocols and other relevant national/international legislation. The Black Sea countries are also bound by international environmental agreements and conventions. A large number of conventions and agreements have been signed and ratified by all six countries, providing a good basis for improvement of transboundary cooperation. International/transboundary cooperation is also supported through bi/tri-lateral agreements.¹³³

The importance of the environment as a key challenge for the Black Sea Basin cooperation area was further emphasized by the Environment Partnership¹³⁴ of the Black Sea Synergy, launched in March 2010. In addition, the "Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018" from March 2019 identifies lessons learnt and progress made in the area of environmental protection and climate change. Given that Black Sea Synergy is the main strategic framework for actions under the environment-climate change field, the lessons and conclusions of the joint staff working paper shall be taken into account when programming under Policy Objective 2.¹³⁵

The first of the three main goals of the **Common Maritime Agenda for the Black Sea** is a *healthy marine and coastal ecosystems*, goal pursued through the following priorities:

¹³⁰ EEA (2019) - The European environment – state and outlook 2020. Knowledge for transition to a sustainable Europe <https://www.eea.europa.eu/soer/2020>

¹³¹ Directive 2008/56/EC of the European Parliament and of the Council of 17 June 2008 establishing a framework for community action in the field of marine environmental policy (MSFD)

¹³² EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹³³ Commission on the Protection of the Black Sea against Pollution - Black Sea Commission (2009), Strategic Action Plan for the Environmental Protection and Rehabilitation of the Black Sea

<https://ec.europa.eu/environment/marine/international-cooperation/regional-sea-conventions/bucharest/pdf/SAP2009.pdf>

¹³⁴ Source: https://ec.europa.eu/commission/presscorner/detail/en/IP_10_279

¹³⁵ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027



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ensuring the protection and sustainability of the marine ecosystem, addressing marine pollution and plastic litter, supporting sustainable fisheries and aquaculture, as well as innovative marine research infrastructures, and encouraging the production, management and sharing of marine and coastal environmental knowledge for effective environmental monitoring and observation.

Moreover, in its conclusions on EU's engagement to Black Sea regional cooperation of June 2019¹³⁶, the Council reaffirmed its long-standing commitment to fostering prosperity, stability, and resilience in the Black Sea area and called for enhanced EU involvement in the regional cooperation via the Black Sea Synergy.

Finally, in the **Joint Paper on Interreg NEXT Strategic Programming 2021-2027**, EC-EEAS provide that Policy Objective 2 "A greener low-carbon Europe and its neighbourhood" should enhance greener, carbon-free Europe and partner countries. It should contribute to the implementation of the Paris Agreement and invest in energy transition, clean renewables and the fight against climate change.

In line with the European Green Deal, launched by the Commission in December 2019, cooperation actions supporting this PO should promote among others: energy efficiency, clean renewable energy, climate change adaptation, risk prevention and disaster resilience, sustainable water management and the transition towards a circular economy in both the Union and the partner countries. They can also contribute to the development of smart energy systems, grids and storage at local level. PO 2 aims as well at enhancing biodiversity, green infrastructure in the urban environment and reducing pollution (air, water and soil) in the areas covered by the programmes.¹³⁷

In order to assess the current situation in the Black Sea Basin against the stated objectives of PO2 in terms of main joint challenges, needs and the potential of transnational cooperation to tackle them, a number of various indicators are to be considered in this analysis. The next sections follow the above objectives as well as the availability and consistency of the considered indicators¹³⁸.

4.2 Water quality

The Black Sea region is generally well provided with freshwater resources, including those suitable for drinking water. However, pollution of rivers has led to a sharp decline in access to safe drinking water resources and necessitates the use of costly technologies for water treatment. Usage of groundwater for drinking purposes is not possible everywhere because of a lack of resources (this particularly applies to the southern part of the Black Sea region)¹³⁹, while groundwater may itself be polluted. As a result, the current access to safe drinking water in the region could be characterised as problematic, particularly in rural areas.

Two out of the five strategic objectives of the EU macro-regional Strategy for the Danube Region (EUSDR), as included in the revised Action Plan¹⁴⁰ are of particular importance for the Black Sea region, given that the two regions partially coincide: counteracting climate change and stimulating sustainable development. Moreover, potential cooperation actions need to create synergies with Priority Area 4 *Water quality*.

¹³⁶ Source: <https://www.consilium.europa.eu/media/39779/st10219-en19.pdf>

¹³⁷ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹³⁸ The current analysis faced the challenge of missing data, especially at regional level, therefore the assessment is mostly based on the data available at national level.

¹³⁹ UNEP/GIWA (2005), *Eutrophication in the Black Sea Region, Impact assessment and causal chain analysis*

¹⁴⁰ EC (2020), Revised Action Plan for the European Union Strategy for Danube Region

<https://danube-region.eu/wp-content/uploads/2020/04/EUSDR-ACTION-PLAN-SWD202059-final.pdf>



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The data availability relevant for the water quality topic determined the consideration of the following indicators:

- Rate of connection of inhabitants to safe drinking water

When analysing the *rate of connection of inhabitants to a safe drinking water system*¹⁴¹, a slight upward trend is observed in the region for period 2014-2017, being clearly visible in Armenia (an increase of more than 10%, reaching 86%), as observed in the figure no.22 below:

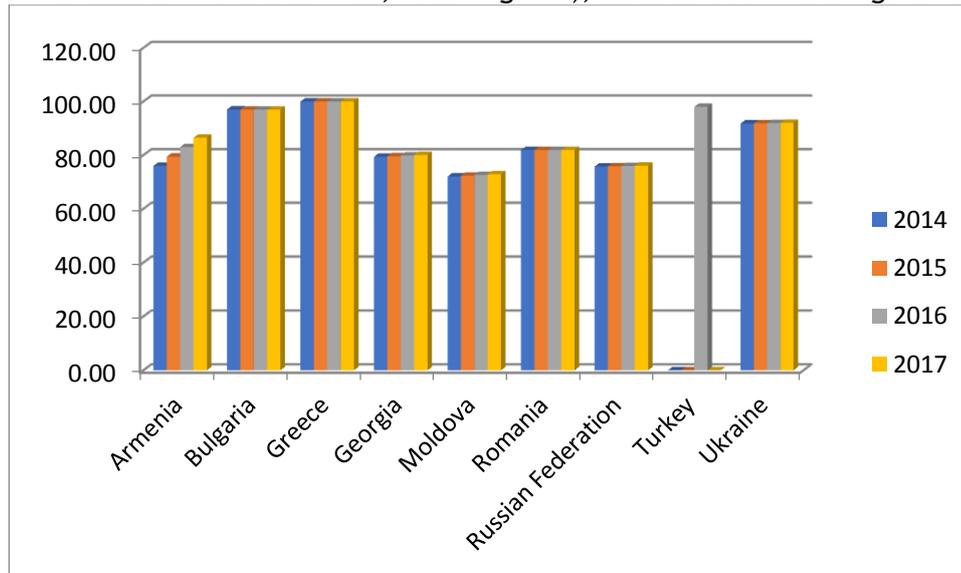


Figure no.22- People using safely managed drinking water services (% of population)

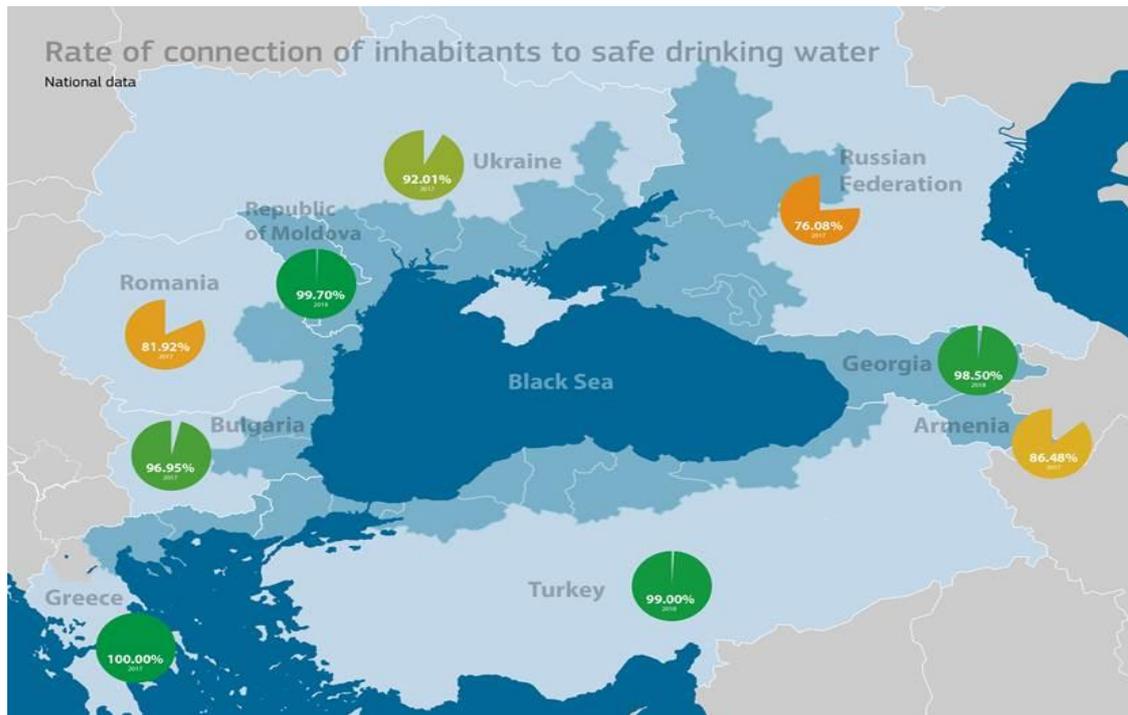
A higher need to increase the rate of people using safely managed drinking water services is observed in Rep. of Moldova, Russian Federation and Georgia (rates below 80%) and also in Romania and Armenia (rates below 90%).

As data availability at regional level is limited, the indicators define the situation only at national level, as also shown in *Map no. 4* below:

¹⁴¹ World Development Indicators and Turkstat for Turkey (year 2016 only).



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Map no. 4 -Rate of connection of inhabitants to safe drinking water (year 2017)¹⁴²

- Annual water use per capita

As regards the **annual water use per capita**¹⁴³, figure no.23 below shows a clear distinction between the high consumption of water in the Member States (especially Greece and Bulgaria) compared with the other countries, discrepancy which is to an extent proportional with the rate of connection of inhabitants to safe drinking water as described above.

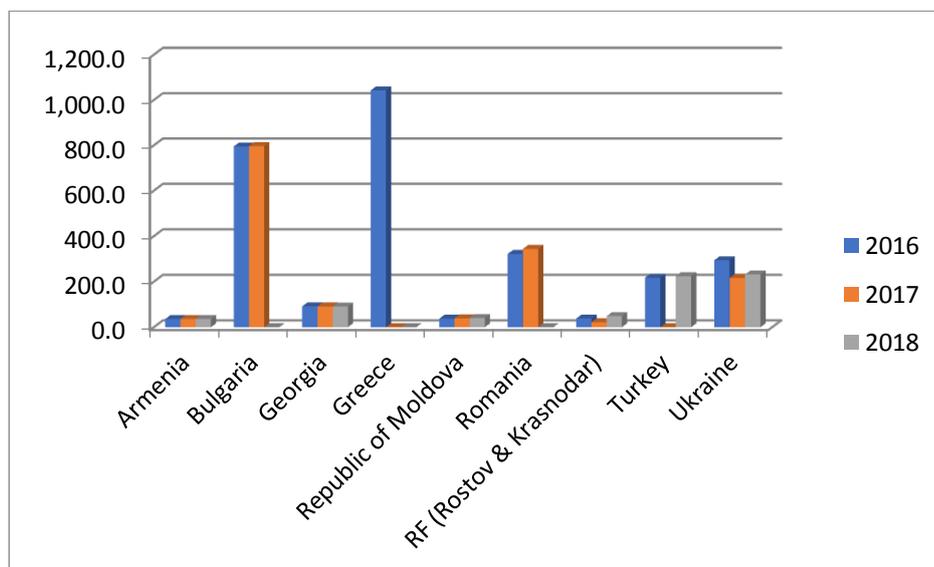


Figure no.23- Annual water use per capita

¹⁴² World Development Indicators (data for Turkey not available at World Bank)
<https://databank.worldbank.org/reports.aspx?source=2&series=SH.H2O.SMDW.ZS>

¹⁴³ Source: Data provided by participating countries during the programming period, based on national statistics and Eurostat (*Fresh water abstraction by source per capita - m³ per capita*). Data for few years, in certain countries, not available. Data for Russian Federation are average at regional level (Rostov and Krasnodar).



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As regards the Black Sea area, there is a disproportion between water resources and water consumption and there is a need for comprehensive consideration of water resources in the system of the water sector.¹⁴⁴

4.3 Pollution

Concerning pollution, land-based sources are the biggest polluters and account for more than 70% of all pollution in the Black Sea area. Eutrophying nutrients, which enter the sea from air pollution via surface and ground water or directly through deposition on the sea surface are one of the more damaging pollutants. Specifically nutrients stemming from the Danube River (mainly nitrates) remain significant but stable over time. Oil pollution in the Black Sea remains an on-going concern along major shipping routes and in coastal areas around river mouths, sewage outputs, industrial installations and ports.¹⁴⁵

Water pollution, whether from agricultural activities, industrial or urban discharges are critical problems, exacerbated by risks of marine pollution in regional seas, like the Black Sea. Air pollution is a transboundary issue too in marine areas also due to maritime transport.¹⁴⁶

The data availability relevant for pollution determined the consideration of the following indicators:

- Carbon dioxide emissions per unit of GDP

Carbon dioxide emissions per unit of GDP varies between countries in the Black Sea Basin for the period 2010-2015, due to differences in the structure of the economy and different patterns in energy efficiency. Across the whole basin, the rate is decreasing, except in Armenia and Georgia, showing a gradual decarbonisation of some of main economies in the area.¹⁴⁷ The trend is similar for year 2016, as depicted in *figure no.24* below, when the rate of carbon dioxide emissions per unit of GDP continues to decrease in most countries, except Russian Federation, while also remaining higher in Ukraine.¹⁴⁸

¹⁴⁴ Dimitrova R. (2017), Key factors affecting water consumption in the Black Sea region
http://journal.ue-varna.bg/uploads/20170629060641_549194520595498f108490.pdf

¹⁴⁵ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁴⁶ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁴⁷ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁴⁸ World Development Indicators for year 2016 and EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027 for year 2015



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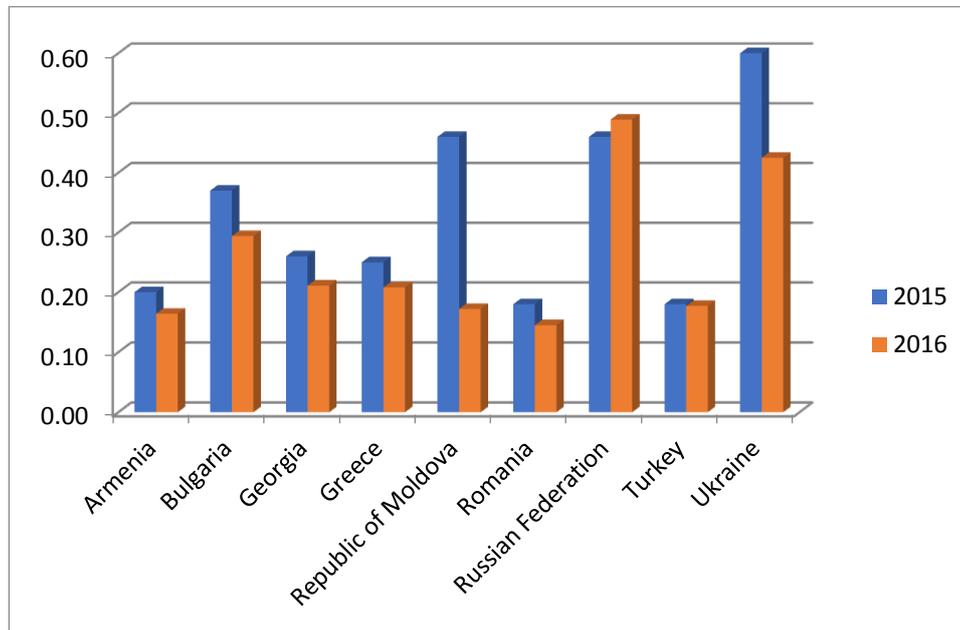


Figure no.24. Carbon dioxide emissions per unit of GDP

- Wastewater treatment / wastewater disposal

Regarding marine and coastal water, the Black Sea's catchment area is very large, with a total surface area of around 2 million km², five times the surface of the Black Sea itself.¹⁴⁹ The large cities of the Black Sea Basin catchment area outside the coastal zone mostly have full biological treatment of wastewater, which in general operates with sufficient efficiency. Nonetheless, wastewater treatment is often not sufficient in the rural areas and in coastal cities - all the more so given that the treatment plants get overloaded in the high season, when the population in coastal cities increases substantially. Untreated or insufficiently-treated sewage (mostly due to worn-out equipment) is the main source of pollution from coastal cities and villages. Moreover, usually no structures exist to remove effluent far from the shore (for instance, 3 miles), thus the coastal area of the sea is polluted. Municipal wastewater contributes significantly to the load of organic materials and nutrients in the Black Sea, as well as to the spread of diseases, though microbiological pollution is primarily a local problem¹⁵⁰.

As regards the population connected to wastewater treatment plants, the available data for years 2016-2017¹⁵¹ show that people in Greece (93%), Bulgaria (87%) and Turkey (from 70.7% in 2016 to 74.2% in 2017) have higher and increasing access to wastewater treatment facilities, while Romania ensures 50% access to these facilities (from 49.7% in 2016 to 51.5% in 2017). Data is not available for the other partner countries, however lower level of access is anticipated for these areas.

¹⁴⁹ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁵⁰ UNEP/GIWA (2005), *Eutrophication in the Black Sea Region, Impact assessment and causal chain analysis*

¹⁵¹ Eurostat for Member States, OECD for Turkey

https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=env_ww_con&lang=en



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The Common Maritime Agenda for the Black Sea¹⁵² supports reducing marine litter production and marine pollution, by actions such as raising awareness among public authorities and citizens on marine environmental issues and the impact of human activities on marine ecosystem, encouraging joint projects on marine environmental protection at all educational levels and on the prevention and response to pollution caused by ships and ports, education on marine ecosystem, promoting the practice of marine litter harvesting and recycling, supporting research on the challenges related to eutrophication, invasive species, emerging pollutants and litter.

4.4 Climate change

Environmental protection and climate change issues are important in the context of shared sea basins.¹⁵³

The Black Sea remains one of the seas most heavily impacted by human activities in the world. A combination of features renders its ecosystem highly sensitive to pressures from such activities. The area is also marked by the effects of climate change, although this issue has not been sufficiently addressed.¹⁵⁴

The EU strategic long-term vision „A clean Planet for all” is aimed toward a prosperous, modern, competitive and climate-neutral economy by 2050¹⁵⁵. In order to achieve this ambitious goal, territorial cooperation becomes of paramount importance, as combating the negative effects of climate change is not only a national level matter, whether EU or neighbourhood.

The data availability relevant for the climate change topic determined the consideration of the following indicators:

- Energy consumption per capita (watts)

Energy consumption per head is relatively low in the Black Sea area compared to the pattern observed in Western European countries¹⁵⁶, being displayed in *figure no.25* below¹⁵⁷:

¹⁵² Source: https://ec.europa.eu/maritimeaffairs/press/black-sea-ministers-endorse-common-maritime-agenda_en

¹⁵³ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁵⁴ EC-EEAS (2019), Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018
https://eeas.europa.eu/sites/eeas/files/swd_2019_100_f1_joint_staff_working_paper_en_v3_p1_1013788-1.pdf

¹⁵⁵ COM (2018) 773 - A Clean Planet for all - A European strategic long-term vision for a prosperous, modern, competitive and climate neutral economy

<https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52018DC0773>

¹⁵⁶ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁵⁷ Eurostat/IEA. Data not available for Russian Federation



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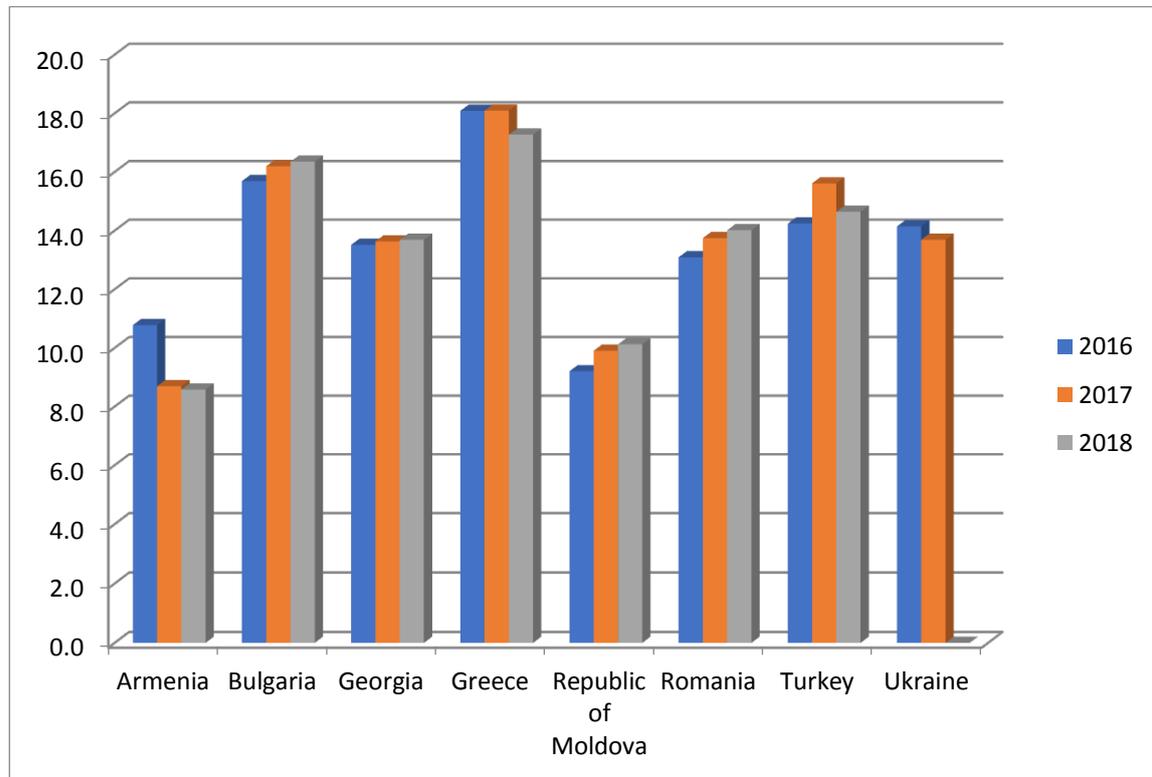


Figure no. 25- Energy consumption per capita (watts)

Nevertheless, the indicator is characterized by notable differences among countries, the energy consumption per capita steadily increasing in Bulgaria, Rep. Moldova, Romania and also Georgia, while decreasing especially in Armenia, but also in Greece and Ukraine.

- Share of renewable energy consumption in gross final energy consumption (%)

The share of renewable energy in final energy consumption for year 2015 is low on average (a maximum of 29% in Georgia and a minimum of 4% in Ukraine). The area's economies are still largely reliant on fossil fuels (including in some cases nuclear energy), even if energy the intensity ratio is declining in most of the countries and the use of renewable energy is gradually increasing (with exception being Georgia).¹⁵⁸

The low share of renewable energy in final energy consumption is kept for the period 2016-2018¹⁵⁹ and it is described in the figure no.26 below, where it decreased in Armenia, Georgia and Romania, while it steadily increased in Greece and Ukraine:

¹⁵⁸ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁵⁹ Data provided by participating countries during the programming period, based on national statistics and Eurostat. Data not available for Russian Federation.



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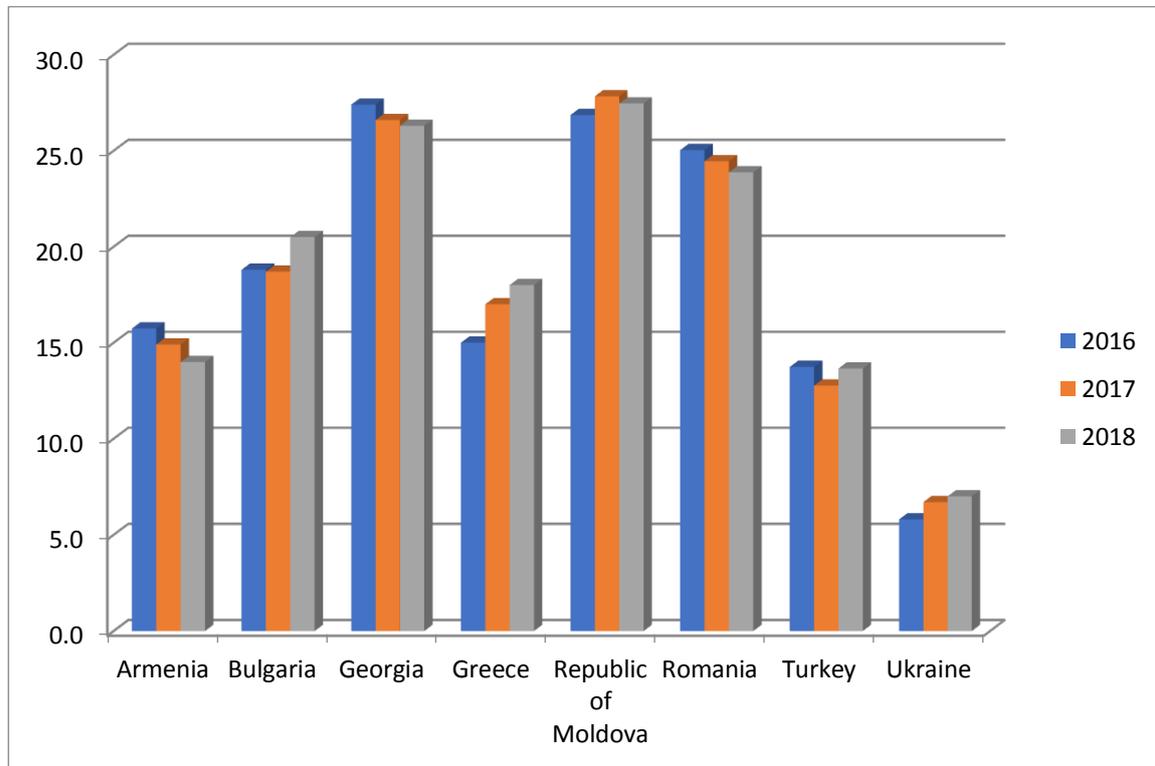


Figure no. 26- Share of renewable energy consumption in gross final energy consumption (%)

- Waste generation per capita (tons)

In 2015, the waste generation is high in the EU Member States - Romania, Greece and Bulgaria - above the EU28 average (5 tons per head), but lower in Turkey. Recycling is negligible in Bulgaria, Greece and Romania while higher for Turkey (around one third of the total waste generated). No data is available for the other countries in the area.¹⁶⁰

As regards the waste generation per capita in 2016¹⁶¹, the values are higher for Armenia, Bulgaria, Romania, Ukraine and Greece and very low for Republic of Moldova, Russian Federation and Turkey, as seen in *figure no.27* below:

¹⁶⁰ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁶¹ Source: Data provided by participating countries during the programming period, based on national statistics and Eurostat. Data for Georgia not available. Data for Russian Federation are at regional level (Krasnodar).



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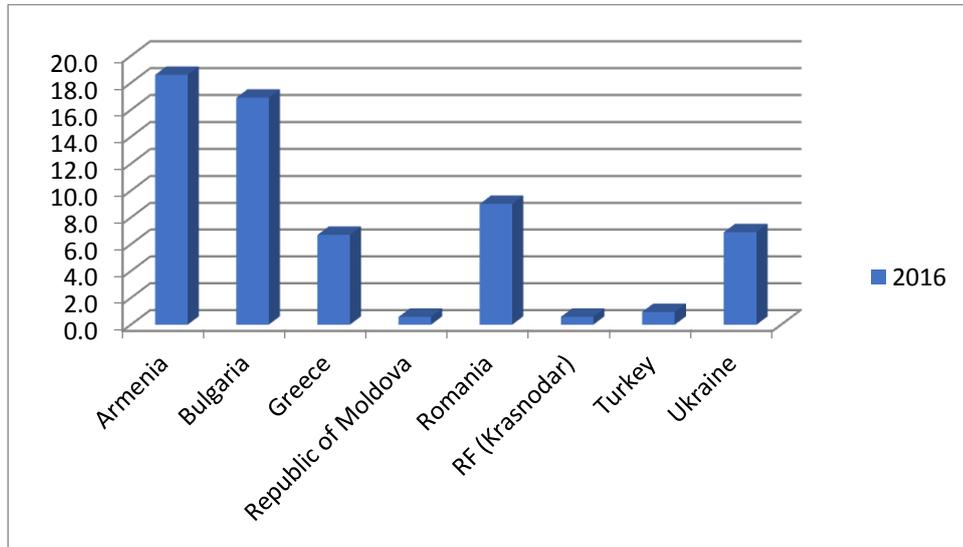


Figure no.27. Waste generation per capita (tons)

- Industrial waste produced (tons/year)

According with the data for year 2016¹⁶², the industrial waste produced is highest in Ukraine, followed at considerable distance by the Member States and Turkey, while Armenia and Rep. of Moldova indicate minor values by comparison.

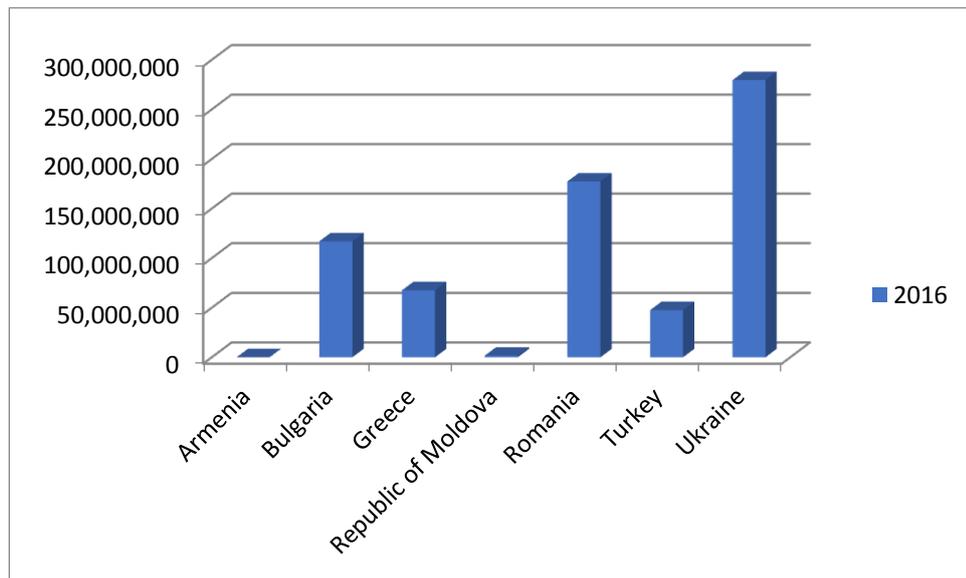


Figure no.28 -Industrial waste produced (tons/year)

The need to promote sustainable energy development has been emphasised by the Ministers of Energy of BSEC Member States¹⁶³ who have agreed to enhance cooperation and explore

¹⁶² Source: Data provided by participating countries during the programming period, based on national statistics and Eurostat. Data for Georgia and Russian Federation not available.

¹⁶³ In their declaration of October 2010 in Nafplion (Greece). BSEC (Black Sea Economic Cooperation) members include Albania, Armenia, Azerbaijan, Bulgaria, Georgia, Greece, Moldova, Romania, Russian Federation, Turkey and Ukraine.



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ways to promote Green Energy investments with an emphasis on energy efficiency, renewable energy sources and environmentally friendly energy technologies.

