FRANCE (CHANNEL) – ENGLAND & 2SEAS AREA

SITUATION ANALYSIS AND SWOT

Situation and SWOT analysis of the 2Seas and France (Channel) – England Programme area

Final report

BUREAUBUITEN
economie & omgeving

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Final report

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CONTENT

EXECUTIVE SUMMARY

Aim of the report

For the preparation of the new EU programme period starting in 2014, the Member States of the France (Channel) England programme and the 2Seas programme have launched a joint situation and SWOT (strengths, weaknesses, opportunities, threats) analysis for the area, as the two programmes areas partly overlap. The programme areas consist of the coastal regions of Flanders, Western France, the West of the Netherlands and the South-West and South-East coasts of the United Kingdom and presents a mix of urban and rural territories.

The analysis aims to provide a clear understanding of the commonalities and differences/specificities between the two programmes and established a list of priorities on which to focus for the future programming period and the accompanying intervention strategy for each programme area. To comply with the requirements of the future INTERREG period, the analyses are built around the 10 key thematic objectives defined by the EU2020 strategy in order to be more focused. Furthermore, the report contains an overview of the smart specializations strategies developed by the regions included in the programme areas.

Scope and methodology

The data and policy documents used and the conclusions that are drawn from this analysis are mainly concerned with the state of play of the programme areas; the upcoming operational programmes will give a more detailed outlook to the future. The selection of data and policy documents has been performed in close cooperation with the joint technical programme secretaries and involved member states, and regional representatives and is based on availability and relevance in relation to the programme areas and the thematic objectives. The report does not intend to be all encompassing, but rather aims at presenting a selection of data and policies that cover for the most important subjects in relation to the coming programme period.

The first part of the report consists of a situational analysis. The situational analysis aims to understand the 'big picture' of the environment in which each of the two programmes are operating and presents a) a data analysis, b) a policy context analysis and c) the identification of joint needs. The data analysis presents the state of play of 47 indicators on NUTS2/3 level, sorted by the thematic objectives. Next to conclusions being drawn for each indicator, the analysis also gives an overview of the conclusions on commonalities and differences between the two programme areas. The data analysis is complemented by a policy analysis on European, national and regional level and identifies the main driving forces in terms of policies the (cross-border) territories involved.

The second part of the report is concerned with the SWOT analyses, based on the situation analysis. The SWOT analysis is made separately for the 2Seas and France (Channel) England programme areas and identifies the needs and potential topics for cooperation within each programme area, with a focus on the issues that have a true cooperation nature. Furthermore, the common needs/actions are shown with specific attention for common challenges, policy attention and governance level and their relevance for each of the two programme areas.

Conclusion situational analysis

There are a few general conclusions that count for both programme areas, as regional disparities are often significant and indicators and policies included are focused on a too broad variety of topics to draw non-prioritized conclusions. For more detailed conclusion we would like to refer to the conclusions per indicator in the second chapter.

The 2Seas and France (Channel) England area share many commonalities, but there are some clear differences between the programmes. The programmes share most commonalities on the themes knowledge economy and

low carbon economy. Differences between the current situations in both areas were mainly observed for ICTs, climate change adaptation, sustainable environment, poverty and education.

During the current programme period, the largest negative changes in socio-economic and territorial situations since 2007 took place in SMEs (less investment options, more unemployment), employment and poverty rates. Sustainable transport and ICT levels positively changed since 2007. On the themes that have a specific EU2020 target, most regions are behind schedule:

- Regarding the low carbon economy theme, all regions are below EU targets.
- In the France (Channel) England area, all regions are lagging behind on education targets.
- For the knowledge economy there is a mixed situation, with most regions below EU targets.
- Employment in the 2Seas area is the only target where most regions are on track, but the financial crisis will have a negative impact; in the France (Channel) England most regions are below the line.

Thematic objectives which are, based on the policy analysis, a priority at all levels (national, regional, county, cities) and in most/all territories are the knowledge economy, climate change adaptation, sustainable environment and to a lesser extent SMEs and low carbon economy. Sustainable transport is a theme that is more prioritized in the Netherlands. In France, all thematic objectives are a priority on at least some governmental level whereas predominantly the UK has a more specific focus on knowledge economy, SMEs, climate change adaptation and sustainable environment. ICTs and education are the themes less prioritized. Flanders' main focus in the common priorities knowledge economy, climate change adaptation and sustainable environment and to a lesser extend sustainable transport and employment.

In terms of sectors, the following sectors are mentioned most often for targeted innovation policy and cluster development in the smart specialization strategies:

- logistics, transport (i.e. shipping) and ports, in particular streamlining the logistics chain and making port operations more sustainable;
- environmental & marine technology and developing the "blue economy";
- agro-food;
- renewable energy production and energy efficiency;
- communication, digital and creative industries.

Conclusion SWOT analysis

General conclusions of the SWOT analysis can be drawn from the needs/actions that are derived the identified the strength, weaknesses, threats and with special attention for the opportunities. The table below presents the needs and actions on the thematic objectives and the common challenges and policy attention per programme area and relevant governance level. An explanation of the table can be found below.

Table 0.1 Summary of needs derived fro the SWOT analysis

TO1 : Knowledge economy	Conclusion relevant need for cross-border cooperation
1.1 Refocus R&D on major societal challenges (such as climate change, energy and resource efficiency (blue economy), health, demographic change…).	This is a in both programme areas.
1.2 Promote cooperative approaches in research in order to achieve a "critical mass" for innovation in niche sectors.	This is a relevant need for cross-border cooperation in both areas, but more particularly within the FCE area.
1.3 Strengthen the development of and clustering in strategic sectors to stimulate innovation creation (smart specialisation clusters).	This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.
1.4 Cross-sectoral innovation with ICT, design.	This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.
1.5 Improve R&I in the SMEs (see also TO3).	This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.
TO2: ICT	
2.1 ICT applications for tackling societal challenges (enabler and smart specialisation) see also TO1.	This is a relevant need for cross-border cooperation in both areas.
2.2 ICT for stimulating the economy in rural areas.	This is a relevant need for cross-border cooperation in the FCE area and to a lesser extent in the 2Seas area.
2.3 Roll out of broadband.	This might not be a relevant need for cross-border cooperation in both areas.
2.4 Empowering people to reap the rewards of internet, see also TO 10.	This might be a relevant need for cross-border cooperation in the FCE and the 2Seas area.
TO3: SMEs	
3.1 Connecting SMEs with academia.	This need might be relevant for cross-border cooperation in the FCE and 2Seas areas.
3.2 Business advisory services.	This need might be relevant for cross-border cooperation in the FCE and 2Seas areas.
3.3 Diversification of fisheries and agriculture sector.	This need is relevant for cross-border cooperation in the FCE area, and in a lesser extend it might be relevant for the 2Seas area.
3.4 Providing access to capital.	This need might be relevant for cross-border cooperation in the FCE and 2Seas area.
3.5 Creating cross-border business environment.	This need is relevant for cross-border cooperation in the FCE and 2Seas areas.
3.6 Promoting R&D investment and valorisation in SMEs.	This need is relevant for cross-border cooperation in the FCE and 2Seas areas.
TO4: Low carbon economy	
4.1 Stimulating sustainable (decentralised) energy generation on land and coasts (including development of necessary infrastructure, storage, distribution systems e.g. port facilities).	This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.
4.2 Stimulating sustainable energy generation offshore.	This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.
4.3 Stimulating environmental technologies and bio-economy, e.g. by knowledge development and pilot projects (see also TO1).	This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.
4.4 Stimulating public acceptance and use of renewable energy.	This might not be a relevant need for cross-border cooperation in the FCE as well as 2Seas area.
4.5 Cooperation on international energy connections, generation and management of joint energy supply.	This might be a relevant need for cross-border cooperation in the FCE as well as 2Seas area.
4.6 Carbon storage in empty oil and gas fields.	This need is not relevant for FCE as and might be relevant (limited) for the 2Seas area.
4.7 Smart systems for supply and demand of (decentralized) energy.	This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.
4.8 Stimulating energy efficiency (reduction emission of GHG) in urban areas, enterprises and agriculture.	This might be a relevant need for cross-border cooperation in the FCE as well as 2Seas area, but more particularly within the 2 Seas area.

TO5: Climate change adaption	
5.1 Innovations in climate-proof spatial planning and coastal protection (including legislative measures and risk management policy) to improve the preparedness and resilience of climate change impacts.	This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.
5.2 Integrated water management (water quality, preservation of natural resources, biodiversity) ensuring climate-change resilience of sensitive marine areas	This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.
5.3 Development of scenario planning for (cross-border) disasters, especially flooding, and also droughts.	This is a relevant need for cross-border cooperation in the 2Seas area as well as in the FCE area.
5.4. Innovative climate change adapting solutions for agriculture (water), fisheries and development of aqua-culture.	This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.
5.5 Maritime spatial planning.	This need might not be relevant for cross-border cooperation in the FCE and the 2Seas areas.
5.6 Common information sharing and developing between maritime authorities related to climate change, including the improvement of cross-border marine and coastal observing systems.	This is a relevant need for cross-border cooperation in the FCE area.
5.7 Prevention of inland flooding.	This is a relevant need for cross-border cooperation particularly in the FCE area.
TO6: Sustainable environment	
6.1 Integrated management of coastal and cross-border environmental zones.	This need is relevant for cross-border cooperation in the FCE-area and the 2Seas area.
6.2 Mitigate erosion and natural risks.	This need is of limited relevance for cross-border cooperation in the FCE area.
6.3 Improve maritime safety, potentially through cooperation.	This might not be a relevant need for cross-border cooperation because the relevant governance level for this theme is the national level.
6.4 Develop resource-efficiency policies and changing attitudes of economic actors to more sustainable behaviour.	This need is relevant for cross-border cooperation in the FCE-area and the 2Seas area.
6.5 Strengthen the economy and environmental quality by developing the “Blue economy”.	This need is relevant for cross-border cooperation in both the FCE-area and the 2Seas areas.
6.6 Network approaches, connecting Natura 2000 areas.	This might be a relevant need for cross-border cooperation in both programme areas, especially in the 2 Seas area.
6.7 Development of high quality green tourism using the area’s rich cultural, natural and historical heritage.	This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area (see also need 2, TO 8).
TO7: Sustainable transport	
7.1 Improving cooperation by ports and transport authorities in order to improve interoperability, logistic chains.	This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.
7.2 Promotion and development of more sustainable modes of transport, multimodal and intelligent transport systems and travel behaviour (low noise, less congestion, less CO2-emission), especially in urban areas.	This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.
7.3 Enhancing public transport services in border areas, serving the cross-border commuters and labour markets.	This is a relevant need for cross-border cooperation in the 2Seas area.
7.4 Improving interregional and multimodal transport connections, especially between urban areas / ports and their hinterland. This includes a.o. improving better organization of different transport modes and stimulating the use of existing connections.	This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the FCE programme.
7.5 Remove administrative burdens for short sea shipping.	This is not a relevant need for cross-border cooperation in one of the programme areas.

TO8. Employment and labour market	
8.1 The diversification of the coastal economy into non-farming activities and marine and maritime activities other than fishing.	This need is relevant for cross-border cooperation in the FCE-area.
8.2 Stimulating employment in tourism (growth sector).	This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area (see also need 7, theme 6).
8.3 Remove barriers to labour mobility, e.g. by developing skill systems (see also TO10).	This need might be relevant for cross-border cooperation in the FCE and is not relevant for 2Seas.
8.4 Sector specific (economic) employment policies.	This need might not be relevant for cross-border cooperation in the FCE as well as the 2Seas area.
8.5 Stimulating cross-Channel commuting / employment by resolving language barriers (see also TO10), providing better information and lowering ticket prices (Channel UK-France)	This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.
8.6 Stimulating the labour potential of women.	This need is not relevant for cross-border cooperation in none of the areas.
8.7 Actions reducing youth unemployment (cross border commuting (see also need 5), sharing best practices and skills programmes.	This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.
TO9: Social inclusion and poverty	
9.1 Enhancing access to facilities and services (health, well being,) for target groups like the elderly.	This need might be relevant for cross-border cooperation in the FCE and in the 2Seas area
9.2 Stimulating employment of vulnerable groups (elderly, youngsters) (see also TO8).	This need might not be relevant for cross-border cooperation in the FCE as well as the 2Seas area.
9.3 Stimulating social enterprises / social and solidarity economy.	This need is relevant for cross-border cooperation in the FCE and in the 2Seas area.
9.4 Urban and rural regeneration tackling concentrations of multiple deprivations.	This need is relevant for cross-border cooperation in the FCE and in the 2Seas area.
TO10: Education and skills	
10.1 Integrating (higher) education and labour markets, by improving (cross border) mobility and exchanges, including lowering lingual fragmentation.	This need might be relevant for cross-border cooperation in the FCE and 2Seas area
10.2 Identifying business needs for skills and developing tailor made and demand oriented programmes for skills and training.	This need is might be relevant for cross-border cooperation in the FCE and 2Seas area.
10.3 Stimulating cross-border exchange (language learning).	This need is relevant for cross-border cooperation in the FCE and 2Seas area.

1. INTRODUCTION

1.1 Joint analysis for France (Channel) England and 2Seas

For the preparation of the new Programmes beyond 2014, the Member States of the 2Seas and France (Channel) England Programmes have decided to launch jointly a “Situation analysis” and “SWOT analysis”. Because the two programmes partly overlap (see figure 1), a joint analysis is efficient and of added value of both programmes.

1.2 Aim of the study

The analyses should ensure that the two programmes start their programming process with a clear understanding of their commonalities and differences/specificities. At the end of this process, the two programmes should have a first list of priorities on which they should focus.

Aim of the analyses is to provide a clear and objective picture regarding the state of play within the territories of the programme area in order to draw conclusions for the intervention strategy for the future INTERREG period.

1.3 INTERREG IVA 2Seas and FCE 2007-2013

The FCE Programme involves partners from all coastal areas in Northern France bordering the Channel (Finistère to Nord-Pas-de-Calais in France) and the coastal area in the UK extending from Norfolk to Cornwall. The 2Seas Programme involves partners from France, UK, Flanders and the Netherlands. For both Programmes, the participation of an English partner is mandatory in each project. It is to be noted that the current programming period 2007-2013 distinguishes between eligible areas and adjacent areas of the programmes.

Within the continental areas, both areas present a mix of urban and rural territories, with the FCE Programme having a higher share of rural territories than the 2Seas programme.

The current project partners are “demand-driven” and focused on the main OP drivers (Lisbon/Gothenburg/ Quality of life), which were defined as EU priorities in the context of the preparation of the programmes in 2007. In this context, most of the projects are “bottom-up” initiatives.

1.4 INTERREG IVA 2Seas and FCE 2014-2020

The analysis takes into account the constraints of the future programming period. The programmes for the period 2014-2020 are supposed to be more focused, more complementary with mainstream programmes as well as with other EU European territorial cooperation programmes and thematic programmes. Particular attention should be given to the “smart specialization” approach.

The analyses take into account the priorities of the future Cohesion Policy and more specifically the 11 thematic objectives broken down in investment priorities listed in the ERDF and ETC draft regulation as proposed by the EC.

1.5 This report

This final report gives includes:

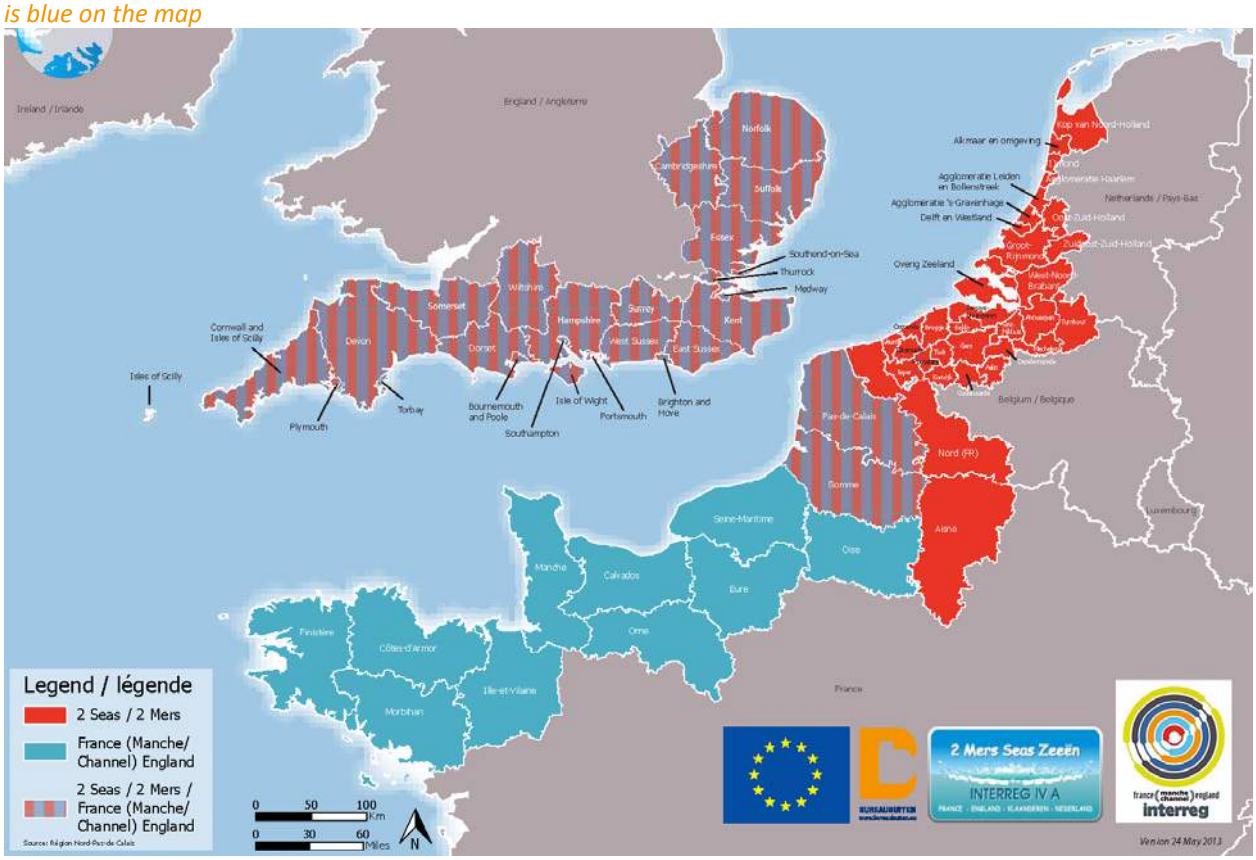
- The state of plan and policy analysis for the FCE 2Seas programme area. The data and policy analysis are presented in **factsheets** per thematic objective, also a general overview of the area is presented (paragraph 2.0).
- Synthesis of the data and policy analysis (chapter 3)
- Introduction on the SWOT analysis (chapter 4)

SWOT analysis: In chapter 5 and 6 the SWOT analyses are presented for the FCE area (chapter 5) and the 2Seas area (chapter 6), identifying the strengths, weaknesses, opportunities and threats per programme area and the (relevance of) needs/actions of the programmes.