However, significant gaps still exist regarding waste management in the region and decarbonisation of key economic sectors. The adaptation of critical infrastructure to climate change has not been sufficiently addressed.¹⁶⁴

The Council particularly takes into account the need for enhanced international cooperation for addressing the environmental and climate challenges in the Black Sea.¹⁶⁵

Therefore, main challenges for the cross-border area are related to improving waste management systems, increasing recycling, preventing pollution from waste generation and reducing marine litter.¹⁶⁶

4.5 Environmental risks

The environmental risk refers to negative effects on environmental quality, terrestrial and water ecosystems' status and functioning, and ecological balance as a whole. Some of the environmental (ecological) risks can be reasonably well anticipated but others are wholly unsuspected effects at the time the technology or activity was developed. Thus environmental risks correlate to uncertainty.

The Black Sea, with surface area of 432 000 km², total volume of 547 000 km³ and maximum depth of 2212m, and strongly impeded exchange of water masses between the Black Sea and the Ocean (through the Bosphorus Strait) is one of the most isolated seas in the World. The large European rivers, the Danube, Dnieper and Don as well as main rivers: Rioni, Kodori and Inguri Chorokh, Kyzylirmak, Eshil-Irmak, Sakarya, Southern Bug and Dnister flow into the Black Sea. The amount of river inflow per year is 340.6 km³. The Black Sea drainage area is approximately 2 million km² and the total shoreline of (without the Sea of Azov shoreline) is 4 340km. The ratio of its surface and its catchment area exceeds 6. For this reason, the Black Sea is very vulnerable to pressure from land based human activity and its health is equally dependent from the coastal and noncoastal states of its basin. Due to natural factors: impeded water exchange with the Ocean, anoxic zone presence (over 78% of the sea volume saturated with hydrogen sulfide), significant river inflow and low salinity (16-18‰ to 22‰) of the sea, together with anthropogenic factors: unsustainable use of marine resources and pollution, the biodiversity of the Black sea is limited. Biodiversity of species of the Black Sea is presented by 1619 species fungi, algae and higher plants; 1983 species invertebrates; 168 - 300 fish species and 4 species of marine mammals (incl. 1 extinct). The diversity of species of Black Sea fauna is approximately three times lower compared with the Mediterranean. The above-mentioned specific features of the Black Sea make it very vulnerable to disturbances of its environment and its ability to provide ecosystem services.¹⁶⁷

The data availability relevant for environmental risks determined the consideration of the following indicators:

- Forest area (% of land area)

¹⁶⁴ EC-EEAS (2019), Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018

¹⁶⁵ Council Conclusions on the EU's engagement to the Black Sea regional cooperation (2019)

<https://www.consilium.europa.eu/media/39779/st10219-en19.pdf>

¹⁶⁶ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁶⁷ TONEVA D., Assessment of Environmental Risks in the Black Sea, scientific project "Creation of Interuniversity centre for risk management and assessment for prevention of ecological and technological risks in the Black Sea (IUCRISKMAN)", contract 2.2.1.73194.264 MIS-ETC 1459, funded by Joint Operational Programme "BLACK SEA BASIN 2007-2013".



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Deforestation is amongst the most detrimental human activity with a high impact on the broad climate change.

The area covered by forest is higher in Russian Federation, Georgia (covering most of the coastal zone¹⁶⁸) and the Member States and lower in the other countries in the Black Sea basin, while a slight increasing trend over 2014-2016 period is observed, especially in Member States and also Turkey, as shown in *figure no.29*¹⁶⁹ below:

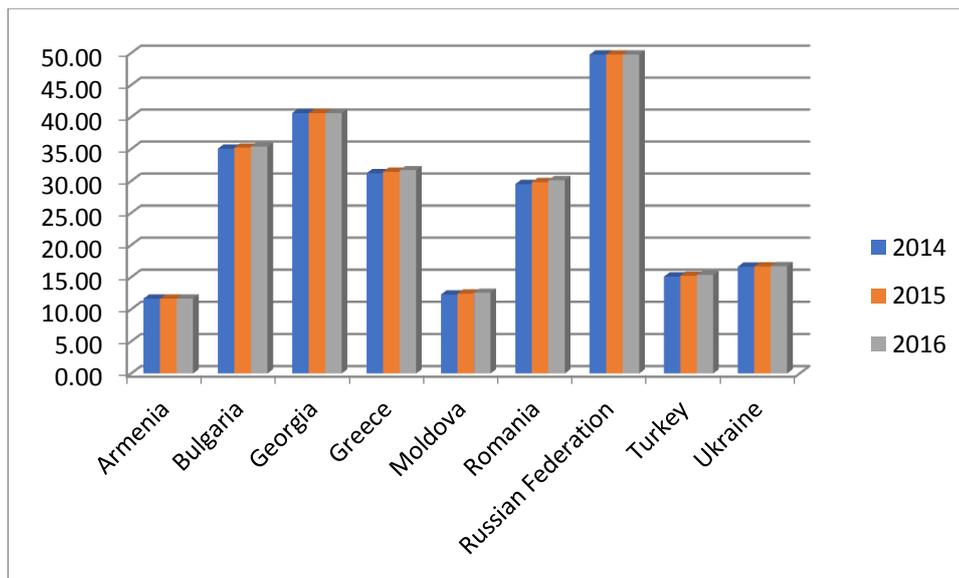


Figure no.29- Forest area (% of land area)

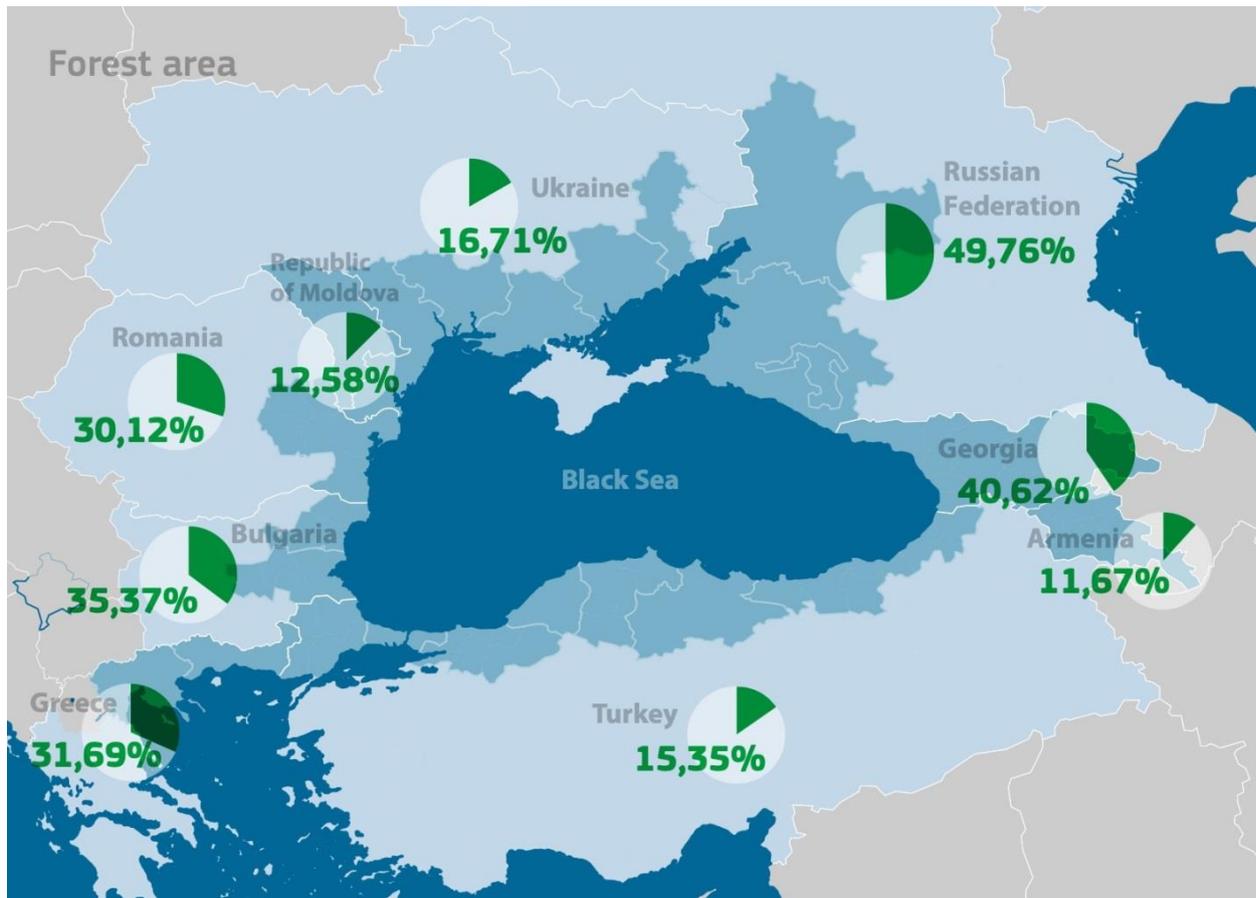
As data availability at regional level is limited, the indicators define the situation only at national level, as also shown in *map no.5* below:

¹⁶⁸ Commission on the Protection of the Black Sea against Pollution - Black Sea Commission (2019), State of the Environment of the Black Sea 2009 - 2014/5
<https://ec.europa.eu/environment/marine/international-cooperation/regional-sea-conventions/bucharest/pdf/SoE2009-2014.pdf>

¹⁶⁹ World Development Indicators



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Map no. 5- Forest area (% of land area) -

Climate change is already a serious problem for Europe's and neighbourhood's forests. While its precise impact will differ depending on geographic location, climate change is likely to affect the forests' rate of growth, forest land coverage and the range of species, the range of biotic agents such as certain parasites, and even the frequency and intensity of extreme weather events.¹⁷⁰

- Areas under risk of flood (sq. km)

It is also well known that higher number of flooding events has also been associated with climate change.

Based on the available statistical data for period 2016-2019¹⁷¹, the areas under the risk of flood remain constant in Greece, Rep. of Moldova and Romania, however higher in Anatolikli Makedonia, Greece (5,170 sq km) and South-East, Romania (4,921 sq km), while lower in Kentriki Makedonia, Greece (3,735 sq km) and Rep. of Moldova (2,640 sq km).

- Eroded coastal area, sq. km (%)

¹⁷⁰ THE EUROPEAN UNION AND FORESTS (2020)

https://www.europarl.europa.eu/ftu/pdf/en/FTU_3.2.11.pdf#:~:text=In%20total%2C%20forests%20cover%2043%25%20of%20the%20EU%E2%80%99s,two%20thirds%20of%20the%20EU%E2%80%99s%20forested%20areas%20283.2.10%29

¹⁷¹ Source: Data provided by participating countries during the programming period, based on national statistics, at national and regional level. For the rest of the countries/regions, data is not available



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Regarding the coastal sea level risk, the mean rate of sea level rise for the Black Sea has been detected as 3.19 ± 0.81 mm/year. In this context, in the Black Sea coast, the most important threats are confirmed as coastal erosion and saltwater intrusion¹⁷².

Coastal erosion is a serious problem along the Black Sea coasts, where 19% (800 km) of the coast is experiencing erosion rates higher than 1 m/year and there is a lack of proper coastal erosion management strategies, regulations and frameworks in the riverine countries.¹⁷³

As regards the percentage of eroded coastal area for the countries having access to the Black Sea coast, the available statistical data¹⁷⁴ show in *figure no.30* below that in 2019 the coast in Russian Federation is most vulnerable compared with the coast in the other countries, especially with the lower vulnerable coast in Ukraine.

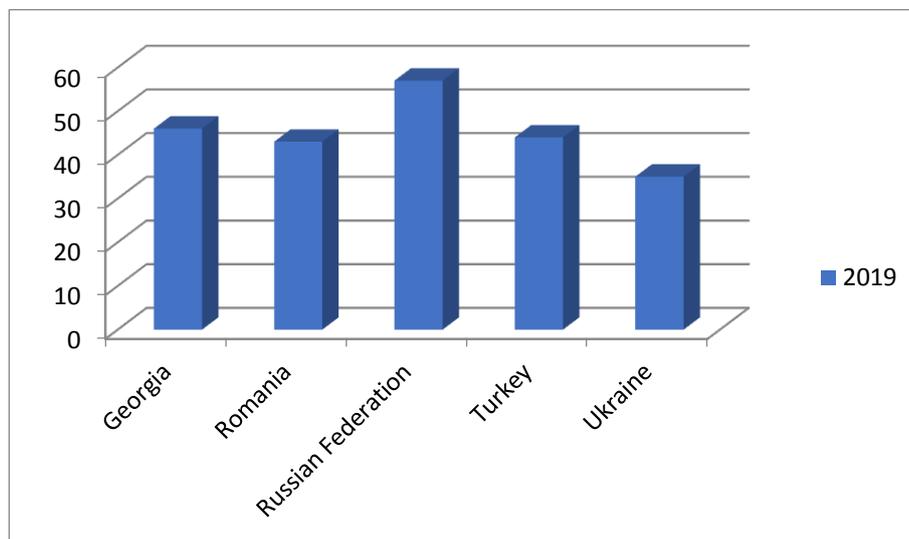


Figure no.30- Eroded coastal area, sq. km (%)¹⁷⁵

Deforestation, salinization and coastal erosion together with agriculture remain major threats to the biodiversity in region.¹⁷⁶

¹⁷² Nevin Betul Avsar, Senol Hakan Kutoglu, Bihter Erol and Shuanggen Jin, Coastal Risk Analysis of the Black Sea Under the Sea Level Rise, Conference paper, FIG Working Week 2015
https://www.researchgate.net/publication/319331039_Coastal_Risk_Analysis_of_the_Black_Sea_Under_the_Sea_Level_Rise

¹⁷³ The Black Sea coastline erosion: Index-based sensitivity assessment and management-related issues, Ocean & Coastal Management, Volume 182, December 2019
<https://www.sciencedirect.com/science/article/abs/pii/S0964569119303199>

¹⁷⁴ The Black Sea coastline erosion: Index-based sensitivity assessment and management-related issues, Ocean & Coastal Management, Volume 182, December 2019
<https://www.sciencedirect.com/science/article/abs/pii/S0964569119303199>

¹⁷⁵ Data for Bulgaria nor available

¹⁷⁶ EEA (2002), Europe's biodiversity - biogeographical regions and seas. Biogeographical regions in Europe. The Black Sea Region - shores and delta
https://www.eea.europa.eu/publications/report_2002_0524_154909/biogeographical-regions-in-europe/blackseareg.pdf/view



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4.6 Biodiversity and resources

Despite the fact that the Black Sea ecosystems are known to be rich and diverse, the knowledge regarding these ecosystems is by far limited compared to other seas. For example, all biodiversity features of its marine region have an ‘unknown’ status.¹⁷⁷

Experience with proposing EU Natura 2000 sites in the marine environment has shown that this exercise presents more of a challenge than originally expected because of a general lack of scientific knowledge on the distribution and abundance of species and habitats, and the high costs of carrying out research and surveys in offshore marine areas¹⁷⁸.

It may be argued that in the recent past decades, the Black Sea ecosystem is a result of human activities, Black Sea coast being a zone of many types of activities. In catchment Black Sea area, land and water are used for intensive agriculture, forests for paper industry, and construction, as well as rivers and the sea for navigation and commercial fishing, coastal resources for tourism, energy generation, transport infrastructure, constructing and other industries. To meet increasing demands for oil and gas, coastal and marine areas are used for pipelines construction. As a result, natural landscapes are deteriorated and gradually replacing by anthropogenic landscapes¹⁷⁹.

Nevertheless, there are more than twenty nature reserves in the Black Sea and eight in the Sea of Azov and these have different status at local, national and international levels, as in map no.6 below. The four **UNESCO biosphere reserves**¹⁸⁰ of international status protected by identical legislation are Kamchia¹⁸¹ (Bulgaria), Chernomorsky (Ukraine), Danube Delta (Romania) and Dunaisky (Ukraine). All Black Sea countries have ratified the **Ramsar Convention on Wetlands of International Importance**¹⁸² and the largest protected area of this kind in the coastal zone of the sea is in Ukraine¹⁸³. The **UNESCO World Heritage Sites**¹⁸⁴ are described in *Chapter 2 - Smarter cooperation area (PO1)*.

¹⁷⁷ EC-EEAS (2019), Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018 and EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

¹⁷⁸ European Commission Environment, Conservation and Protection of the Black Sea Biodiversity. Review of the existing and planned protected areas in the Black Sea (Bulgaria, Romania, Turkey) with a special focus on possible deficiencies regarding law enforcement and implementation of management plans, 2012

¹⁷⁹ Commission on the Protection of the Black Sea against Pollution - Black Sea Commission (2019), State of the Environment of the Black Sea 2009 - 2014/5

<https://ec.europa.eu/environment/marine/international-cooperation/regional-sea-conventions/bucharest/pdf/SoE2009-2014.pdf>

¹⁸⁰ Source: <https://en.unesco.org/biosphere/wnbr>

¹⁸¹ Kamtchia - withdrawn in 2017

¹⁸² Source: <https://rsis Ramsar.org/>

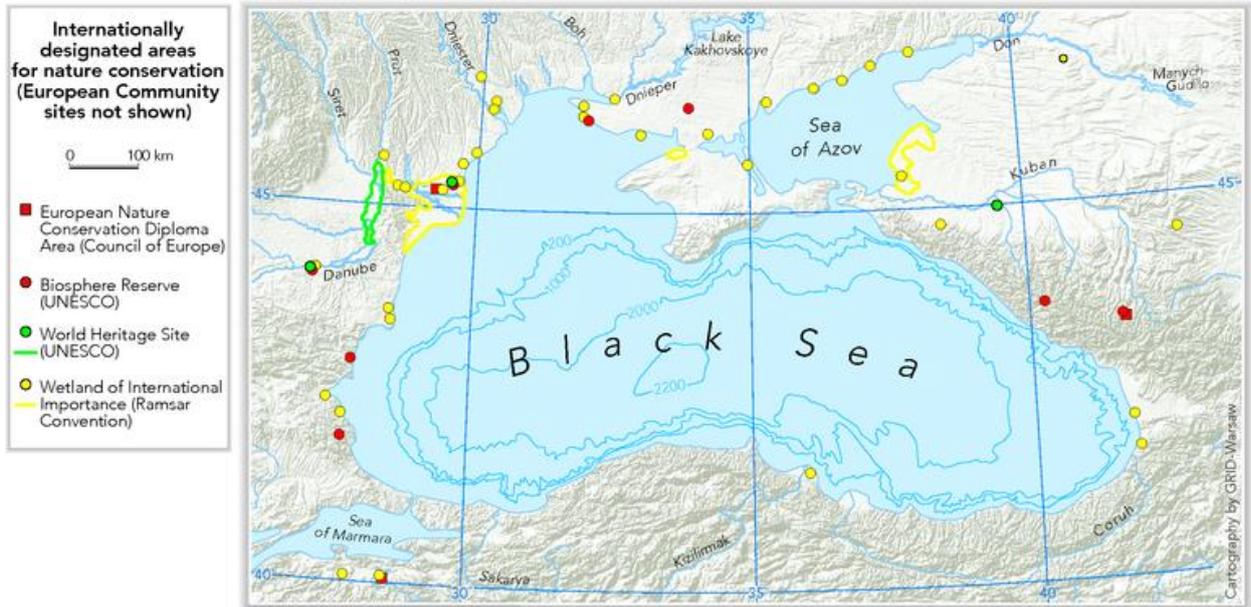
¹⁸³ EEA (2002), Europe's biodiversity - biogeographical regions and seas. Seas around Europe. The Black Sea - an oxygen-poor sea

https://www.eea.europa.eu/publications/report_2002_0524_154909/regional-seas-around-europe/BlackSea.pdf/view

¹⁸⁴ Source: <https://whc.unesco.org/en/list/>



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Map no. 6 International nature protection areas in the Black Sea¹⁸⁵

The overarching international framework for cooperation on protected areas remains the UN Convention on Biological Diversity¹⁸⁶ and notably the Convention's Programme of Work on Protected Areas¹⁸⁷. The 'Environment for Europe' process within UNECE¹⁸⁸ has been promoting integrated networks of protected areas towards the establishment of a Pan-European Ecological Network, which is being implemented in the EU via the 'Natura 2000' network¹⁸⁹ and promoted in the other countries around the Black Sea through the 'Emerald Network'¹⁹⁰. In addition to this global framework, the Black Sea Environment Programme¹⁹¹ organises conservation work in habitats that are critical for populations of priority species.

These efforts to recognize and protect the natural environment do, however, face serious limitations. Overall, the number and surface of terrestrial and marine protected areas at national level¹⁹² are characterized by great disparities (see figures 31 and 32 below). Even though the number of protected areas is extremely high in Russian Federation and very high in Ukraine, followed at distance by the Member States and very low in the other countries, the surface of the protected areas still falls significantly short, especially in Turkey (0.33% in total), but also in Rep. of Moldova (4.15%), Ukraine (7.4%), Georgia (9.96%) and Russian Federation (12.7%). In addition, most of the existing protected areas are terrestrial, while there are fewer marine protected areas, except Romania having a balanced representation between terrestrial and marine protected areas.

¹⁸⁵ Source: <https://www.eea.europa.eu/data-and-maps/figures/international-nature-protection-areas-in-the-black-sea> (last update 2013)

¹⁸⁶ Source: <https://www.cbd.int/convention/>

¹⁸⁷ Source: <https://www.cbd.int/protected/pow/learnmore/intro/>

¹⁸⁸ Source: <https://www.unece.org/env/efe/welcome.html>

¹⁸⁹ Source: <https://natura2000.eea.europa.eu/#>

¹⁹⁰ Source: <https://www.eea.europa.eu/data-and-maps/figures/emerald-network-in-the-eastern>

¹⁹¹ Under The Commission on the Protection of the Black Sea Against Pollution - Black Sea Commission <https://www.unenvironment.org/explore-topics/oceans-seas/what-we-do/working-regional-seas/regional-seas-programmes/black-sea>

¹⁹² UNEP-WCMC (2020). Protected Area from the World Database of Protected Areas, October 2020. Available at: www.protectedplanet.net



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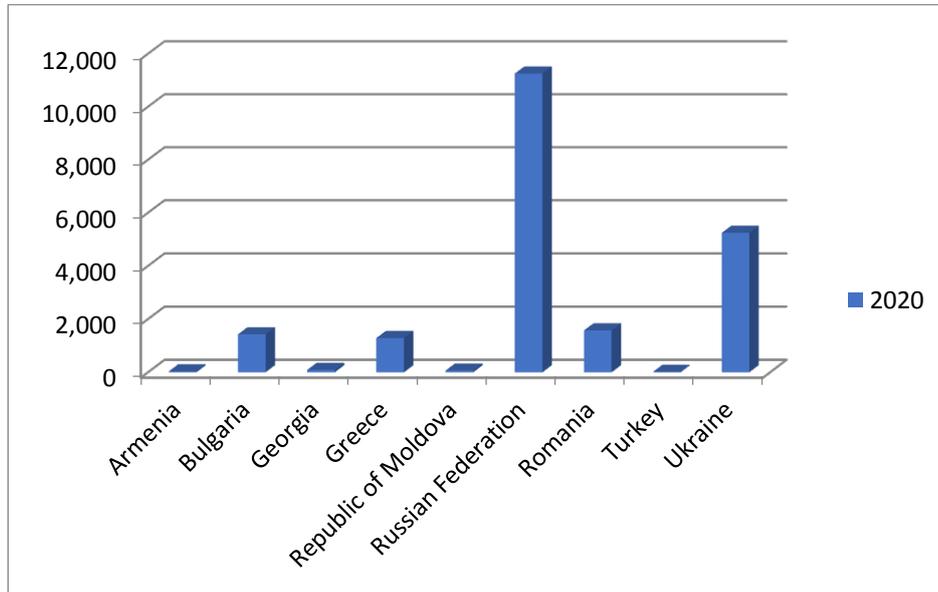


Figure no.31. Number of protected areas (total terrestrial and marine)

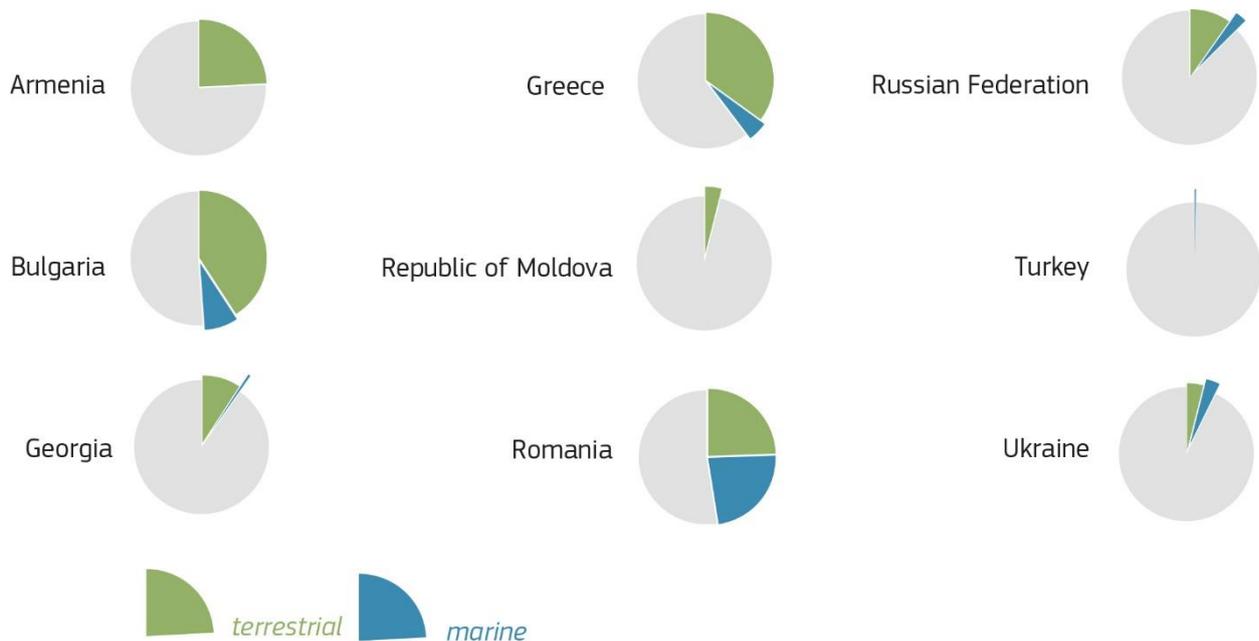


Figure no.32- Surface of protected areas % (terrestrial and marine)

Between 2000-2019, coverage of nationally protected areas more than doubled in Republic of Moldova, increased substantially in Ukraine (75 %), and expanded to a lesser extent in Georgia (37 %) and Armenia (26 %). With European Union and Council of Europe support, 561 Emerald sites¹⁹³ have been created, covering 12.3 % of the Eastern Partnership countries' territories (including Belarus). The designations used to create protected areas vary significantly across these countries due to different national legislative frameworks, making

¹⁹³Source: <https://www.eea.europa.eu/data-and-maps/figures/emerald-network-in-the-eastern>



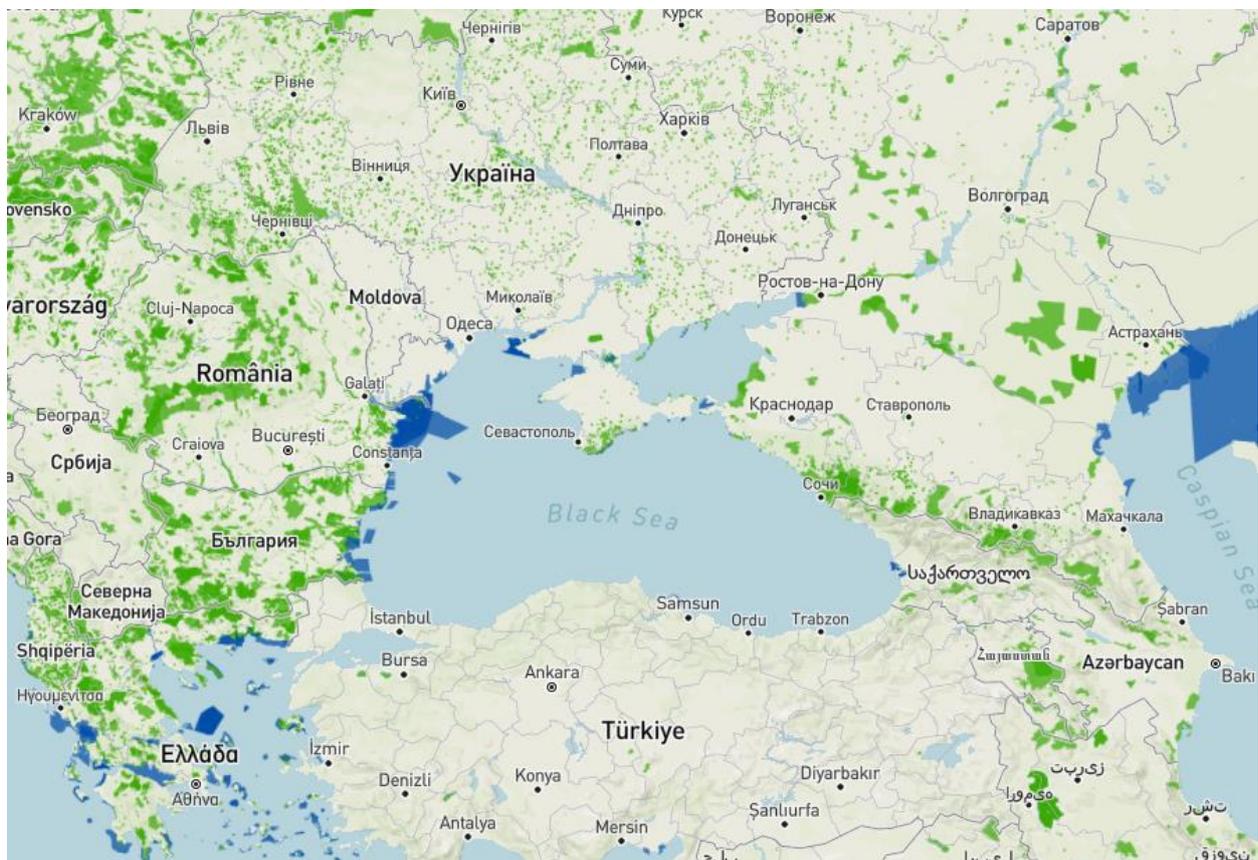
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regional comparisons of the level of protection challenging. Although countries have made substantial efforts to report data under international reporting obligations, monitoring still needs to be improved.¹⁹⁴

During the informal ministerial dialogue between Eastern Partnership countries and the EU in 2015, the ministers of environment for these countries underlined the need for further cooperation in areas of common interest and concern, and biodiversity in particular, to meet the Aichi Biodiversity Targets¹⁹⁵ for the biodiversity strategy to 2020.¹⁹⁶

Many protected areas still lack effective management plans and infrastructure¹⁹⁷, so that reinforced cooperation in those areas continues to be of crucial importance, considering the rich and vulnerable environment of the Black Sea region.



Map no. 7. Protected areas¹⁹⁸ - terrestrial and marine
(UNESCO, Ramsar, Natura 2000, Emerald and national protected areas)

¹⁹⁴ EEA (2020), Protected areas in the Eastern Partnership countries

<https://www.eea.europa.eu/themes/biodiversity/europe-protected-areas/protected-areas-in-the-eastern>

¹⁹⁵ <https://biodiversity.europa.eu/policy/target-1-and-related-aichi-targets>

¹⁹⁶ EEA (2020), Protected areas in the Eastern Partnership countries

¹⁹⁷ EEA (2002), Europe's biodiversity - biogeographical regions and seas. Seas around Europe. The Black Sea - an oxygen-poor sea

https://www.eea.europa.eu/publications/report_2002_0524_154909/regional-seas-around-europe/BlackSea.pdf/view

¹⁹⁸ UNEP-WCMC (2020). Protected Area from the World Database of Protected Areas, October 2020. Available at: www.protectedplanet.net



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The Common Maritime Agenda for the Black Sea¹⁹⁹ supports the protection and sustainability of the marine ecosystems, by actions such as promoting further research providing new knowledge to mitigate the impacts of global climate change and anthropogenic stressors, encouraging joint projects amongst protected areas and also research and valorization of biodiversity and natural heritage. Also, the Agenda encourages the production, management and sharing of marine and coastal environmental knowledge for effective environmental monitoring and observation by actions such as encouraging science-based policy making process and marine data collection and sharing through existing databases.

Furthermore, two out of the five strategic objectives of the EU macro-regional Strategy for the Danube Region (EUSDR), as included in the revised Action Plan²⁰⁰ are of particular importance for the Black Sea region, given that the two regions partially coincide: counteracting climate change and stimulating sustainable development. Moreover, potential cooperation actions need to create synergies with Priority Area 2 *Sustainable Energy* of EUSDR as well as with Priority Area 6 *Biodiversity and landscapes, quality of air and soils* of EUSDR.

In December 2019, the new European Commission set out an ambitious **new European Green Deal** aimed at tackling the most pressing EU *environmental and climate-related* problems. With the new strategy, these challenges will be turned into new opportunities across all EU policy areas to boost the economy, while promoting a transition towards a more sustainable growth agenda, turning Europe into the world's first climate neutral continent by 2050. By working together, the Member States can significantly transform the EU's economy and society, and put them on a more sustainable path, building on its strengths as a global leader on *climate and environmental* measures. However, as the drivers of *climate change and biodiversity* loss are global, Europe cannot act alone. The Commission will therefore continue to promote its environmental goals and standards internationally, leading by example and using its influence and expertise to mobilise other nations to follow a more sustainable path.²⁰¹

In May 2020, the Commission published its **new EU Biodiversity Strategy to 2030**. It forms an integral part of the Green Deal and together set out a comprehensive package of EU wide actions and commitments to put Europe's *biodiversity* back on the path to recovery by 2030. The recent COVID-19 pandemic has illustrated just how intricate the link is between our own health and that of our natural environment. It has become increasingly clear that protecting and restoring Europe's biodiversity is essential for reinforcing our own resilience to future pandemics. The EU Biodiversity Strategy will also help kick start Europe's economic recovery after COVID-19. Restoring and protecting nature will also be a vital ally in the fight against *climate change*. Many of the problems facing *climate and biodiversity* are intrinsically linked. To address all these issues, the new Biodiversity Strategy sets as a headline target to ensure that 'by 2050 all of the world's ecosystems are restored, resilient and adequately protected', in line with the 2030 Agenda for Sustainable Development and the Paris Agreement on Climate change.²⁰²

¹⁹⁹ Source: https://ec.europa.eu/maritimeaffairs/press/black-sea-ministers-endorse-common-maritime-agenda_en

²⁰⁰ EC (2020), Revised Action Plan for the European Union Strategy for Danube Region <https://danube-region.eu/wp-content/uploads/2020/04/EUSDR-ACTION-PLAN-SWD202059-final.pdf>

²⁰¹ Source: <https://ec.europa.eu/environment/nature/info/pubs/docs/nat2000newsl/ENG%20Nat2k47%20WEB.pdf>

²⁰² Source: <https://ec.europa.eu/environment/nature/info/pubs/docs/nat2000newsl/EN%20Natura%202000%2048%20WEB.pdf>



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4.7 SWOT analysis and preliminary conclusions

The Black Sea states are structurally very heterogeneous, which presents a multitude of opportunities, but also challenges.²⁰³

The main environmental challenges, as defined in the Strategic Action Plan for the Environmental Protection and Rehabilitation of the Black Sea (SAP2009)²⁰⁴, for the Black Sea remain: (a) the preservation of the commercial marine living resources, (b) the conservation of Black Sea biodiversity and habitats, (c) eutrophication reduction and ensuring good water quality for human health, (d) recreational use and aquatic biota.²⁰⁵

On the other hand, the four strongly interlinked priority transboundary problems of the Black Sea, as defined by EMBLAS Project²⁰⁶ are eutrophication - nutrient enrichment, changes in marine living resources, chemical pollution (including oil), and biodiversity/habitat changes, including alien species introduction - as well as the underlying root causes like industrial activities, agriculture, domestic wastewater, sea transport (oil spills, ballast water), and coastal zone degradation (urbanisation, tourism).

Nevertheless, environmental issues are equally important on land-borders, particularly in relation to transboundary waters (river basins, including groundwater, and lakes), transboundary air pollution and waste management, or shared protected areas.²⁰⁷

Due to its enclosed nature, urbanisation and industrialisation of coastal areas and increasing pressure on its natural resources, the Black Sea underwent substantial degradation over the last century. As a result, there have been considerable efforts at both regional and national levels to curb pollution inputs, address eutrophication and improve natural resource management. In addition, there is the wider concern of how climate change will impact the Black Sea ecosystem, which is not yet well understood. Tackling these issues will enhance the environment, but also encourage the development of those maritime activities that are directly dependent on a healthy environment, such as fisheries, aquaculture and tourism.²⁰⁸

Environmental protection remains a pressing issue for the region. Without international cooperation, the environmental situation of the Black Sea is at high risk of degradation. Achieving 'good environmental status' of the Black Sea by 2020 remains a key EU goal, also taking into account its impact on human health.²⁰⁹

²⁰³Source:

<https://webgate.ec.europa.eu/maritimeforum/system/files/Report%203%20%28Task%204%29%20Final%20final%2014-4-14.pdf.pdf>

²⁰⁴ Commission on the Protection of the Black Sea against Pollution - Black Sea Commission (2009), Strategic Action Plan for the Environmental Protection and Rehabilitation of the Black Sea

<https://ec.europa.eu/environment/marine/international-cooperation/regional-sea-conventions/bucharest/pdf/SAP2009.pdf>

²⁰⁵ Commission on the Protection of the Black Sea against Pollution - Black Sea Commission (2017), Black Sea Integrated Monitoring and Assessment Program (BSIMAP) for years 2017-2022

https://ec.europa.eu/environment/marine/international-cooperation/regional-sea-conventions/bucharest/pdf/BSIMAP_2017_to_2022_en.pdf

²⁰⁶ EMBLAS Project *Improving Environmental Monitoring in the Black Sea* www.emblasproject.org

²⁰⁷ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027

²⁰⁸Source:

<https://webgate.ec.europa.eu/maritimeforum/system/files/Report%203%20%28Task%204%29%20Final%20final%2014-4-14.pdf.pdf>

²⁰⁹ EC-EEAS (2019), Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018 and EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027



SWOT - A Greener low-carbon cooperation area

STRENGTHS

- BSB region is generally well provided with freshwater resources
- Gradual decarbonisation of some of main economies in the area
- Large cities outside the coastal zone mostly have full and sufficiently biological treatment of wastewater
- Black Sea ecosystems are known to be rich and diverse
- Unique natural heritage resources

WEAKNESSES

- Significant pressure from land-based pollution, through its large catchment area
- Black Sea low renewal rate and very prone to eutrophication
- Oil pollution along major shipping routes and in coastal areas around river mouths, sewage outputs, industrial installations and ports
- Current access to safe drinking water in the region could be characterised as problematic, particularly in rural areas. Usage of groundwater for drinking purposes is not possible everywhere
- Wastewater treatment often not sufficient in rural areas and coastal cities: worn-out equipment, no structures exist to remove effluent far from the shore, and insufficient institutional capacity at regional level
- Coastal wastewater treatment plants get overloaded in the high season
- Low use of renewable energy
- High waste generation and low levels of recycling
- Limited awareness of human impacts on the Black Sea
- Large areas exposed to erosion
- Knowledge regarding the Black Sea ecosystems is by far limited compared to other seas
- Lack of quality data to allow effective environmental monitoring and observation
- Low extent of terrestrial and marine protected areas
- Most of the existing protected areas are terrestrial, while there



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	<p>are fewer marine protected areas</p> <ul style="list-style-type: none"> • Many nature reserves lack effective management plans and infrastructure • Complex of transboundary ecological problems around the Black Sea (decline in living resources, chemical pollution in water and air, biodiversity change, habitat destruction, invasion by alien species, climate-change impacts, and mesoscale variability in the circulation system)
<p>OPPORTUNITIES</p>	<p>THREATS</p>
<ul style="list-style-type: none"> • Policy agreement on the Common Maritime Agenda for the Black Sea, <i>A healthy marine and coastal ecosystems</i>; • The previous ENI/ENPI Black Sea Basin programmes have already financed projects in the field of environment, like improving joint environmental monitoring and promoting common awareness-raising and joint actions to reduce river and marine litter, which may be capitalized. 	<ul style="list-style-type: none"> • Discharge of insufficiently treated sewage • Risks related to pollution of water and soil • High degree of vulnerability to climate change • Significant future erosion of the beaches • Irreversible damage in the natural environment • Invasive plants and animal species • Lack of financial resources for investments

Black Sea and its coastal and marine ecosystems are at risk. This is partly due to climate change effects, such as sea-level rise, erosion, ecosystem changes, acidification, natural meteorological effects, and elevation of temperature. At the same time, unsustainable past and existing maritime, coastal and terrestrial activities - pollution, marine litter and wastewater and unsustainable practices - have a direct impact on the marine and coastal ecosystem. The main challenge is to ensure environmental protection and sustainability in the exploitation of coastal and marine resources across the Black Sea. To achieve this, regional cooperation and joint work is required to improve environmental protection of the shared natural heritage.²¹⁰

The SWOT analysis, as well as the data presented in this chapter shows a large variety of cross border projects opportunities for the Interreg NEXT Black Sea Basin Programme 2021-2027.

²¹⁰ Source: https://ec.europa.eu/maritimeaffairs/press/black-sea-ministers-endorse-common-maritime-agenda_en



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As regards the thematic concentration, the ROM Report issued by EC-DG NEAR in 2019 for the predecessor *Joint Operational Programme Black Sea Basin 2014-2020*²¹¹ observed that the concentration was challenging, but successful. With the selection of two thematic objectives (TO), out of which TO6 “Environmental Protection, and Climate Change Mitigation and Adaptation”, the programme has made a sound concentration of funding on needs. Stakeholders were satisfied with the selection. Environment (including transboundary ecological issues) was identified in the programming process 2014-2020 as priority sector.²¹²

Two out of the five strategic objectives of the EU macro-regional Strategy for the Danube Region (EUSDR), as included in the revised Action Plan²¹³ are of particular importance for the Black Sea region, given that the two regions partially coincide: counteracting climate change and stimulating sustainable development. Moreover, potential cooperation actions need to create synergies with Priority Area 5 *Environmental risks* of EUSDR.

Most relevant areas for cooperation, as proposed by the Joint Paper on Interreg NEXT STRATEGIC Programming 2021-2027:

- Water pollution, as sources and effects both transcend national borders and require cooperative solutions;
- Climate change and its effects need to be monitored and mitigated through cooperation actions;
- Biodiversity and natural resources: cross-border coordination could improve management of protected areas and regional cooperation is needed to ensure sustainable management of marine natural resources;
- Air pollution, where cross border cooperation could develop useful approaches to improve the situation.

In this respect, **future transnational actions** may cover the following²¹⁴:

Water availability, quality and pollution

- Sharing of best practices in water quality monitoring and management;
- Pilot actions and small investments in wastewater treatment in remote areas and isolated communities;
- Joint management plan of cross-border river basins.

Climate change and natural risks

- Monitoring the impact of climate change at a cross border territorial level;
- Setting up common alert and emergency management systems to prevent and manage the risks linked to climate changes;
- Joint planning for mitigation (emission reduction) and adaptation to climate change;
- Public awareness-raising campaigns and trainings of stakeholders related to impact of human activities on marine ecosystem, climate change, potential impacts and adaptation strategies;
- Small demonstrative investments and pilot actions for adaptation and mitigation actions.

Biodiversity and natural resources

- Joint management plan of cross-border protected areas;
- Joint monitoring and studying in dynamics of cross-border biodiversity losses;
- Joint action plan and management to protect endangered species;

²¹¹ Source: <https://blacksea-cbc.net/black-sea-basin-2014-2020/reference-documents/>

²¹² EC (2019), Results-Oriented Monitoring (ROM) Report for ENI CBC Black Sea Basin Programme 2014-2020

²¹³ EC (2020), Revised Action Plan for the European Union Strategy for Danube Region
<https://danube-region.eu/wp-content/uploads/2020/04/EUSDR-ACTION-PLAN-SWD202059-final.pdf>

²¹⁴ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027



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- Awareness-raising campaigns and training related to the economic and social services provided by biodiversity

Air quality

- Sharing of best practices in air quality monitoring and modelling
- Sharing best practices of improving air quality in ports and harbours
- Actions towards developing a Black Sea Emission Control Area in line with International Maritime Organisation, building on experiences in the Baltic & North Sea.

In conclusion, taking into consideration that the environment field was identified as priority sector in the previous programming process on one hand and, on the other hand, the Common Maritime Agenda for the Black Sea²¹⁵, the analysis of the area and the added value which could in particular be provided by the Interreg NEXT Black Sea Basin Programme 2021-2027, **Policy Objective 2 is recommended as one of the most relevant objectives for support** (focusing on water availability, quality and pollution, climate change and natural risks, biodiversity and natural resources)²¹⁶.

²¹⁵ Source: https://ec.europa.eu/maritimeaffairs/press/black-sea-ministers-endorse-common-maritime-agenda_en

²¹⁶ EC-EEAS (2020), Joint Paper on Interreg NEXT Strategic Programming 2021-2027



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Chapter 5 - More connected cooperation area (P03)

A more connected Europe, both between the EU member states and with its neighbourhood, is an ambitious and stringent aim, related with all the other policy objectives. European transport network faces for some time now consistent environmental, economic and social challenges.

The European Commission clearly linked²¹⁷ the need for a sustainable transport development with the fight against climate change. The shift from road and air to rail and water-based transport may contribute to achieving the foregoing goal. Nevertheless, the transition requires not only a functional intra-European network, but also its connection with similar intelligent and intermodal networks beyond EU borders.

Analysing the Black Sea basin challenges, needs for policy intervention and the potential for transnational cooperation to address them, requires screening transport and digital connectivity sectors.

5.1 Transport infrastructure

In 2019, from a quantitative point of view, ports infrastructure²¹⁸ within the Black Sea region (see figure no.33) remained unchanged compared to the 2016. Ports are linking European transport corridors to the rest of the world. As 75% of European external trade and 36% of intra-EU trade transits through EU ports, both shipping and ports sectors play a major role in connecting the European market with its trade partners²¹⁹. However, a number of challenges persist at European level, as well as within the Black Sea basin, limiting the development potential of these sectors, including a weak integration of ports with the overall transport network compared to the volume of trade, as well as a poor efficiency of seaports services²²⁰.

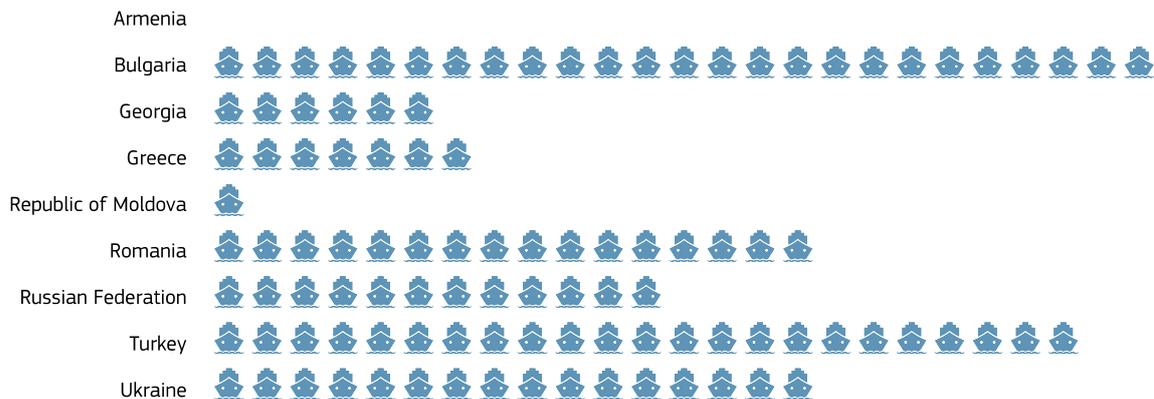


Figure no. 33- Number of ports with international links for goods and/or persons

²¹⁷ European Commission communication - A clean planet for all (2018)

²¹⁸ Figures cover national level of Armenia, Georgia and Republic of Moldova and eligible regions of Bulgaria, Greece, Romania, Russian Federation, Turkey and Ukraine. Armenia is not covered, as it has no access to the sea. Sources: data provided in 2020 by participating countries (gathered by the Joint Programming Committee country representatives)

²¹⁹ Source: https://ec.europa.eu/transport/modes/maritime/maritime-transport_en

²²⁰ According to the 2019 Global Competitiveness Report (World Economic Forum) on a 1-7 grid, Georgia scored 3.8, Moldova 2.3, Romania 3.9 and Ukraine 3.9 regarding the efficiency of seaport services



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Nine corridors have been identified to streamline and facilitate the coordinated development of the Trans-European Transport Network (TEN-T)²²¹, the Black Sea being positioned at EU's Eastern end of Orient/East - Med corridor (brown) and Rhine-Danube corridor (blue in the map no. 8, below), which connect the EU with its Eastern neighbourhood.



Map no. 8 - Core Network Corridors of Trans-European Transport Network (TEN-T)

The Rhine-Danube corridor and its Eastern end connection with the Black Sea, call for a closer dialogue and cooperation between Danube and the Black Sea regions, with the Danube River being the main water way and connection between the Black Sea and Central and Western Europe. Between 2015 and 2018, efforts were made to develop the links between the two regions. Creating new connections between the Black Sea ports can improve the inter-connection of the Black Sea with the Danube, the Dnieper and the Dniester rivers.

One of the objectives of the EU macro-regional Strategy for the Danube Region (EUSDR) was to open the Danube region up to the Black Sea, given that the two regions partially coincide. Some of the priority areas of the EUSDR, such as navigability, are of particular importance for the Black Sea region. Cargo transport on the river is to be increased by 20 % by 2020 compared to 2010. This requires the development and coordination of ports, including those in the Black Sea²²².

The Black Sea ports' connections among themselves and ferry links with the Greek ports should be further developed, so as to provide a partial connection with the Mediterranean through Bosphorus strait, as well as Eastwards, to the Caucasus, to guarantee the integration of the Black Sea region's East and West coasts²²³. The Black Sea - Mediterranean connection is important also for the implementation of the Motorways of the sea, as a real competitive alternative to land transport. Focusing on freight flow sea-based logistical routes it aims to reduce road congestion through modal shift. At European level, Motorways of the sea is

²²¹ Source: https://ec.europa.eu/transport/themes/infrastructure/ten-t_en

²²² Joint Staff Working Document, Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018

²²³ Potential and challenges for the Black Sea regional cooperation Galya VLADOVA , Jörg KNIELING, EASTERN JOURNAL OF EUROPEAN STUDIES Volume 5, Issue 1, June 2014



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envisaged to become part of TEN-T network²²⁴, so the Black Sea - Mediterranean connection becomes important, especially with regard to the South-East Europe corridor.

In the above-mentioned context, the need for greater inter and multi-modality comes to the front. It is for this reason that the Black Sea ports and their related infrastructure should be modernized and connected with the rail and road transport and with existing transport nodes. In particular, the connection with the TENs corridors, running through Bulgaria, Romania and Ukraine could be improved, which will provide better connectivity of the region with the adjacent networks and will be a step towards its further territorial integration in Europe²²⁵.

Due to its strategic location on the way of important energy routes between Europe, Caucasus and Middle East, the Black Sea region became an expanding energy market with great development potential and an important hub for energy and transport flows²²⁶. The Caspian Sea region specifically emerged as an important oil and gas supplier for Europe. Most export routes for Caspian oil and gas to Europe cross the Black Sea, or the riparian states²²⁷. Main ports of Ukraine, Russian Federation and Georgia are all terminals for oil and gas pipelines from the Caspian Sea (see map no.9 below²²⁸), therefore, the transport of oil and gas across the Black Sea became a major activity, mainly via tankers sailing from Novorossiysk and Tuapse (Russian Federation), Odessa (Ukraine) and Batumi (Georgia) towards Europe's mainland, or linking the North with the South shores between Russian Federation and Turkey.



Map no. 9 Oil and gas pipelines projects

²²⁴ Source: https://ec.europa.eu/transport/modes/maritime/motorways_sea_en

²²⁵ Potential and challenges for the Black Sea regional cooperation Galya VLADOVA , Jörg KNIELING, EASTERN JOURNAL OF EUROPEAN STUDIES Volume 5, Issue 1, June 2014

²²⁶ Black Sea Synergy - A New Regional Cooperation Initiative

²²⁷ International Energy Agency, Black Sea Energy Survey, www.iea.org

²²⁸ Oil and gas pipelines and oil fields in the Caspian and Black Seas Region, Turkey, and the Middle East: Rekacewicz Philippe, Geographer Cartographer and Journalist, Le Monde diplomatique



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Between 2015 and 2018, developing key energy infrastructure projects remained an important element for improving Black Sea transit potential and enhancing energy security, both at EU level and within the region²²⁹. Implemented programmes like TRACECA (Transport Corridor Europe-Caucasus-Asia), INOGATE (Interstate Oil and Gas Transportation to Europe), Southern Gas Corridor, TurkStream, Blue Stream and BRUA gas pipeline, as well as projects like NABUCCO, or South Stream, prove the importance of the Black Sea, its bridging role and the need for further development of the technical transport infrastructure in the region.

The Black Sea also plays a bridging role in EU's Strategy to better connect Europe and Asia, having at its base sustainable, comprehensive and rules-based connectivity²³⁰. The sea transport is explicitly identified as a key element in assuring this connectivity, bringing diversified trade and travel routes, linking existing and future transport networks, assuring shorter transit times and simplified customs procedures. The key actions identified by the Strategy include the Black Sea countries when referring to the promotion of digitalisation and administrative simplification of maritime transport and the adoption of the Rotterdam rules. In addition, a number of other aspects, such as energy, digital backbones and decarbonisation of sea transport, are relevant also for the Black Sea region²³¹.

The importance of the Black Sea region for the Europe-Asia connection and for the development of a Europe-wide network is highlighted also by the Indicative TEN-T Investment Plans, which support a stronger connectivity with the Eastern Partnership countries. The Plan foresees the construction of 4800 Kilometres of road and rail, 6 ports and 11 logistic centres across Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine by 2030²³². The development of infrastructure should, nevertheless, be done in a balanced manner, as the protection of Black Sea coastal line entails the limitation of new transport infrastructure development²³³ and the transition to green intermodal transport.

With regard to airports connected to an international network in the Black Sea region, the 2019 data (see figure no. 34) shows that, compared to 2016, only one new airport has been constructed in Turkey, Istanbul (TR10) region²³⁴. The wider exploitation of the medium-sized airports in the region and improving their connectivity can better support both trade and tourism²³⁵.

²²⁹ Joint Staff Working Document, Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018

²³⁰ The 2018 Joint Communication on Connecting Europe and Asia - Building Blocks for an EU Strategy

²³¹ Joint Staff Working Document, Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018

²³² EU-Asian Connectivity Factsheet, European Commission, September 2019

²³³ Guideline on integrated coastal zone management in the Black Sea, <https://blacksea-cbc.net/improvement-of-the-integrated-coastal-zone-management-in-the-black-sea-region-iczm/>

²³⁴ Figures cover national level of Georgia and Republic of Moldova and eligible regions of Bulgaria, Greece, Romania, Russian Federation, Turkey and Ukraine. Sources: data provided in 2020 by participating countries (gathered by the Joint Programming Committee country representatives).

²³⁵ The International Centre for Black Sea Studies, The Black Sea Synergy: the way forward, February 2020



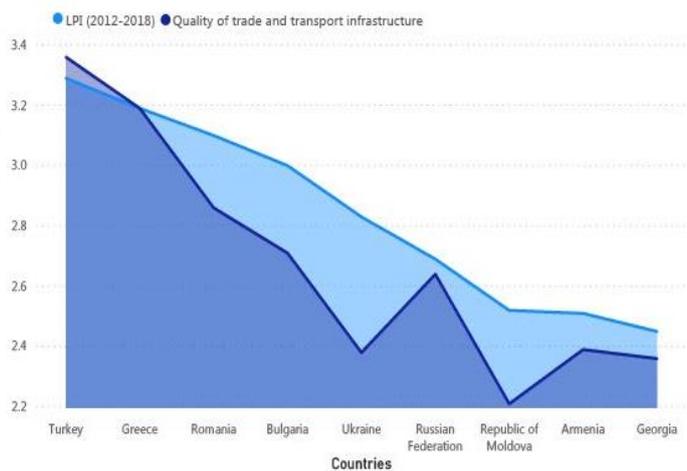
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Figure no.34- Number of airports with international

With less access to highways and motorways, the Black Sea region road transport infrastructure still misses an integrated, regional planning approach. The Black Sea Ring Highway serves as a notable example, with parts well-developed in certain countries, but under-developed in several others, where works proved to be stagnated. This highlights that road transport integration in the region is still to be achieved and impacts to a certain extent the region’s trade competitiveness²³⁶. According to the Aggregated Logistics Performance Index (LPI)²³⁷ for 2012-2018, the Black Sea countries are ranked within a broad range, with Turkey having the 37th and Georgia the 124th places worldwide, when measuring the performance of their trade logistics (see the figure no.35 below).

Countries	LPI rank (out of 160 countries)
Turkey	37.00
Greece	44.00
Romania	50.00
Bulgaria	57.00
Ukraine	69.00
Russian Federation	85.00
Republic of Moldova	113.00
Armenia	116.00
Georgia	124.00



Measured on a 1 to 5 scale, the LPI rankings are directly influenced by the quality of trade and transport related infrastructure (see the figure no.36 above). Road, rail, air and water

²³⁶ The International Centre for Black Sea Studies, The Black Sea Synergy: the way forward, February 2020

²³⁷Source: <https://lpi.worldbank.org/>



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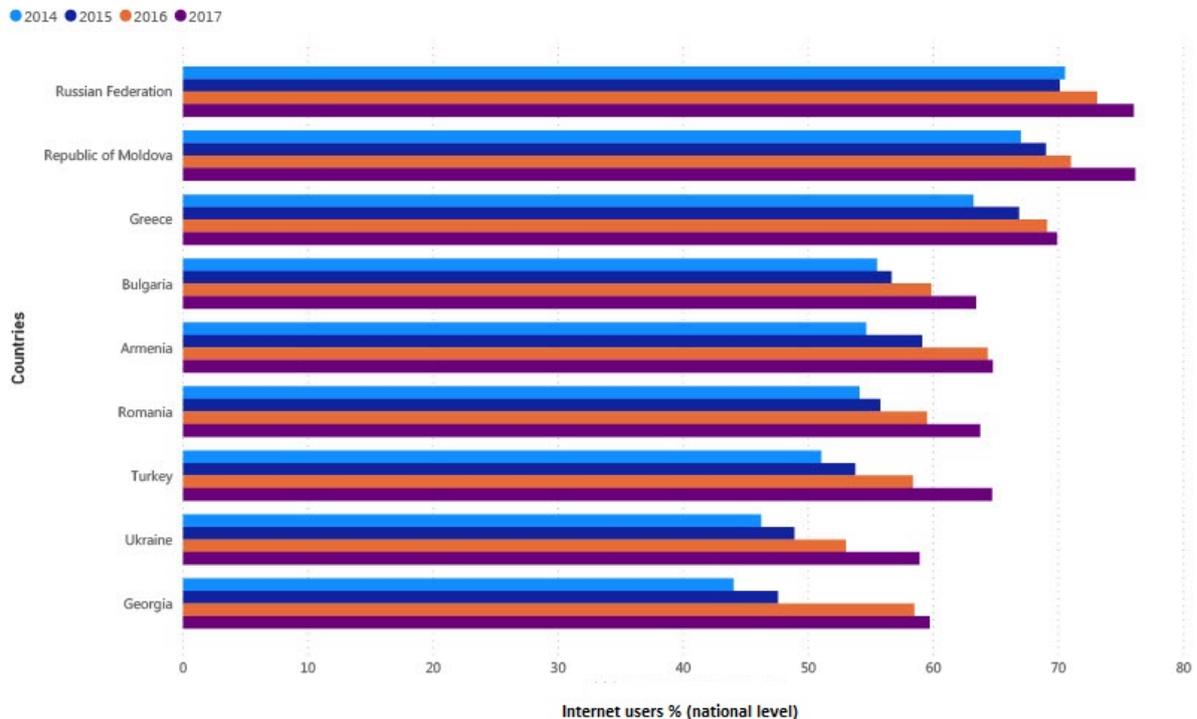
trade and transport related infrastructure within some of the Black Sea countries is rather of poor quality and needs further development.

5.2 Digital connectivity

The link between transport and digital connectivity is a close one, as digitalization can help the transport sector to become more sustainable, safe, secure and efficient.²³⁸ The measures that can be implemented to reach this end target the expansion of digital infrastructure and make the mobility infrastructure smart, automation of all modes of transport, strengthen smart connectivity and promoting innovation for digital mobility.

The expansion of digital infrastructure and high-capacity communication networks are vital, as they serve as a basis for new technologies. With the 4G technology becoming the worldwide leader in 2018²³⁹, developing broadband and mobile communication networks, as well as digital literacy, remains a priority in the Black Sea region.

Internet usage has steadily increased since 2014 in all countries of Black Sea region²⁴⁰ (see figure no.37 below).



²³⁸ Passau Declaration, 29/30 October 2020, Informal Meeting of EU Ministers of Transport, Passau, Germany

²³⁹ According to “The State of Broadband 2019 Report”, issued by the Broadband Commission for Sustainable Development, in 2018, 4G overtook 2G to become the leading mobile technology across the world, with 3.4 billion connections. At EU’s level, according to the “Digital Economy and Society Index 2020 - Connectivity”, the average 4G mobile availability was in 2019 of 96% (% of households), up from 85% in 2016.

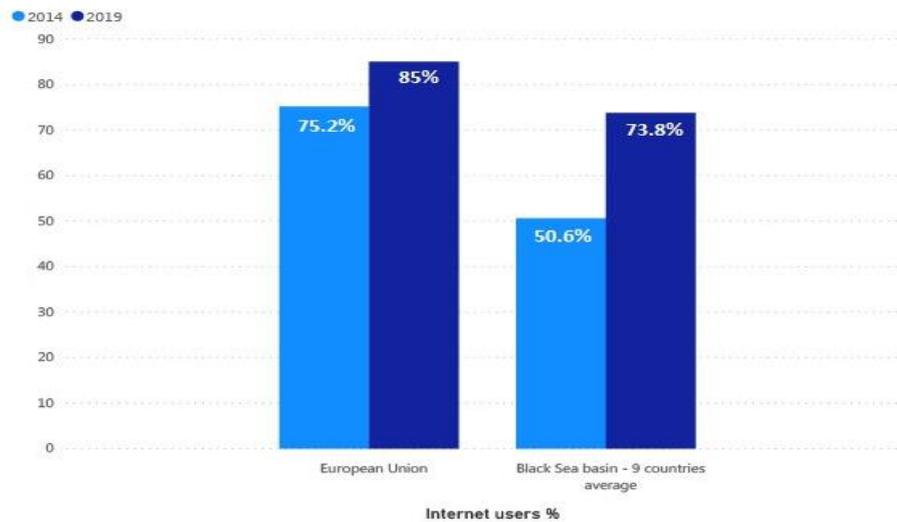
²⁴⁰ World Bank DataBank, World Development Indicators (WDI), <http://data.worldbank.org/data-catalog/world-development-indicators>



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It is also noticeable that, in 2019, prior to COVID-19 pandemic, the gap between the EU, where 85% of the population used the Internet²⁴¹ and the average number of internet users in the countries of Black Sea region²⁴², has narrowed compared to the 2014 figures. Still, the Black Sea region lags behind the EU average, as it can be noticed in figure no.38, on the right.