- Methodology (chapter 7) with the description of the methodologies used for the analyses.

Figure 1.1 is a map of the geographical scope of the analysis. The geographical scope also includes the whole province of Zuid-Holland and the coastal NUTS3 areas of Noord-Holland in the Netherlands.

Figure 1.1 geographical scope of the analyses: 2Seas area is red on the map; the France (Channel) England area is blue on the map



Source: Bureau BUITEN / M&S Advies

2. DATA AND POLICY ANALYSIS

2.0 General indicators

The following subjects are used to present a general picture of the programme area:

- Population;
- Demographic change ;
- Regional economy;
- Area typology (urban / rural).

Population	
Description	Total population, 1 January 2007 and 1 January 2012 Population Density (inhabitants per km^2) 2007 and 2012 Source: EUROSTAT
State of play	

Map 0.1 Population density

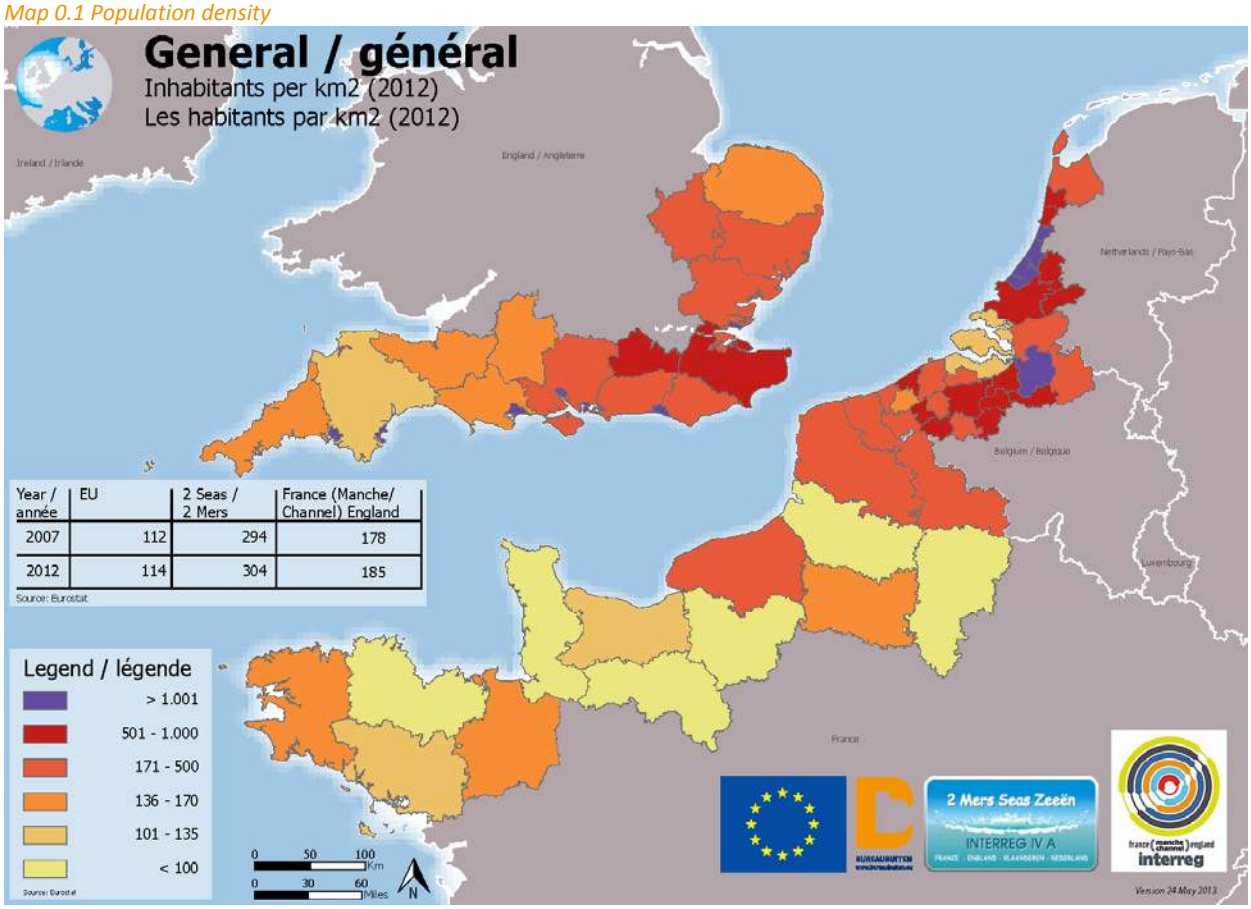


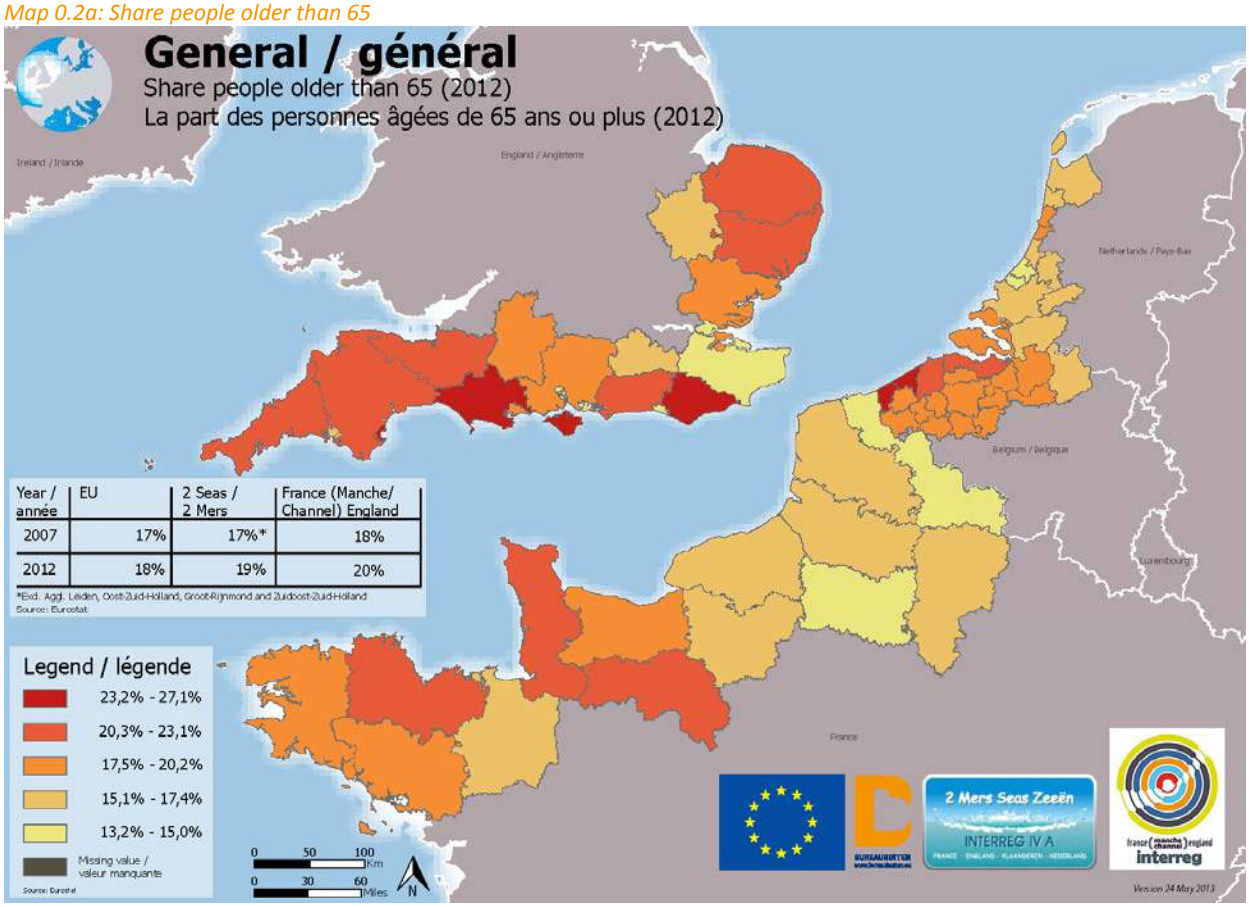
Table 0.1 Overview population and population density

	EU27	Total FCE and 2Seas	FCE	2Seas
Area km2 2012	4.422.993	158.323	133.138	87.979
Population 2007	495.291.925	35.227.137	22.973.107	27.494.260
Population 2012	503.663.601	36.328.488	23.748.118	28.396.861
Area share (% of EU 27)	100%	3,6%	3,0%	2,0%
Population share 2007 (% of EU 27)	100%	7,1%	4,6%	5,6%
Population share 2012 (% of EU 27)	100%	7,2%	4,7%	5,6%
Population density 2007 (inh./km^2)	111,98	222,50	172,55	312,51
Population density 2012 (inh./km^2)	113,87	229,46	178,37	322,77
Population change 2007-2012	+8.371.676	+1.101.351	+775.011	+902.601

Conclusions in general	The total population of the area is 36,3 million, which represents 7,2% of the population of the EU in 2012. We see that the FCE and 2Seas area belong to the most densely populated area in Europe. The average population density is 2 times as high compared to the EU average. The departments / provinces with the most inhabitants in the area are Nord (2,6 million inhabitants) and Zuid-Holland (3,5 million inhabitants). The population in the FCE and 2Seas area is growing faster than the EU average. Of the 8,4 million new EU inhabitants since 2007, over one million new inhabitants can be found in the FCE and 2Seas areas, representing 13% of the EU27 population growth.
Conclusions in relation to FCE and 2Seas	<u>Commonalities</u> Both programme areas belong to the most populated areas of Europe, although major differences can be seen within the areas. The population growth in both areas is more or less the same: between 2007 and 2011 the growth in the FCE area was 3,3% and in the 2Seas area 3,2%. <u>Differences</u> The 2Seas area (323 inhabitants per km^2) is much more densely populated than the FCE area (178 inhabitants per km^2). The above map shows this is largely due to the concentration of population in the Netherlands and Flanders.
Demographic change	The concept of “demographic change” describes a population’s age structure. The composition of the European population’s age structure will change substantially in the near future: the population of Europe is getting older because the birth rate is low and people live longer.
Description	To gain insight in demographic change the following indicators have been looked at: - the share of the population older than 65 (2012, EUROSTAT, the most recent data for Flanders is of 2009); - the regional aging index: the share of people older than 65 divided by the people aged less than 15 (2010, SIESTA ESPON); - the annual change of the population aged 20-65 between 2000 and 2007 (2010, SIESTA-study ESPON). The share of the population older than 65 and the regional aging index give insight in the current situation in the area. The aging index also says something about the future share of the population older than 65: where the index is under 1 there are more children than people older than 65, which influences the future share of people older than 65.

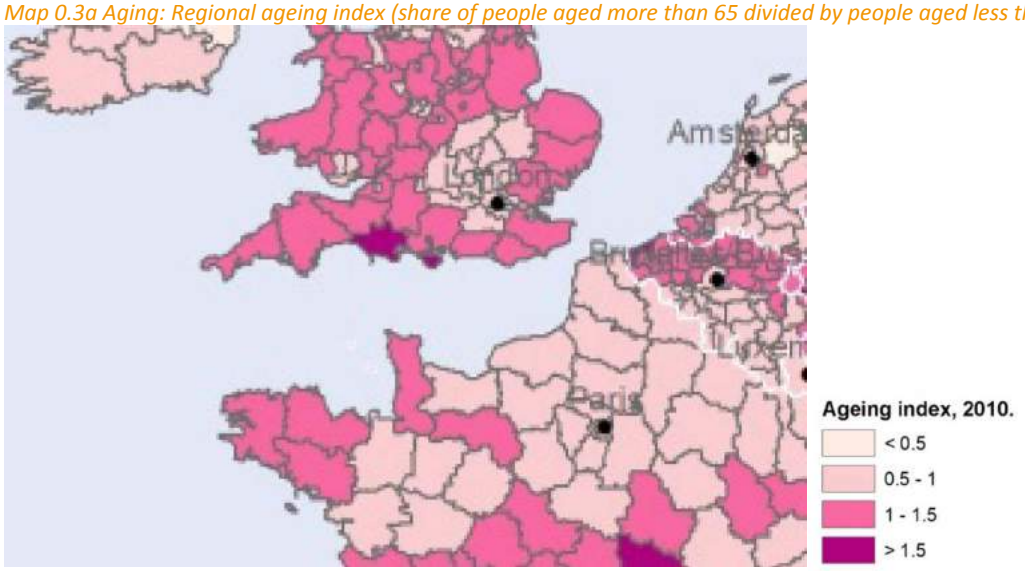
	The annual change of the population between 20-65 years gives an indication of the process: at what pace does the demographic change process takes place? A decrease of the population aged 20-65 (working population) affects for example the possibilities for economic growth. Although this indicator is not available on NUTS 3 level, it still gives a significant picture for the area.
State of play	

Map 0.2a: Share people older than 65



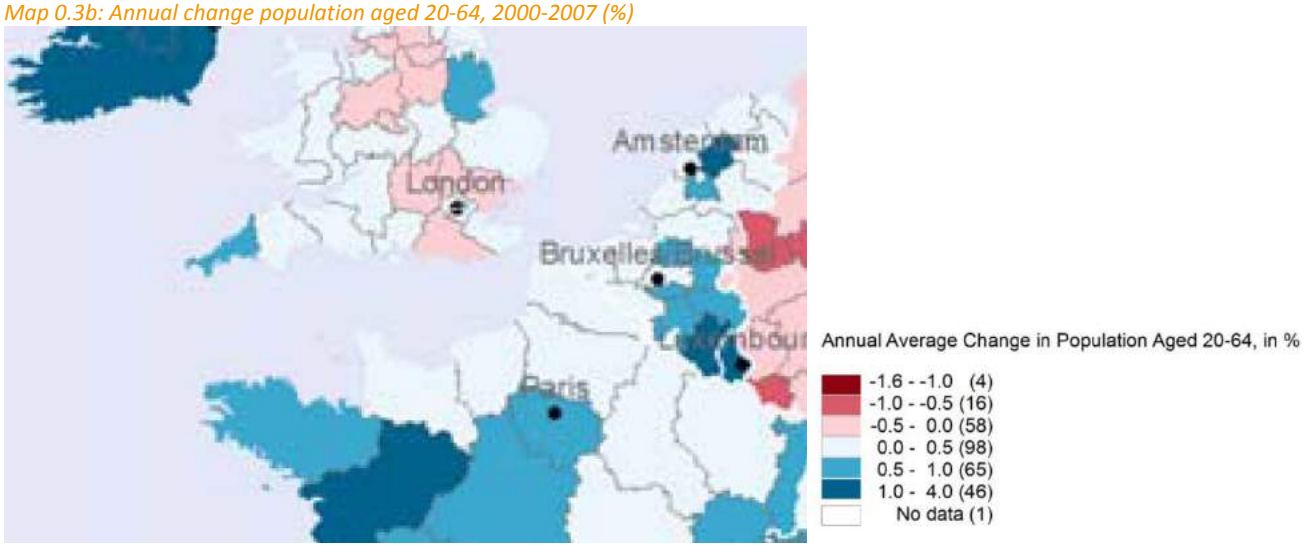
Source: EUROSTAT

Map 0.3a Aging: Regional ageing index (share of people aged more than 65 divided by people aged less than 15), 2010



Source: Siesta, ESPON

Map 0.3b: Annual change population aged 20-64, 2000-2007 (%)

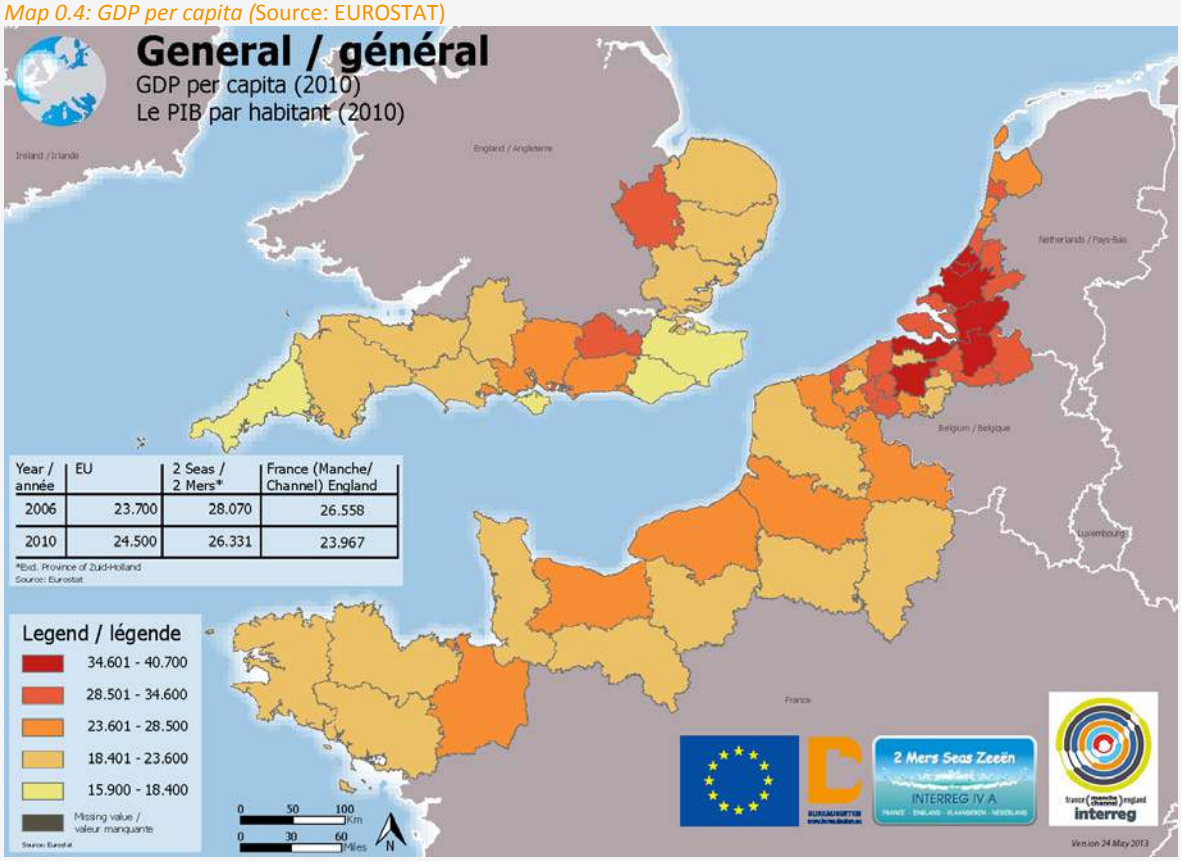


Source: Edora, ESPON

Conclusions in general	The share of people older than 65 in the FCE area and in the 2Seas area is slightly higher than the EU average, but varies within the areas (map 0.2). On the other hand, the share of people older than 65 in relation to the share of people younger than 15 (aging index, map 0.3) is positive (ratio below 1) in Noord-Holland, Zuid-Holland, West-Brabant, Surrey, Plymouth, Nord-Pas-de-Calais, Picardie, Haute-Normandie, Calvados and Ille-et-Villaine. In almost all regions, the potential labour force (people between 20-64 year map 0.4) increased slightly with an annual average growth from 0% to 0.5% between 2000 and 2007. Bretagne, Plymouth and Cornwall experienced a higher growth from 0.5% to 1%. Surrey and Sussex experienced an annual decline from -.5% to 0%. Based on map 7 (page 37) of the DEMIFER study, it can be concluded that the biggest change of the old age dependency ratio 2005-2050 (the pressure placed on the working age population (age 20-64) to take care of the old (age 65+)) will likely be seen in the Netherlands and the north of France (DEMIFER-study, ESPON).