In the latest years, digital connectivity became closely linked to the access of internet from private networks. Black Sea basin area experienced a year-on-year average growth of the numbers of households equipped with a personal computer and of the households with internet access. Moreover, the use of internet services by citizens continuously augmented.

5.3 SWOT analysis and preliminary conclusions

SWOT – TRANSPORT & DIGITAL CONNECTIVITY	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Transport of oil and gas across the Black Sea is a major activity; • Energy projects, including major infrastructure projects, continued to be developed with EU support, showing the potential of the Black Sea region to become an energy hub; • Overall quality of transport infrastructure is good in Greece and Turkey; • Internet usage has increased in all countries of the Black Sea region; • The digital gap that existed among Black Sea Basin countries and the EU has narrowed; 	<ul style="list-style-type: none"> • Quality of ports infrastructure around the Black Sea still needs improvements; • Slow transition towards green maritime transport; • Less progress with regard to intermodal transport; • Less access to highways and motorways; • Poor connection between the airports in the region; • A complex of issues and requirements concerning maritime infrastructure, fleet renewal, quality of the services in the seaport, market access to the port

²⁴¹ Digital Economy and Society Index 2020 - Use of internet services (<https://ec.europa.eu/digital-single-market/en/use-internet>)

²⁴² World Bank DataBank, World Development Indicators (WDI), <http://data.worldbank.org/data-catalog/world-development-indicators>. For the Black Sea basin countries, the only available data for 2019 were for Bulgaria, Georgia, Greece, Romania, Russian Federation and Turkey.



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	<p>services, adjustment to the international environmental standards and improvement of regulations and legislation related to the sea ports remain challenging;</p>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • The ports of the Black Sea region may increase their role in the Europe-Asia connection; • Closer dialogue and cooperation between the Danube and Black Sea regions; • Motorways of the Sea, may be used as a transnational multimodal axis including the BSB region for the extension of the Trans-European Transport Networks to EU Neighbouring countries; • Involvement of public and private regional stakeholders in projects of mutual interest; • Involvement of EU experts for best practices sharing; • Investment in fully renewable fuels technologies, with green ports becoming hubs for energy production; 	<ul style="list-style-type: none"> • Conflicts in the BSB area; • COVID-19 pandemic.

The Black Sea basin presents new opportunities for connectivity. Developing sustainable, intelligent and intermodal infrastructures, port infrastructure and management modernization and digital connectivity may bring added value to the region and beyond. Black Sea basin's bridging role in terms of interconnectivity and its links with Asia, through the Caspian region, with the Danube and Mediterranean should be further developed, as they play a key role in the energy and transport sector²⁴³.

Nevertheless, given the size of the covered area and the faced challenges, reaching the foregoing ends related to strategic sustainable transport and digital networks would demand high investments in infrastructure, making the intervention less efficient and its effects very limited. Henceforth, **the cooperation under PO3 is not encouraged.**

²⁴³ Joint paper on Interreg NEXT Strategic Programming 2021-2027



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Chapter 6 - More social cooperation area (P04)

Social development has always been a component of the cross-border-cooperation, holding a main role in reaching cohesion goals and directly contributing to economic and territorial integration of the EU with its neighbouring countries. The improvement of the welfare of people in the Black Sea basin entails collaborative reactions and a systemic approach aiming to foster education, health care and employment and to promote social development and inclusion.

6.1 Education

As described by the Joint Paper²⁴⁴, the area as a whole has an above average educated population. Certain countries show nonetheless important proportions of young people out of education, training or employment.

The level of public spending on education as a percentage of GDP varies significantly across the programme countries (see figure no.39 below), ranging from 2.8% in Armenia to 5.8% in the Republic of Moldova and Turkey. The average for programme countries of 4.2% is below the EU average for education spending, which was estimated at 4.64% of GDP in 2017²⁴⁵.

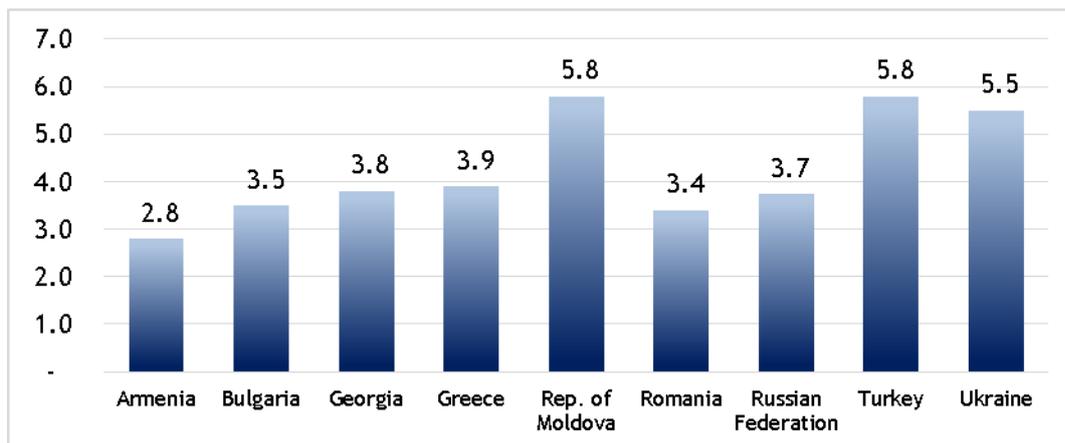


Figure no. 39 - Public expenditure on education as a % of GDP²⁴⁶

The education features analysed differ significantly across the programme area. The basic educational infrastructure, as reflected by the number of schools and high-schools, has, in general, a negative trend across the eligible areas in the analysed period, with various intensities. The exception is made by three Turkey regions (Istanbul, Tekirdağ and Kocaeli), having positive trends. The most significant decrease is observed in the Ukrainian regions. As regards the trend of the number of school-aged children, the differences between eligible areas are even more pronounced, as both positive and negative trends are registered, and with various intensities. Comparing the trends of the two indicators, there are many cases where they are opposite, i.e. in Armenia, Bulgaria, Georgia, the Russian Federation and Ukraine, the infrastructure decreased, while the number of school-aged children increased (see figure no.40 below).

²⁴⁴ Joint paper on Interreg NEXT Strategic Programming 2021-2027, 20 January 2020

²⁴⁵ Source: Eurostat, https://ec.europa.eu/eurostat/databrowser/view/educ_uae_fine06/default/table?lang=en

²⁴⁶ Source: World Bank - for Armenia, Georgia, the Russian Federation, Turkey, Ukraine; European Training Foundation - for Georgia - year 2018; Eurostat - for Bulgaria, Greece, Romania; National Bureau of Statistics - for Republic of Moldova. Latest available data for each country was used: 2019 - for Armenia, Bulgaria, Republic of Moldova, Romania, Ukraine, 2018 - for, Georgia, Greece, Turkey, 2016 - for the Russian Federation.



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The trends at national levels²⁴⁷ (in case of countries participating with eligible areas in the programme) are generally similar to the regional ones, with few differences, namely Turkey (positive trends at national level) and Greece (slight increase in infrastructure).

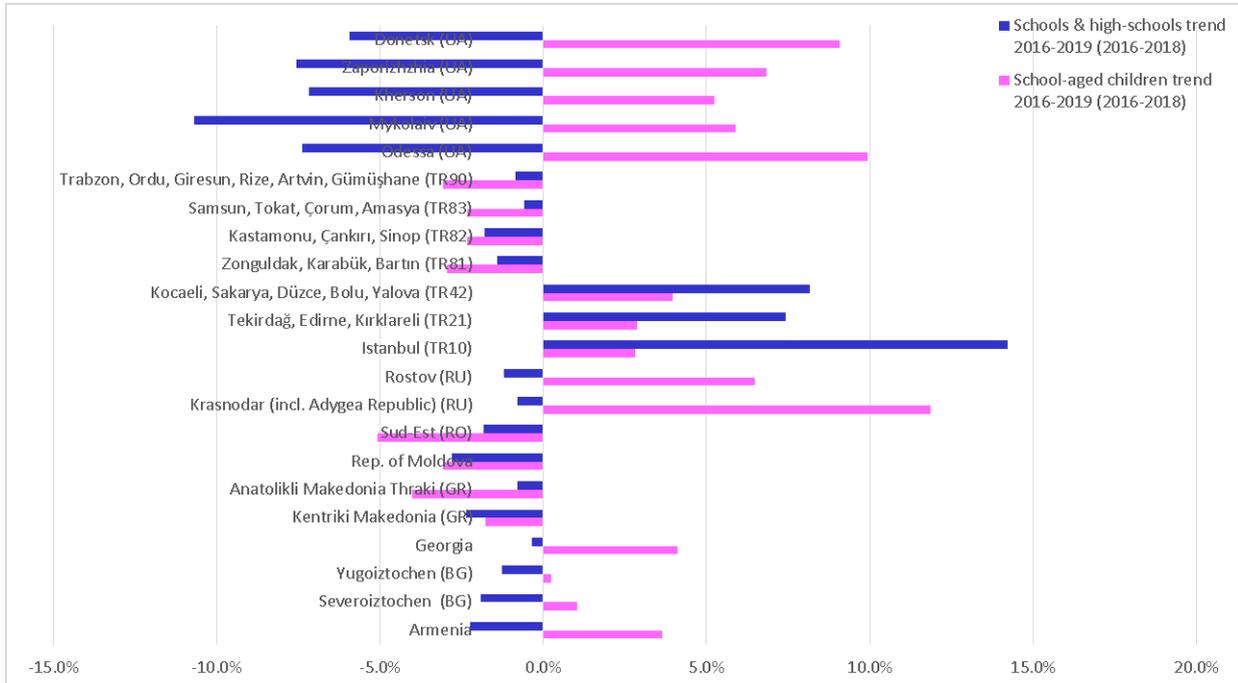


Figure no. 40- Trends for number of schools and high-schools and for the number of school-aged children, 2016-2019 (2016-2018)²⁴⁸

Looking beyond secondary education, the enrolment in higher education²⁴⁹ of the population is overall well represented (although there are great disparities between the programme countries), ranging from 41.1% in the Republic of Moldova to 136.6% in Greece (see figure no.41 below). In addition, the trend of enrolment in higher education is predominantly increasing in the analysed period, with the exceptions in Bulgaria and the Republic of Moldova (minor decreases, however, of 0.3% and 0.1%). Human capital therefore appears as a strong asset in the region.

²⁴⁷ Source: data provided by the participating countries. Data was unavailable for the Russian Federation and, for the number of schools and high-schools in 2019, for Greece and Turkey.

²⁴⁸ Source: data provided by the participating countries. Trends for the period 2016-2019 were calculated, except for Greece (schools and high-schools) and Turkey, for which trends for 2016-2018 were calculated due to data unavailability for 2019.

²⁴⁹ The enrolment in tertiary (higher) education of the population, regardless of age, expressed as a percentage of the population of the five-year age group following after the secondary school. This indicator can be over 100% as it includes students who may be older or younger than the official age group.



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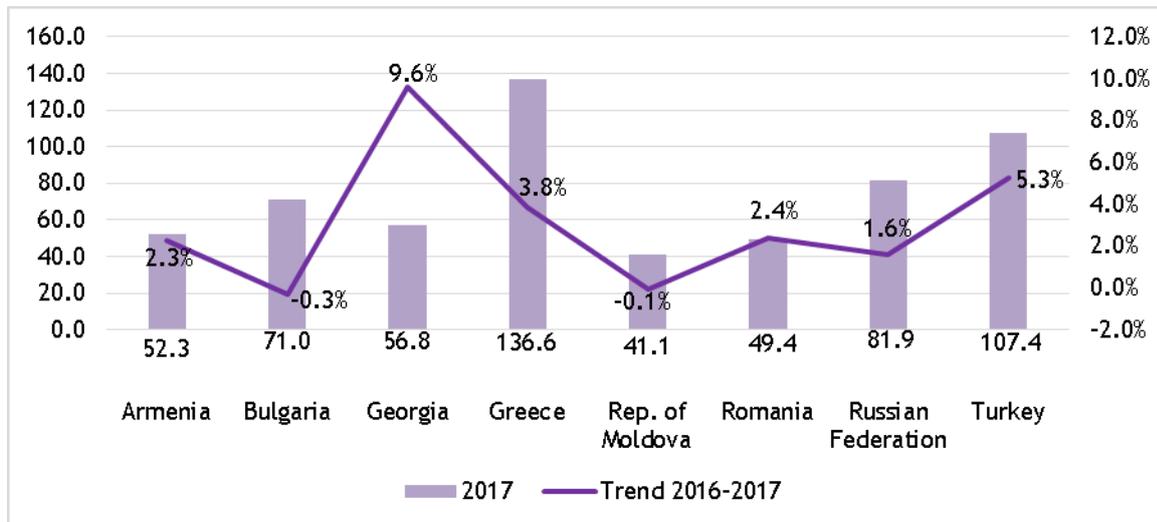


Figure no.41 - Enrolment in tertiary education (as a % of relevant age class), in 2017, and trend for 2016-2017²⁵⁰

The vocational education has an important role in providing skills relevant to employment, in preparing the students' entry to the labour market. Vocational education may have work-based components (e.g. apprenticeships). The importance of vocational programmes is also in preventing early leaving from education and training, while reducing the incidence of early leaving is an important element in mitigating the risk of social exclusion²⁵¹. In the programme countries, vocational education, considered as number of students in high-school (upper secondary education level) out of the total number of high-school students enrolled in all programmes (vocational and general), is, on average, less represented than the general education (38.8%), ranging between 8.8% in Georgia to 56.2% in Romania. As trend in the analysed period, the vocational education generally slightly decreased in popularity in the programme countries, except for the Republic of Moldova (with significant increase), Armenia and Ukraine (see figure no.42 below).

²⁵⁰ Source: World Bank DataBank, Education Statistics, <https://databank.worldbank.org/source/education-statistics-%5Eall-indicators>; Turkish Statistical Institute, <https://data.tuik.gov.tr/en/main-category-sub-categories-sub-components2/> - for Turkey. For Ukraine, no data was available after 2014 (82.7% gross tertiary enrolment ratio in 2014, with a small increase from 2013).

²⁵¹ Source: European Training Foundation, "Key indicators on education, skills and employment 2019", https://www.etf.europa.eu/sites/default/files/2019-12/kiese_2019.pdf



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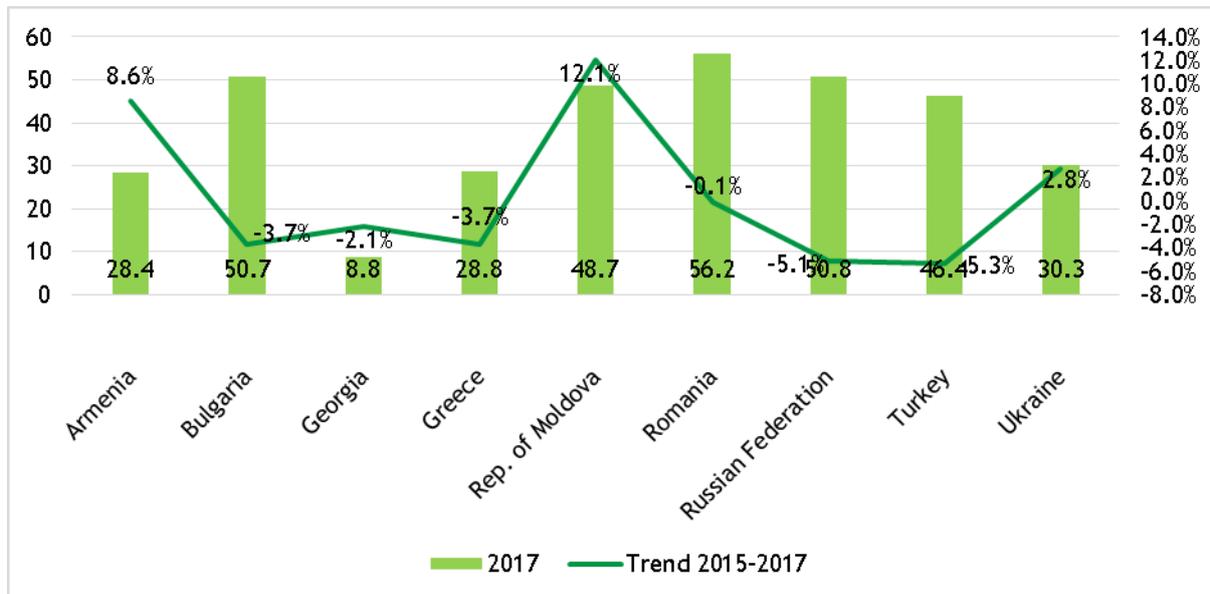


Figure no.42 - Share of high-school students enrolled in vocational programmes (% of high-school students in total programmes), in 2017, and trend for 2015-2017²⁵²

Black Sea Synergy, as adopted in 2007, highlighted the mutual interest in providing high-speed connectivity between research and education communities and in promoting legal and regulatory harmonisation of these countries' frameworks with the EU framework. Furthermore, a need to promote the use of ICT in education and research was noted.

The third implementation report, “Black Sea Synergy: review of a regional cooperation initiative - period 2015-2018” registered less progress under education, but it received great interest from the partners.

Unfortunately, the COVID-19 pandemic has created the largest disruption of education systems in history. Closures of schools and other learning spaces have impacted 94 per cent of the world's student population, up to 99 per cent in low and lower-middle income countries. The crisis is exacerbating pre-existing education disparities by reducing the opportunities for many of the most vulnerable categories to continue their learning (people in poor or rural areas, girls, refugees, persons with disabilities and forcibly displaced persons). In addition, the education disruption has substantial effects beyond education (provision of essential services to children and communities, including access to nutritious food, the ability of many parents to work, and increase risks of violence against women and girls). Preventing a learning crisis from becoming a generational catastrophe requires urgent action. Education is not only a fundamental human right, but also an enabling right with direct impact on the realization of all other human rights. When education systems collapse, peace, prosperous and productive societies cannot be sustained.²⁵³

²⁵² Source: World Bank DataBank, Education Statistics, <https://databank.worldbank.org/source/education-statistics-%5Eall-indicators>; European Training Foundation, “Key indicators on education, skills and employment 2019”, https://www.etf.europa.eu/sites/default/files/2019-12/kiese_2019.pdf - for Armenia - year 2017

²⁵³ Source: United Nations, Policy Brief: Education during COVID-19 and beyond, August 2020, https://www.un.org/development/desa/dspd/wp-content/uploads/sites/22/2020/08/sg_policy_brief_covid-19_and_education_august_2020.pdf



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6.2 Employment

The strong structural heterogeneity of Black Sea Basin economies (share of traditional industries, weight of the agricultural sector) is reflected also in employment distribution. The prevalence of people employed in services is a general feature of the programme countries (see figure no.43 below). However, as described by the Joint Paper, existing blue skills and know-how are not sufficient to ensure the requested standard level in services, which is required by the market, in particular in sectors such as tourism or port services. They do not correspond to businesses' demand for skilled man-power for existing or emerging sectors.

As well, the Joint Paper underlined that the need for employment support differs widely throughout the programme area.

Over the period 2016-2019, the agriculture sector generally contracted in terms of employment (except for the Republic of Moldova); the services, on average, gained in the share of employment, followed by industry.

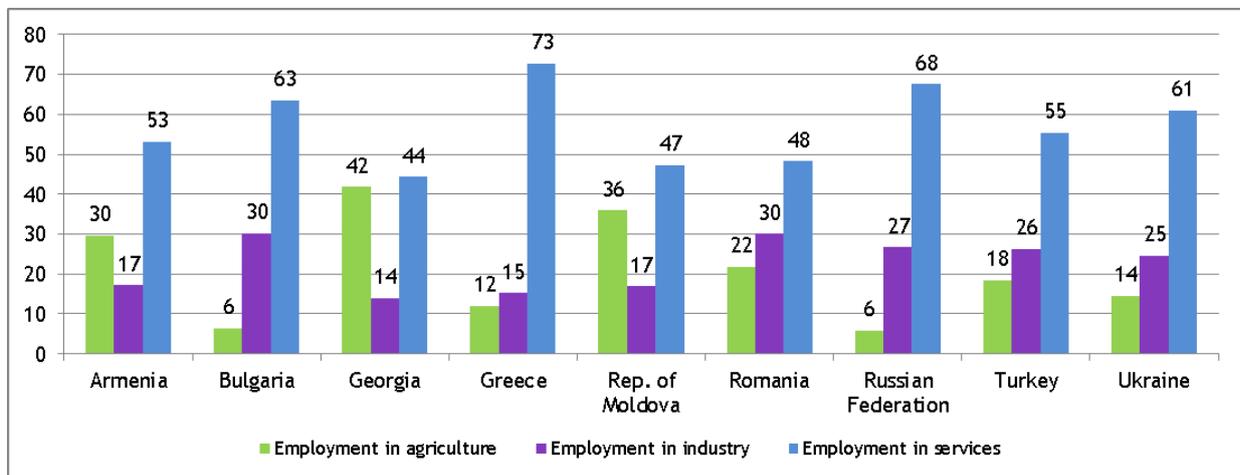
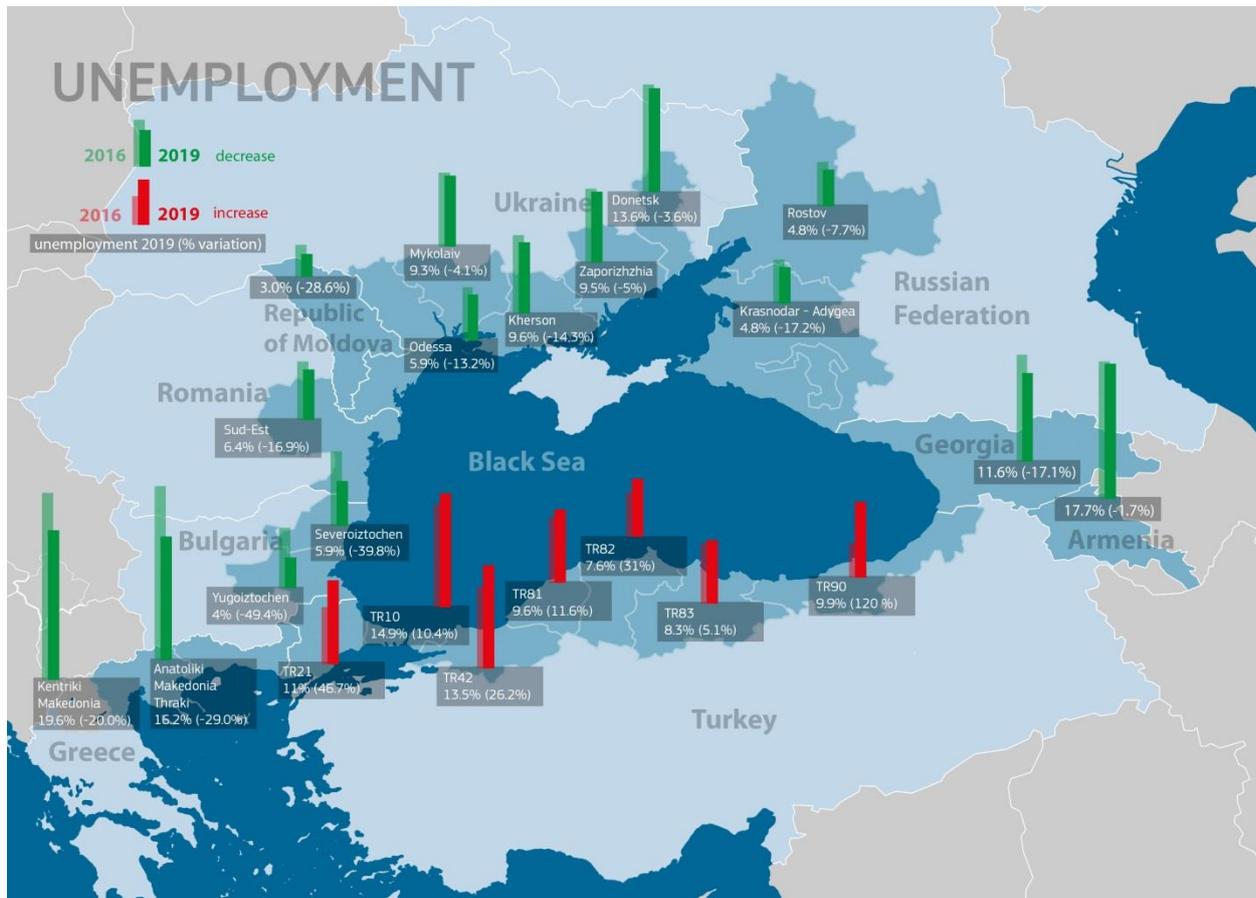


Figure no.43 - Employment distribution - agriculture / industry / services (% of total employment), 2019²⁵⁴

²⁵⁴ World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>



Map no. 10 - Unemployment rate

Statistics reveal that the programme eligible areas have very different unemployment challenges. While the Republic of Moldova, the eligible regions from the Russian Federation, Bulgaria and Romania and the region Odessa from Ukraine experience low or moderate levels of unemployment (<7%), the eligible regions from Greece, Armenia, Georgia, the region Donetsk from Ukraine and part of the eligible regions from Turkey have unemployment rates of above 10%, up to almost 20%. The average rate for BBS eligible area stands at almost 10%, above the EU average of 6.7% in 2019²⁵⁵.

Youth unemployment is a particularly acute issue, reaching over 19% on average in the Black Sea Basin area (above the EU average of 15% in 2019²⁵⁶), considerably higher than the average unemployment rate for all age intervals (almost 10%). Although common to all the Black Sea Basin eligible regions, youth unemployment varies widely, from 4.3% in the Odessa region (Ukraine) to 33.4% in Kentriki Makedonia (Greece) (see figure no.44 below).

²⁵⁵ Source: Eurostat, https://ec.europa.eu/eurostat/databrowser/view/une_rt_a/default/table?lang=en

²⁵⁶ Source: Eurostat, https://ec.europa.eu/eurostat/databrowser/view/UNE_RT_A_custom_61623/default/table?lang=en



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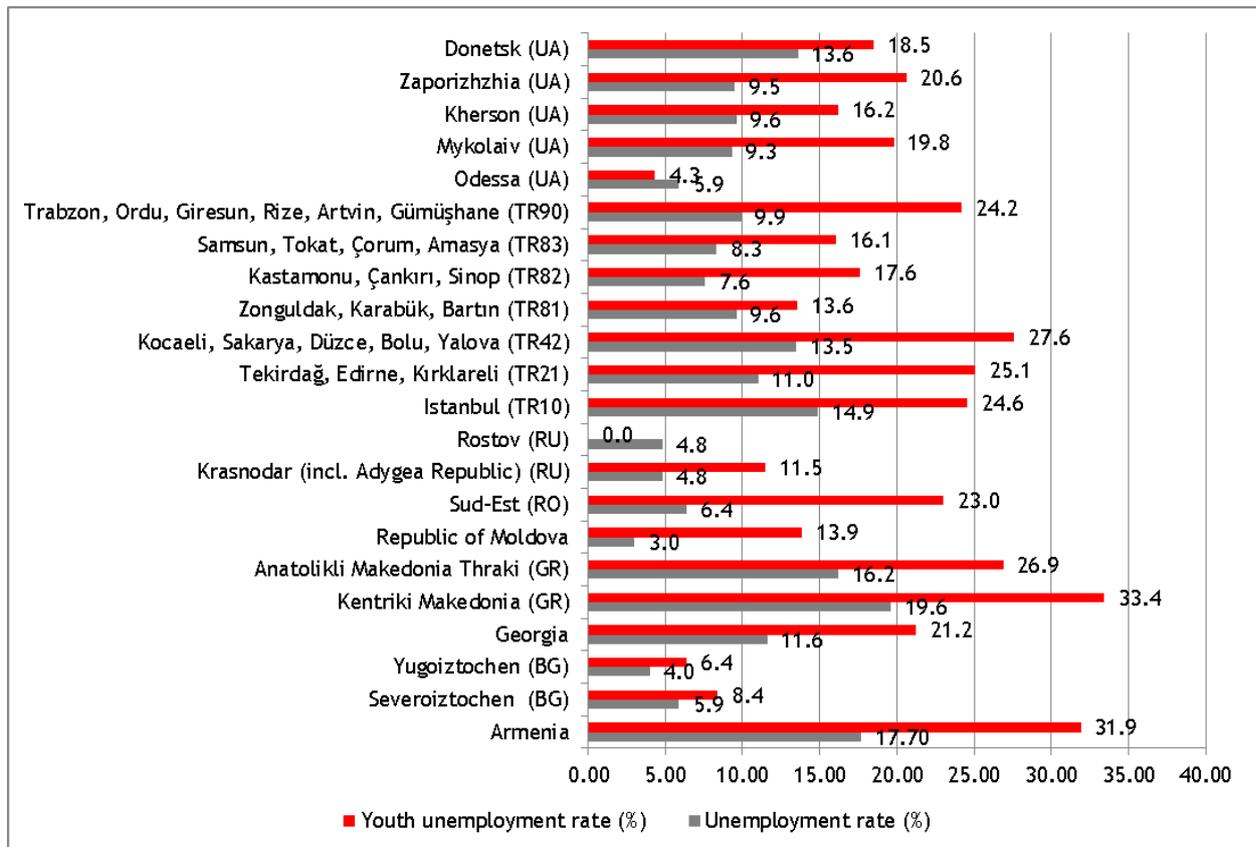


Figure no.44 - Unemployment rate²⁵⁷ (%) and youth unemployment rate²⁵⁸ (%), per each eligible area, 2019

Considering the whole eligible area per country, Greece has the highest unemployment rate in 2019 (17.90%), closely followed by Armenia (17.70%). Republic of Moldova registered the lowest rate (3%), followed by the Russian Federation (4.80%) and Bulgaria (4.95%). In terms of youth unemployment per country eligible area, the highest value is in Armenia (31.9%), closely followed by Greece (30.2%), while the lowest rate is in Bulgaria (7.4%).

Compared with the national levels²⁵⁹ (in case of countries participating with eligible areas in the programme), the unemployment is generally higher in the eligible area, with the exception of Turkey. In terms of youth unemployment, the situation is reversed, with national levels²⁶⁰ generally higher, except in Romania and, with minor difference, in Ukraine.

Looking at the trends over the analysed period, the unemployment in the eligible area generally decreased, with an exception in Turkey. However, the trend intensity varies across eligible areas, with the greatest decrease in Bulgaria, followed by the Republic of Moldova and Greece. The lowest decrease rates can be observed in Armenia and Ukraine.

²⁵⁷ Source: International Monetary Fund - for Armenia, Georgia, Republic of Moldova; Eurostat - for Bulgaria and Greece; National Institute for Statistics - for Romania; Russian Statistical Bureau - for Russian Federation; Turkish Statistical Institute - for Turkey; data provided by the participating country - for Ukraine

²⁵⁸ Source: Statistical Committee - for Armenia; Eurostat - for Bulgaria and Greece; National Statistics Office - for Georgia; National Bureau of Statistics - for Republic of Moldova; National Institute for Statistics - for Romania; data provided by the participating country - for Krasnodar (including Republic Adygea), data unavailable for Rostov; Turkish Statistical Institute - for Turkey; data provided by the participating country - for Ukraine

²⁵⁹ Source: International Monetary Fund, except for the Russian Federation - World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

²⁶⁰ Source: Statistical Committee - for Armenia; National Statistical Institute - for Bulgaria; National Statistics Office - for Georgia; Eurostat - for Greece; National Bureau of Statistics - for Republic of Moldova; National Institute for Statistics - for Romania; World Bank - for the Russian Federation; Turkish Statistical Institute - for Turkey; State Statistics Service - for Ukraine



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The trend for the youth unemployment is generally more intense than the general unemployment, i.e. it decreased (or increased, in the single case of Turkey) in a higher degree, with the exception of Bulgaria, where the general unemployment decrease slightly more than the youth unemployment. A particular case is noticed in Georgia, where the youth unemployment even increased, even if the general unemployment decreased in the analysed period (see figure no.45 below).

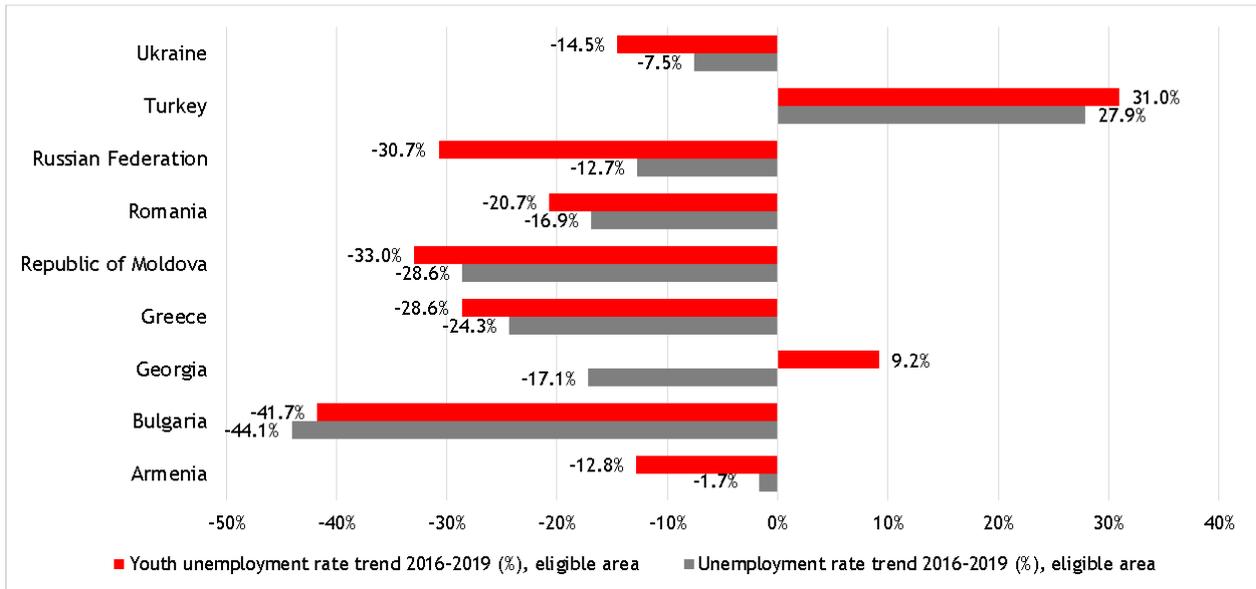


Figure no.45 - Unemployment and youth unemployment rate trend (%), eligible area, 2016-2019

In regard to gender influence and unemployment rates, female unemployment tends to be higher in Greece, Turkey and Armenia (with the highest discrepancies in Greece and Turkey) and lower in the other countries (see figure no. 46 below).

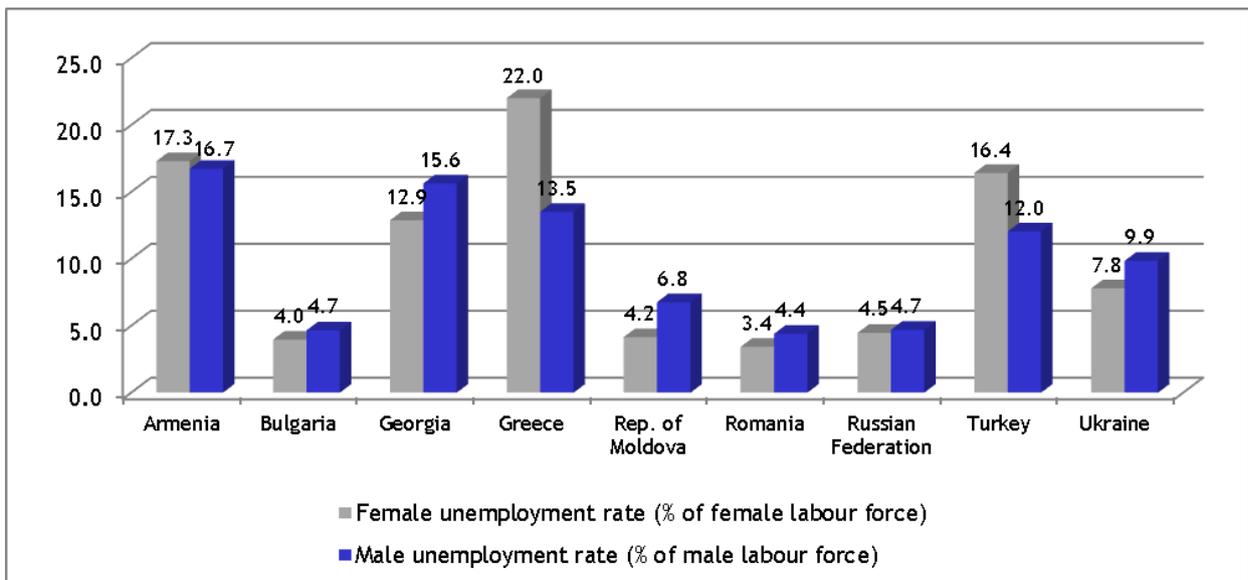


Figure no.46 - Female unemployment rate (% of female labour force) and male unemployment rate (% of male labour force), 2019²⁶¹

²⁶¹ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>



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The share of youth not in education, employment or training offers an indication on young people most at risk of being marginalised from the labour market and underutilising their skills²⁶². The relative high values (e.g.: the highest value is 31.3% in Armenia) were nonetheless decreasing in the analysed period in most of the programme countries, the exceptions being the Russian Federation, Turkey and the Republic of Moldova, with increasing trends (see figure no.48 below).

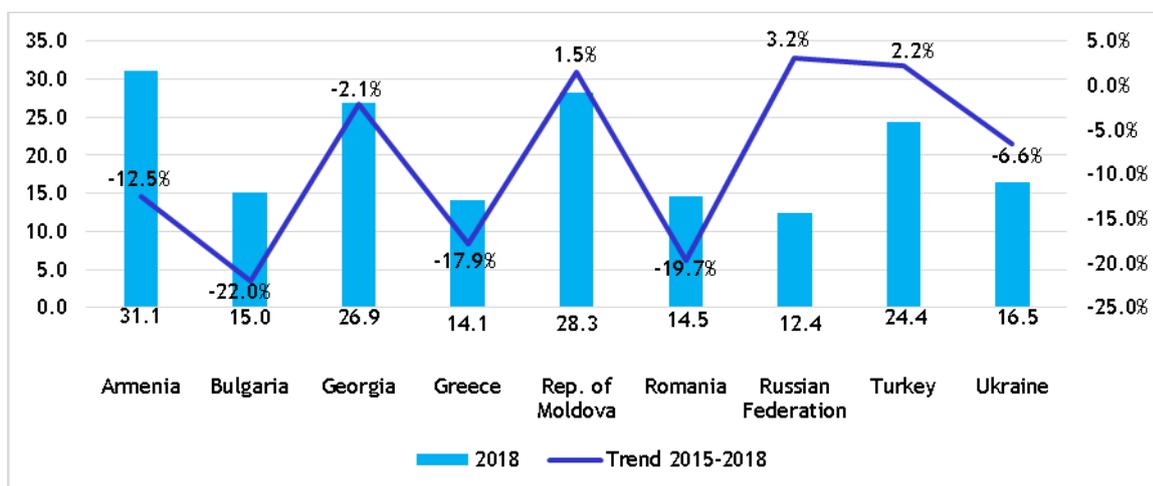


Figure no.47- Share of youth not in education, employment or training, total (% of youth population), in 2018, and trend for 2015-2018²⁶³

Gender disparities are more pronounced in this category, with more young females not in education, employment or training in almost all programme countries, except for the Republic of Moldova and (with a minor difference) Greece (see figure no.49 below).

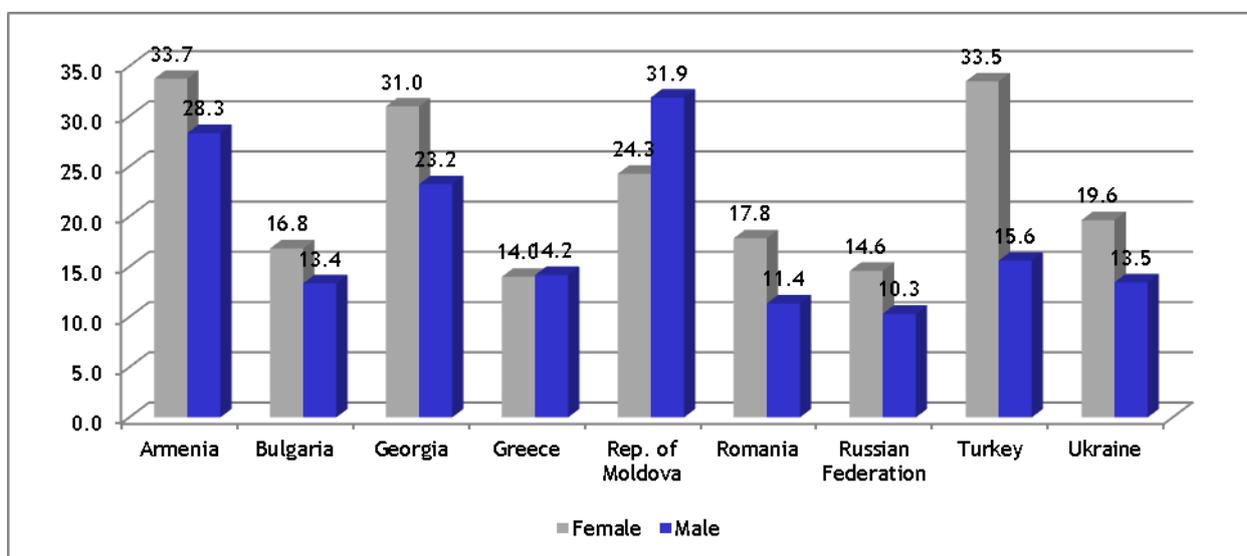


Figure no.48 - Share of female/male youth not in education, employment or training (% of female/male youth population), 2018

²⁶² Source: European Training Foundation, “Key indicators on education, skills and employment 2019”, https://www.etf.europa.eu/sites/default/files/2019-12/kiese_2019.pdf

²⁶³ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>. Data used for the Russian Federation is for the period 2015-2016, due to unavailability of data for 2017-2018. Data for Ukraine is for the period 2015-2017, due to unavailability of data for 2018.



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The COVID-19 crisis is having a substantial impact on labour market as well and it is likely to continue in the near future or potentially beyond. Many millions of workers across a large number of world countries have been directly impacted by lockdowns: some are able to continue their work through teleworking or remote working arrangements, while others experienced a reduction or loss of their livelihood. Others still, for example workers in health or public security, will experience a different type of change, namely a huge increase in working burden in the face of the crisis. All these changes are quite difficult to be grasped in official statistics across the world. Furthermore, the situation is rapidly evolving, making normal planning impossible.²⁶⁴

Even if specific statistical data for the BSB area is not available with the recent developments, in order to have a general image of the impact, it can be mentioned that, worldwide, the first quarter of 2020 saw a loss of the equivalent to 155 million full-time jobs, a number that increased to 400 million in the second quarter, with lower- and middle-income countries hardest hit. A closer image is offered by Eurostat with reference to the labour market at the EU level. In the first quarter of 2020, a total of 22.9 million persons were absent from work in the EU, an increase of 4.3 million compared to the fourth quarter of 2019. This increase is to a large extent due to a sharp increase in temporary lay-offs, which rose from 0.3 million persons to 2.3 million persons. Women have been affected more than men and it can be added that, since the pandemic, data from rapid gender assessment surveys indicate that women in some regions are shouldering the extra burden of an increased workload, particularly in terms of childcare and household chores (in the context that, worldwide, even before the pandemic, women did three times more unpaid domestic and care work than men)²⁶⁵.

A significant impact may be also registered in case of mid-paid jobs and of non-standard employment (e.g. temporary, part-time, self-employed). An analysis of labour market changes at EU level in recent years showed that the risks are higher in these cases during recessions. Also, lessons from previous crisis have shown that retaining workers' attachment to the labour market and, where possible, enhancing skills are important ways to ensure a rapid recovery²⁶⁶.

The Joint Paper identified as most relevant areas for cooperation in education and employment the promotion of blue skills and know-how to ensure standard level in services provisions, which is required by the market, in line with recommendations of the Common Maritime Agenda. Potential cooperation actions could cover joint analyses of regional skills gaps and jointly developed training programmes aimed at developing blue skills and for young people in isolated areas.

Black Sea Synergy, as adopted in 2007, mentioned unemployment as one of the common challenges of the Black Sea countries. Cooperation at regional level on this issue could provide additional value, particularly when it comes to the exchange of information and best practices.

²⁶⁴ Source: International Labour Organization, <https://ilostat.ilo.org/topics/covid-19/covid-19-impact-on-labour-market-statistics/>

²⁶⁵ Source: Committee for the Coordination of Statistical Activities, *How Covid-19 is changing the world: a statistical perspective, Volume II*, September 2020, https://unstats.un.org/unsd/ccsa/documents/covid19-report-ccsa_vol2.pdf

²⁶⁶ Source: Eurofound, <https://www.eurofound.europa.eu/publications/flagship-report/2020/labour-market-change-trends-and-policy-approaches-towards-flexibilisation>



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6.3 Social inclusion

Social inclusion refers to status, rights, meaningful participation and fair treatment of everyone in society.

Social inclusion is multi-dimensional and affects various life domains: economic, political, cultural, social. The integrating processes do not act independently of one another. Poverty allows social disadvantages to concentrate in the affected group who might slip towards social exclusion.

The proportion of population under poverty line varies across BSB countries from 12.6% in Greece²⁶⁷, to significant values as 27.6% in Ukraine. However, the population under poverty line generally decreased across the programme countries, with the exception of Turkey, where the trend 2016-2018 remained unchanged (see figure no.50 below).

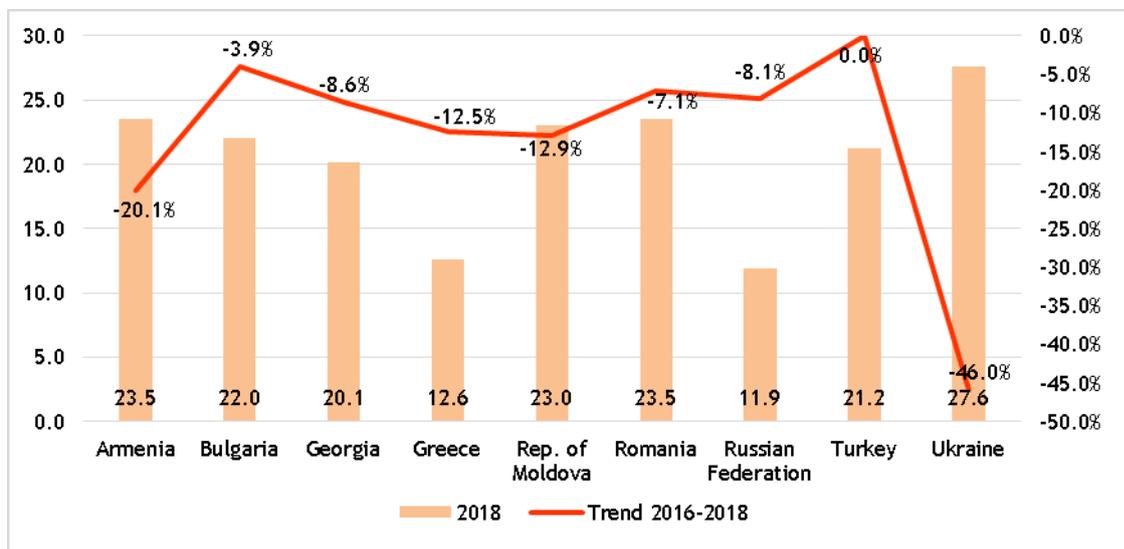


Figure no.49 - of % of population under poverty line, in 2018, and trend for 2016-2018²⁶⁸

Regarding the proportion of population at risk of poverty, despite the unavailability of data for part of the programme countries, it can be concluded that the uneven character across the programme area is confirmed in this respect as well: the range varies between 18.3% in the Republic of Moldova and 18.5% in Greece to as high as 33% in Romania and 32.8% in Bulgaria in 2018. Similar to the previous indicator, the population at risk of poverty generally decreased across the programme countries that were analysed, with the exception of Turkey, where the trend 2016-2018 remained unchanged.

As described by the Joint Paper, given the region's location on refugee "routes", cooperation could facilitate social inclusion of the refugee population.

Details on the refugee population are presented in Chapter 9 - A safer and more secure cooperation area (ISO2) of the present document. In brief, by far, the most important flow of refugees is registered in Turkey (nearly 3.6 million in 2019 alone, with high values each year in the analysed period). Greece is the second place, with a notable number of refugees (80,454 in 2019), at the same registering a significant increasing trend over the period 2016-2019.

²⁶⁷ For Greece, the latest available data is from 2017.

²⁶⁸ Source: data provided by the participating countries. For the Russian Federation, data for eligible regions was used, due to unavailability of data at national level.



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The COVID-19 outbreak affects all segments of the population and is particularly detrimental to members of those social groups in the most vulnerable situations, such as people living in poverty situations, homeless people, older persons, persons with disabilities, youth, indigenous peoples. Early evidence indicates that the health and economic impacts of the virus are being borne disproportionately by poor people. People without access to running water, refugees, migrants, or displaced persons also stand to suffer disproportionately both from the pandemic and its aftermath - whether due to limited movement, fewer employment opportunities, increased xenophobia etc. If not properly addressed through policy the social crisis created by the COVID-19 pandemic may also increase inequality, exclusion, discrimination and global unemployment in the medium and long term. Comprehensive, universal social protection systems, when in place, play a much durable role in protecting workers and in reducing the prevalence of poverty, since they act as automatic stabilizers. That is, they provide basic income security at all times, thereby enhancing people's capacity to manage and overcome shocks.²⁶⁹

Ethnic minorities and migrants are also overrepresented in high-risk frontline jobs with low pay, which increases the risk of exposure and feelings of exclusion. Additionally, sudden border closures have left many migrant workers stuck in precarious situations, putting their own health and that of others in jeopardy.²⁷⁰

Black Sea Synergy, as adopted in 2007, mentioned social affairs (like widespread informal economy, issues related to the promotion of decent work, such as social dialogue, social protection and gender equality) as one of the common challenges of the countries in the Black Sea region. Better integration of ethnic minorities and combating discrimination are key concerns for social cohesion in many of the Black Sea countries. Cooperation at regional level on these issues could provide additional value, particularly when it comes to the exchange of information and best practices, as well as awareness-raising initiatives, including training programmes for relevant officials, social partners and civil society organizations.

6.4 Health

As emphasised by the Joint Paper²⁷¹, and also concluded by the analysis presented below, health provision is highly inconsistent throughout the programme area and the programme countries still face key health challenges.

The level of spending on healthcare goods and services as a percentage of GDP varies significantly across the programme countries (see figure no.51 below), ranging from little over 4% in Turkey to around 10% in Armenia. Generally, the trend is slightly negative in the period 2016-2017. The average for programme countries of 7% is therefore below the EU average for health spending, which was estimated at 9.9% of GDP in 2017²⁷².

²⁶⁹ Source: United Nations, Department of Economic and Social Affairs, Social Inclusion, "Everyone Included: Social Impact of COVID-19", <https://www.un.org/development/desa/dspd/everyone-included-covid-19.html>

²⁷⁰ Source: <https://cic.nyu.edu/publications/covid-19-minorities-and-social-exclusion>

²⁷¹ Joint paper on Interreg NEXT Strategic Programming 2021-2027, 20 January 2020

²⁷² Source: Eurostat, https://ec.europa.eu/eurostat/documents/4187653/10321591/Healthcare_expenditure_2017-02_2.jpg/832870fe-8345-3de6-01e8-be2807c52076?t=1585550206734



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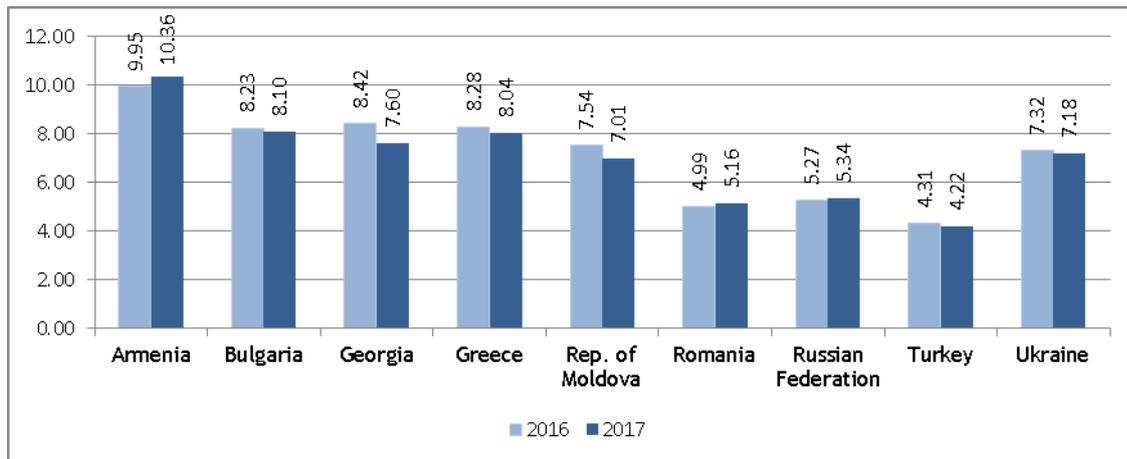


Figure no.50 - Current health expenditure (% of GDP), 2016-2017²⁷³

The life expectancy at birth varies significantly across the programme countries, ranging from almost 72, in the Republic of Moldova and Ukraine, to almost 82, in Greece. A slight increase is observed during the analysed period throughout the programme countries (see figure no.52 below). The gain in life expectancy varies from 0.1 years in Romania and Ukraine, to 1 year in the Russian Federation. The people in the programme countries still live on average (almost 75 years, in 2018) less than in the EU²⁷⁴ (81 years, in 2018), however, the gap decreased from 7 years reported in the previous programme, to 6 years. Greece is the only programme country above the EU average.

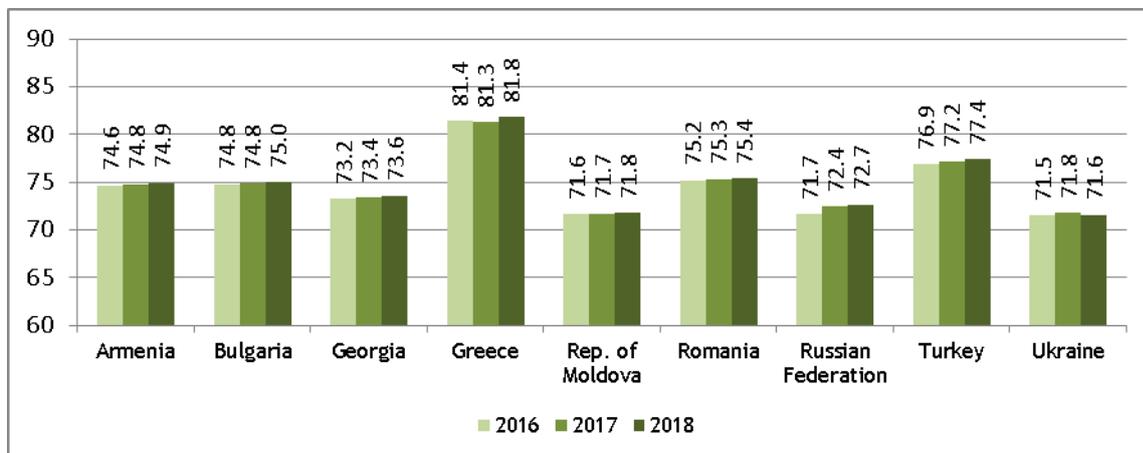


Figure no.51 - Life expectancy at birth (years), 2016-2018²⁷⁵

The infant mortality rate (number of infants dying before reaching one year of age, per 1,000 live births), a useful indicator of both access to health care and overall living conditions, reveals great disparities among programme countries, with only Greece (3.5, in 2018) close to EU average²⁷⁶ (3.4, in 2018). The Russian Federation, Bulgaria and Romania follow Greece at the low end of the rate. High levels are observed in the Republic of Moldova and Armenia - more than 3 times higher than the EU level. The rate nonetheless decreased steadily across the countries over the period (see figure no.53 below) and, moreover, the gap decreased

²⁷³ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>, data provided by participating country - for Ukraine

²⁷⁴ Source: Eurostat, https://ec.europa.eu/eurostat/databrowser/view/sdg_03_10/default/table?lang=en

²⁷⁵ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

²⁷⁶ Source: Eurostat, https://ec.europa.eu/eurostat/databrowser/view/demo_minfind/default/table?lang=en



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between programme countries average and EU average (e.g.: 6.5 gap in 2012, as compared to 4.4 gap in 2018).

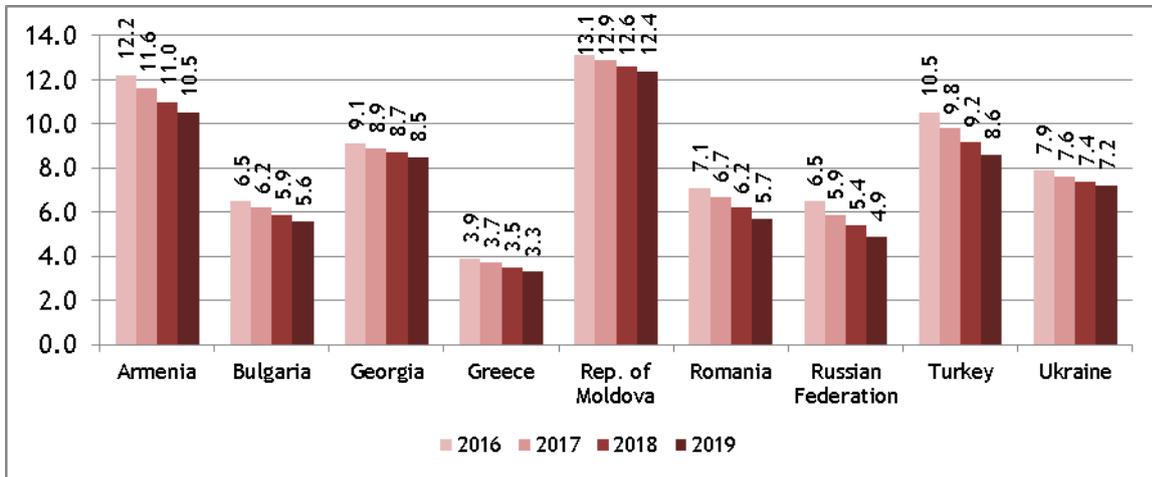


Figure no.52- Mortality rate, infant (per 1,000 live births), 2016-2019²⁷⁷

Health challenges also include the impact of reproductive health on gender inequalities. Safe motherhood reflects the importance society attaches to women's reproductive role. Early childbearing, as measured by the adolescent fertility rate, is associated with greater health risks for mothers and infants while adolescent mothers often are forced out of school and into low-skilled jobs. High rates for both maternal mortality and adolescent fertility rates do not only reflect health system deficiencies, but they also prevent gender equality²⁷⁸. Across the programme countries (see figure no 54 below), significant levels for both indicators are observed in Georgia, while Greece registers the lowest ones. However, the overall trend is generally slightly positive as both indicators generally decreased in the analysed period (only maternal mortality rate remained unchanged in Armenia, Bulgaria and Greece). The gap between programme countries average and EU average²⁷⁹ is significant, the programme countries average being around 2.5 times higher than EU countries average in 2017 (the programme average maternal mortality ratio is 17.2, while EU average is 6.7; the programme average adolescent fertility rate is 27.2, while EU average is 11).

²⁷⁷ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

²⁷⁸ Source: Joint Operational Programme Black Sea Basin 2014-2020, <https://ec.europa.eu/transparency/regdoc/?fuseaction=list&coteld=3&year=2015&number=9187&version=ALL&language=en>

²⁷⁹ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>



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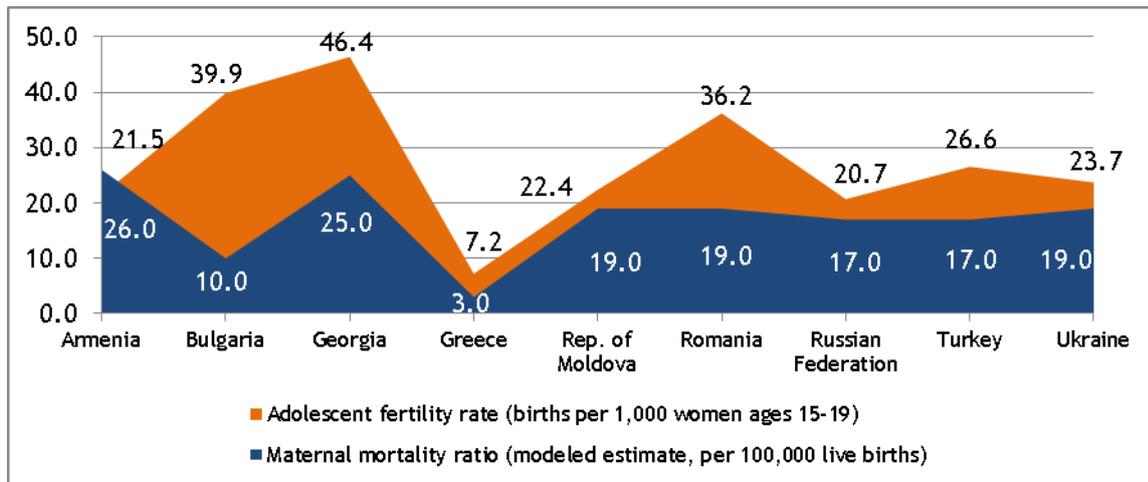


Figure no.53- Maternal mortality ratio and Adolescent fertility rate, 2017²⁸⁰

Female reproductive health has a strong impact on the UNDP calculation of the gender inequality index²⁸¹. Women’s relative disadvantage is highest in Georgia, while in Greece is smallest. However, the gender inequality index improved over the period 2012-2018 (see figure no.55 below).

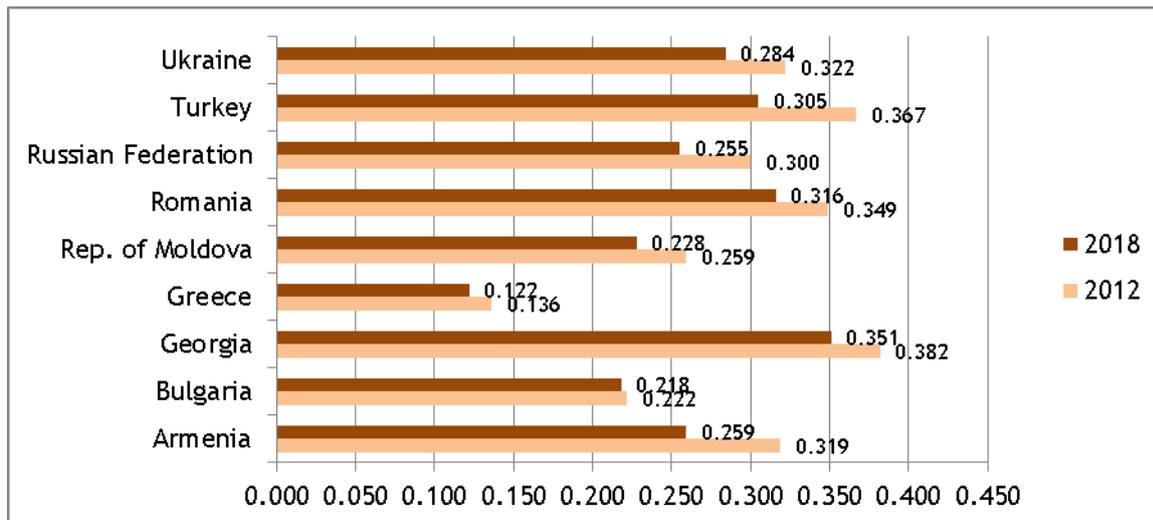


Figure no.54- Gender inequality index, 2012 and 2018²⁸²

The universal health coverage, measuring the people’s access to health services without facing financial hardship, also varies across the programme countries, ranging, on a scale of 1 to 100, from 66, in Georgia, to 75, in Greece. In almost all programme countries, the access to needed health services increased over the period 2015-2017, and the only exception involved the maintaining of the value (Georgia). The programme average (70.6, in 2017) is lower than the EU countries average (78, in 2017) and no country from the programme area is above the EU average.