	Current and future migration has a significant impact on the demographic change. Looking at the net migration at NUTS 3 level (EUROSTAT statistical atlas), it can be derived that Orne, Seine-Maritime, Picardie, Nord-Pas-de-Calais, Zeeuws-Vlaanderen, Oost-Zuid-Holland and Zuidoost-Zuid-Holland have a negative migration balance (2010). This will enforce the process of demographic change in these regions. Migration has a positive influence on demographic change in the UK regions in the area, in Flanders and the other regions in the Netherlands.
Conclusions in relation to FCE and 2Seas	<u>Commonalities</u> Both programme areas show a highly diversified picture looking at the different demographic change indicators. The area as a whole has a slightly older population compared to the EU average. Also the relative growth of the share of people older than 65 is higher than EU average (1,1% in EU27 and 1,6% in the FCE 2Seas area). <u>Differences</u> In average the FCE area has a slightly older population compared to the 2Seas area. In the FCE area 19,6% of the population is older than 65, in the 2Seas area 18,9% (in EU27 18,0% in 2012).
Regional Economy	Economic Density, sectorial distribution of the regional economy and tourism capacity.
Description	The following indicators are used to describe the state of play of the regional economic situation: - Gross Domestic Product (GDP) in Euro per inhabitant at current market prices on NUTS 3 level (EUROSTAT 2010); - share of agriculture, industry and services in the economy in terms of employment. What is presented is the share of the persons (working age 15-64 years) in paid employment in the agriculture, industry and service sectors, as a percentage of the total (ELTIS plus 2010) at NUTS 3 level; - capacity of collective tourist accommodation. This is the number of establishments, of hotels and other collective accommodation establishments (tourist campsites, holiday dwellings, other collective accommodation) for NUTS 3 regions (2011, EUROSTAT). - The gross domestic product is the market value of all officially recognized final goods and services produced within a country in a given period of time (year). GDP per capita is often considered an indicator of a country's standard of living. The GDP per capita exactly equals the gross domestic income (GDI) per capita. - The share of agriculture, industry and service sectors in the total employment gives insight in the characteristics of the regional economy. - The capacity of tourist accommodation per region gives an indication of the importance of tourism in the regional economy. - The employment rate and unemployment rate also give insight in the structural regional economic situation. These indicators can be found under theme 9.
State of play	

*Map 0.4: GDP per capita (*Source: EUROSTAT)



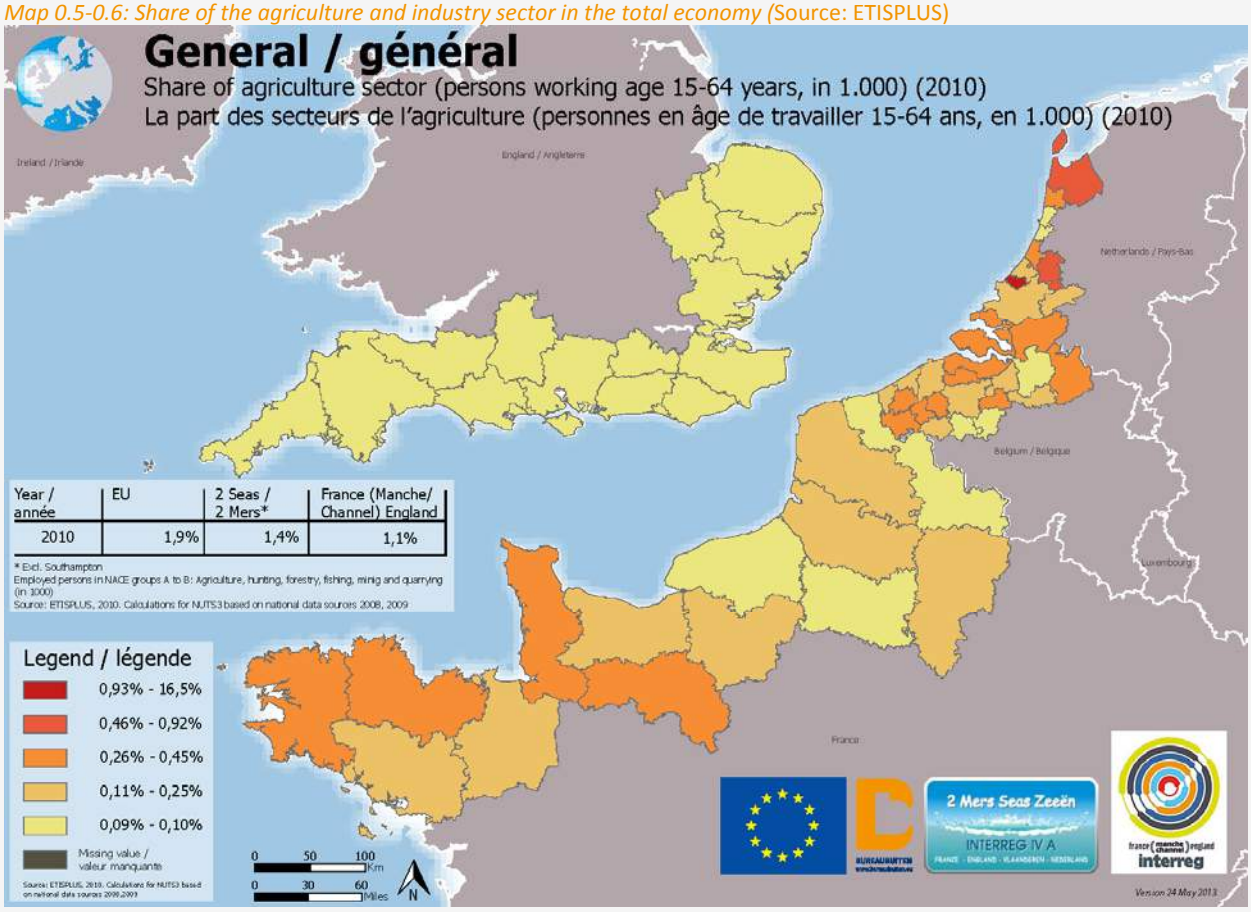
Conclusions in general

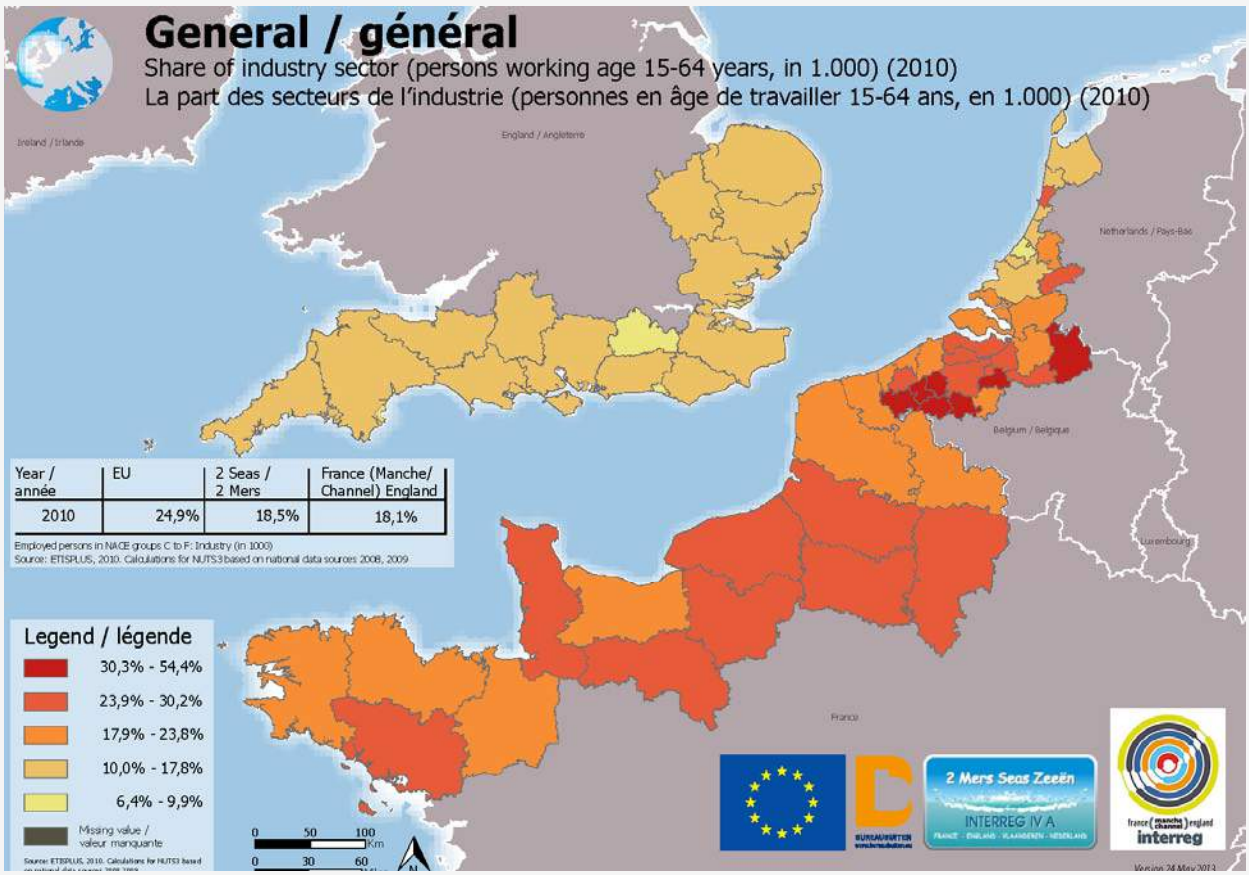
GDP per capita

Within the programme areas there are considerable spatial differences in regional GDP per capita. The regional income per inhabitant varies between 67% (Torbay) to 166% (Antwerp) of the EU 27 average in 2010. In the Dutch and Flemish regions the GDP per capita is relatively high (all above EU average except Arr. Diksmuide, Aalst, Dendermonde, Eeklo). Also Surrey, Nord, Brighton and Hove, West Sussex, Bournemouth and Poole, Seine-Maritime, Hampshire CC, Ille-et-Vilaine, Cambridgeshire CC and Portsmouth are above EU average. All other regions are below the EU average. Lowest GDP per capita is found in Torbay, Isle of Wight, Cornwall and Isles of Scilly, Medway and East Sussex CC (<75 – 67% of the EU27 average 2010).

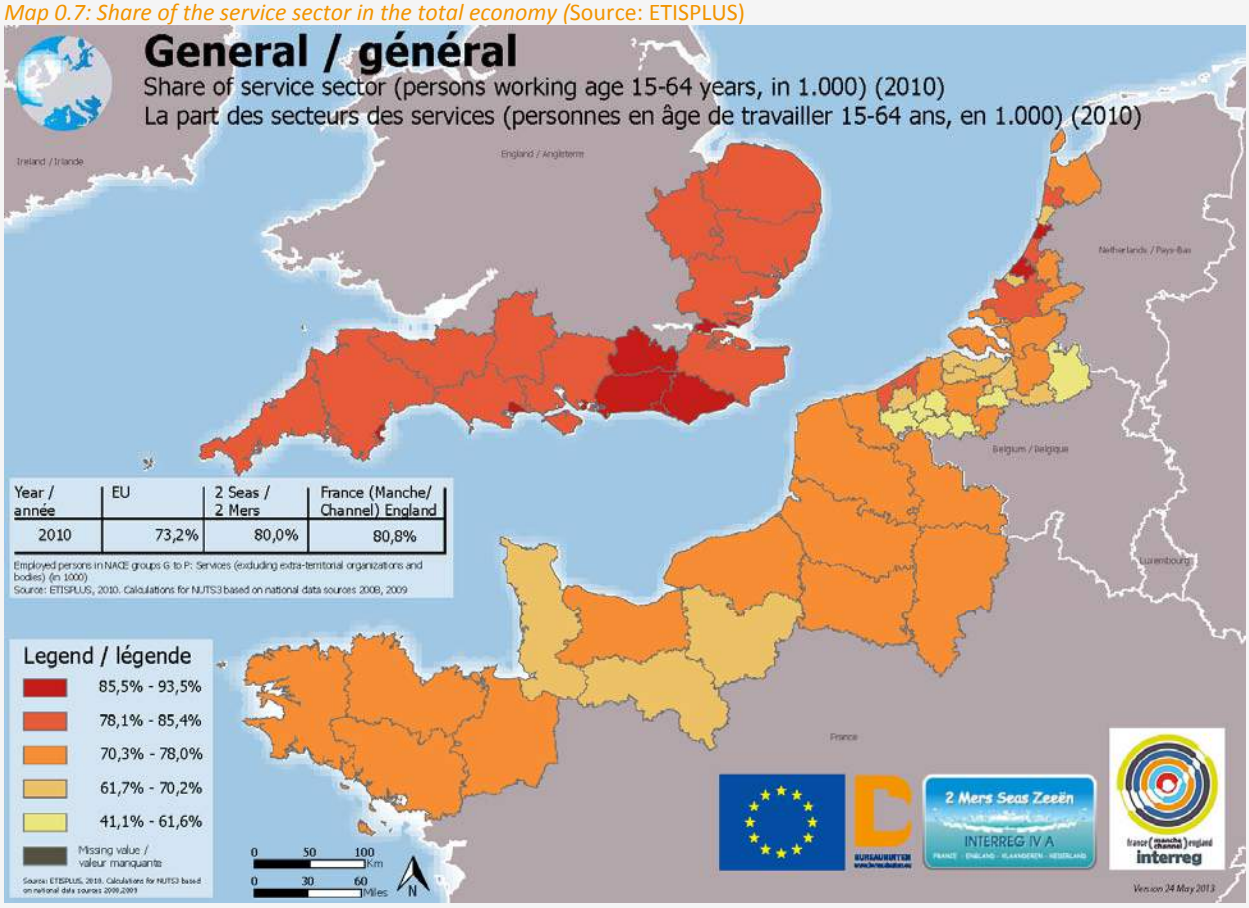
Looking in the GDP in absolute figures, it can be concluded that the total area represents 7,2% of the EU population and 6,8% of the EU GPD in 2010.This share has decreased since 2006, which means that the economy in the area performed under EU average. The change in the region GDP between 2000 and 2009 is highly differentiated across the programme areas. The GDP per capita has decreased in all UK regions, as well as in Finistère, Manche, Morbihan, Côtes-d'Armor, IJmond, Arr. Diksmuide and Haarlem between 2006 and 2010. The GDP per capita stayed the same or increased in all other regions. Dutch and Flemish regions performed best between 2006-2010.

*Map 0.5-0.6: Share of the agriculture and industry sector in the total economy (*Source: ETISPLUS)





*Map 0.7: Share of the service sector in the total economy (*Source: ETISPLUS)



Sectoral distribution

On European level (EU27), over 3,6 million persons are working in agriculture, accounting for 1,9% of the total employment, slightly higher than in the 2Seas (1,4%) and FCE (1,1%) programme areas. Europe-wide, higher shares are found in former Eastern Europe, the Baltic states and the rural regions of the Mediterranean states and the Iberian peninsula. The highest shares in the programme areas in agriculture are found in the Dutch regions and France. The highest share is found in the Delft and Westland (16,5%), a region with many greenhouses. For France, the higher agricultural levels are found in the more rural westerns regions Normandie and Bretagne. Agricultural shares in the UK-regions are rather low[1].

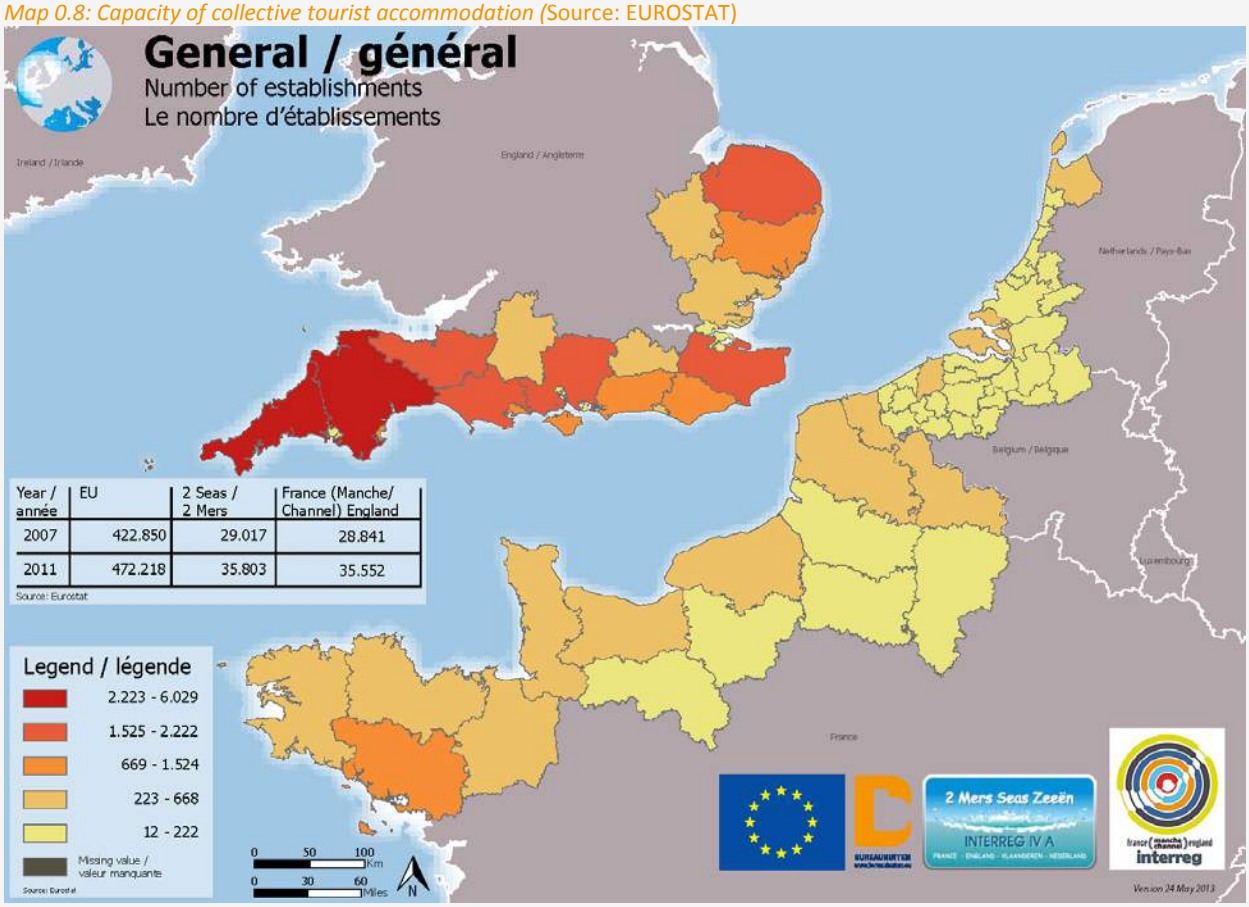
Approximately 47 millions Europeans (EU27) are working in the sector of industry, accounting for 24,9% of the total employment, a higher share than in the 2Seas (18,5%) and FCE (18,1%) programme areas. Europe-wide, high shares for industry can still be found in traditional mining areas such as the German Ruhr-area, southern Poland and the border area between the Czech Republic and Slovakia. In the programme areas, the Flemish regions account for the highest shares. The industrial share in Tielt is found to be the highest of the two programme areas, with 54,4% of all employed persons working in the industry. Other areas with high shares can be found in regions with port-related and automobile related industry. Industry shares in the UK-regions of the programme areas are low, as industry in the UK traditionally concentrated in the Midlands and northern-regions.

By far, most persons in the EU27 (73,2%), 2Seas (80,0%) and FCE (80,8%) are working in the services sector. The EU average is lower than in the programme areas, as on a whole

[1] Note that data is based on information from the ETISPLUS study to increase comparability. Other sources (BRES/DEFRA) indicate higher shares for agriculture, with percentages up to 0,7% in Cornwall and Devon.

Eastern European economies tend to have a higher share of persons active in agriculture and industry. Most Western European states show a share that is comparable with the share of the programme areas. Persons working in the services sector are concentrated in the more urban areas, both in the EU as well as in the programme areas. Shares tend to be low in the regions with a higher representation of persons working in the industry (mainly Flanders) and rural region (mainly France). The relatively high share of the service-sector in the UK-region, especially the south-western part, might be a result of the high number of persons working in the tourist industry.

*Map 0.8: Capacity of collective tourist accommodation (*Source: EUROSTAT)



Tourist capacity

In Europe, in each country domestic tourism favours rural and coastal areas. This is also the case in the programme areas where the average tourist capacity per inhabitant is above EU average (1,1 accommodations per 1000 inhabitants in the programme areas and 0,9 in the EU 2011). The capacity is particularly high in the UK regions of Cornwall and Isles of Scilly, Norfolk, Suffolk, East Sussex CC, Hampshire CC, Isle of Wight, Medway, Bournemouth and Poole, Dorset CC, Somerset, Devon CC, Torbay and Plymouth (more than 1000 establishments).

The tourist capacity in Europe increased by 10% between 2007 and 2011. Although the capacity increased with 17% in the programme areas, also a decrease of more than 10% could be noted in Orne, Kop van Noord-Holland, Alkmaar and surroundings and Oost-Zuid-Holland.

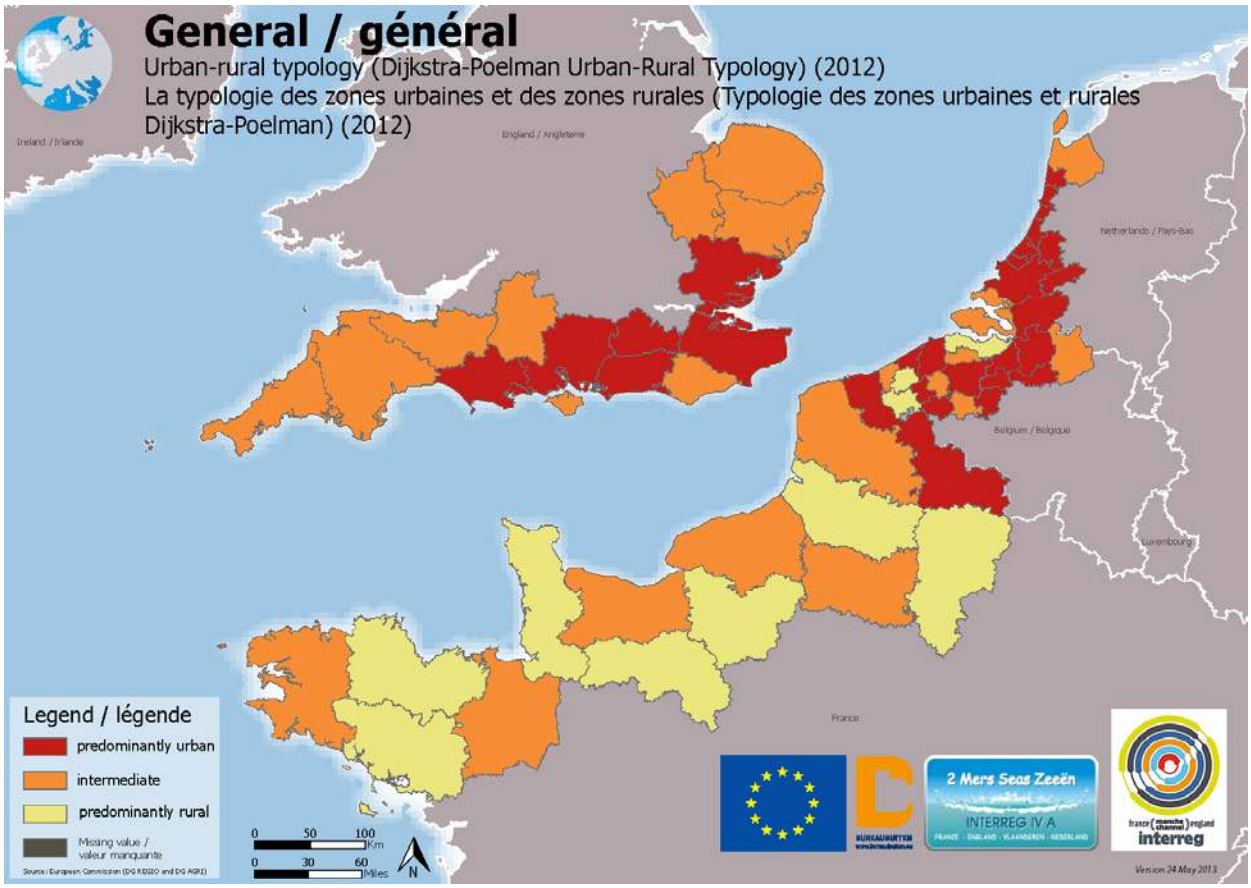
Conclusions in relation to FCE and 2Seas

Commonalities

- The GDP per capita in both areas is above EU 27 average, although in both areas the economy performed under EU average in the period 2006-2010. This underperformance is explained by the severe consequences of the economic and financial

	crisis. - Both areas have a higher share of people active in the services sector and a lower share for agriculture and industry. Sectorial patterns within both areas seem to be related to traditional industry levels, port-related activities and urbanisation rate. - The tourism capacity in absolute terms is comparable in both areas (although there is a difference if it is calculated per 1000 inhabitants, see below). The capacity (per 1000 inhabitants) in both areas is above EU average. Additionally, tourism capacity in both areas has developed faster compared to the EU average. <u>Differences</u> - The economy of the 2Seas area is in relative and absolute terms more extensive than the economy in the FCE area. The 2Seas area represents 4.9% of the population and 5.2% of the GDP, and the FCE area accounts for 4.7% of the population and 4.6% of the GDP. This can be explained by the fact that the FCE area has a more rural and less densely populated character. - In terms of economic growth, the 2Seas area performed better than the FCE region. This is due to the fact that economic growth (2006-2010) in the FCE area is lagging behind (negative or below EU average) in all regions except Calvados, Pas-de-Calais and Somme in France. - Although on average the two areas do not differ, clear differences can be seen between the Member States. The UK-regions have a higher share in the services sector and lower shares for agriculture and industry; Flemish regions on the Walloon border show higher shares in industry; French-regions show average shares for all sectors, with a slightly higher share in agriculture in the western-regions and industry in the north-west; the urban areas in the Dutch-regions clearly show a higher share in the service economy and shares in agriculture are found to be high in the regions with a high representation of greenhouses and tillage-land. Calculated per 1000 inhabitants, it can be noted that the tourist capacity in the FCE area is bigger than in the 2Seas area (0.94 is the EU average, 1.24 is the 2Seas aver-age and 1.54 the FCE average).
Area Typology	Urban rural typology The aim of this typology is to provide a consistent basis for the description of urban, rural or intermediate regions in all European Commission communications, reports and publications, including EUROSTAT statistical analyses.
Description	To draw a picture on the level of urbanization and the presence of rural societies in the area, the following typology has been used: - Dijkstra-Poelman Urban- Rural typology. Dijkstra-Poelman created a typology of rural-urban regions which distinguishes 3 main categories in relation to accessibility and rurality: Predominantly Urban (PU), Intermediate (I)and Predominantly Rural (IR). This typology is based on a definition of urban and rural 1 km² grid cells. Urban grid cells fulfil two conditions: 1) a population density of at least 300 inhabitants per km² and 2) a minimum population of 5 000 inhabitants in contiguous cells above the density threshold. The other cells are considered rural. Thresholds for the typology: 50% and 20% of the regional population in rural grid cells.
State of play	

Map 0.9: Urban-rural typology (Dijkstra-Poelman Urban-Rural Typology)



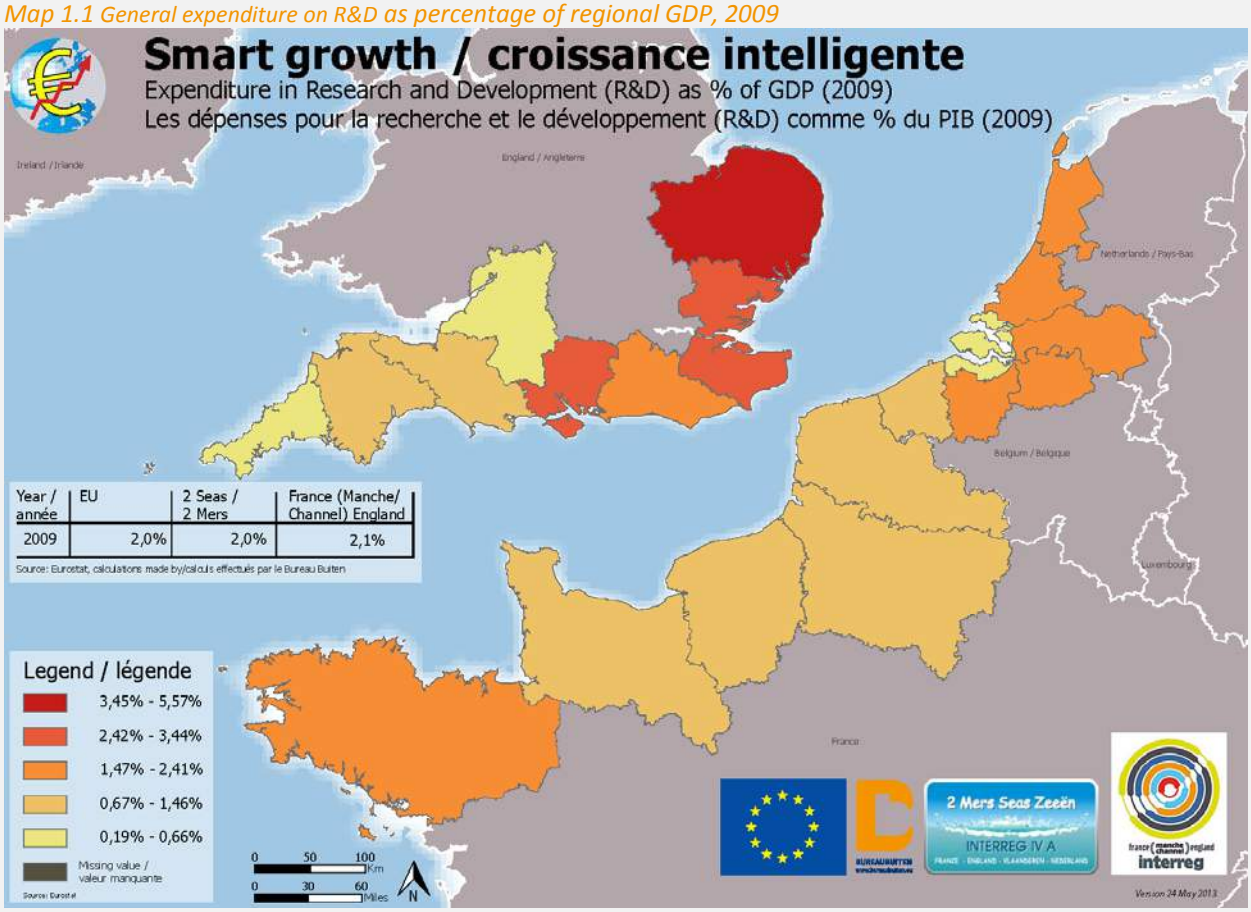
Source: European Commission

Conclusions in general	Looking at the Urban-rural typology of the programme area, a large part of the urban areas can be distinguished in the Netherlands and Flanders, although there are also predominantly rural areas located within these more urban regions (Diksmuide, Ieper, Zeeuws-Vlaanderen). Predominantly urban areas are also found in the South-East of the United Kingdom (Southend-on-Sea, Thurrock, Essex CC, Brighton and Hove, West Sussex, Portsmouth, Southampton, Hampshire CC, Medway, Kent CC, Bournemouth and Poole, Dorset CC and Surrey). There are no predominantly rural regions in the UK programme area. The only predominantly urban French region in the area is Nord.
Conclusions in relation to FCE and 2Seas	<u>Differences between 2Seas and FCE</u> The 2Seas area has more predominantly urban areas than the FCE area. The rural / intermediate character of the FCE area is caused by the rural regions in France.

2.1 Theme 1: Knowledge economy

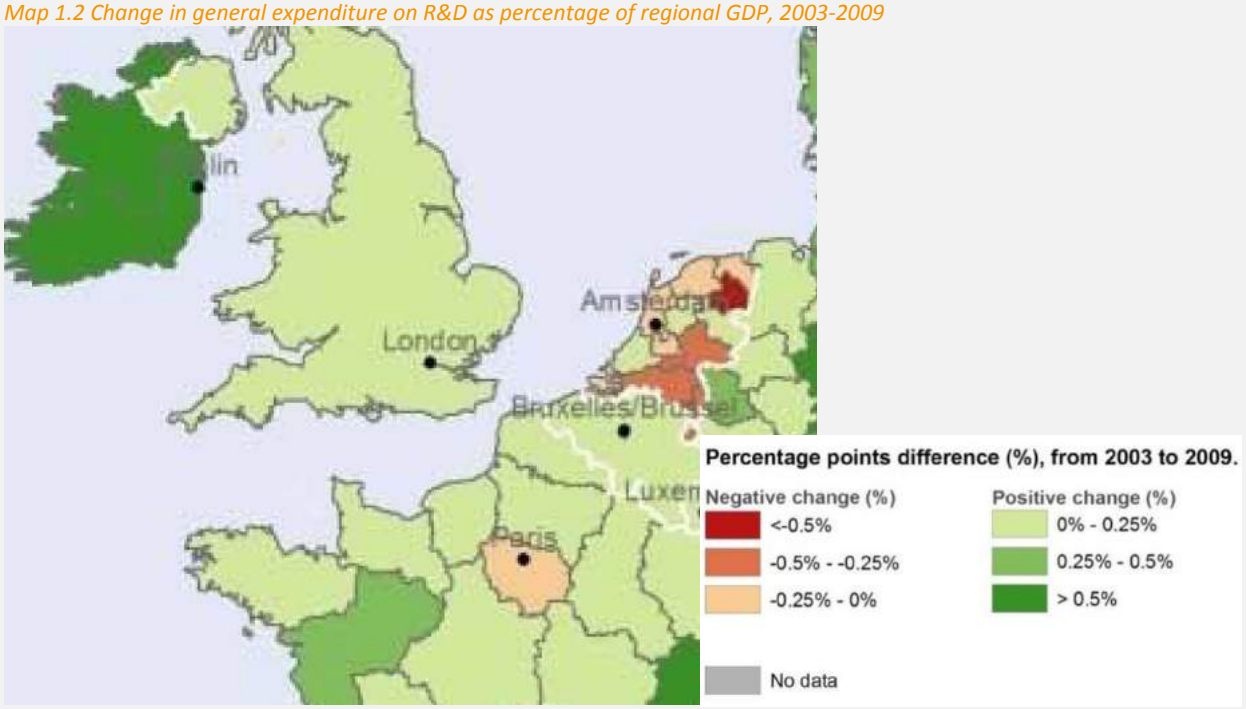
Theme 1: Knowledge economy Strengthening research, technological development and innovation	*Investment priorities under theme Knowledge economy:* - 1A: enhancing research and innovation (R&I) infrastructure […] and capacities to develop R&I excellence and promoting centres of competence, in particular those of European interest; - 1B: promoting business investment in innovation and research, and developing links and synergies between enterprises, R&D centres and higher education, in particular product and service development, technology transfer, social innovation, eco-innovation, [cultural and creative industries,] public service applications, demand stimulation, networking, clusters and open innovation through smart specialisation and supporting technological and applied research, pilot lines, early product validation actions, advanced manufacturing capabilities and first production, in particular in Key Enabling Technologies and diffusion of general purpose technologies, including cooperation between large enterprises and SMEs.
EU 2020 target	Indicator EU2020: General expenditure on R&D as percentage of GDP EU2020 target: 3%
Description	To gain insight in the knowledge economy the following indicators have been looked at: - General expenditure on R&D. 2009 is the latest available year covering the whole area (2010, SIESTA study, ESPON). This indicator is only available at NUTS2 level; - Change in general expenditure on R&D as percentage of regional GDP, 2003-2009 (2010, SIESTA, ESPON) (at NUTS 2 level); - Patent applications to the EPO per million inhabitants by inventor's region of residence (2009, EUROSTAT). Available on NUTS3 level; - Share of employment in high-technology sectors (2008, EUROSTAT). Available on NUTS2 level; - Regional Innovation Scoreboard (RIS). The RIS is a comparative assessment of innovation performance across NUTS 1 and NUTS2 regions of the European Union, Croatia, Norway and Switzerland. The RIS 2012 methodology consists of 12 indicators leading to grouping analysis which shows four performance groups, ranging from Innovation leaders to Modest innovators. The general expenditure on R&D indicates to what extent regions meet the EU2020 target. The change in R&D expenditure gives insight in the development of the expenditure: are regions getting closer to the target or are they developing in the opposite direction? Because these indicators on expenditure are only available at NUTS 2 level, a third indicator on patent applications (which is available at NUTS3) is added to give insight in the state of play of the regional knowledge economy. Creating, exploiting and commercialising new technologies is essential in the global race for competitiveness. High-tech sectors are key drivers of economic growth and generally a source of high value-added and well-paid employment. To give insight in the high-tech sectors, the share of employment in high-tech sectors is shown. High-tech sectors comprise of high-technology manufacturing and knowledge-intensive high-technology services.
State of play	