²⁸⁰ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

²⁸¹ UNDP gender inequality index is based on reproductive health (maternal mortality, adolescent fertility), empowerment (educational attainment, parliamentary representation) and labour force representation data.

²⁸² Source: United Nations Development Programme, Human Development Reports, <http://hdr.undp.org/en/data#>

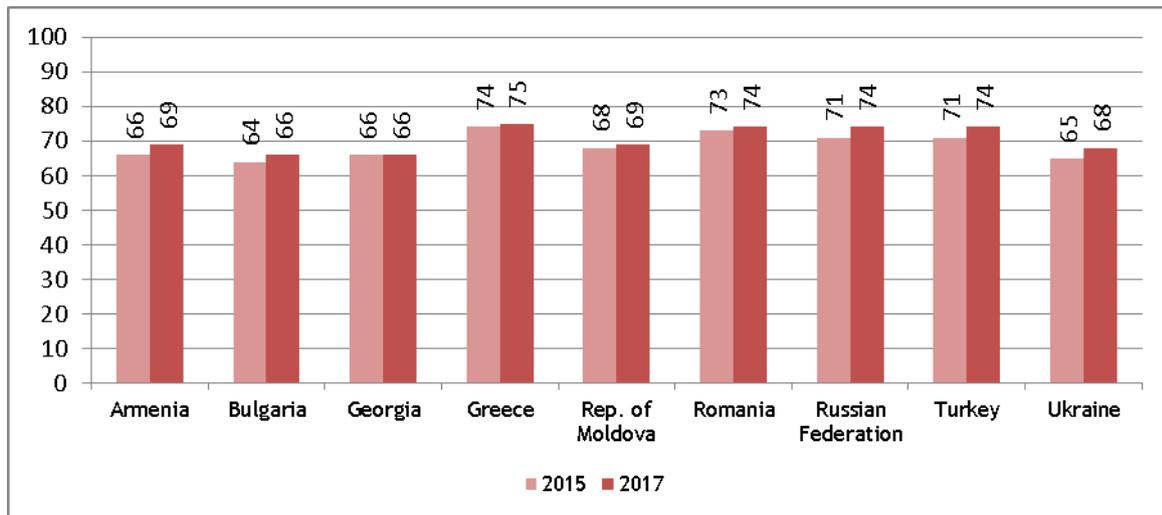


Figure no.55 - Universal health coverage (UHC) service coverage index, 2015 and 2017²⁸³

The healthcare resources, as reflected by the number of beds and the number of doctors per 1,000 people, are characterised by huge discrepancies between countries' eligible areas (see figures no.57 and 58 below). Generally, the trend is slightly positive, with the minor exceptions in Greece, where the number of doctors was maintained, and Ukraine (data available at national level, however), where the number of hospital beds slightly decreased.

With reference to the number of beds, it should be noted that the indicator may not reveal certain shortcomings of the health system, if these would exist (such as a limited capacity utilisation of the hospital beds or the reliance on a hospital-based treatment of patients, in Ukraine²⁸⁴).

A challenge, in relation to the number of doctors (and skilled medical workforce in general) for certain countries, is represented by emigration. For instance, the most severe impact of doctors' migration is in Romania, considering that 11,387 Romanian doctors (about one fifth of the number of doctors in the country) worked, in 2018-2019, in Germany, France, the United Kingdom and Belgium alone (in addition, in smaller numbers, Romanian doctors worked in other countries as well). Also, a significant number of doctors from Bulgaria (2,456) and Greece (4,648) worked in these countries²⁸⁵.

The comparison of the eligible area data with the national data (where different from eligible area) offers quite a different image. In the Russian Federation and Turkey, there is a substantial higher number of hospital beds and doctors concentrated in the eligible area. Also, in Greece and Bulgaria, even though in a lesser extent, there is a higher concentration of hospital beds and doctors in the eligible area than at national level. In Romania however, the situation is reversed, with a concentration of hospital beds and doctors in the eligible area below the national level. For Ukraine, the comparison could not be made due to data unavailability at regional level.

²⁸³ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

²⁸⁴ Source: "Health Care in Ukraine" report, by Orange Health Consultants, 2018, <https://www.rvo.nl/sites/default/files/2019/03/Health-Care-in-Ukraine.pdf>

²⁸⁵ Source: OECD, Health Workforce Migration: Foreign-trained doctors by country of origin – stock, 2018 and 2019, <https://stats.oecd.org/Index.aspx?QueryId=68336>



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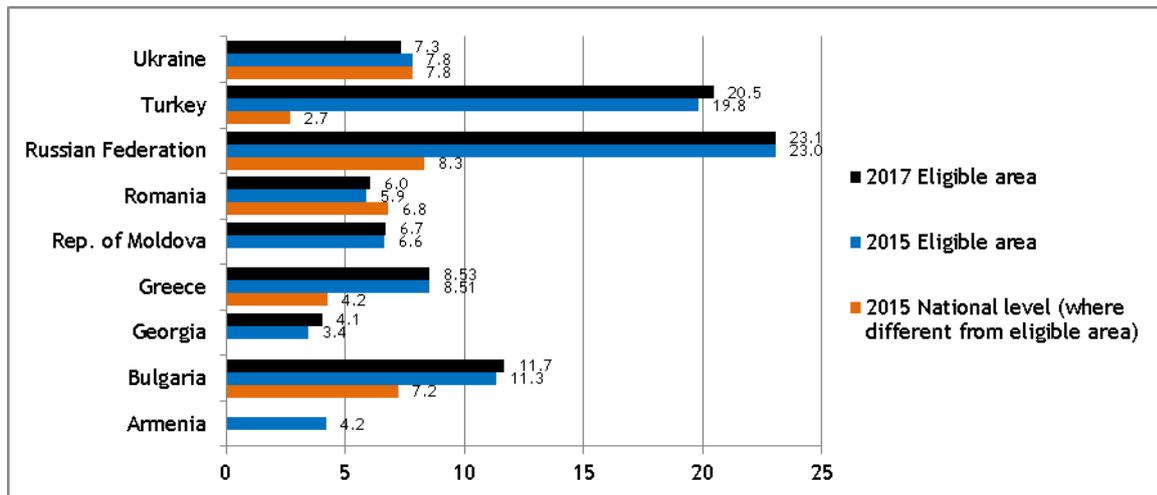


Figure no.56- Hospital beds (per 1,000 people), eligible area²⁸⁶ in 2015 and 2017 and national level (where different from eligible area) in 2015²⁸⁷

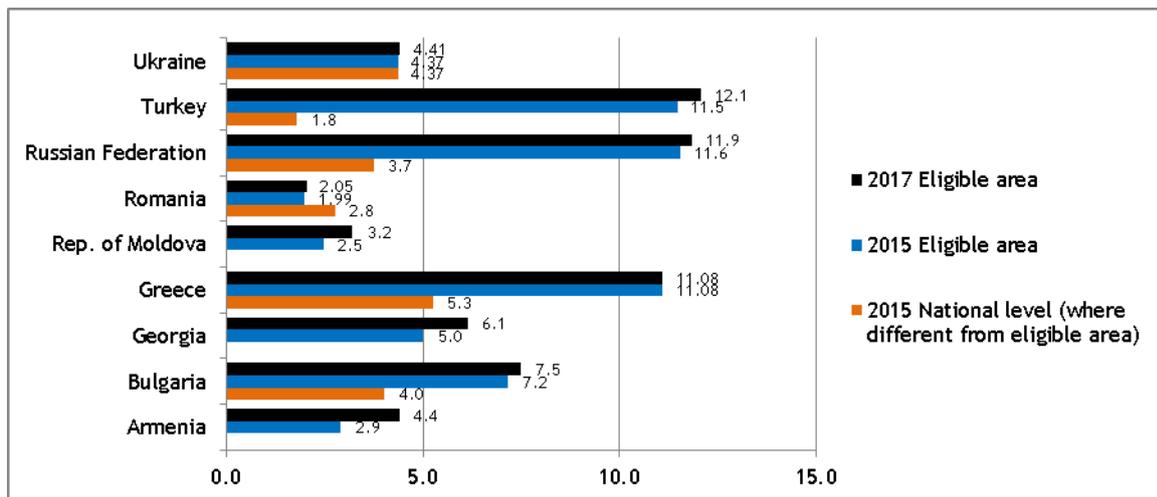


Figure no.57 - Doctors (per 1,000 people), eligible area²⁸⁸ in 2015 and 2017 and national level (where different from eligible area) in 2015²⁸⁹

²⁸⁶ Source: World Bank Data Bank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators> - for Armenia, data available only for 2015; Eurostat, general and regional statistics, <https://ec.europa.eu/eurostat/data/database> - for eligible regions in Bulgaria, Greece, Romania and Turkey; <https://www.geostat.ge/en/modules/categories/54/healthcare> - for Georgia; National Bureau of Statistics, http://statbank.statistica.md/PxWeb/pxweb/en/30%20Statistica%20sociala/30%20Statistica%20sociala_08%20SAN_SAN010/SAN_010900rcl.px/?rxid=b2ff27d7-0b96-43c9-934b-42e1a2a9a774 - for Republic of Moldova; Federal State Statistic Service, <https://eng.gks.ru/territorial> - for eligible regions in the Russian Federation; For Ukraine, data at national level was available, <http://www.ukrstat.gov.ua/>.

²⁸⁷ Source: World Bank Data Bank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators> - for Armenia; Eurostat - for Bulgaria, Greece, Romania and Turkey; <http://www.ukrstat.gov.ua/> - for Ukraine; Federal State Statistic Service, <https://eng.gks.ru/health> - for the Russian Federation.

²⁸⁸ Source: World Bank Data Bank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators> - for Armenia, Georgia and Republic of Moldova; Eurostat, general and regional statistics, <https://ec.europa.eu/eurostat/databrowser/view/tgs00062/default/table?lang=en> - for eligible regions in Bulgaria, Greece, Romania and Turkey; Federal State Statistic Service, <https://eng.gks.ru/territorial> - for eligible regions in Russian Federation; For Ukraine, data at national level was available, State Statistics Service, <http://www.ukrstat.gov.ua/>.

²⁸⁹ Source: World Bank Data Bank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>, with the following exceptions: Eurostat - for Romania; State Statistics Service, <http://www.ukrstat.gov.ua/> - for Ukraine.



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To sustain the average gains in life expectancy, continuous efforts are required to decrease mortality. In order to have an overall picture for as many programme countries as possible, data from 2014 is used as regards the cause of death by major cause classes (data was available for all countries). By far, the main cause of death for population of the programme countries falls under the category of diseases of the circulatory system (over 50% on average). The second cause of death (over 17% on average) comes from neoplasms (see figure no.59 below). This hierarchy is the same as in the previous programme.

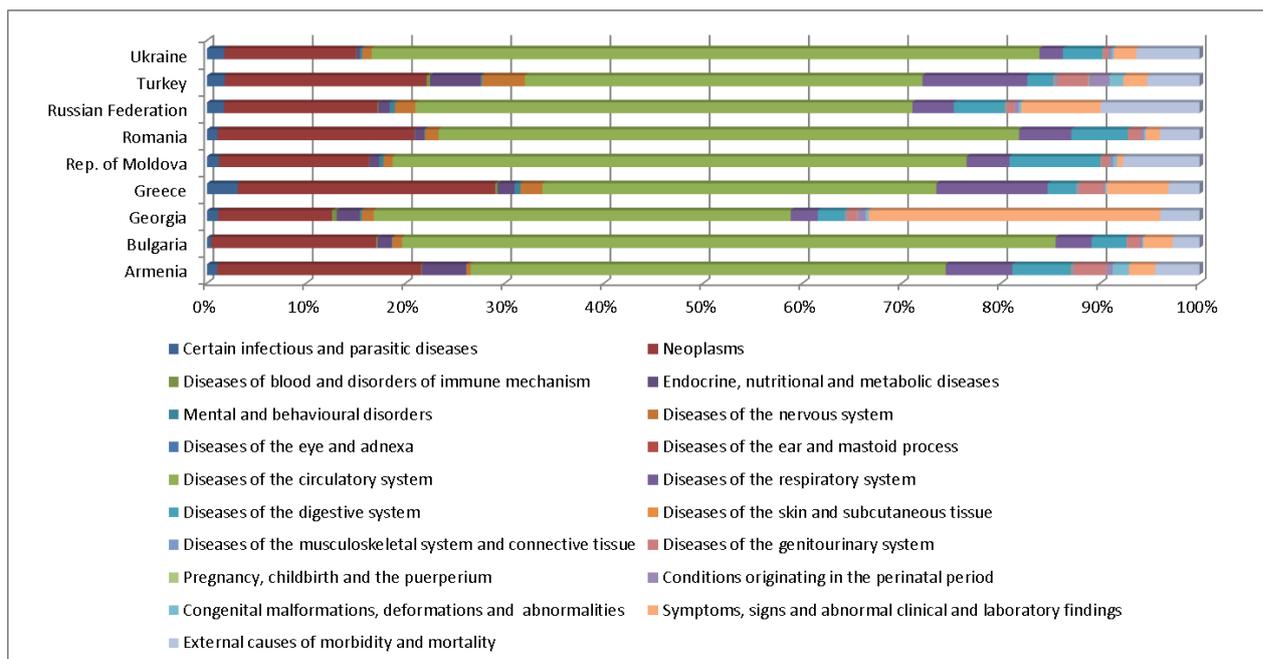


Figure no.58- Distribution of deaths by major cause classes, 2014²⁹⁰

Another distribution of deaths can be made by the following major categories: communicable diseases (infectious and parasitic diseases, respiratory infections, and nutritional deficiencies such as underweight and stunting), non-communicable diseases (chronic diseases, not passed from person to person - cancer, diabetes mellitus, cardiovascular diseases, digestive diseases, skin diseases, musculoskeletal diseases, and congenital anomalies) and injuries. Similar to the previous figure, this distribution reveals some disparities between programme countries, with the general prevalence of the non-communicable diseases (see figure no.60 below). The non-communicable diseases, which impose a major and growing burden on health and development, become more important in the context of COVID-19 pandemic, as the services for their prevention and treatment have been severely disrupted since the pandemic began²⁹¹.

²⁹⁰ Source: World Health Organization, https://apps.who.int/healthinfo/statistics/mortality/causeofdeath_query/

²⁹¹ Source: World Health Organization, <https://www.who.int/news-room/detail/01-06-2020-covid-19-significantly-impacts-health-services-for-noncommunicable-diseases>



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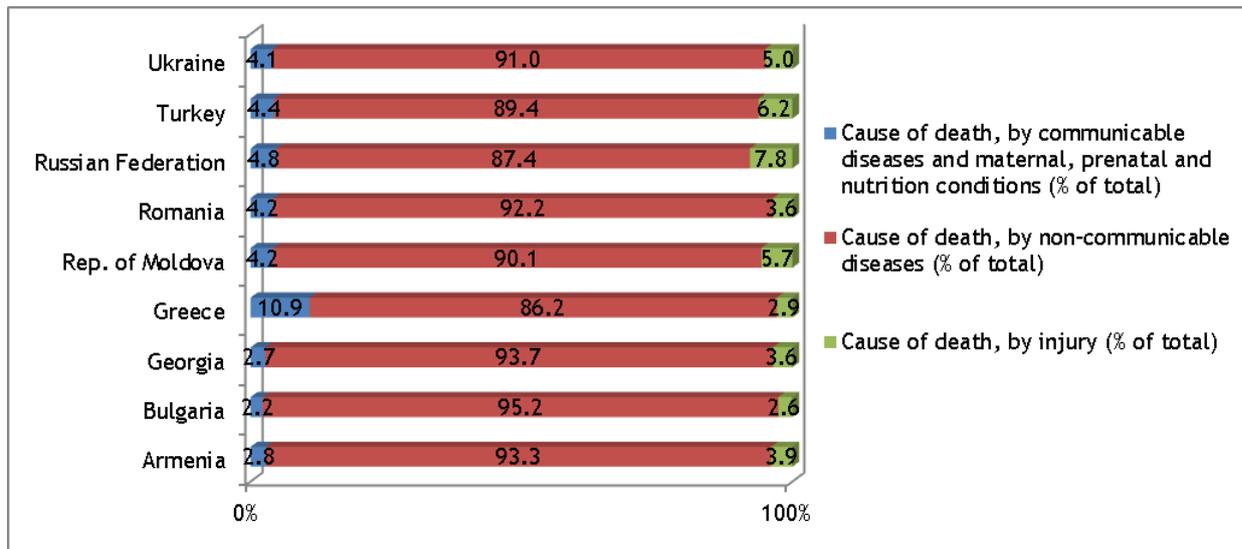


Figure no.59 - Distribution of deaths by major cause categories (communicable / non-communicable diseases, injury), 2016²⁹²

In the currently evolving context of COVID-19 pandemic, an accurate assessment of the impact is difficult. However, for an indicative picture, the status of reported cases and deaths caused by this disease is presented, as of 30th September 2020, compared with the population statistics available from 2019 (see figure no.61 below). Disparities can be noted in this respect as well across the programme countries, with the highest impact of COVID-19 in the Republic of Moldova and Armenia in terms of reported cases out of the total population and in Bulgaria and Romania in terms of reported deaths out of the reported cases, and with the lowest impact in Georgia and Greece in terms of cases and also in Georgia in terms of deaths.

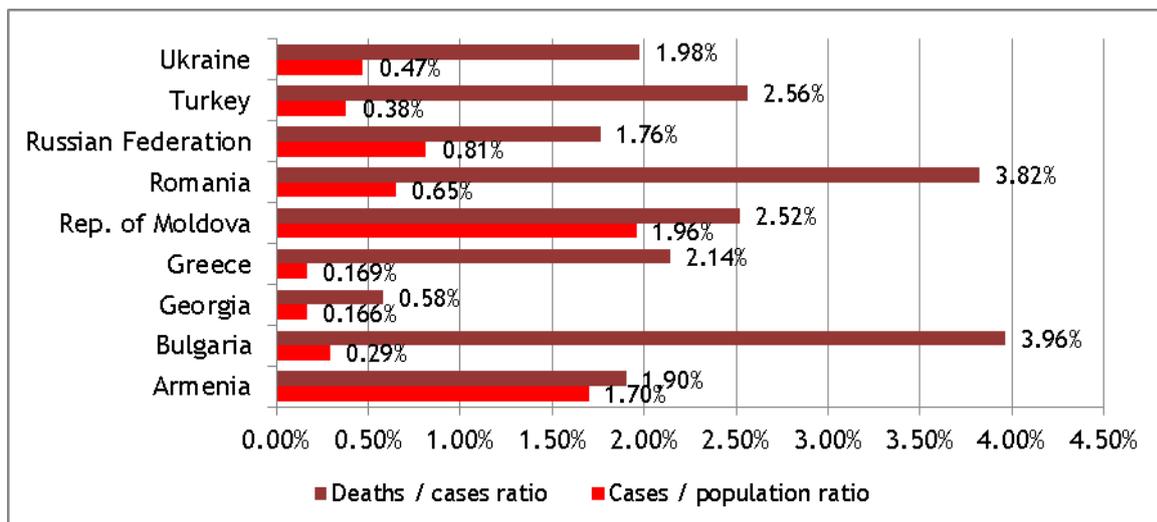


Figure no.60 - Cases of COVID-19, at 30th September 2020²⁹³, out of population, 2019²⁹⁴; deaths by COVID-19, at 30th September 2020, out of cases of COVID-19

²⁹² Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>

²⁹³ Source: World Health Organization, WHO Coronavirus Disease (COVID-19) Dashboard, <https://covid19.who.int/table>

²⁹⁴ Source: World Bank DataBank, World Development Indicators in <https://databank.worldbank.org/source/world-development-indicators>



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The COVID-19 pandemic has highlighted the importance of strong public health systems and emergency preparedness for communities and economies globally and that greater investments in universal health coverage are needed²⁹⁵.

The Joint Paper identified as most relevant area for cooperation the exchange of best practice in e.g. e-health services for remote areas (e.g. rural areas, minority groups).

²⁹⁵ Source: United Nations News, October 2020, <https://news.un.org/en/story/2020/10/1074832>



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6.5 SWOT analysis and preliminary conclusions

SWOT - More social cooperation area	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Higher level of education well represented overall; • Unemployment generally decreased in the analysed period (except Turkey); • Population under poverty line and population at risk of poverty generally follow a decreasing trend in the analysed period; • Despite rather small changes, trends for some health indicators were generally positive in the analysed period; • Life expectancy has increased more quickly in BSB countries than in the EU. 	<ul style="list-style-type: none"> • Low spending on education as percentage of GDP, below EU average, in many of the BSB countries; • Infrastructure (schools) trend for primary and secondary education does not match with the trend of potential needs (school-aged children) in many of the BSB eligible regions; • Significant unemployment rate in Greece, Armenia, Georgia, Ukraine and Turkey; • High youth unemployment; • Higher female unemployment in Greece, Turkey and Armenia; • Important share of youth not in education, employment or training, with higher rates for young females; • Proportions of population under poverty line and of population at risk of poverty are generally high; • Low spending on health as percentage of GDP, below EU average; • Great inequalities between programme countries in terms of life expectancy • The access to health services of the people in the programme countries is more difficult than in the EU;
OPPORTUNITIES	THREATS



- In the context of COVID-19 crises and restrictions, digitalisation and online communication should be considered for supporting education system;
 - In the context of COVID-19 crises and restrictions, digitalisation and online communication in working and training should be considered for supporting the labour market, including for the youth;
 - Number of hospital beds and doctors is higher in the eligible area of the programme than at the national level of the programme countries;
 - With disparities across programme countries, best practices could be shared between them to tackle the health weaknesses;
 - In the context of COVID-19 pandemic, the increasing focus on remote and online communication could encourage development of e-health services.
- Vocational education enrolment at high-school level is on a slightly negative trend in many BSB countries;
 - COVID-19 pandemic brings severe disruptions in the education systems, with a higher impact on the already vulnerable categories of people;
 - In the context of COVID-19 pandemic, the labour market in the BSB countries is considerable deteriorated;
 - In the COVID-19 pandemic context, female employment and non-standard employees (temporary, part-time, self-employed) may be affected in a greater extent;
 - The COVID-19 pandemic is particularly detrimental to members of those social groups in the most vulnerable situations (people living in poverty situations, homeless people, older persons, persons with disabilities, youth, indigenous peoples, refugees, migrants);
 - Health systems face challenges dealing with COVID-19 pandemic;
 - The burden of non-communicable diseases (chronic diseases) on health and development is increased due to COVID-19 pandemic.

There is a high level of education of BSB population overall. There are differences across the programme area in relation to primary and secondary educational infrastructure, with some risks for needs to be unfulfilled in some countries. Vocational high-school education enrolment is generally on a slightly negative trend. Severe disruptions in education systems appeared in the context of COVID-19 crises, with expected long-term negative effects (and more accentuated for disadvantaged groups), not only for education, but also for society in general. In the context of physical restrictions, new challenges and opportunities for education are to be considered (digitalisation, online education).

Unemployment rates are high in the eligible area, especially for youth. In the context of COVID-19 crises, it is expected to increase and greater impact may be registered for the disadvantaged categories. In the context of physical restrictions due to the pandemic, new



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challenges and opportunities for the labour market are to be considered (digitalisation, remote / online working and training).

The COVID-19 pandemic may put additional pressure on the pre-existing social issues in the BSB area, especially for the vulnerable categories of population, such as the refugees, poor people, older persons, persons with disabilities, youth.

Health provision is highly inconsistent throughout the programme area and generally below EU average levels. There are general marginal positive trends in some areas (e.g. life expectancy, infant mortality rate, universal health care coverage, number of hospital beds, number of doctors). Additional burdens are brought to healthcare by the COVID-19 pandemic. Nevertheless, in the context of the pandemic restrictions, opportunities like digitalisation and remote and online communication may encourage the development of e-health services.

During the Regional Stakeholder Seminar on Blue Economy towards a Common Maritime Agenda for the Black Sea that took place in March 2019²⁹⁶ there have been highlighted specific challenges faced by the education and employment fields:

- Development of a coherent lifelong learning system across Black Sea countries;
- Limited provision for targeted educational programmes (incl. Black Sea marine environment) in accordance with industry needs to support the development of blue economy;
- Difficulties in establishing commonly accepted standardization of programs, skills and diplomas, etc., at regional level;
- Difficulties in the full adaptation of educational systems (less theoretical and more practical and business oriented) to meet blue economy market needs;
- ‘Mismatch’ between human resources with regional training and/or academic qualifications and the practical competences needed for the development of blue economy across the Black Sea;
- Difficulties in the enhancement of specialised vocational training across the Black Sea countries among a wide range of interested parties, i.e. academia, businesses, investors, civil society at large;
- Difficulties in adjusting and/or aligning academic curricula with market needs;
- Promotion of training on digitalisation to professionals across the Black Sea countries;
- Poor visibility and limited appeal of the economic activities across the blue economy for the young and talented professionals;
- Difficulties in overcoming existing legal barriers (e.g. diploma etc.) for full movement of workers;
- Difficulties in regional coordination for the development of a common regulatory framework (e.g. for regular training) for the upgrade of blue skills for the human workforce in the Black Sea region.

As response to these challenges, some actions and projects ideas were identified:

- Communication and dissemination campaigns for sustaining training on digitalisation to professionals;
- Promotion campaigns on blue careers;
- Set-up of online platforms;

²⁹⁶ Source: https://blackseablueeconomy.eu/sites/default/files/rs_final_conclusions_0.pdf



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- Communication on initiatives from Black Sea key stakeholders (industry, universities, etc.);
- Develop a regional platform to accommodate sharing of actions and skills needs for Blue economy within the Black Sea;
- Set up programmes for internship and vocational education and training) adapted to the Black Sea needs;
- Implementation of joint training programs, exchange of students and teachers;
- Monitoring of training programs of Black Sea universities and creation of a virtual platform of the best programs;
- Education as a way to raise interest in maritime issues (including education of teachers;
- Develop mobility programmes.

More project ideas were identified at the second workshop towards the implementation of the Common Maritime Agenda: “Supporting innovative solutions for blue economy development”, November 2019²⁹⁷:

- Blue Economy Skills Hub - Pilot project with the participation of academic/research institutes from at least 3 different Black Sea countries to establish a training programme, build capacity and advise stakeholders on how to access funding and implement projects on Blue Economy;
- Blue economy internship and vocational education and training for the Black Sea - Grants/call to develop programmes for internship and vocational education and training, adapted for the Black Sea and its blue economy highest potentials in jobs and gross value added creation in the Black Sea;
- Mapping of market demand on skills/qualifications and possible improvements to address them - Examine the correlation between existing training systems and market demand and provide for innovative/corrective actions.

Furthermore, two out of the five strategic objectives of the EU macro-regional Strategy for the Danube Region (EUSDR), as included in the revised Action Plan are of particular importance for the Black Sea region, given that the two regions partially coincide: Stimulating Sustainable Development and Establishing and enforcing Knowledge Society, stimulating the Economy and fight Poverty.

In view of the thematic concentration, in the Joint Paper on Interreg NEXT Strategic Programming 2021-2027 the conclusion of the analysis carried out for Policy Objective 4 was that this PO is not encouraged, given the need for concentration of resources and the fact that interventions under this theme are better suited for land-based cooperation.

Nevertheless, the cooperation actions under this policy objective **might potentially contribute to the Common Maritime Agenda for the Black Sea**, Goal II: “A competitive, innovative and sustainable blue economy”, Priority 3: “Promote blue skills and blue careers as an engine for innovation and competitiveness”:

- Action 1: “Skills. Promote the development of the human (skills, know-how) and technical (infrastructures, services) capital in the region. Foster regional training programmes and vocational education, mobility of youth, trainees, workers, learners and teachers. Promote the setting up of skills hubs for the blue economy across the Black Sea, which will increase cooperation between education and research institutions, industry, innovation centres and public authorities. Examine how employment and training systems are responding to the needs of business and what

²⁹⁷ Source: https://blackseablueeconomy.eu/sites/default/files/event_report_romania_workshop_vwebsite_0.pdf



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policy levers are being used to increase employer engagement and training programmes.”

- Action 2: “Education. Promote formal and informal learning, vocational education and training, as well as transfer of educational technologies and knowledge for established and new marine and maritime jobs. Promote collaboration frameworks between industry and educational institutions. Encourage life-long learning, including via regional programmes, and fully exploit the opportunities of the digitalized, on-line life-long learning.”
- Action 4: “Blue Careers. Encourage better anticipation of future blue skills needs. Raise awareness of the marine and maritime professions and their appeal to young people. Encourage cross regional internship programmes for marine and maritime experts and internship programmes on blue careers developed by the business sector, in particular SMEs, in cooperation with educational institutions. Collaboration with the Black Sea Universities Network (BSUN) in the areas above is encouraged.”
- Action 5: “Better policies and programmes aligning on labour market needs and skills. Exchange of best practices and enhanced partnerships between national authorities, municipalities and local authorities, as well as among local authorities and employment/training agencies, in order to adapt national policies to the local socio-economic conditions.”



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Chapter 7 - A cooperation area closer to citizens (PO5)

Policy Objective 5 under the 2021-2027 ERDF Regulation concerns a Europe and its neighbourhood closer to citizens by fostering the sustainable and integrated development of urban, rural and coastal areas and local initiatives with the following specific objectives:

- i. fostering the integrated social, economic and environmental development, cultural heritage, tourism and security in urban areas;
- ii. fostering the integrated social, economic and environmental local development, cultural heritage, tourism and security, including for rural and coastal areas also through community-led local development.

This objective is an integrated one, following a bottom-up and territorial approach, where local communities identify the challenges of a specific area and identify strategic approaches to tackle multiple challenges within a territory. Furthermore, these challenges are not bound to single administrative units, but rather occur in functional areas characterised by economic, social, environmental as well as governmental linkages. Integrated development combines horizontal, inter-sectoral integration, with vertical integration, which relates various spatial and governance levels.

7.1 Tools to support integrated territorial development

The choice of PO5 is conditioned by the elaboration or existence of a territorial or local development strategy in any of the forms mentioned in art. 22 of draft Common Provisions Regulation (CPR), as the achievement of this without such a territorial or local development strategy is not possible. Nevertheless, the strategy should not be considered as an aim in itself, but as a tool to support integrated territorial development.

The types of strategies and the requirements they should observe are stated in the draft CPR. According to art. 22 draft CPR, the Member State shall support integrated territorial development through territorial and local development strategies in any of the following forms:

- (a) integrated territorial investments (ITI);
- (b) community-led local development (CLLD);
- (c) another territorial tool supporting initiatives designed by the Member State for investments programmed for the ERDF under PO5.

7.1.1 Integrated territorial investments (ITI)

An Integrated Territorial Investment (ITI) is an instrument which provides for integrated delivery arrangements for investments under more than one priority axes of one or more operational programmes. Funding from several priority axes and programmes can be concentrated into an integrated investment strategy for a certain territory or functional area. It allows the managing authorities to delegate the implementation of parts of different priority axes to one body (a local authority) to ensure that investments are undertaken in a complementary manner. Within an ITI some components can be undertaken through community led development combining the two approaches²⁹⁸.

²⁹⁸Source: <https://urbact.eu/what-are-integrated-territorial-investments>



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For the programming period 2014-2020, at the moment of concluding the Partnership Agreements, several Member States have decided not to use Integrated Territorial Investment (ITIs) as a tool for territorial development, among which Bulgaria²⁹⁹. The only example regarding the implementation of the ITI tool in Romania has been in the Danube Delta area, for which €1.3 billion were allocated to the ITI from various operational programmes.