Map 1.1 General expenditure on R&D as percentage of regional GDP, 2009



Source: EUROSTAT

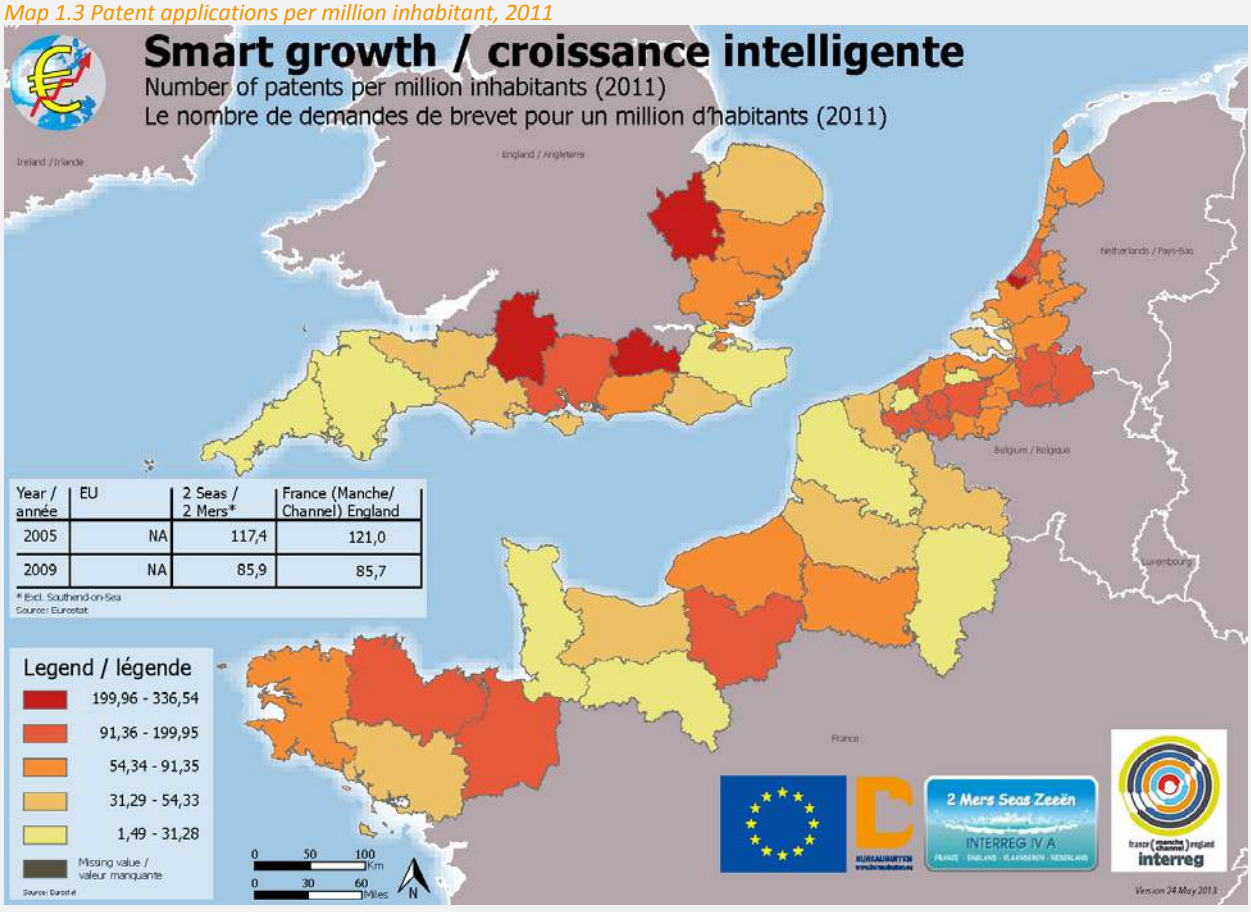
Map 1.2 Change in general expenditure on R&D as percentage of regional GDP, 2003-2009



Source: SIESTA study, ESPON

Conclusions in general	<u>Expenditure on R&D (as % of GDP)</u> A few UK regions (Hampshire, Isle of Wight, Gloucestershire, Wiltshire and Bristol/Bath area) in the programme area have reached the EU2020 target (2009). All other regions in the area have an expenditure on R&D below 3%. The UK also hosts several regions (Cornwall, Devon and Dorset and Somerset) with the lowest R&D expenditure (<1%). This also applies to Nord-Pas de Calais. Most Dutch, Flemish and French regions have an expenditure on R&D that lies between 1% and 2%. Looking at the average picture, it can be concluded that **the area as a whole performs on the same level as the EU 27 average**. The general expenditure as a percentage of the GDP in EU27 and the programme area as a whole is 2,0% in 2009. Between 2003 and 2009 the expenditure on R&D increased (between 0% and 0,25% points) in all regions (note that in the UK there is no regional information available). Exceptions are the Dutch provinces Noord-Holland, Zeeland and Noord-Brabant where the R&D expenditure was stable or decreased (-0% to 0,5% points) between 2003-2009.
State of play	

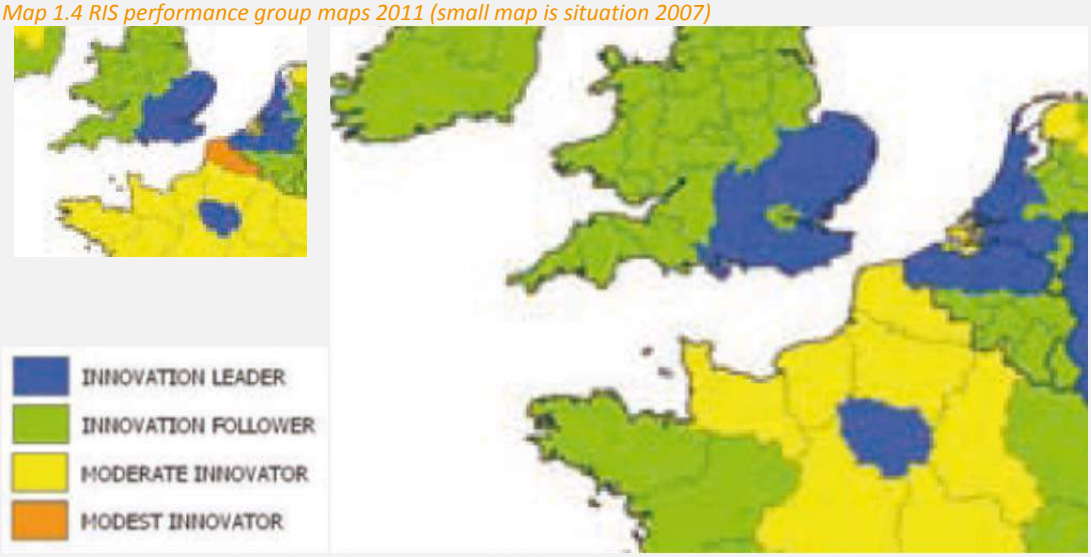
Map 1.3 Patent applications per million inhabitant, 2011



Source: EUROSTAT

Conclusions in general	Patent applications (per million inhabitants) Although there are regions with a relative high number of patent applications, on average **the number of patent applications in the programme area as a whole is low compared to the EU average**. The EU average (2009) is 111 patents per million inhabitants whereas the average in the area is only 86. Only 12 regions perform above EU average; 51 regions perform below EU average (no data for Zuid-Holland and Southend-on-Sea). The highest numbers of patent applications in the programme area are found in Surrey, Wiltshire CC and Cambridgeshire CC (which includes Cambridge University), are all above 300. Between 2005 and 2009 the number of patent applications decreased worldwide, and this trend can be seen in the programme area as well. As the amount of patent application is below EU-levels in most regions, these regions (also) rely on knowledge from other areas to foster innovation. Cross-border cooperation might be helpful for this.
State of play	

Map 1.4 RIS performance group maps 2011 (small map is situation 2007)

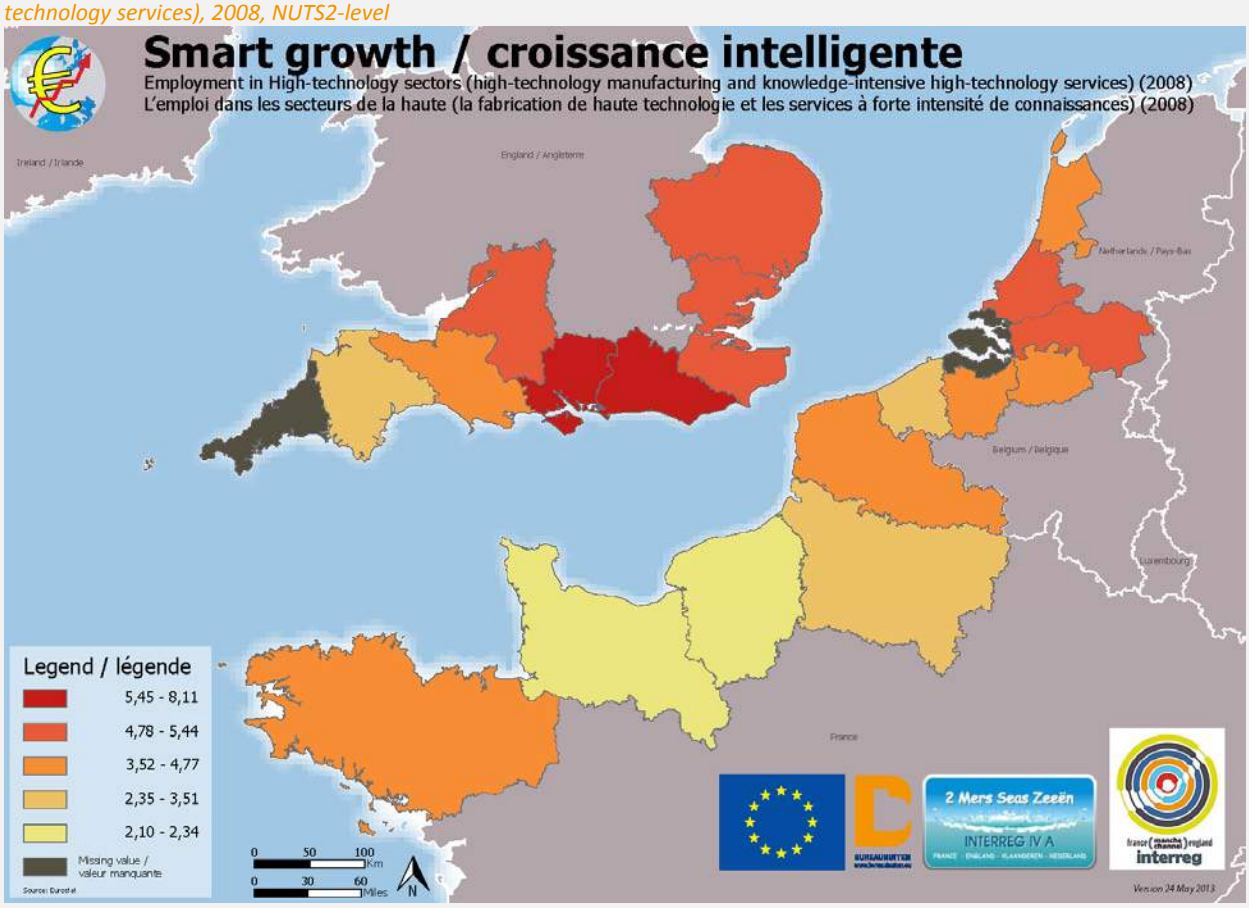


Source: Regional Innovation monitor 2012

Conclusions in general	Regional Innovation Scoreboard The RIS shows considerable diversity in regional innovation performances. In the 2Seas and FCE area three of the four performance groups occur. Innovation leaders are all UK regions in the area except Dorset and Somerset, Cornwall and Isle of Scilly and Devon, all Dutch regions except Zeeland and all Flemish regions in the area. Moderate innovators are Zeeland, Nord-Pas-de-Calais, Picardie, Haute-Normandie and Basse-Normandie; all other areas are innovation followers. Between 2007 and 2011 regional performance is quite stable in EU27. Most regions developed positively or stayed the same between 2007-2011. Dorset and Somerset, Cornwall and Isle of Scilly and Devon were the only regions in the area that developed negatively between 2007 and 2009 (from high to medium innovation follower). Zuid-Holland and Zeeland stayed in the same (sub) performance group between 2007-2011 (innovation leader low). Among the 8 regions in EU27 that have demonstrated a continuous improvement (in both 2009 and 2011) is Bretagne (Regional innovation scoreboard 2012).
State of play	

Map 1.5 Share of employment in high-technology sectors (high-technology manufacturing and knowledge-intensive high-

technology services), 2008, NUTS2-level



Source: EUROSTAT

Conclusions in general	<u>Employment in high-technology sectors as percentage of total employment</u> The shares of both manufacturing and services in the high-technology sectors in total employment varied considerably from one region to another. **The average share of employment in high tech and knowledge intensive services in the programme area is above the EU27 average** (3,7%). The highest shares can be found in Hampshire, Surrey and Sussex, followed by Zuid-Holland and Noord-Brabant (between 5,5% and 8,1%, the EU27 average is 3,7%). The lowest shares of employment in high-technology sectors are found in Basse-Normandie and Haute-Normandie (below 2,10%).
Conclusions in relation to FCE and 2Seas	<u>Commonalities</u> - The area as a whole functions on the same level as the EU 27 average, in terms of general expenditure on R&D (as % of the income). - Patent application: both programme areas show a great variety in the regional number of patent applications. In average there is almost no difference in the number of patent applications per million inhabitants between FCE and 2Seas (85,7 in FCE and 85,9 in 2Seas). There is however a big difference with the EU-average of 111 patents per million inhabitants (EUROSTAT). <u>Differences</u> - In the FCE area as a whole, general expenditure on R&D is lower than in the 2Seas area, although the difference is not very big. On the other hand it can be concluded that the change in expenditure on R&D (between 2003-2009) is more positive in the FCE area than in the 2Seas area (especially because the Dutch regions underperform). - Employment in high-technology sectors is lower in the FCE area, because of the low shares in Basse-Normandie and Haute-Normandie. - The Regional Innovation Scoreboard the 2Seas region has more innovation leaders

	than the FCE area (cf. Dutch regions, Flanders etc.), where the FCE area has more innovation followers and moderate innovators and no innovation leaders on the continental side.

Table 1.1: Overview smart specialisation

Regional Smart Specialization	Agro & Food	Biotechnology	Marine (& tech.)	Chemicals	Energy & water	Manufacturing & eng.	Logistics & tr. & ports	Wholesale & Retail	Creative, digital & comm.	Business services, ICT	Tourism & leisure	Life science & health	High tech (other)	Environmental technology	Other
Maritime strategy for the Atlantic ocean			■		■									■	Offshore, Blue technology
Action Plan Maritime Strategy Atlantic Ocean															
UK	*3*	*2*	*4*	*1*	*5*	*6*	*5*	*2*	*11*	*4*	*5*	*10*	*2*	*6*	
County strategies															
Cornwall (RIS3, Cornwall 2030)					■				■			■			
Plymouth			■						■			■			
Devon (& Exeter)		■								■			■	■	
Dorset															
Essex							■		■			■			
West-Sussex															
Kent	■				■							■			
Medway (within Kent county)						■			■						
Suffolk	■	■			■		■		■	■	■	■			Finance and insurance
City strategies															
Poole										■		■			Financial services
Bournemouth											■				
Southampton							■								
Southend									■		■				
Isle of Wight								■			■				
Portsmouth			■				■	■	■					■	Aerospace
Plymouth			■						■	■	■	■			
Brighton & Hove									■					■	Sustainability
LEP Strategies															
New Anglia	■	■			■	■	■		■	■	■	■			Financial services
Hampshire				■		■									
West Sussex						■			■			■	■	■	
Southeast					■	■	■								
Heart of the South West			■		■	■					■				Social enterprise, rural economy, nuclear, green economy
Dorset									■	■				■	(Green economy)
Solent			■			■									
Cornwall & Scilly islands			■		■										Aerospace
Swindon Wiltshire										■	■	■		■	Military, Environmental techn
BE	*4*	*1*	*1*	*1*	*4*	*2*	*4*	*0*	*2*	*0*	*2*	*1*	*2*	*3*	
WP RIS³ Flanders/New Industrial Policy for Flanders	■	■	■	■	■	■	■			■		■	■	■	Automotive, materials, textiles
Strategic vision economy P. Antwerp	■				■		■						■	■	Nanotech, ICT
VNDelta studie + Deltamonitor			■	■	■		■								Maintenance
PO 2014-2019 Province of West-Flanders	■						■				■				
G.agreement 2013–2018 Oost-Vlaanderen	■	■			■				■						(agro: Flowers)
New industrial Policy for West-Flanders	■					■			■				■	■	Cleantech (environmental tech.)
Strategic agenda West-Brabant 2012-2016	■	■					■								Maintenance
Economic vision Rotterdam 2020				■			■		■			■			

Regional Smart Specialization	Agro & Food	Biotech	Marine (& tech.)	Chemicals	Energy & water	Manufacturing & eng.	Logistics & tr. & ports	Wholesale & Retail	Creative, digital & comm.	Business services, ICT	Tourism & leisure	Life science & health	High tech (other)	Environmental technology	Other
NL	*7*	*6*	*1*	*1*	*2*	*0*	*8*	*0*	*2*	*4*	*2*	*5*	*1*	*1*	
RIS3 2014-2020– South Holland	■	■					■								Maintenance
Economic agenda 2012-2015, Province NH	■				■		■		■	■	■	■			ICT, int. meetings (Agro: incl flowers)
Economic agenda ZH and Rijnland	■	■					■			■		■			Aerospace
Economic programme Brabant 2020	■	■					■					■	■	■	Creative industries as 'enabler'
Econ.Agenda 2013-2015, Province Zeeland	■	■	■		■		■			■	■	■			Aqua culture
Economic agenda South Randstad 2015	■	■					■			■					ICT as ´enabler´ for priority sectors
FR	*6*	*1*	*1*	*4*	*2*	*2*	*7*	*1*	*0*	*4*	*2*	*2*	*0*	*4*	
NPDC - Diagnostic territorial strategies pour preparer les programmes 2014-2020	■	■		■		■	■			■		■			Textiles and materials(Chemicals), (picture) ICT
Picardie - SRI															Composites Vibro-Acoustic
Haute Normandie - Diagnostic territorial strategique pour preparer les progr 14-20														■	
Haute Normandie - SRI	■			■	■		■					■		■	Materials (= chemicals), aerospace, automotive, health and cosmetics.
Haute Normandie - SRADT							■								
Basse Normandie - SRI				■											
Basse Normandie - SRADT	■			■	■	■	■			■	■				Digital safety, pharma, automotive, boating (=tourism)
Bretagne - SRI	■						■			■				■	Mer
Contribution des villes atlantiques à l'appel à suggestions sur les priorités clés d'investissement et recherche			■				■								Transport safety
Conseil général Finistère - Participation au diagnostic régional stratégique	■							■		■					Creative and business sectors = up-coming
Strategic provincial project 2008-2020 - General council of Pas-de-Calais	■						■				■			■	Biofuels, automotive
Governance level regulations and laws in the field mentioned above *(preliminary)*															
EU / int. level	■	■	■	■	■		■			■	■			■	
National Level	■		■		■	■	■			■	■	■	■	■	
Regional level							■				■	■	■	■	
Local level								■	■		■	■	■	■	

NB. All documents listed in the glossary are processed, however not all processed documents are listed. In this table we focused on documents on the interregional/regional/local policy level that have a clear connection with smart specialization or make distinct choices in terms of supporting priority sectors. For UK regions with multiple relevant documents (f.i. County of Cornwall, Kent) we integrated the different inputs.

Policy analysis

European level

The Innovation Union flagship is about creating a vibrant, innovation-based economy. With over thirty action points, the Innovation Union aims to improve conditions and access to finance for research and innovation in Europe, to ensure that innovative ideas can be turned into products and services that create growth and jobs. Its targets are:

- **refocusing** R&D and innovation policy on **major challenges for our society** like climate change, energy and resource efficiency, health and demographic change;
- **strengthening every link in the innovation chain**, from 'blue sky' research to commercialisation.

Regional level

Because of the budget cuts, local/regional authorities that pursue policies to support innovation (LEP's in UK, regional development agencies in the Netherlands and Provinces in Flanders) will have to create a measurable **impact to EU2020 innovation targets with less available funds**. To do so, policy tends to concentrate more on **specific and targeted** actions.

Concentration of policy and intervening 'where it matters most' aligns with the EU agenda for **smart specialization**. Putting smart-specialization into practice, regions should focus specifically on those industries and parts of the value chain in which competitive advantages can be reached and sustained.

In the most recent publications on innovation policy in the programme area (such as the LEP business plans in the UK and the smart specialisation strategies for Flanders), regional and local authorities retain their ambition to facilitate innovation, but show a movement towards more **demand-oriented** ways to do so. For example, in the UK the Local Enterprise Partnerships are led by by business leaders from the region.

Looking at the overview of smart specialisation strategies (policy documents) available in the area (see table 1.1), one can easily identify potentials for cooperation between regions on specific sectors. Of course ports and logistics can be seen throughout the area. Marine technologies, as well as 'blue economy and marine energy, are mentioned specifically by some regions, others tend to see this as an aspect of environmental technologies (including green tech, green economy). Very specific sectors like Aqua culture, Aerospace and automotive are mentioned more than once, which could lead to the conclusion that **cooperation between these regions might help realising necessary critical mass for innovations**.

National/regional level

According to their policy strategies, most public bodies see their role in the innovation process as facilitators of innovation. Support focusses on research, technological development and innovation. Often mentioned **public services to increase innovation levels in regions** are:

- favourable spatial planning for innovation (creating business zones, incubators, campuses);
- attracting innovative companies (attracting investment, regional image & publicity campaigns);
- mediating between knowledge partners and representing the business community abroad;
- actions promoting entrepreneurship and innovative business start-ups;
- creating regional knowledge and innovation networks;
- subsidies for innovative actions of companies/innovative pilot projects
- diversifying the economy where it is dependent on tourism, fisheries or marine industries.

The ESaTDOR study (ESPON) mentions the longer term potential for blue biotechnology and to exploit mineral resources (mining) as an opportunity, particularly in the Atlantic area.

Needs and opportunities cross-border cooperation

In terms of innovation support actions, a need can be observed for **actions, that seek to lower costs to attract knowledge and expertise for innovation in regional industries**, for example:

- supporting and connecting fundamental research of regional knowledge institutions to the business innovation agenda;
- supporting regional open innovation systems and network approaches between

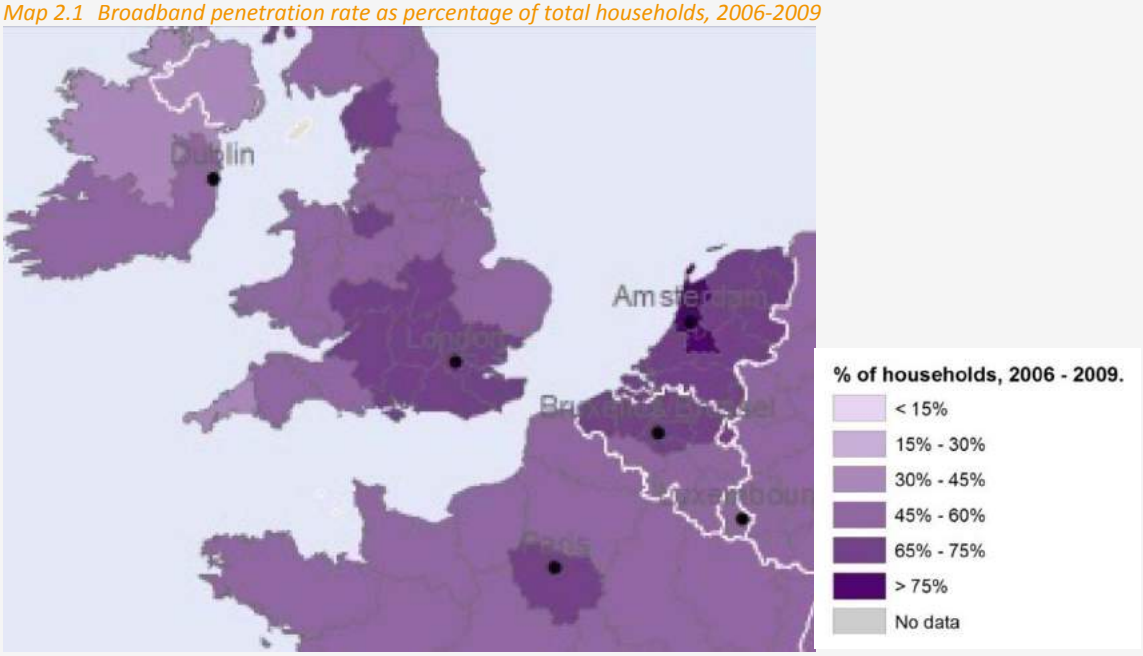
businesses, large companies and SMEs and Universities/Knowledge centres (Hampshire, Devon, West-Flanders, Noord-Brabant);
- stimulation of entrepreneurship amongst students and within universities and amongst employees of companies, matching youth education to business needs and developing growth ambitions for priority sectors (see also TO3: SMEs).

In terms of sectors, the following **sectors** are mentioned most often **for targeted innovation policy and cluster development**:
- logistics, transport (i.e. shipping) and ports, in particular streamlining the logistics chain and making port operations more sustainable;
- environmental & marine technology and developing the “blue economy”;
- agro-food;
- renewable energy production and energy efficiency;
- communication, digital and creative industries.

2.2 Theme 2: ICT

Theme 2: ICT Enhancing access to and use and quality of ICT	*Investment priorities under theme ICT:* Enhancing access to and use and quality of ICT through: 2A: extending broadband deployment and the roll-out of high-speed networks and supporting the adoption of emerging technologies and networks for the digital economy; 2B: developing ICT products and services, e-commerce and enhancing demand for ICT; 2C: strengthening ICT applications for e-government, e-learning, e-inclusion, e-culture and e-health;
EU 2020 target	Indicator EU2020: there is no EU2020 target formulated for the theme ICT.
Description	To gain insight in the state of play regarding the theme ICT we look at: - The broadband penetration rate 2006-2009 (SIESTA, ESPON). This is the latest complete set of data on this indicator; - Share of persons that regularly use the internet 2010 (EUROSTAT). Both indicators are only available on NUTS 2, there is no other data available on NUTS 3 level. The **Broadband penetration rate** describes the percentage of households having high-speed connections to the Internet. Internet access is directly quoted in A Digital Agenda for Europe as a necessary social development in order to grow strongly, to create jobs and prosperity and to ensure citizens access the content and services they want. The **usage of internet** looks at regular use, defined as using the internet once a week. (Note: in France the share of persons regularly using the internet is only available on NUTS1-level).
State of play	

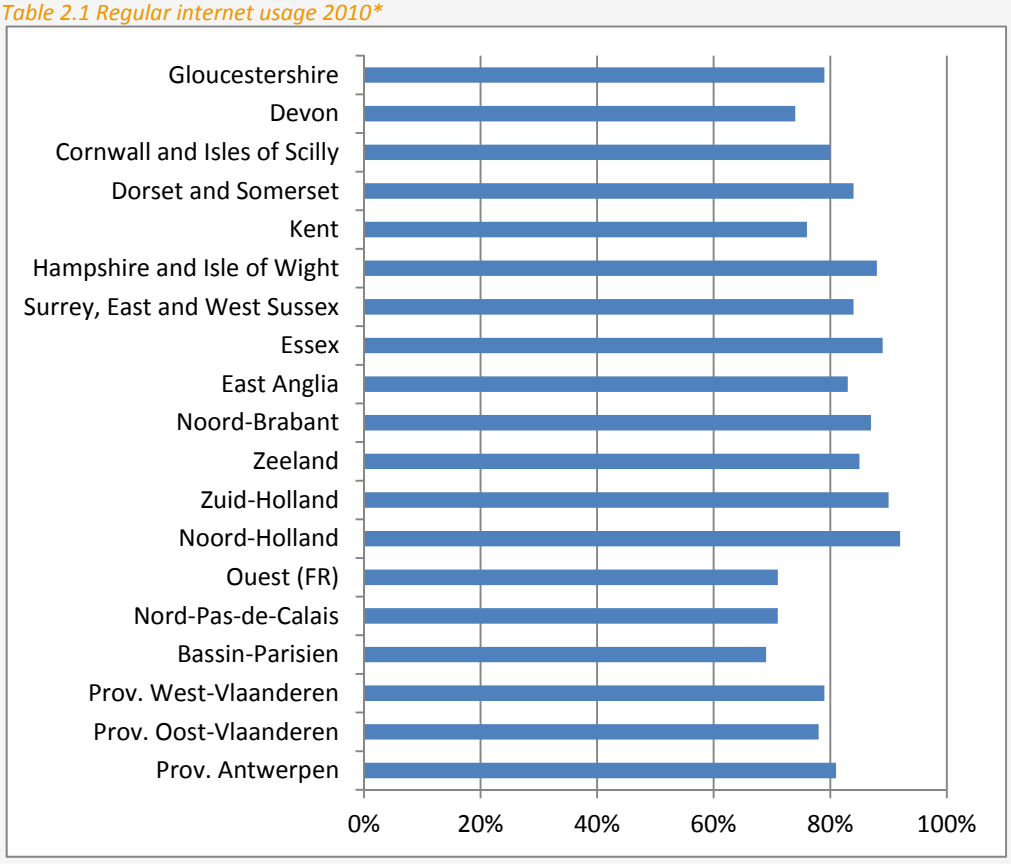
Map 2.1 Broadband penetration rate as percentage of total households, 2006-2009



Source: SIESTA, ESPON

Conclusions in general	<u>Broadband penetration</u> From the analysis of EU wide data not reported in this analysis[2], one can observe a highly divers spatial pattern, varying between rates above 75% (e.g. some Swedish regions and Iceland) and less than 15% in some Romanian regions. The EU27 average in 2009 was 56%. The broadband penetration in the 2Seas and FCE area is 67% (2009) which is above the EU27 average (2009). Within the FCE and 2Seas programme area the differences are much smaller. The broadband penetration is above EU average in all regions. Broadband penetration rate is higher in urban areas[3]. The highest penetration is found in Noord-Holland (87% in 2011 where the EU27 average is 64,5%). The lowest penetration is found in Nord - Pas-de-Calais : 57% in 2009. Between 2006-2010 the penetration rate increases in the EU27 and all FCE and 2Seas areas. The EU27 average increases in this period from 41% in 2006 to over 60% in 2010. Notable is the above average growth between 2006 and 2009 in the UK regions; resulting in a penetration of more than 70% for all regions (no data available for Cornwall and Isles of Scilly and Devon). The Flemish and French regions also made a steady increase, but we see a decrease in Nord-Pas-de-Calais between 2010 and 2011 (from 68 to 65%). The growth rate in the Dutch regions is found to be lower, as average broadband penetration rates were already relatively high in 2006 (61%-67%).
State of play	

*Table 2.1 Regular internet usage 2010**



* Regular: Frequency of Internet access: once a week. All data for 2010, except Devon (2008).

Source: EUROSTAT

Conclusions in general	<u>Regular usage</u>

[2] Digital Agenda for Europe Scoreboard 2012

[3] definition urban and rural, see also section 'general indicators; urban rural typology' and map 0.9

	The share of persons (age 16-74, EU27) that uses the internet regularly in 2011 is 68%. This share within both project areas is considerably higher: 81% (FCE) and 85% (2Seas). The highest regional shares are found in several UK and Dutch regions (Noord-Holland, 92%, Noord-Brabant and Essex 89%, Zuid-Holland and Hampshire and Isle of Wight 88%). Lowest rates are found in France (around 70%) (Note: in France the data is only available on NUTS1-level). The Dutch-regions already had a high percentage of individuals using the internet in 2006 (75%-80%), whereas the UK-regions made a fast growth with levels between 53%-67% in 2006, to 76%-89% in 2010. In France and Flanders, the growth rate is steady but lower than in the UK. The growth experienced in West-Vlaanderen between 2008-2009 was the highest in the area:, from 60% to 74% in one year.
Conclusions in relation to FCE and 2Seas areas	<u>Commonalities</u> In both programme areas the regular usage of internet and the broadband penetration rate is relatively high compared to Europe as a whole. <u>Differences</u> - The average broadband penetration rate in the 2Seas area is higher than in the FCE-area (2Seas = 81% and FCE = 65% in 2009 calculated on NUTS 2 level). This is mainly caused by the relatively low broadband penetration in the French regions and in the south west UK regions (Dorset and Somerset, Cornwall and Isles of Scilly and Devon) - The share of people (age 16-74) that uses the internet regularly in the 2Seas area (85%) is a higher than the shares in the FCE-area (81%, 2011, calculated on NUTS 1 / 2 level). This is mainly caused by lower internet use in French regions.
Policy analysis	<u>European level</u> The European digital agenda, as one of the EU's 7 flagship initiatives, aims to help Europe's citizens and businesses to get the most out of digital technologies. The Digital Agenda contains 13 specific goals which encapsulate the digital transformation which the EU strives to achieve, among others: - 50 % of the EU to subscribe to broadband above 100 Mbps by 2020 - 33 % of SMEs to make online sales by 2015 - all key cross-border public services, to be agreed by Member States in 2011, to be available online by 2015. - to double public investment in ICT R&D to € 11 by 2020. <u>National level</u> On a national level, the yearly reform programmes and position papers take on board specific EU recommendations regarding the digital agenda. In France the development of ICT applications and services and support large-scale social change and to promote inclusion including the elderly should be promoted. In the UK, the focus should be on increasing ICT-uptake in export-oriented SMEs. This indirectly connects to Flanders where CSF Funds should help step up business investment in ICT to increase the technology content of products and boost productivity. Flanders also mentions ICT as 'enabler' for specific other sectors and cross-sector innovation and tackling societal challenges[4]. For the Netherlands no specific ICT related challenges are mentioned in the position paper.

[4] The societal challenges as described in the Horizon 2020 programme are: Climate action, resource efficiency, and raw materials; Secure, clean and efficient energy; Food security, sustainable agriculture, marine and maritime research and the bio-economy; Health, demographic change and wellbeing; Inclusive, innovative and secure societies; Smart, green and integrated transport.

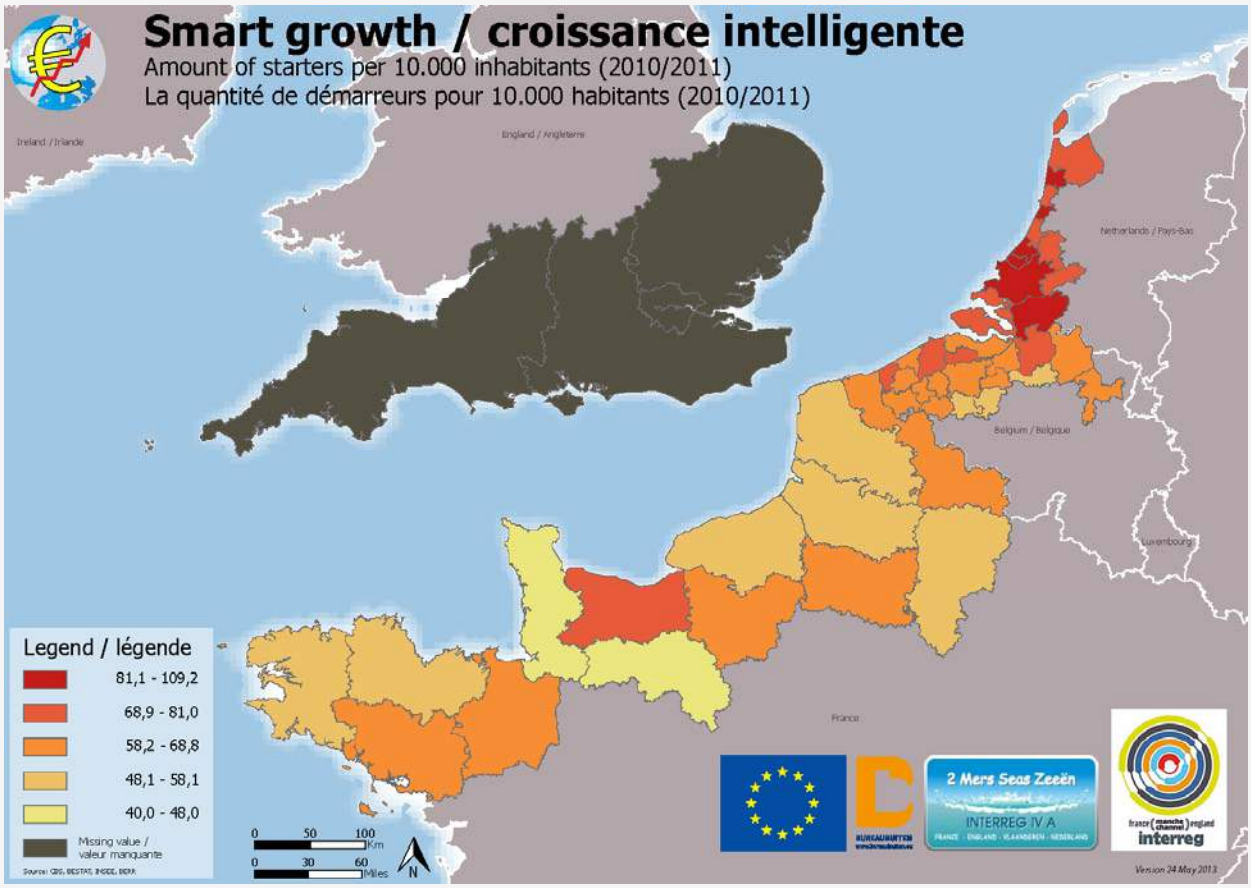
	Regional level On regional level, ICT policies focus on broadband roll-out and/or on supporting ICT as a priority economic sector. Several regions mention ICT (in general or a specific aspect) as a smart-specialization sector (Noord-Holland, Zeeland, Zuid-Holland, Suffolk, Swindon, Wiltshire, Dorset, Poole, Devon (& Exeter), Antwerp, Nord-Pas-de-Calais, Finistère, Bretagne, Basse-Normandie). Like Flanders, Noord-Brabant also mentions ICT as 'enabler' for specific other sectors and cross-sector innovation and tackling societal challenges. Broadband roll-out activities include setting up a broadband fund (Noord-Brabant), offering specific broadband facilities and services to companies (Kent, Cornwall & Scilly) or creating a broadband incubator area for digital business (Oost-Vlaanderen). Increasing digital accessibility is a major issue in several, mostly rural, regions. In Bretagne and Finistère the focus is on the creation of very high speed networks, awareness and ICT training and strengthening the ICT sector backed by a recognized scientific center of excellence. The roll-out of broadband connections is mentioned in the UK (national level) as a measure to stimulate economic growth in rural areas. Conclusion policy analysis Within the programme areas focus within the ICT theme should be primarily on stimulating development of innovative demand-driven ICT-applications and services (cross-sectoral) and on broadband roll-out in rural areas (especially in the FCE programme area).