At European level, the ITI operation for Gorizia, Mestna občina Nova Gorica and Občina Šempeter-Vrtojba in Italy and Slovenia is the only example of cross-border ITI³⁰⁰.

However, the use of the ITIs does not demonstrate necessarily all the will of a region to invest in urban development because there are other possible means to invest in urban development. This can take the form of an integrated strategy for sustainable urban development (SUD), but also for inter-municipal cooperation in specific territories. In the case of the three Member States within the Black Sea Basin area, a series of integrated development strategies were elaborated under dedicated priority axis for Sustainable Urban Development (SUD).

7.1.2 Community-led local development (CLLD)

Community-led local development (CLLD) is a method for involving partners at local level including the civil society and local economic actors in designing and implementing local integrated strategies that help their areas make a transition to a more sustainable future³⁰¹.

The community-led local development (CLLD) instrument has been implemented as a tool focusing on small scale territories with a strong bottom-up approach, funded by all ESI funds, developing predominantly rural Local Action Groups (LAGs), while in some cases this tool has also been dedicated to marginalized communities in urban areas with more than 20,000 inhabitants. It is an instrument transitioning from the LEADER approach, which was initially introduced in response to the failure of traditional, top-down policies to address problems faced by many rural areas in Europe. The acronym "LEADER" derives from the French phrase "Liaison Entre Actions de Développement de l'Économie Rurale" which means, 'Links between activities for the development of rural economy'³⁰². The success of LEADER in rural areas led other ESI Funds to open up the possibility of applying this approach in other types of areas, such as already mentioned small urban communities or in fisheries areas.

According to the LAG Database of The European Network for Rural Development³⁰³, in Greece there are currently 69 LAGs, in Bulgaria there are 72 LAGs, while in Romania the number is much higher, reaching the value of 261 entities, with 44 LAGs in the South-East Region of Romania. In addition, during the 2014-2020 programming period, in Romania, this instrument has been used for urban LAGs as well, with 22 urban LAGs being established throughout the country, out of 49 strategies submitted for approval.

At European level, there is also only one example of cross-border CLLD in the case of Interreg V A Italy-Austria which was built on existing LAGs established under LEADER.

²⁹⁹ Source: https://www.ccre.org/img/uploads/piecesjointe/filename/CEMR_Study_ITI_EN-0.pdf

³⁰⁰ Source: <https://interregviarobg.eu/assets/2020/08/200618-territorial-analysis-updated.pdf>

³⁰¹ Interact (2018) - New territorial development tools and cooperation for the programming period 2014-2020

³⁰² Source: https://enrd.ec.europa.eu/leader-clld/leader-toolkit/leaderclld-explained_en

³⁰³ Source: https://enrd.ec.europa.eu/leader-clld/lag-database_en



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7.1.3 Other territorial tools supporting initiatives

While ITI and CLLD are ready-made tools, the third option provides the opportunity to tailor-make the right territorial tool for the implementation of the strategy. That could be existing territorial structures (EGTC - European Groupings of Territorial Cooperation) or structures established just for this purpose (such as a Steering Committee) or a Small Project Fund. Such a strategy for the development of a certain territory refers to the notion of functional areas and not for a certain programme (programme strategy), not being limited to Interreg, and it could also include integrated actions supported by other funding mechanisms. If the programme wants to support different functional areas, then the programme also needs to develop different territorial or local development strategies³⁰⁴.

According to art. 23 draft CPR, a ‘territorial strategy’ should contain the following:

- the geographical area covered by the strategy;
- an analysis of the development needs and the potential of the area;
- a description of the integrated approach (the multi-sectoral character);
- a description of the involvement of all partners in preparation and implementation of the strategy

Some argue that an Interreg programme in itself is by definition a territorially-integrated functional area, and can be considered as such an integrated territorial strategy within the framework of PO 5, since Interreg programmes are multi-sectoral, multi-level and multi-stakeholder in their approach. However, there is no such general rule. The starting point is to define the relevant functional area(s) which through PO 5 would be able to implement their territorial strategies in an integrated way. Functional areas are areas with a high degree of interactions and interdependencies, where simultaneous actions in different sectors are necessary for future development (education, employment, transport, health, business support)³⁰⁵.

7.1.3.1 European Grouping of Territorial Cooperation (EGTC) and Euroregions

The European Grouping of Territorial Cooperation (EGTC) is an European legal instrument designed to facilitate and promote cross-border, transnational and interregional cooperation. The EGTC is a legal entity and as such, will enable regional and local authorities and other public bodies from different states to set up cooperation groupings with a legal personality. For example, an EGTC or EGTC members can be: Member States, regional or local authorities, associations, any other public body³⁰⁶. Under specific conditions, it is also possible for entities from outside the European Union to participate in an EGTC. In this case, the country must either be a neighbour of one of the Member States involved, or part of a joint cross-border, transnational or sea-basin programme. However, in all cases at least one member of the EGTC has to be located on the territory of an EU Member State³⁰⁷.

The EGTC enables public authorities to team up and deliver joint services, without requiring a prior international agreement to be signed and ratified by national parliaments. Member States must however agree to the participation of potential members in their respective

³⁰⁴ EC (18 June 2020) - Policy Objective 5, available at <http://www.interact-eu.net/library#2974-publication-bringing-territoriality-interreg-policy-objective-5>

³⁰⁵ EC (18 June 2020) - Policy Objective 5, available at <http://www.interact-eu.net/library#2974-publication-bringing-territoriality-interreg-policy-objective-5>

³⁰⁶ Source: https://ec.europa.eu/regional_policy/en/policy/cooperation/european-territorial/egtc/

³⁰⁷ Interact (2015) - Fact Sheet; EGTC - European Grouping of Territorial Cooperation

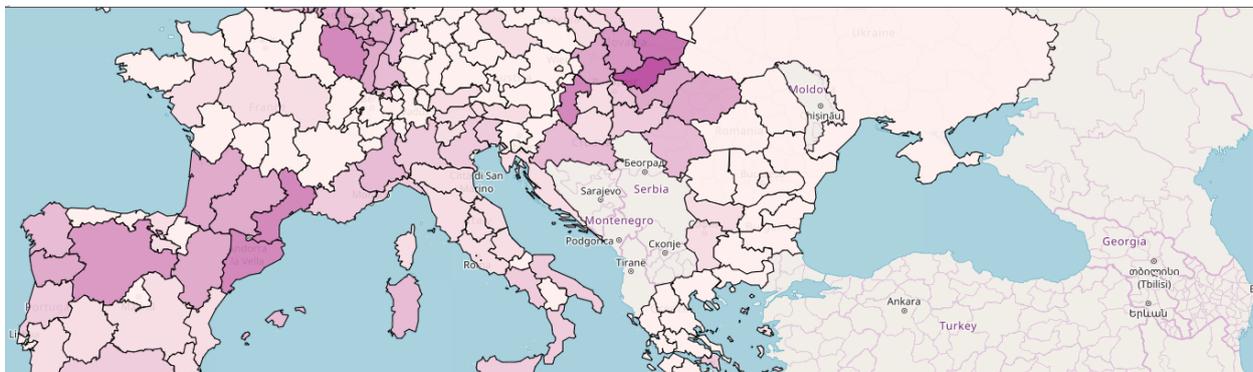


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countries. The law applicable for the interpretation and application of the convention is that of the Member State in which the official EGTC headquarters are located³⁰⁸.

Some of the challenges in establishing an EGTC are: the time-consuming and complex procedures, national implementation of the EGTC regulation may differ, not enough regulation provisions of membership of partner countries and their regional and local authorities, insufficient awareness of EGTC and their potential use in cooperation programmes. The uptake of using EGTCs has differed considerably across Europe, studies showing that the EGTC distribution in Europe partly reflects on the centralized versus decentralized policy systems, as well as on patterns of governance diffusion based on spatial proximity³⁰⁹. According to the European register of EGTC³¹⁰, at the level of year 2019 there were not established any EGTCs in the Black Sea Basin analysed area (regions of Romania, Bulgaria and Greece).



Map no.11 - EGTCs (source: CoR portal - portal.cor.europa.eu)

Euroregions have largely been established without reference to a European Grouping of Territorial Cooperation (EGTC). However, since the objective of an EGTC is to facilitate and promote territorial cooperation with the aim of strengthening economic, social and territorial cohesion, an EGTC could indeed be a suitable instrument for the establishment, or further development, of a Euroregion.

Euroregions can be considered structures of cross-border territorial governance aimed at creating an integrated territory through specific policies in various sectors, such as local economy, social networks, cultural activities, educational facilities, transportation networks, environmental conservation³¹¹. Euroregions do not represent a new local or regional institutional-administrative level, but rather an exchange and governance point for already existing public and private institutions. These territorial entities are set-up by partners from two or more cross border regions in different countries. The first Euroregion, Euregio, was established in 1958 on the Dutch-German border.

In the Black Sea Basin analysed area, there are 4 Euroregions established: Lower Danube Euroregion, Danube-Dobrogea Euroregion and Black Sea Euroregion.

³⁰⁸ https://ec.europa.eu/regional_policy/en/policy/cooperation/european-territorial/egtc/

³⁰⁹ Sielker, F. (2018) - The European Commission's proposal for a cross-border mechanisms (ECMB): Potential implications and perspectives, available at https://www.researchgate.net/publication/328770964_The_European_Commission's_proposal_for_a_cross-border_mechanism_ECBM_Potential_implications_and_perspectives

³¹⁰ Source: <https://portal.cor.europa.eu/egtc/CoRActivities/Pages/egtc-map-2.aspx>

³¹¹ Berzi, M., Camonita, F., Noferini, A., Durà-Guimerà, A. (2016) - Euroregions as drivers of Cross-Border Cooperation (CBC): comparing recent experiences of excellence in governance across the EU



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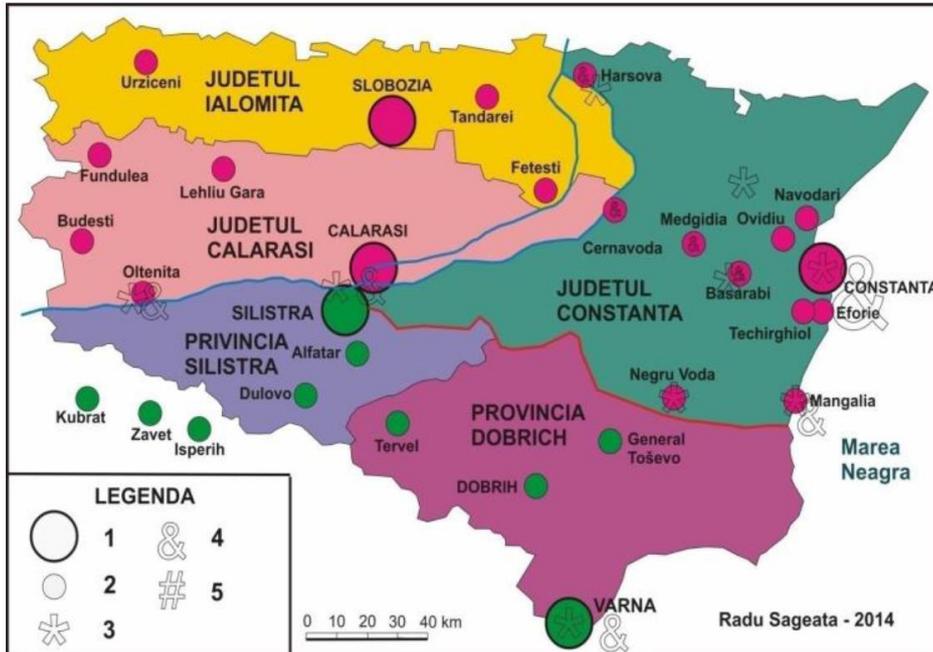
Euroregion	Countries involved
Lower Danube Set up in 1997-1998	Romania (Galati, Braila and Tulcea counties) Ukraine (Odessa Regional Council, Odessa Regional State Administration and Reni District Council) Republic of Moldova (Cahul District Council and Cantemir District Council)
Danube-Dobrogea Set up in 2002	Romania (Ialomița, Călărăși and Constanța counties) Bulgaria (Silistra and Dobrich provinces)
Black Sea Euroregion	Romania (Constanța and Tulcea counties) Bulgaria (Burgas, Dobrich and Varna provinces)
Euro-Caucasus Euroregion Set up in 2009	Armenia (avush, Lori and Shirak municipalities) Georgia (Dmanisi, Bolnisi, Marneuli and Ninotsminda municipalities)



Map no. 12 Lower-Danube Euroregion (source: Wikipedia)



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Map no. 13 - Danube-Dobrogea Euroregion (source: Marinescu, S, Bogdan, V (2020) - The Economic Development of Cross-Border Cooperation Euroregions of Romania as a Determinant of European Security)



Map no. 14- Black Sea Euroregion

Euroregions can represent real factors of progress in the region, ensuring the prosperity and stability of the Black Sea Basin area. However, the success in implementing Euroregions depends on multiple factors, such as the political support, institutional capacity, ensuring multiple (i.e. legislative, technological, financial, etc.) support for communities, connecting



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the provisions of the internal law to the requirements of the European Union framework, streamlining local decisions, coordinating the achievement of practical efforts, all being produced for long periods of time.

7.2 SWOT analysis and preliminary conclusions

SWOT – A COOPERATION AREA CLOSER TO CITIZENS	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Integrated, bottom-up and territorial approaches help local communities identify the challenges of a specific functional area and identify strategic approaches to tackle those multiple challenges; • Experience of Member States with CLLD (community-led local development) under LEADER axis. 	<ul style="list-style-type: none"> • Integrated territorial investments (ITI) and community-led local development (CLLD) only in Member States; • Reduced models of implementing cross-border integrated strategies - even in other EU regions; • Challenges in adapting the EU regulations to the transnational context and to the legislation of the participating countries; • -Limited institutional capacity of local and regional authorities, as well as of civil society, in participating in this type of bottom-up initiatives
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Increase the institutional capacity of public and private stakeholders to cooperate across borders for the purposes of improving multi-level governance (ISO1) 	<ul style="list-style-type: none"> • Tradition of centralized administrative systems in the participating countries characterized by the use of bottom-up approaches; • Heterogeneity of the area (cultural, economic, political etc.)

The opportunity of using tools for integrated territorial development, such as ITI and CLLD, EGCTs can bring several advantages, as they can provide a specific framework for cooperation, as well as a place-based and integrated approach to local challenges. However, taking into consideration the insufficient experience at European level and the lack of examples in EU countries in applying these tools at cross-border level, their possible implementation can bring new challenges in adapting the European regulations both to the transnational context, as well as to national legal frameworks.



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The integrated territorial strategies are meant as vehicle of cooperation for the sub-national level. Local authorities are in a difficult situation in some of the Black Sea countries, thus the bottom-up initiatives may encounter difficulties in such an environment. Moreover, bringing Europe and its neighbourhood closer to its citizens is a cross-cutting issue that goes hand in hand with good governance. It also includes participation of the civil society. Thus, one policy element of critical importance is the institutional capacity of local and regional authorities in this type of cooperation.

As further discussed in the next chapter, the implementation of Policy Objective 5 is closely linked to the Interreg-specific objective 1 "A better Interreg governance". Therefore, the support of the involvement of local communities and civil society in such complex instruments and being more applicable to the specificities of the Black Sea Basin could be provided under the Interreg Specific Objective (ISO) 1³¹².

³¹² EC (2020) - ANNEX IV Orientations for the Interreg NEXT Black Sea Basin cooperation



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Chapter 8 - Better governed cooperation area (ISO1)

Interreg Specific Objective 1 *A better cooperation governance* under the 2021-2027 Interreg Regulation is a dedicated objective shaped on the specific of Interreg programmes.

The difference between “thematic” policy objectives 1 to 4 and PO 5 on integrated territorial development and ISO 1 is that while the former address single thematic challenges (1-4) respectively integrated, strategy-based development approaches (PO 5) in a certain territory, ISO 1 addresses governance challenges related to cooperation³¹³. ISO 1 is a catalyst to make the cooperation in the area and programme strategies work, or make it work better and more sustainably. ISO 1 is neither a thematic policy objective nor an objective limited to one specific theme, as it should focus on governance issues for cooperation.

Governance in a cross-border transnational context stands for a framework that enables diverse public and private stakeholders to cooperate across borders³¹⁴. Besides the interdependence of various actors, an increasing interdependence between governments of different territorial levels can be witnessed, both at supra-national and sub-national level, leading to a model of multi-level governance.

Multi-level governance is defined as the vertical (multiple, different territorial levels involved: local, regional, sub-national, national, macro-regional) and horizontal (multiple actors: governmental, non-governmental, society, private) dispersion of central government authority³¹⁵ and refers to both political structures and decision making processes. Thus, the concept of multi-level governance adds the dimension of scale.

Cross-border governance is characterised by a number of distinctive features³¹⁶:

- ✓ The territorial dimension - the coordination and cooperation processes are constituted within an area whose spatial characteristics - presence of natural boundaries, population density, degree of socioeconomic integration etc. - determine the resulting challenges to be matched with regard to the production of joint spatial solutions. The territorial dimension of cross-border cooperation has a strong inter-relation with the given politico-administrative boundaries which makes it more difficult to handle spill-over effects that typically exceed these limits.
- ✓ The transnational dimension - this type of regional governance takes place within a context that involves relations between different countries, decision arenas of different political and administrative systems have to be inter-connected. The challenge here is not only to coordinate different delivery-mechanisms of different politico-administrative systems, but also to manage the complex “embeddedness” of the cross-border territorial sub-system into the respective national politico-administrative systems.
- ✓ The European dimension - European notions, objectives and policy approaches, such as “territorial cohesion” or “European Neighbourhood Policy” are concepts that relate directly to the European dimension of cross-border cooperation.

³¹³ Interact (October 2020) - ISO1: Better Cooperation Governance, available at: <http://www.interact-eu.net/library#3082-publication-iso-1-better-cooperation-governance>

³¹⁴ Source: <http://www.espaces-transfrontaliers.org/en/resources/topics-of-cooperation/themes/theme/show/cross-border-governance/>

³¹⁵ Bache, I. & Flinders, M. (2004). Themes and Issues in Multi-level Governance, in Bache, I. & Flinders, M. (Eds.), Multi-level governance. Oxford/New York: Oxford University Press, pp. 1-11 & pp. 195-206.

³¹⁶ Beck, J. - *Cross-border cooperation and the challenge of transnational institution-building - the example of the European Grouping of Territorial Cooperation (EGCT)*



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- ✓ The thematic dimension - cross-border cooperation consists of less or more integrated approaches of cooperation between different given national policy areas. The complexity of such governance is increased by the fact that variable policy types may determine the interests and strategies of the actors involved directly, thus also affecting the interaction style, the applied decision rules and ultimately the efficiency of cross-border problem-solving significantly.

The structures of cross-border governance consist primarily of transnational institutional players. However, the involvement of civil society and private sector players is an important element. In this way, alongside the political pillar, the economic pillar (chambers of commerce, chambers of trade, development agencies, clusters, etc.), the scientific pillar (universities, further education institutions, research centres) and the civil society pillar (members of the public interested in cross-border issues, associations, private sector groupings and foundations, and official institutions) should be ensured to enhance cooperation across borders.

For the purposes of improving cooperation governance, the following actions under this policy objective are indicated in the draft Interreg Regulation to be covered by transnational cooperation programmes³¹⁷:

- enhance institutional capacity of public authorities and stakeholders to implement macro-regional strategies and sea-basin strategies, as well as other territorial strategies;
- building up mutual trust, by enhancing sustainable democracy and by supporting civil society actors and their role in reforming processes and democratic transitions.

Hence, the focus of this chapter shall be on the following:

- The institutional and stakeholder capacity to participate in and benefit from regional and territorial strategies in the Black Sea Basin area and coordination and cooperation with other territorial programmes and EU macro-regional strategies;
- The state of civil society and its contribution to democracy in the Black Sea basin area.

8.1 Institutional and stakeholder capacity to participate in and benefit from regional and territorial strategies in the Black Sea Basin

8.1.1 Enhance institutional capacity

Support to the implementation of regional strategies and other territorial strategies through dedicated support to institution building, coordination and governance of macro-regional, sea-basin and other territorial strategies³¹⁸ should be considered as a specific action offered under ISO 1 for transnational programmes working in territories covered by such strategies, for which the alignment of programme priorities with the priorities of the respective strategy is obligatory³¹⁹ and work under this objective could be an incentive to deepen the work on shared priorities.

The implementation of the strategies includes tasks such as facilitating generation and implementation of initiatives and projects, setting of indicators and targets, reinforcing

³¹⁷ Draft Interreg Regulation, June 2020 - art. 14(4)(b) and (c)

³¹⁸ Interact (October 2020) - ISO1: Better Cooperation Governance, available at <http://www.interact-eu.net/library#3082-publication-iso-1-better-cooperation-governance>

³¹⁹ Draft Interreg Regulation, June 2020 - art. 15(3)



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bridges to the relevant EU funding instruments and programmes, and participation in programme committees, where appropriate.

Macro-regional strategies represent a new opportunity for comprehensive development of a larger region, addressing common challenges and potential. They represent a clear EU value added, and existing EU horizontal policies are reinforced.

As the key political initiative for the EU's engagement in the region, the Black Sea Synergy Initiative (BSS) and the Common Maritime Agenda (CMA) represent the strategic framework for enhanced regional cooperation in the Black Sea area.

As for its governance structure, the Common Maritime Agenda is a multi-level type of sea basin initiative³²⁰, cutting across policies, ministries and levels of government. The participating countries set priorities, take ownership, align policies and funds at national level, encourage the participation of private investors and provide the relevant resources, based on the countries' capacity.

The regional organisations and bodies active in the regions are closely involved in the CMA, including the Permanent International Secretariat of the Organization of the Black Sea Economic Cooperation (BSEC PERMIS) and the Permanent Secretariat of the Commission on the Protection of the Black Sea against Pollution (Black Sea Commission) as consultative bodies, the Secretariat of the General Fisheries Commission for the Mediterranean, the Secretariat of the Conference of Peripheral and Maritime Regions, and the Managing Authority of the Joint Operational Programme Black Sea Basin as observers.

From the implementation point of view, the implementation process of the Common Maritime Agenda takes place through both political and operational coordination:

- Political coordination - provided through ad hoc Ministerial meetings. These meetings are convened upon the initiative of the coordinator of the Common Maritime Agenda Steering Group and benefit, as much as possible, from the calendar of the Ministerial meetings, organised by the Organization of the Black Sea Economic Cooperation (BSEC). The Ministers provide political guidance, review progress and achievements and revise priorities as necessary. They could consider, launch and commit political support for flagship regional projects. The European Commission should ensure coordination among the relevant EU policies and initiatives, and as much as possible, the alignment of the EU funds and programmes with the priorities of the Agenda.

- Operational coordination - ensured through a Common Maritime Agenda ad hoc Steering Group, which coordinates the implementation of the goals, priorities and actions of the Agenda. To this end, the work of the Steering Group will be coordinated by one of the participating countries on a voluntary rotation basis and on a one-year term. The European Commission remains closely associated to the work of the Group Coordinator and of the Steering Group. The mandate, functions, coordination and composition of the Steering Group are validated at Ministerial level. Technical groups involving experts and stakeholders may be established to ensure appropriate discussion and implementation at operational level and to promote the definition and identification of projects. Key stakeholders should be involved, including national, regional and local authorities, economic and social actors, civil society, academia and non-governmental organisations. Sectoral meetings/business fora may be organised, at the initiative of one or more of the participating countries. The Steering Group

³²⁰Source: https://ec.europa.eu/info/news/launch-european-black-sea-strategic-research-and-innovation-agenda-2019-may-08_en



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may facilitate the organisation of these meetings, for instance with the identification of relevant stakeholders.

To make the Agenda work and to attract investments, flagship regional projects - potential joint regional projects as well as bankable investment projects - need to be suggested by the countries to guide the implementation of the Agenda.

The successful implementation of regional strategies largely depends on the institutional capacity of the multiple-level institutions and actors involved in its governance. It becomes even more challenging as the Black Sea Basin area is a large heterogeneous area, from a demographic, social, economic and political point of view.

Institutional quality is defined as a multi-dimensional concept consisting of high impartiality and quality of public service delivery, along with low corruption³²¹. In order to have an insight into the efficiency of institutions in the area, the World Bank's Worldwide Governance Indicator (WGI) measuring the governance effectiveness will be taken into account, as it deals with the capacity of governments to effectively formulate and implement sound policies³²².

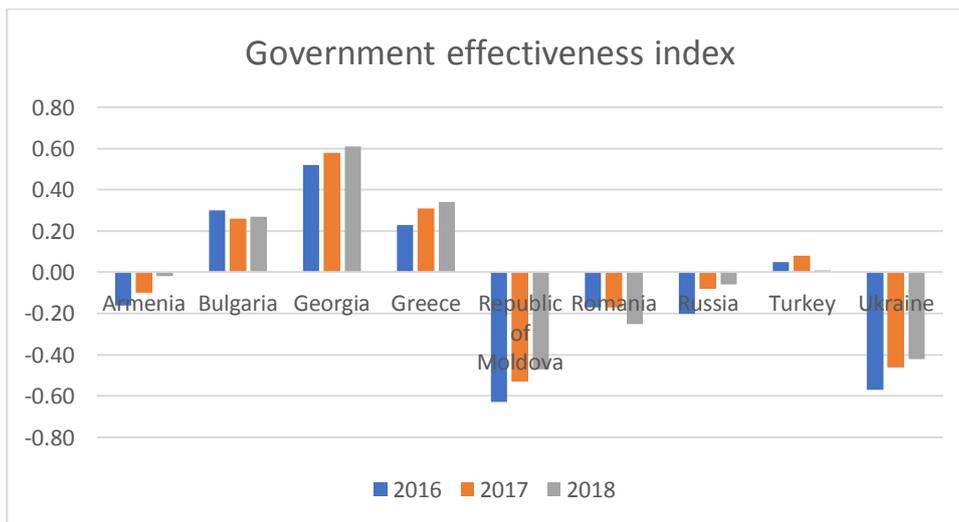


Figure no.62- Government effectiveness index³²³

The EU average for 2018 was 1.04 points. The highest value was in Finland: 1.98 points and the lowest value was in Romania: -0.25 points. In addition, the indicator shows that Bulgaria, Georgia and Greece are above the EU average, whereas Moldova and Ukraine show rather low levels in this regard.

Improving the quality of governance leads to the development of regions with lower growth rates and its dimensions should be addressed by tailored measures, as “low quality government affects regional environmental performance and decisions on public investment and threatens inclusiveness and participation in the political process”³²⁴. Consequently,

³²¹Source: https://ec.europa.eu/regional_policy/en/information/maps/quality_of_governance#1

³²² Mirtl, J. - The Role of Institutional Capacity in Fostering Economic, Territorial and Social Cohesion in the Danube Region

³²³ The ranking is from -2.5 as less effective, to 2.5 as more effective.

³²⁴ European Commission, 2017. My Region, My Europe, Out Future - Seventh report on economic, social and territorial cohesion



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administrative capacity can also be a determinant factor in the success of cooperation initiatives.

In addition to the above-mentioned indicator, other indicators measuring public sectors performance indicate that Member States in the area perform less efficiently than the EU average³²⁵. According to a recent EC study³²⁶ on a scale from 1 to 7 the scores given to the public sectors of the three Member States part of this cluster are ranked between 3.6 (Greece) and 3.1 (Bulgaria).

The experience in the previous BSB programmes revealed that the majority of the applications were submitted by lead beneficiaries from the Member States, situation closely interdependent to the higher institutional capacity of beneficiaries in these states related to EU funded projects. However, in general, the participation of public authorities from all countries remained lower than expected.

8.1.2 Digital public services

Another important element for providing good quality territorial governance is the level of transformation of public services through digitalisation. E-government has been employed to mean everything from ‘online government services’ to ‘exchange of information and services electronically with citizens, businesses, and other arms of government’. Traditionally, e-government has been considered as the use of ICTs for improving the efficiency of government agencies and providing government services online. Later, the framework of e-government has broadened to include use of ICT by government for conducting a wide range of interactions with citizens and businesses as well as open government data and use of ICTs to enable innovation in governance³²⁷.

*E-government development index*³²⁸ is used to measure the willingness and capacity of national administrations to use information and communication technologies to deliver public services. While e-government rankings tend to correlate with the income level of a country, financial resources are not the only critical factor in advancing digital government, but also the country’s political will, strategic leadership and commitment to advance digital services³²⁹.

Country	Rank 2016 ³³⁰	EGDI 2016	Rank 2018 ³³¹	EGDI 2018	Rank change 2016 to 2018
Armenia	87	0.5179	87	0.59	0
Bulgaria	52	0.6376	47	0.7177	-5
Georgia	61	0.6108	60	0.6893	-1
Greece	43	0.6910	35	0.7833	-8
Republic of Moldova	65	0.5995	69	0.6590	+4
Romania	75	0.5611	67	0.6671	-8
Russian Federation	35	0.7215	32	0.7969	-3
Turkey	68	0.5900	53	0.7112	-15
Ukraine	62	0.6076	82	0.6165	+20

Table no. 6- E-government development index

³²⁵ Joint paper - Black Sea Basin programme

³²⁶ EC, *Public administration characteristics and performance in EU28*

³²⁷ Source: <https://publicadministration.un.org/egovkb/en-us/About/UNeGovDD-Framework>

³²⁸ Source: <https://publicadministration.un.org/egovkb/en-us/About/UNeGovDD-Framework>

³²⁹ Source: <https://www.un.org/development/desa/publications/publication/2020-united-nations-e-government-survey>

³³⁰ Out of 193 countries

³³¹ Out of 193 countries



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Alongside these trends, the COVID-19 pandemic has now not only reinvigorated the role of digital government in its conventional delivery of public services and in ensuring business continuity, it has also brought about innovative ways in managing the crisis, such as in contact tracing, e-health, online learning, and remote working.

The e-participation index

Promoting participation of citizens is the cornerstone of socially inclusive governance. The goal of e-participation initiatives should be to improve the citizen's access to information and public services and promote participation in public decision-making which impacts the well-being of society, in general, and the individual, in particular³³².

The e-participation index focuses on the use of online services to facilitate provision of information by governments to citizens (“e-information sharing”), interaction with stakeholders (“e-consultation”), and engagement in decision-making processes (“e-decision making”).

Country	Rank 2016	EPART 2016	Rank 2018	EPART 2018	Rank change 2016 to 2018
Armenia	84	0.5254	103	0.5674	+19
Bulgaria	43	0.6949	35	0.8708	-8
Georgia	76	0.5593	87	0.6236	+11
Greece	65	0.6102	34	0.8764	-31
Republic of Moldova	50	0.6610	37	0.8596	-13
Romania	60	0.6271	69	0.7079	+9
Russian Federation	32	0.7458	23	0.9213	-9
Turkey	60	0.6271	37	0.8596	-23
Ukraine	32	0.7458	75	0.6854	+43

Table no. 7 - The e-participation index

Considering the fact that digital public services and a digital economy can reduce the challenges of peripherality, future governance of the target area could benefit from furtherly developing this sector through a stronger cooperation.

8.2 Civil society organisations and sustainable democracy in the Black Sea basin area

In addition to enhancing institutional capacity, Interreg programmes at external borders should focus strongly on support to sustainable democracy and civil society as, to some extent, such programmes work at the edge of cohesion policy and EU external policy³³³.

The importance of stimulating cooperation with the civil society organizations in the Black Sea region with a view to facilitating sustainable development and increasing societal resilience was reiterated by the Foreign Affairs Council of 17 June 2019. Creating space for civil society remains a constant priority³³⁴.

³³² Source: <https://publicadministration.un.org/egovkb/en-us/About/UNeGovDD-Framework>

³³³ Interact (October 2020) - ISO1: Better Cooperation Governance, available at <http://www.interact-eu.net/library#3082-publication-iso-1-better-cooperation-governance>

³³⁴ EC (2020) - Joint paper on Interreg NEXT Strategic Programming 2021-2027. Interreg NEXT programmes on EU external borders with the neighbouring partner countries - Annex IV Orientations for the Interreg NEXT Black Sea Basin cooperation



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The shrinking space of civil society in the region continued to be a cause for concern. Good governance includes active participation of civil society in the region. The NGOs often remain poorly anchored in society, with low membership and volunteering levels and even lower levels of individual donations, relying mostly on foreign or public funds.