2.3 Theme 3: SMEs

Theme 3: SMEs Enhancing the competitiveness of SMEs	*Investment priorities under theme SMEs* Enhancing the competitiveness of SMEs through: - 3A: promoting entrepreneurship, in particular by facilitating the economic exploitation of new ideas and fostering the creation of new firms; - 3B: developing new business models for SMEs, in particular for internationalisation.
EU 2020 target	Employment: 75% of the 20-64 year-olds to be employed
Description	To gain insight in the state of play regarding the theme SMEs indicators used are: - number of starters and failures at NUTS3-level; - SME size and size distributions per member state; - annual growth percentages in employment, real added value and real productivity of SMEs The **number of starters and failures** shows the dynamics of the economy. The rate between the starters (creating of businesses) and failures/insolvencies indicates the performances of a region's enterprises, and shows where companies are likely to start and in which regions companies are disappearing. The **SME size and size distributions** give insights in the importance of SMEs to the economy as a whole, by presenting the share of persons working for SMEs in total employment. Furthermore, the indicator shows the number of SMEs for different SME size categories per member state, which reveals its average SME size. SMEs are defined as enterprises with 250 or less employees. The **annual growth percentage** gives insights in the capacities/strengths of the new (small) enterprises per member state, and their performance in comparison with other European countries. Regional data on entrepreneurship and the numbers and performance of SMEs is not available on European level. Therefore the data for starters and failures has been drawn from national data sources: - Flanders: number of businesses created 2012/ # number of insolvencies and businesses deregistrated 2012; - France: number of businesses created in 2012 / # of corporate bankruptcies in 2011; - Netherlands: number of businesses created / # number of insolvencies and businesses deregistrated; - United Kingdom: rates of VAT-registration and deregistration (2007) and insolvencies (2011) per 10.000 resident adults per NUTS1-region in UK parts of the programme area; - United Kingdom: number of VAT and/or PAYE based enterprise by age of business per NUTS-3 region (2012); - Whole programme area: SME size and size distributions for employment, forecast for 2013, (Source: EUROSTAT SME size distribution); - Whole programme area: annual growth percentages in employment, real value added and real productivity of SMEs in EU27, 2008-2011 (Source: EUROSTAT/National Statistics Offices of Member states/Cambridge Econometrics/ Ecorys). Because data has been drawn from several data sources, definitions for starters and failures slightly differs. Starter/failure rates for the Netherlands and Flanders can be compared. Figures for France contain an underrepresentation for failures and should

	only be compared to other regions with caution. The number of VAT registrations/deregistrations in the UK doesn't represent the total amount of starters/failures, because VAT registration is voluntary for businesses with a turnover below £79,000. In order to make comparisons, indicators on size distribution of companies (number of companies per size) and SME performance (employment growth, real value added and productivity) on national level have been added.
State of play	

Map 3.1: Starters per 10.000 inhabitants (data for UK not comparable)



Source: BESTAT, CBS, INSEE

Table 3.1 Starters and failures Flanders parts of the programme area, 2012

NUTS3-Region	Starters*	Failures #	Rate	Starters per 10.000 inhabitants
Prov. Antwerpen	11.717	8.195	1,4	65
Prov. Oost-Vlaanderen	6.932	5.704	1,2	62
Prov. West-Vlaanderen	10.164	7.487	1,4	67

** Number of businesses created / # Number of insolvencies and businesses deregistrated*

Source: BESTAT

Table 3.2: Starters and failures in France, 2011/2012

NUTS3 Region	Starters *	Failures #	Rate	Starters per 10.000 inhabitants
Calvados	5.040	517	9,7	74
Côtes-d'Armor	3.340	415	8,0	56
Finistère	4.896	601	8,1	54
Ille-et-Vilaine	6.303	526	12,0	63
Manche	2.318	301	7,7	46
Nord	16.318	1.790	9,1	63
Pas-de-Calais	7.810	910	8,6	53
Seine-Maritime	6.723	832	8,1	54
Somme	2.889	376	7,7	50
Aisne	2.856	376	7,6	53
Oise	5.219	540	9,7	65
Eure	3.745	411	9,1	64
Orne	1.364	198	6,9	47
Morbihan	4.708	621	7,6	65

** Number of businesses created in 2012 / # of corporate bankruptcies in 2011*

Sources: INSEE; BODACC

Table 3.3: Starters and failures in the Dutch parts of the programme area, 2011

NUTS3-Region	Starters*	Failures #	Rate	Starters per 10.000 inhabitants
Kop van Noord-Holland	2.675	1.725	1,6	72
Alkmaar and surroundings	2.035	1.190	1,7	88
IJmond	1.565	940	1,7	81
Agglomeratie Haarlem	2.415	1.405	1,7	109
Agglomeratie Leiden en Bollenstreek	3.300	1.955	1,7	81
Agglomeratie 's-Gravenhage	8.430	4.920	1,7	104
Delft en Westland	1.990	1.050	1,9	92
Oost-Zuid-Holland	2.265	1.380	1,6	77
Groot-Rijnmond	1.2420	7.790	1,6	88
Zuidoost-Zuid-Holland	3.030	1.975	1,5	77
Zeeuwsch-Vlaanderen	690	430	1,6	65
Overig Zeeland	1.945	1.095	1,8	71
West-Noord-Brabant	5.280	3.240	1,6	86

** Number of businesses created / # Number of insolvencies and businesses deregistrated*

Source: CBS

Table 3.4 Rates of VAT-registration and deregistration (2007) and insolvencies (2011) per 10.000 resident adults per NUTS1-region in UK parts of the programme area

Regions	Insolvencies	Registrations	Deregistration	Rate	Starters per 10.000 inhabitants
East of England	26.1	43	32	1,3	43
South East	24.3	48	34	1,4	48
South West	30.4	40	29	1,4	40

Sources: BERR Enterprise Directorate (Statistics Team) and The Insolvency Service

*Table 3.5 Number of VAT and/or PAYE registered enterprises by age of business per NUTS-3 region (2012)**

Region	Less than 2 Years	Share of total
Southend-on-Sea	980	18%
Thurrock	885	21%
Essex County	8.630	16%
Norfolk County	3.705	13%
Suffolk County	3.450	13%
Brighton and Hove	2.035	19%
Isle of Wight	475	11%
Medway	1.160	18%
Portsmouth	845	18%
Southampton	945	18%
East Sussex County	2.660	13%
Hampshire County	7.985	16%
Kent County	8.205	16%
West Sussex County	4.705	15%
Bournemouth	1.030	19%
Cornwall	2.265	11%
Isles of Scilly	10	5%
Plymouth	835	17%
Torbay	455	13%
Devon County	3.615	11%
Dorset County	2.120	12%
Cambridge	680	16%
Surrey County	9.585	18%
Wiltshire	2.720	14%
Somerset County	2.495	11%

Source: Inter Departmental business registrations

* total number of businesses (also non-VAT registrations is estimated at twice the number

Conclusions in general

Starters and Failures

Due to different definition usage among the EU member states, regional data on European level is not comparable. This means that for starters and failures, unfortunately no comparisons can be made on European level and no trend indication can be given.

The different use in definition also means that comparisons between the programme's regions should be carried out with caution. However, the indicators for Member states give an indication of the performance of SME entrepreneurship in the different states.

In 2012 there were 28.813 starters in the Flanders regions and 21.3865 failures, a surplus of 7.427 enterprises. Antwerpen (arrondisement) is the region which has the highest amount of starters (6.993); Diksmuide, although in absolute numbers the region with the lowest amount of starters, had the highest rate with 1,5 starting enterprises for every failure.

Between 2011 and 2012, 73.529 enterprises started their business in the French regions. Nord, with the city of Lille as its capital, was the French region with most starters (16.318). The rate for starters/failures (which is based on a different definition of failures and which is therefore higher than in other regions outside France), is the highest in Ille-et-Vilaine whereas Orne and Morbihan have a relative low rate, meaning that the relative highest surplus can be found in Ille-et Vilaine.

In total there were 48.040 starters in the Dutch-regions in 2011. In the same year, there were 29.095 failures, resulting in an increase of 18.945 enterprises. The highest number of starters is found in Groot-Rijnmond, followed by 's-Gravenhage and West-Noord-Brabant. The starter/failure rate was highest in Delft en Westland, meaning that the relative increase

in enterprises was the highest in this region.

The numbers on registration and deregistration for the UK-regions are highest in the South East region, where 43 people per 10.000 inhabitants started a business. This resulted in a slightly higher starter/failure rate for this region compared to the East of England and South West region, although differences are small. As data on starters and failures was only available at NUTS1-level, data for the United Kingdom has been supplemented with data on business age per NUTS3-level. This data shows that the Surrey, Kent and Essex counties contain the highest number of enterprises with a business age of less than 2 years. As share of the total amount of companies, Thurrock, Brighton and Hove and Bournemouth relatively contain the highest number of businesses which started over the last two years. The number of new companies on the Isles of Scilly tends to be rather low.

The number of starters per 10.000 inhabitants gives an indication of SME entrepreneurial activity in the various Member states. These figures show that the number of starters in the Dutch regions is higher than elsewhere with 89 starters per 10.000 inhabitants. In comparison, this number is 64 in the Flanders regions, 59 in the French regions and the UK regions account for 44 starters per 10.000 inhabitants. In all regions, the number of starters has increased over the last 10 years, which is mainly a result of the increase in independent contractors.

State of play

Figure 3.1 SME size and size distributions for employment, forecast for 2013

Source: EUROSTAT SME size distribution

SME size distribution

In the EU27, 69,% of all employed persons are working in SMEs (2013). The share of persons working for SMEs consisting of 9 persons employed or smaller is 31,8% and thereby makes up the largest shares of the SME categories.

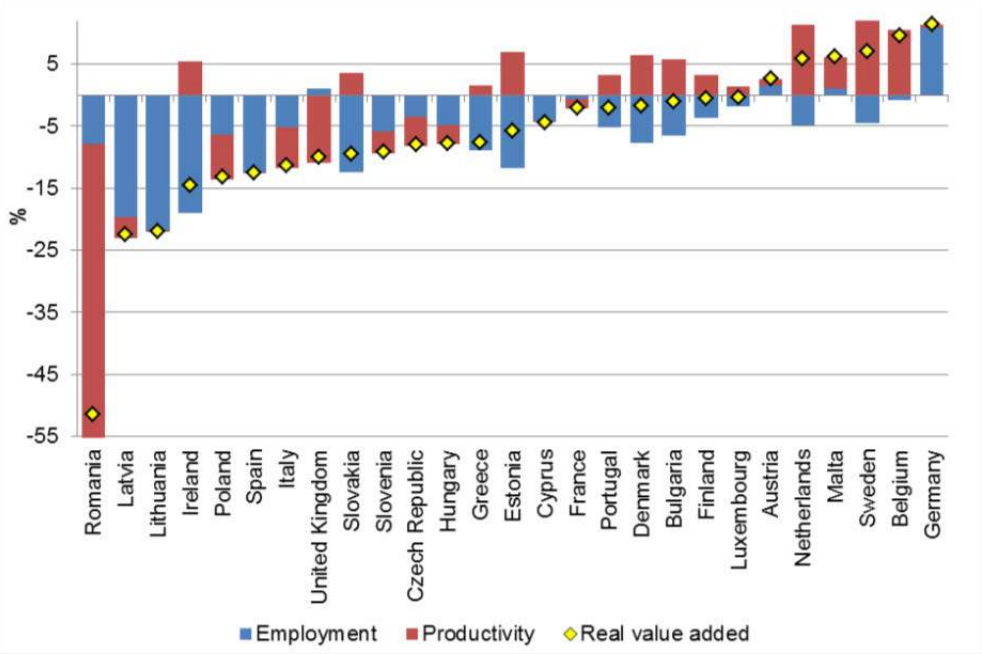
In France (68%), Belgium (64%) and the Netherlands (65%), the share of employed persons

in SMEs is comparable to the EU27 level. In the UK however, the SME share in employment is lower with only 54%. The lower share of SMEs in the UK is mainly a result of its high share of people employed in business with over 249 employees (46%) and the share of SMEs in the total number of businesses: in the UK 90% of all businesses is a SME, which is slightly lower than in the other Member states.

When focussing on the trends in SME employment between 2005-2013, no changes occurred in the share of SMEs in total employment; both are 68,7%. There has been a slight change though in the size of SMEs, as the share of SMEs with 9 or less employed persons declined slightly (from 31,8% to 31,3%). The number of SMEs with 50-249 employed persons showed a slight increase (from 16,2% to 16,6%). The changes are larger when looking at the four member states: the number of employed persons in SMEs in Belgium (-3%) and the UK (-2%) declined, whereas the number in France (7%) and the Netherlands (11%) increased. A focus on the number of SMEs shows that between 2005-2013, the number of SMEs increased in all four Member states, with high increases in Belgium (30%) and the Netherland (24%) and lower increases in the UK (7%) and France (4%).

State of play

Figure 3.2: Annual growth percentages in employment, real value added and real productivity of SMEs in EU27, 2008-2011



Source: EUROSTAT/National Statistics Offices of Member states/Cambridge Econometrics/Ecorys

Conclusions in general

SME performance

The figure on SME performance shows the annual growth percentages of different SME performance indicators between 2008-2011 for the whole European Union. Except for the United Kingdom, the annual growth percentage for employment dropped in the programme countries between these years, with the largest decrease in the Netherlands. Compared to the overall European pattern, deviations in employment in the programme countries are modest. Differences are found for productivity, which increased in the Netherland and Belgium with over 5%, whereas decreases are found in France (-2%) and the United Kingdom (-12%). Similar patterns can be detected for the real value added, with Belgium showing the largest increase (8%), followed by the Netherlands (5%).

Conclusions in relation

Commonalities

to FCE and 2Seas	In both programme areas, there has been an increase in the number of SMEs, which in both programmes make up for the vast amount of businesses. Differences - The number of starters is higher in the 2Seas area, as a result of high starters levels in the Netherlands - The SMEs size distribution (national level) for employment and growth rate differs among the four Member States of the two programmes. - Divergent results for the MS are also found for SME performance, although productivity and real added value tends to be higher in the 2Seas area as a result of increases in Belgium and the Netherlands.
Policy analysis	European level Promoting the competitiveness of small and medium-sized enterprises (SMEs) is a key goal of the Europe 2020 Strategy. **Creating the right conditions for start-ups** is an important part of the EU's growth and jobs strategy, as described in the Commission's Europe 2020 Industrial Policy flagship communication. In addition, the EU has a key role to play in **unlocking the growth potential of SMEs**. Activities in this area focus on addressing the key market failures that limit SME growth – for example in relation to access to finance – and ensuring that SMEs are able to take full advantage of the enormous potential of the European single market. The specific interests and circumstances of SMEs are taken into account in the design of all EU policies and funding programmes, for example by simplifying rules, reducing the costs of participation, accelerating award procedures and providing a "one-stop shop" approach to make life easier for the beneficiaries of EU funding. In addition a **dedicated programme for industrial competitiveness and SMEs** will be introduced by the Commission, as a successor to the non-innovation part of the current "Competitiveness and Innovation Framework Programme" (CIP). The "Competitiveness and SMEs Programme" (COSME) will focus mainly on measures to promote more dynamic and internationally-competitive SMEs. The EC's 4 position papers to Member states for the 2014-2020 period reflect the European ambitions on SME development in the UK, France, the Netherlands and Belgium and recommend approaches that show connections in scope and approach. In the UK, SME competitiveness and entrepreneurship development should be supported through the provision of funding, in particular non-bank finance (financial engineering) and business advisory services. In France, the focus is on connecting mechanisms between SMEs and academia, next to direct support schemes to SMEs. Instead of providing direct subsidies, the focus is on 'revolving fund' approaches, loans and providing bank guarantees. In Belgium, access to financing for SMEs should be improved as well, but focus should also be on supporting entrepreneurship, strategy training, and enhancing entrepreneurial attitude. Enhancing business innovation and competitiveness by unlocking private sector R&I investment and capacities is the main recommendation for the Netherlands. Strengthening connections between SMEs and the science and research world is essential in this respect. For the Dutch SMEs, in particular stronger focus on eco-innovation and resource-efficiency is recommended. In short, while differences in ambitions and approach exist between the position papers, there seem to be many common challenges on which cross-border cooperation is possible. National level The position papers for the 4 nations all specifically mention the **fisheries and agriculture sector as priority sectors** for SME support, mainly to **accelerate the on-going structural changes and diversification**, by providing business skills courses, fostering entrepreneurship and introducing new technologies and organisational know-how. The Maritime strategy for the Atlantic underlines that educational establishments should be the driving force to create labour mobility, entrepreneurship and diversifi-

cation in the fisheries sector. 'Virtual clusters' could be the basis of cross-border co-operation, in which SMEs, large enterprises and researchers collaborate on distance on innovative and high-value added products and services in the maritime industry.
On a national level, several mechanisms to support start-ups and SMEs already exist. In the Netherlands for example, there are funding opportunities for SMEs for R&D activities, digitalization and sustainability investments. In the UK, SME support will be focused on high-growth sectors. In France, a National Seed Fund and Strategic Investment Fund exists that in the near future will be complemented by regional seed funds and co-investment. Flanders is also looking to respond to the position paper ambition, and strives to ensure credits and funding for SMEs by providing a Bank Plan that plan will offer targeted aid to entrepreneurs, invest in more and stronger entrepreneurs and will provide instruments that facilitate company investments (strategic training and investment aid).