With strong competition for funding, local NGOs often remain organization-centered rather than joining forces in coalitions and networks around issues. Fostering a collaborative spirit among NGOs and connecting them to the wider society remains a challenge in large parts of the Black Sea Basin area.

At the level of the Black Sea Basin, NGO cooperation has developed within the Black Sea NGO Forum, which met regularly since its launch in Bucharest in 2008, providing space for debate, mutual knowledge and cooperation among civil society representatives in the Black Sea region. The Forum has been organized with the support of the Romanian Ministry of Foreign Affairs and the European Commission, in the framework of the Black Sea Synergy. This EU funded project is aimed at fostering regional cooperation among civil society organisations that support the creation of joint partnerships and projects³³⁵. Where relevant, new instances of civil-society cooperation, could build upon the work of the Black Sea NGO Forum.

Following an interactive process organised during the 12th edition of the Black Sea NGO Forum (Istanbul, 2019), the Strategic Framework for Civil Society Cooperation in the Black Sea Region was revised and later on endorsed by participants.

According to the newly revised Strategic Framework³³⁶, for the period 2019 - 2024 the Black Sea NGO Forum will focus on:

1. Supporting the creation of formal and informal regional thematic NGO networks in the following cooperation areas: knowledge networks for development, anti-corruption, civic engagement, youth, culture and education, sustainable development, human rights, networking, media and communication, CSO sustainability and resilience, environment and climate change, sustainable development and corporate, social responsibility, volunteering development

2. Promoting and supporting an enabling environment for civil society in the Black Sea Region, with focus on building the resilience of civil society (at both internal and external level).

The Eastern Partnership Civil Society Forum also provides a medium for cooperation among NGOs, from both sides of the EU external borders, on reforms in Black Sea Partner Countries.

All the countries in the Black Sea Basin region are members of the Council of Europe and signatories of the European Charter on local self-government, which was supplemented in 2009 by an additional protocol on citizen participation. They all take part in the Council of Europe Congress of the Local and Regional Authorities that promotes the principles of local democracy³³⁷.

The Assembly of European Regions (AER) provides also an active forum for interregional cooperation at a wider Europe level, and membership at regional level from all the Black Sea Basin countries is widespread³³⁸. In 2011, the EU Committee of the Regions established a Conference of the Regional and Local Authorities for the Eastern Partnership (CORLEAP) that

³³⁵Source: https://eeas.europa.eu/sites/eeas/files/factsheet_blackseasynergy_2019_en_final_digital.pdf

³³⁶ Black Sea NGO Forum website

³³⁷ Council of Europe website

³³⁸ Assembly of European Regions website



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provides a platform for dialogue between local and regional authorities from the EU and the Partner Countries.

Nevertheless, the previous BSB programmes have been an important vector for consolidation of Black Sea NGO Community, an important share of partners in the approved projects under the 2014-2020 programme being represented by civil society organisations (75%).

The CSO Sustainability Index³³⁹ measures the strength and overall viability of civil society sectors. The Index is intended to evaluate the overall level of development of the CSO sector as a whole³⁴⁰. Seven different dimensions of the CSO sector are analysed in the CSO Sustainability Index as follows: legal environment, organizational capacity, financial viability, advocacy, service provision, infrastructure, public image.

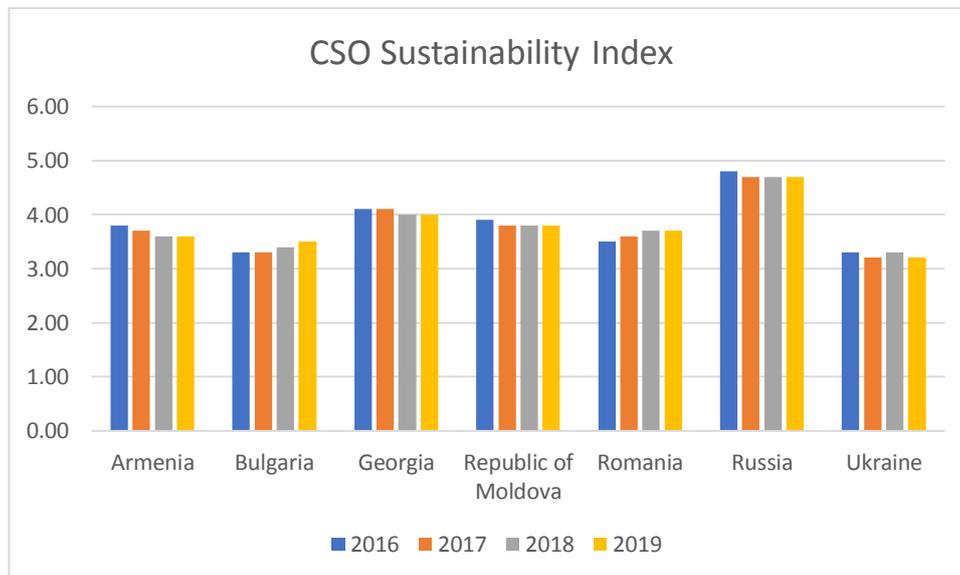


Figure no. 64 CSO Sustainability Index

One way to increase the political, societal sustainability of democracy is by strengthening its participatory dimension by empowering citizens and enabling the civil society to participate in decision making processes and governance. The importance of this has been reiterated by the “Civil Society Days 2019” conference organised by the European Economic and Social Committee³⁴¹.

The spread of the new coronavirus has made civil society and donors alike to embark in a process of transformation, being forced to adapt, to focus on a more efficient management of limited resources and to mobilize volunteers to reach beneficiaries who need assistance. Another trend is the decrease in resources available for humanitarian assistance programs, international cooperation, monitoring of public policies, and ensuring the transparency in decision-making processes, some NGOs being better prepared, others being constrained to cease their activity or to rethink the activities developed within their projects. However, civil society organizations remain instrumental in addressing the crisis and its effects, as they can mobilize volunteers, reach beneficiaries from vulnerable categories, and communicate messages tailored to communities with special needs³⁴².

³³⁹ USAID (<https://csosi.org/>)

³⁴⁰ Score from 7 to 1 - the lower score means more sustainable

³⁴¹ Source: <https://www.eesc.europa.eu/en/agenda/our-events/events/civil-society-days-2019>

³⁴² Black Sea NGO Forum (2020) - The Impact of the COVID-19 Pandemic on the Civil Society Sector in the Black Sea Region - Policy Paper



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8.3. SWOT analysis and preliminary conclusions

SWOT – BETTER GOVERNED COOPERATION AREA (ISO1)	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Existence of strategic framework with high political commitment (Common Maritime Agenda); • Black Sea NGO forum meets regularly; • Civil society and civic movements have been active. 	<ul style="list-style-type: none"> • The existence of areas with reduced administrative capacity and the lack of resources for implementing cooperation initiatives; • Low level of involvement of public authorities in projects financed under the previous programmes; • Digital public sector divide; • The differences between the administrative systems in the countries; • NGOs often remain organization-centered rather than joining forces in coalitions and networks around issues; • Relatively reduced coverage of digital public services; • The language barrier represents an important obstacle to collaboration between stakeholders.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • Existence of platforms for dialogue and cooperation CoE Congress of the Local and Regional Authorities, Assembly of European Regions (AER), as well as the EU Committee of the Regions Conference of the Regional and Local Authorities for the Eastern Partnership (CORLEAP); • The continuity of cooperation programmes at European level; • The existence of complementary programmes at European and at national level that could create synergies with actions implemented in the programme area; 	<ul style="list-style-type: none"> • The regional conflicts; • COVID-19 pandemics; • Difficulties that could hamper coordination between the local and national strategies and the development priorities based on the level of stakeholders' involvement or the complexity and extent of the programme area; • The high level of centralization of the BSB countries;



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- **Solid partnerships created by NGOs under the previous BSB programmes.**

Ensuring good governance of the regional strategies in place should focus on the one hand on an improvement of transnational or multilevel structures (the vertical level of governance) and on the other hand on improved governance capacities of actors (the horizontal level of governance), such as:

- strengthening good and stable governance mechanisms and supporting national structures;
- ensuring involvement of key stakeholders (national, regional, local) in capacity building for the strategy implementation;
- strengthening the capacity for territorial analysis on the basis of harmonised data collection;
- supporting project ideas to become mature transnational projects;
- improving communication to raise awareness on relevant strategies;
- improving capacities of regional and local authorities to deliver quality public services to citizens in border regions;
- identification and coordination of all possible funding sources for joint projects, as the stakeholders tend to lack knowledge about different funding sources;
- coordination with other existing and future macro regional strategies;
- empowering local communities;
- civil society participation.

In addition, as identified in the Joint Paper, cooperation between EU Member States and partner countries should enable sharing of best practice and actions can build on existing projects and initiatives, such as the 'Facility for Blue Growth in the Black Sea' project, an EU-funded assistance mechanism launched by the European Commission in November 2017, to promote regional dialogue on blue growth and foster blue economy development in the Black Sea region, as well as to contribute to the formulation of common maritime and research strategic priorities for the sea basin. Through this initiative, administrations and stakeholders in the Black Sea region got support to identify common priorities for cooperation at sea basin level, thus laying the foundation of the Common Maritime Agenda³⁴³.

As regards the civil society, the data suggests that there is room for significant improvement in a number of countries. One way to go about it is to strengthen the role of civil society and include it especially in the regional and local institutions and decision-making processes. Here, civil society and its non-governmental organisations can make important bottom-up contributions to such strategies, thereby creating mutual accountability between the government and the citizens as well as a common identity.

Hence, the **potentials for transnational cooperation to support civil society and democracy** could include:

- Strengthening administrative and institutional capacities of local and regional government via improving the delivery of public services and the outreach to citizens;

³⁴³ https://ec.europa.eu/maritimeaffairs/policy/sea_basins/black_sea_en



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- Strengthening administrative and institutional capacities by fostering citizen-oriented governance and participatory decision making;
- Strengthening the role and capacities of civil society in the democratic processes and enhancing their cooperation with public authorities;
- Developing e-government tools to allow citizens contributing to local and regional strategies and providing suggestions for improving policies;
- Supporting the development of digital ICT solutions to make participation in decision making processes easier for young people;
- Creating opportunities for young people, marginalised groups and elderly citizens to actively engage in local communities, e.g. by supporting voluntary work;
- Exchanging information on best practices on civil-society inclusion in decision making processes



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Chapter 9 - A safer and more secure cooperation area (ISO2)

Regional security concerns and protracted conflicts in the Black Sea area continue to impede the social and economic development of these transition economies³⁴⁴.

The tensions generated by conflicts over territories represent threats for the security of the region as a whole and not only for the states involved in these conflicts. For the Black Sea basin countries, the borders represent sometimes obstacles but also potential bridges for cooperation.

9.1 Border crossing management and mobility

One example of regional cooperation in border crossing management in the Black Sea area is the Border Coordination and Information Centre based in Burgas. Through this contact point, the interest information, regarding the cross-bordering criminality, is submitted to the countries riparian at the Black Sea (Romania, Bulgaria, Turkey, Georgia, Russian Federation and Ukraine) and is processed afterwards in order to solve some extremely complex cases.

Also, very important in this field is the Southeast European Law Enforcement Center, which is a law enforcement, treaty-based international organization that brings together the resources and expertise of Police and Customs authorities that join synergies in combating more effectively trans-border organized crime in the region. It is based in Bucharest; it has several Black Sea States as observers: Bulgaria, Greece, Republic of Moldova, Romania and Turkey, Georgia and Ukraine.

Improving border management and customs cooperation at regional level are becoming increasingly important. The activities of the South-east European Law Enforcement Center and the Border Coordination and Information Centre are relevant in this regard. Challenges such as illegal migration routes running through the Black Sea region highlight the need for improved regional cooperation in this area³⁴⁵.

There are 207 land border crossing check points with neighbouring countries participating in the programme. The number is constant during the 2016-2019. There are regions which have no land crossing points, as they are not located in the neighbourhood of other country. The border crossing regime which includes control rules and procedures is also relevant in this context together with the number and territorial distribution of border crossing points. Visa restrictions do not allow Black Sea citizens to easily visit and collaborate with each other.

³⁴⁴ European Commission, Joint paper on Interreg NEXT Strategic Programming 2021 - 2027

³⁴⁵ EC Joint Staff Working Document: Black Sea Synergy: review of a regional cooperation initiative
https://ec.europa.eu/maritimeaffairs/sites/maritimeaffairs/files/docs/body/swd_2015_6_en.pdf



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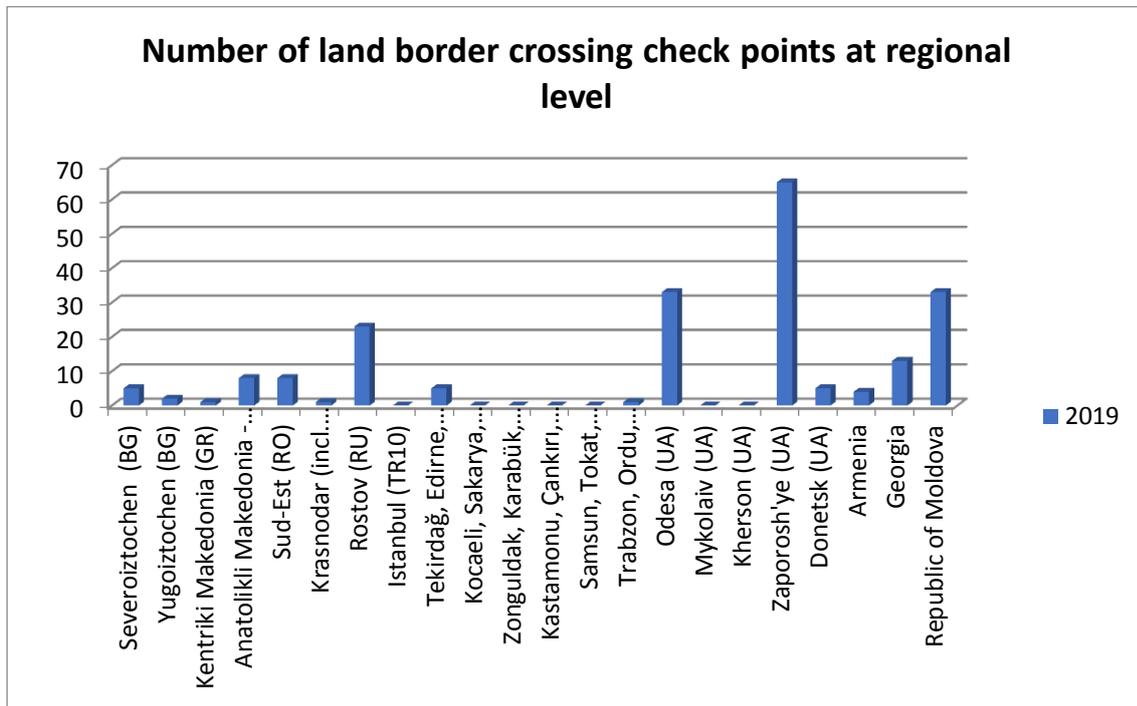


Figure no 66-Number of land border crossing check points at regional level.³⁴⁶

Effective border management requires that the EU’s external borders are both efficient (facilitating legal migration, legitimate trade and transit) and secure (preventing illegal trade and transit as well as irregular migration). In many respects, this requires close cooperation at the national level, but CBC has also an important role to play, for example in upgrading border-crossing infrastructure, in enhancing information exchange and cooperation between border authorities at the local level or in improving governance via a more coordinated approach to management³⁴⁷.

9.2 Migration management

The European Union has been seriously affected in 2015 and 2016 by the refugee and migrant crisis, as consequence of the war in Syria. An extraordinary pressure was put on the EU as hundreds of thousands of persons poured in, often uncontrolled in the Member States. If the Mediterranean Sea was in the forefront of the crisis, the Black Sea played a secondary role. The Black Sea route was temporarily used in 2017, with 537 migrants detected on the Black Sea between August and November, accounting for the highest number of migrants ever detected on this route since 2009³⁴⁸.

On the other hand, the number of refugees present in the EU Member States involved in the Black Sea area was 104 760 in 2019, most of them being located in Greece (80,454), which is one of the main entry points for migration and refugee flows into Europe³⁴⁹. In the second

³⁴⁶ Source: Data provided by participating countries (gathered by Joint Programming Committee country representatives)

³⁴⁷ European Commission, Joint paper on Interreg NEXT Strategic Programming 2021 - 2027

³⁴⁸ Frontex, Risk Analysis for 2018:

https://frontex.europa.eu/assets/Publications/Risk_Analysis/Risk_Analysis/Risk_Analysis_for_2018.pdf

³⁴⁹Source: https://ec.europa.eu/anti-trafficking/member-states/greece_en



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half of 2019, Greece experienced a significant rise in new arrivals, particularly by sea, exacerbating already difficult conditions on the islands in and around the island reception and identification centres³⁵⁰.

Turkey has been host to the largest refugee population globally since 2014. In 2019, the number of Syrians under temporary protection remained stable at nearly 3.6 million. Currently, over 98% of Syrians under temporary protection live in urban, peri-urban and rural areas with less than 2% residing in seven remaining Temporary Accommodation Centres. Turkey also hosts around refugees and asylum-seekers from Afghanistan, Iraq and other countries.³⁵¹

The high number of refugees in Turkey created further migration pressure at the Greek-Turkish borders, in particular sea borders.

Russian Federation hosts also a high number of refugees, but the total number decreased in 2019 (42,413) compared with 2016 (228,981).

Number of refugee population	2016	2017	2018	2019
Armenia	17,883	17,968	17,966	17,980
Bulgaria	17,794	19,166	19,906	20,438
Georgia	2,122	2,089	1,987	1,355
Greece	46,411	38,988	61,446	80,454
Republic of Moldova	432	401	418	423
Romania	2,892	3,908	4,147	3,868
Russian Federation	228,981	126,021	77,382	42,413
Turkey	2,834,441	3,426,786	3,623,192	3,576,370
Ukraine	3,292	3,241	2,606	2,166

Table no. 8 -Number of refugee population³⁵²

The COVID-19 crisis led to a dramatic drop in migration flows to OECD countries. According to preliminary estimates, flows fell by half in the first semester of 2020. Border closures, suspension of domestic and consular services, COVID-19 related restrictions on travel and admission, disruption on international commercial flights explain this trend, as well as the concerns of employers and migrants themselves about travel. Even if migration flows are expected to bounce back as the economy reopens, there are strong signs that they will not reach previous levels for some time because of weaker labour demand, ongoing travel restrictions and alternatives to mobility linked, for example, to the widespread use of teleworking among high-skilled workers and remote learning by students. Migration, on the other hand, will continue to have an important impact on origin countries. Remittances are expected to decline and employment opportunities to become scarcer. As traditional migration destination countries increase their focus on fighting against irregular movements, as legal channels for migration contract and as travel restrictions remain in place, it can be

³⁵⁰ UNHCR, UN Refugee Agency: <https://reporting.unhcr.org/node/14851>

³⁵¹ UNHCR, UN Refugee Agency: <https://reporting.unhcr.org/turkey>

³⁵² Source: Data provided by participating countries (gathered by Joint Programming Committee country representatives) for Republic of Moldova, Romania and Turkey, and World Bank for the rest of the countries



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expected more tension between migration intentions and actual opportunities that, in turn, can generate frustration in origin countries³⁵³.

The BSB countries- such as the Russian Federation, Ukraine, Bulgaria and Romania- have some of the largest emigrant populations within the region³⁵⁴. At over 10 million emigrants in 2019, the Russian Federation had the largest population of its citizens living abroad in Europe.

Just after the EU accession, residents from Romania and Bulgaria started migrating abroad for better jobs and better life conditions. Eurostat estimated that only in 2007, more than one million people migrated abroad from these two countries. And this phenomenon continued over the following years. Romania was the fifth country in the European Union in 2018 in terms of number of people emigrating from the country, (231,661 people left the country), while Bulgaria registered only 33,225³⁵⁵. Also, Armenia is exhibiting one of the world's highest emigration rates in comparison to its overall population³⁵⁶, being place in 2019, on the 18th position in the world.

An important aspect related to migration is the remittances³⁵⁷ sent by migrants to their BSB origin countries. In 2019, the remittances amount received by the BSB countries reached 42,953,900 000 billion \$.

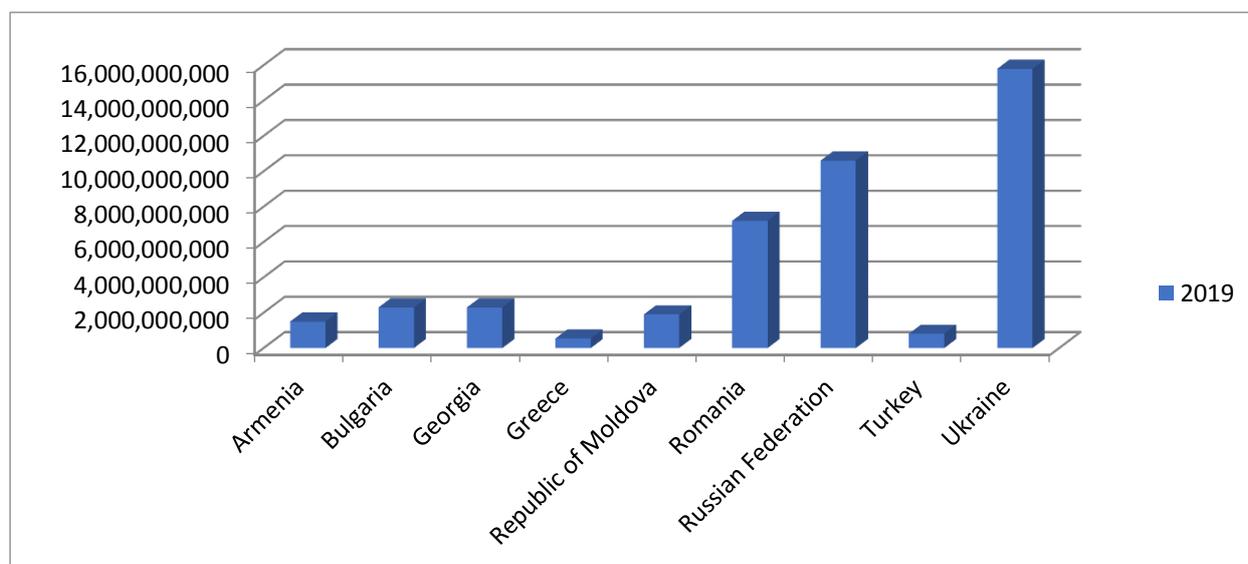


Figure no.67³⁵⁸ Remittances received by the BSB countries as amounts

³⁵³ Source: https://read.oecd-ilibrary.org/social-issues-migration-health/international-migration-outlook-2020_ec98f531-en#page6

³⁵⁴ According to International Migration Organisation, World Migration Report 2020, According to: https://www.un.org/sites/un2.un.org/files/wmr_2020.pdf

³⁵⁵ According to EUROSTAT

³⁵⁶ International Migration Organisation, World Migration Report 2020, According to: [to https://www.un.org/sites/un2.un.org/files/wmr_2020.pdf](https://www.un.org/sites/un2.un.org/files/wmr_2020.pdf)

³⁵⁷ Remittances, usually understood as the money that migrants send back to families and friends in origin countries

³⁵⁸ Source: https://migrationdataportal.org/?i=remit_re_excel&t=2019&cm49=643



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An worrying feature of some BSB countries is the economically dependency of the GDP of the remittances sent by migrants to their BSB countries³⁵⁹: in 2019, in Republic of Moldova, the remittances represented 16,3% of the GDP, followed by Georgia with 14,2%, Armenia with 11,4%, Ukraine with 10,5%, Bulgaria with 3,5%, Romania with 3%, Azerbaijan with 2,3 % Russian Federation with 0,6%, Greece with 0,3% and Turkey with 0,1%.

Net migration³⁶⁰ rates show that Turkey registered positive migration flows in the 2016-2019 period. In Russian Federation, the migration rate was 1, 3 % during the 2015-2020 period³⁶¹.

Net migration rate	2016	2017	2018	2019
Armenia	-8.30	-8.00	-6.20	-5.20
Bulgaria	-1.30	-0.80	-0.50	-0.30
Georgia	-2.20	-0.60	-2.90	-2.20
Greece	-1.40	-2.50	-1.50	-1.40
Republic of Moldova	-0.60	-0.90	n/a	n/a
Romania	-3.20	-2.80	-2.80	-1.20
Turkey	2.30	1.60	4.60	4.90
Ukraine	-4.10	-4.70	-5.50	-6.00

Table no.9 -Net migration rate³⁶²

Regarding the international migrant stock³⁶³, in 2019, there were 24,968,000 migrants living in the BSB countries, out of which 11,600,000 in Russian Federation, followed by 5,900,000 in Turkey and 5,900,000 in Ukraine. Georgia hosted only 79,000 migrants in 2019.

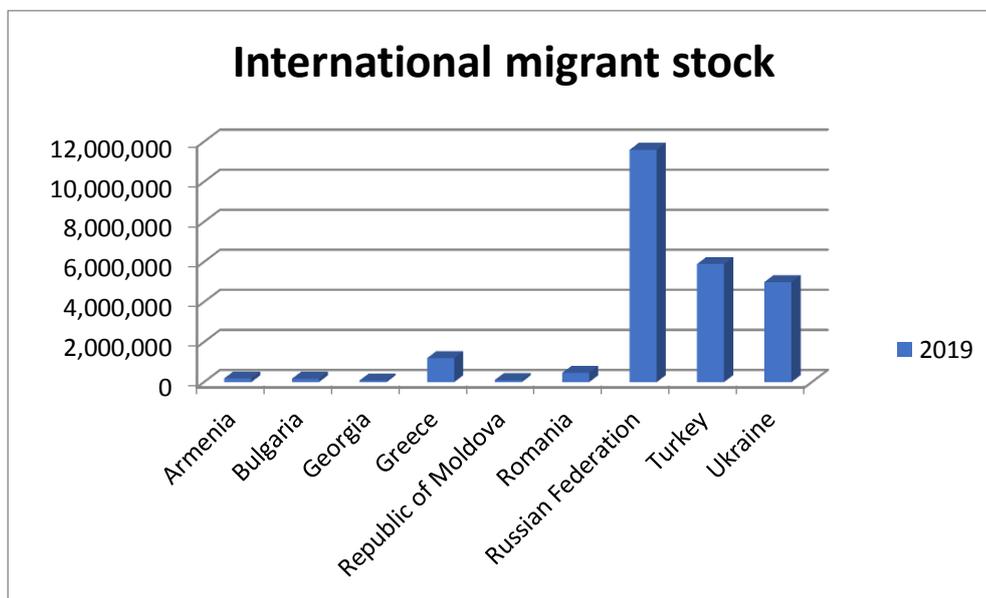


Figure no. 68³⁶⁴ international migrant stock

³⁵⁹ Source: https://migrationdataportal.org/?i=remit_re_excel&t=2019&cm49=643

³⁶⁰ The net migration rate is the difference between the number of immigrants and the number of emigrants (people leaving an area) throughout the year.

³⁶¹ Source: <https://migrationdataportal.org/?i=netmigrate&t=2020>

³⁶² According to Eurostat, except for GE (Geostat)

³⁶³ Stocks include all foreign-born residents in a country, at a certain moment, regardless of when they entered the country



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The international migrant stock as a percentage³⁶⁵ of the total population in 2019, registered high rates in some BSB countries, such as Greece-11,6%, Ukraine 11,3%, Russian Federation-8%, Turkey-7% Armenia-6,4% compared with Republic of Moldova-2,6%, Romania 2,4%, Bulgaria 2,4% Georgia 2%.

With measures introduced by governments to ‘flatten the curve’ of infections, the COVID-19 pandemic is already greatly impacting mobility and migration. Travel restrictions are passed to contain the virus, including by prohibiting entry of residents from other countries, and some countries have closed their borders entirely. Labour migration has been temporarily suspended in some countries while, in others, migration processing and assistance to asylum seekers are being slowed down³⁶⁶. The lack of or inappropriate health insurance, often coupled to insufficient financial resources, has negatively impacted migrants’ ability to take preventive measures against COVID-19 and to receive medical care if contaminated.

Migration needs have been tackled by direct distribution of funds towards the countries hosting large refugees and migrants. In this context, it is worth mentioning the EU Facility for Refugees in Turkey³⁶⁷. The EU Facility for Refugees in Turkey was set up in 2015 in response to the European Council’s call for significant additional funding to support Syrian refugees in Turkey. It has a total budget of €6 billion and focuses on protection and meeting basic needs, as well as education, migration management, health, municipal infrastructure and socio-economic support.

9.3 SWOT analysis and preliminary conclusions

SWOT – A SAFER AND MORE SECURE COOPERATION AREA	
STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> The existence of South-east European Law Enforcement Center and of Border Coordination and Information Centre 	<ul style="list-style-type: none"> Large number of refugees in some BSB countries, especially in Turkey and Greece; Economically dependency of the GDP of the remittances sent by migrants to their BSB countries; Some BSB countries have large emigrant populations; Visa restrictions do not allow Black Sea citizens to easily visit and collaborate with each other

³⁶⁴ Source: https://migrationdataportal.org/?i=stock_abs_&t=2019&cm49=642

³⁶⁵ Source: https://migrationdataportal.org/?i=stock_abs_&t=2019&cm49=642

³⁶⁶ Source: https://www.iom.int/sites/default/files/our_work/ICP/MPR/migration_factsheet_6_covid-19_and_migrants.pdf

³⁶⁷ Source: https://ec.europa.eu/commission/presscorner/detail/en/IP_19_6082



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OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • EU Facility for Refugees in Turkey 	<ul style="list-style-type: none"> • Conflicts in the region; • Covid 19 pandemic

A number of common cooperation opportunities in the border area were identified by the Joint Paper on Interreg NEXT Strategic Programming 2021 - 2027:

- Public health issues also take on a particular importance in a cross-border context, for example in relation to communicable diseases, or possible epidemic or pandemic disease;
- The fight against organised crime is another challenge in border areas. The EU supports bilateral, regional cross-border and international cooperation with third countries in improving the prevention of and fight against organised crime, corruption and terrorism. Specific emphasis should be put on combating all sorts of organised crime, including trafficking of human beings, smuggling, trade of illegal and counterfeited goods, firearms and stolen vehicles or other contraband. Close cooperation at the local and regional level between law-enforcement bodies and other competent authorities on both sides of the EU’s external borders could complement cooperation at the national level.
- Effective border management requires that the EU’s external borders are both efficient (facilitating legal migration, legitimate trade and transit) and secure (preventing illegal trade and transit as well as irregular migration). In many respects, this requires close cooperation at the national level, but CBC has also an important role to play, for example in upgrading border-crossing infrastructure, in enhancing information exchange and cooperation between border authorities at the local level or in improving governance via a more coordinated approach to management.

More precisely, the Joint Paper underlines the fact that in the context of BSB programme, actions enhancing the security of the region should be promoted in close coordination with similar actions under the Black Sea Synergy and EUSDR.

Because of the large cooperation area and to the lack of resources, no projects in the sphere of border management or migration have been financed so far by the previous ENI/ENPI BSB programmes. Building new cross border check points has been financed by the EU mainly by bilateral cooperation programme. Migration is a delicate topic and addressing it requires a lot of funds. At the EU level, there are already other funds dedicated to migration. Moreover, refugees and migration issues do not present common features in all the BSB countries, each country having its own specificity: high number of refugees in Turkey and Greece, countries with high rates of migration (Russian Federation, Romania, Bulgaria, Ukraine, Armenia, and



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Republic of Moldova) and countries economically dependent on remittances received (Ukraine, Armenia, Georgia and Republic of Moldova.

Having in mind all the above, building a safer and more secure BSB cooperation area represents an objective difficult to be addressed by the future Interreg NEXT BSB programme.



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