Regional level
Regional ambitions on SMEs also focus on increasing the amount of start-ups and enhancing their competitiveness and survival rate. However, the focus seems to be more on coaching and networking activities and spatial planning. Examples include early identification of entrepreneurial ability (Noord-Brabant), coaching and mentoring of entrepreneurs (Cornwall, North Dorset, Sussex) and 'entrepreneurship clinics' (Zeeland). Services to allow SMEs to adapt to the low-carbon economy are also offered by some regions (Portsmouth, Haute Normandie). Additionally, some regions offer internationalization services to SMEs (Finistère, Basse Normandie), while focusing on priority sectors.
Spatial planning (incubators, specific business zones) is used by a considerable number of regional authorities to accommodate SMEs in an environment favourable for innovation and growth.

Conclusion policy analysis
Start-ups and SMEs account for a growing amount of jobs and contribute to a large extent to the economic performance of the regions in the programme areas. Considering the current macro-economic climate, the need for governments to provide start-ups and SMEs with the right conditions is ever more apparent. The analysis of policies in both programme areas shows a multitude of initiatives exist to promote self-employment and start-ups, innovation and the growth of SMEs, from the European (CIP and from 2014 COSME) and national (financing schemes) to the regional (mostly networking or internationalization services and business zones) level.

A missing link in this theme to which cross-border cooperation could contribute is coordination of initiatives and exchange of expertise. It will be a major challenge to make all initiatives for SME support (financial, networking, spatial) as complementary as possible, to possibly find synergies and interconnections between them, to achieve a more cross-border SME environment and to prevent unnecessary competition between regions.
Additionally, regions inexperienced with certain types of SME support should be able to profit from the expertise of regions that have already exploited successfully similar initiatives to foster SME performance. Furthermore, the many initiatives that offer targeted support, for example to spur innovation, could also profit from exchange of knowledge to prevent 'the wheel from being invented twice', and to better align efforts to develop new products.

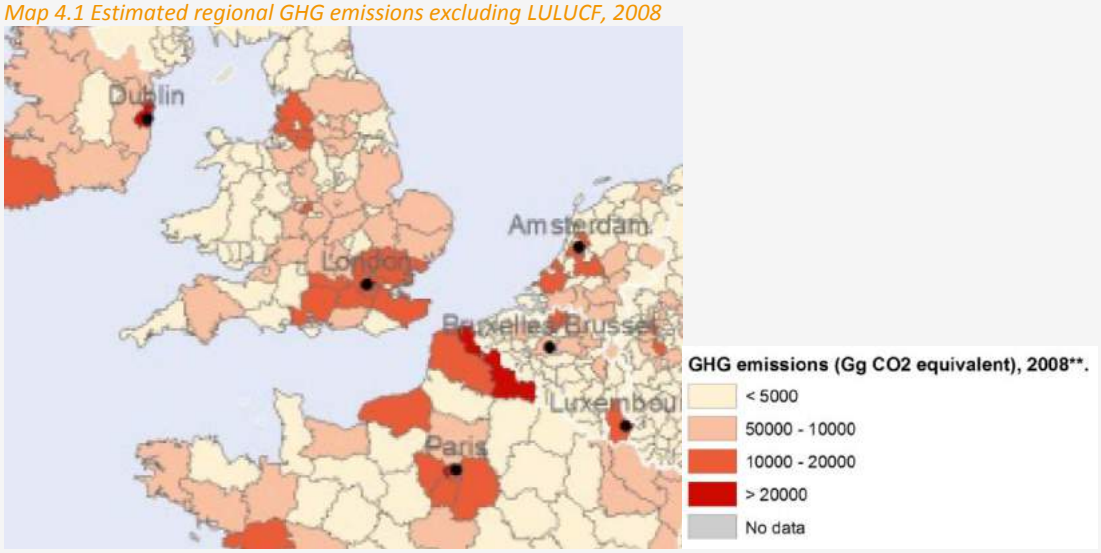
Both coordination and targeted exchange of expertise on SME policies will also contribute to efficient spending of government budgets.

2.4 Theme 4: Low carbon economy

Theme 4: Low carbon Economy	*Aim of theme* Supporting the shift towards a low-carbon economy in all sectors. *Investment priorities* Supporting the shift towards a low-carbon economy in all sectors, through: - 4A: Promoting the production and distribution of renewable energy sources; - 4B: (Proposal)Promoting energy efficiency and renewable energy use in enterprises, primarily in SMEs; - 4C: (Proposal)supporting energy efficiency, smart energy management and renewable energy use in public infrastructures, including in public buildings, and in the housing sector;" - 4D: (Agreement) Developing and implementing smart distribution systems at low and medium voltage levels; - 4E: (Proposal)Promoting low-carbon strategies for all types of territories, in particular for urban areas, including the promotion of sustainable urban mobility and mitigation relevant adaptation measures; - 4F: (Proposal): promoting research in, innovation in and adoption of low-carbon technologies including strengthening ICT applications for energy system management and control; - 4G: (Promoting) the use of high-efficiency co-generation of heat and power based on useful heat demand;
EU 2020 targets	- Reduction of greenhouse gas emissions 20% (or even 30%, if the conditions are right) compared to 1990 - 20% of energy from renewables - 20% increase in energy efficiency
Description	To describe the state of play in this theme we look at: - Estimated regional greenhouse gas (GHG) emissions, source ESPON SIESTA calculations, origin of data EUROSTAT and UNFCC 2011). The data is derived from UNFCC GHG data at national level and allocated to NUTS 3 areas in relation to population and gross value added. To give insight in the potentials for a low carbon economy in the area, we present; - Potential for electricity production from photovoltaic panels represented in kWh, 2005 (Siesta, ESPON) - Potential for electricity production from wind power stations represented in meters / second, 2005 (Siesta, ESPON)

State of play

Map 4.1 Estimated regional GHG emissions excluding LULUCF, 2008



Source: Siesta, ESPON

Conclusions in general

Greenhouse Gas Emissions

In 2009, the EU level of GHG emissions was at 4,6 billion t CO_2 equivalents, which comes down to 9,2 t CO_2 equivalents per capita[5]. The variation between member states is considerable: Luxembourg emitted more than 23 t CO_2 equivalents per capita while Latvia's level of emissions was close to 5 t CO_2 equivalents. For the member states in the programme area, the emission levels per capita (2009) are: Netherlands (12,1) and Belgium (11,6), the UK (9,3) and France (8,2) t CO_2 equivalents.

The estimations on NUTS3 level by Siesta (see map 4.1) show that the densely populated and urban regions emit the highest levels of CO_2. In 2008 the estimated GHG emissions were highest in the French region Nord, with other high estimates for Groot-Rijnmond, Antwerp, Pas de Calais, Seine Maritime, and several eastern UK regions.

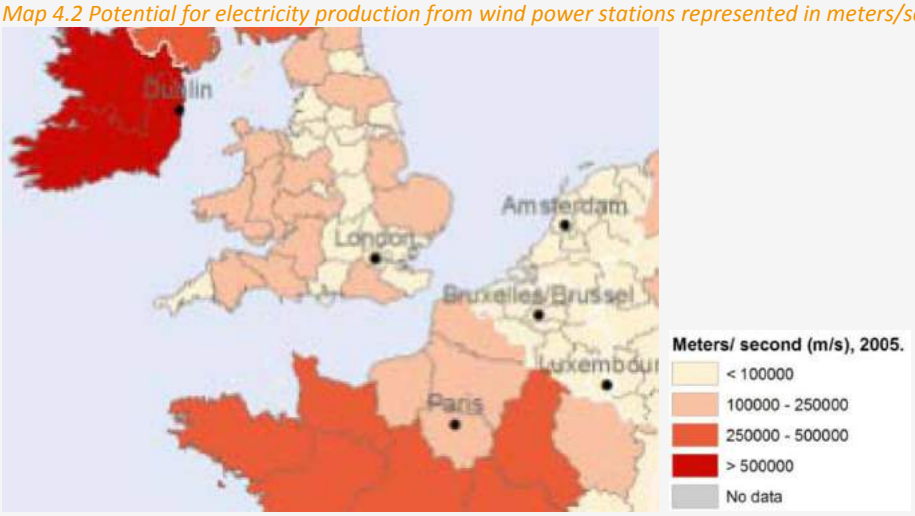
Unfortunately, exact total emission levels or emissions per capita are unavailable for the programme areas regions, so comparisons at this detail level are not possible. The country data indicates however that for the 2Seas area (comprising the Dutch and Flemish regions) emission levels per capita are generally higher than for the France-England area.

A general trend can be observed of lower GHG emissions throughout Europe. This also counts for the programme area, where all member states have lower emission levels in 2009 compared to 1990². The highest reduction of GHG (in the programme area) was found in the UK. France, Belgium and the Netherlands are lagging behind in terms of GHG reduction in relation to their EU2020 targets.

[5] SIESTA (Spatial Indicators for a 'Europe 2020 Strategy' Territorial Analysis (Draft Report) Version 10/08/2012

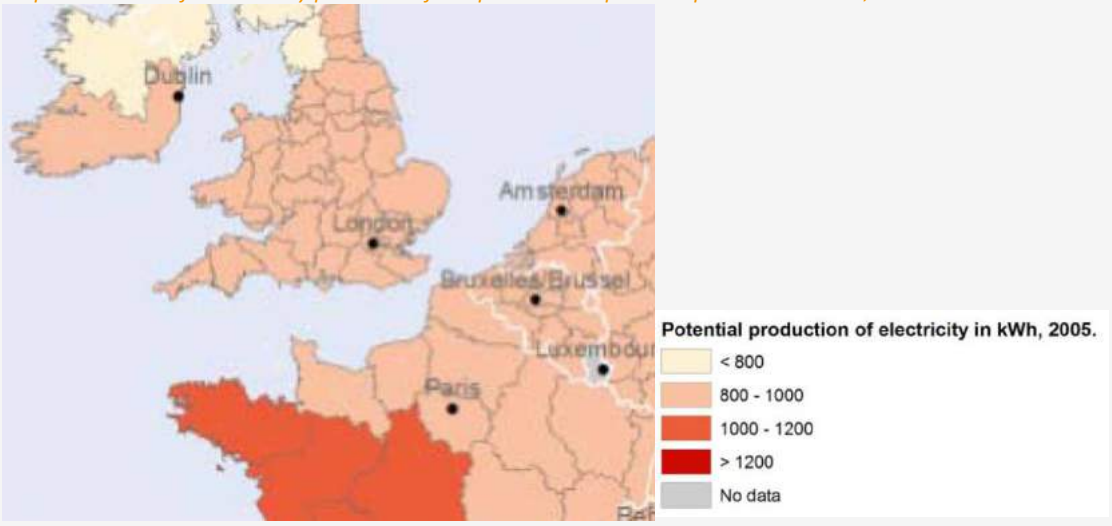
State of play

Map 4.2 Potential for electricity production from wind power stations represented in meters/second, 2005



Source: Siesta, ESPON

Map 4.3 Potential for electricity production from photovoltaic panels represented in kWh, 2005



Source: Siesta, ESPON

Conclusions in general	<u>Renewable energy</u> The share of renewable energy in gross final energy consumption should reach 20% in 2020. In the Netherlands, Flanders and the UK the share of renewable energy in gross final energy consumption is below 5%. In France this share lies between 10% and 20%. This means additional effort is necessary to reach the targets. Furthermore, the progress to more energy from renewables has been slow. By 2009 France, United Kingdom and the Netherlands are more than 9%-points away from the 2020 target set. An increase in the share of renewable energy is of important to decrease the energy independency on other states or a limited amount of resources. For example, in France total energy production relies for 75% on nuclear energy and in Belgium this is 52% (Source: World Nuclear Association 2011). Besides, more remote areas such as Bretagne and Southwest-UK are vulnerable to possible cut-offs, as their supply-lines are limited. However, in relation to this state of play in the 4 member states it should be noted that the national governments of France, the UK and the Netherlands have committed themselves to national targets for renewable energy generation, which are in more ambitious than the EU targets. These ambitions are backed by national investment programmes which make the acceleration in renewable energy generation feasible. The highest potential for wind power can be found in Bretagne and Basse-Normandie. Flanders and the Netherlands have the least potential in this area. Bretagne has also the best potential for electricity production from photovoltaic panels. Furthermore, the Atlantic coast offers a great potential for the development of marine renewable energy, such as wave power, with the coasts of Cornwall and Bretagne being the most suitable locations (ESPON ESaTDOR study, 2012).
Conclusions in general	<u>Energy efficiency</u> (No regional indicators are available for this theme, conclusions based on analysis of SIESTA, ESPON.) The EU target is a 20% increase in efficiency (equalling -385 Mtoe) by 2020. Energy efficiency is measured in energy intensity of the economy. In the 2000-2010 period, all 4 member states have been able to decrease their energy intensity, which proves that energy efficiency has been increased. As by 2010, the UK shows the largest efficiency gains (-30% to -15% energy intensity), the efficiency gains in Belgium, France are -15% to -5% energy intensity and the Netherlands 0 to -5% energy intensity. Overall the need for energy efficiency gains seem higher in the Netherlands (least gains in energy efficiency) and Belgium (largest deficiency in terms of 2020 target) and therefore in the 2Seas region.
Conclusions in relation to FCE and 2Seas	<u>Commonalities</u> - Both areas need to speed up shift to renewable energy - Expected continuation of the increase in energy efficiency in both areas - Urban regions emit most CO_2 in both areas - Considerable potential for renewables as member states committed to the target to increase the share of renewable energy <u>Differences</u> - Higher carbon emissions per capita in 2Seas area - Lower energy efficiency and less dynamism in the 2Seas area - More potential for wind and solar energy production in FCE area
Policy analysis	<u>European level</u> Next to the specific 2020 targets, the EU will boost sustainability through 2 flagship initiatives: 1. Resource-efficient Europe To support the shift towards a resource-efficient, low-carbon economy, our economic growth must be decoupled from resource and energy use by: - reducing CO2 emissions

- Promoting greater energy security.
- reducing the resource intensity of what we use and consume

2. An industrial policy for the globalisation era

The EU needs an industrial policy that will support businesses – especially small businesses – as they respond to globalisation, the economic crisis and the shift to a low-carbon economy, by:

- supporting entrepreneurship – to make European business fitter and more competitive
- Covering every part of the increasingly international value chain – from access to raw materials to after-sales service.

This policy can only be devised by working closely with business, trade unions, academics, NGOs and consumer organisations.

The position papers and country recommendations to member states table specific recommendations for a low-carbon economy in both programme areas.
For all 4 states an increase in energy efficiency is recommended, whereas in France and the Netherlands the focus in on the productive sectors and in the UK in the built environment. According to the EC, in the Netherlands carbon emissions can successfully be curbed by promoting eco-innovations in SMEs.

All states should increase their share of renewables in energy use, while in France and Belgium the focus should be on decentralized production of renewable energy. The Maritime strategy for the Atlantic connects to this ambition, recommending offshore wind developments as well as wave and tidal energy. For Belgium, the EC recommends use of advanced technologies for the production of heat and power from renewable sources and advanced-generation biofuels.

National level

Examples of national policy connecting to the EC recommendations are abound. For example, France has specific sectoral targets in place in order to increase the energy efficiency in industry, as well as energy savings certificate system to support energy efficiency measures.

The Netherlands has a support programme for sustainability investments for SMEs. In addition, the Dutch sustainability agenda specifically targets energy consumption reduction in the built environment and decentralized energy production for biomass, wind and solar. The national reform programme indicates that supply chain policies will make industry more energy-efficient.

Belgium has set up a scheme of green certificates and guaranteed minimum prices to support the development of electricity generation from renewable sources. Flanders mentions renwable energy as priority theme and supports renewable energy generation through targeted industrial policies, while investing in intelligent energy networks.

In the white paper on local growth, the UK is looking to develop financial and non-financial incentives for renewable energy generation. To support business energy efficiency, the 'low carbon clusters' concept will be further elaborated. Especially relevant for the programme area, the UK supports apprenticeships to develop skills in the low-carbon energy sector in coastal communities.

Table 4.1: EU2020 member state's targets for low carbon economy

	CO_2 reduction (compared to 1990)	**% energy from renewables**	**Increase in energy efficiency**
EU	20%	20%	20%
UK	16%	15%	No target

FR	14%	23%	-34 Mtoe
BE	15%	13%	-9,8 Mtoe
NL	16%	14%	No target

Regional level

Regional policies in both programme areas focus on a low-carbon economy in different ways.

Policies to reduce greenhouse gas emissions of agriculture and industry are most common, as almost all regions have a policy scheme / specific actions in place to achieve this. Next to economic sectors, final consumer policies to achieve a more responsible energy consumption are common.

Additionally support of sustainability as an economic sector ('eco-industries') is offered by regions, with Picardie, Bretagne, Antwerp, Rotterdam, Devon and Cornwall all supporting specific aspects of environment-related industries.

The coastal regions are also highly attractive as renewable energy generation sites, and deploy policies in order to speed-up the transition to low-carbon energy generation. Zeeland, Noord-Holland, Bretagne and Kent specifically mention renewable (decentralized) energy generation as priority theme in their spatial and economic policies. Next to wind, biomass and solar, tidal energy seems to gain ground as a renewable energy source.

Needs for crossborder cooperation

Accommodating the energy transition to low-carbon sources will have impacts on both space and industry in the coastal regions of both programme areas. Potential cross-border cooperation topics could be on technical, planning and environmental issues around coastal or marine sustainable energy generation. Implementing offshore wind farms, and related logistics and port facilities, already generate considerable impacts on several towns and marine zones in the programme areas.

In the context of the FCE and the 2Seas programme areas, low-carbon industry and research, and in particular renewable energy generation, have large potential as growth and job creators as member states are investing in these themes to meet the EU2020 targets. Regions on both sides of the Channel will want to reap the benefits of the large offshore wind developments, for example. Regional supportive policies to parts of the 'eco-industry' are already in place. Cross border cooperation will be of added value to effectively create the necessary preconditions for industry to further develop in the regions. Knowledge development and pilot projects could add to the favourable geographic conditions of the coastal regions in the areas.

On-land, the foreseen growth of decentralized energy production will see an increase of required storage and transportation infrastructure. This will generate common societal and spatial challenges, a.o. in raising local acceptance for generators or infrastructure. Activating citizens to become more aware of their consumption and (small-scale) production possibilities will be essential in order to create the acceptance for renewable energy generation.

Whereas the completion of the international energy grid might be a matter of national governments, regional governments might be affected by the integration of the national energy markets into one European market as well. In particular the infrastructure needed to interconnect national energy markets and guarantee the security of supply will be constructed for a fair amount in the coastal regions. This will create common challenges for which the programme areas are highly dependent on decisions on higher European level.

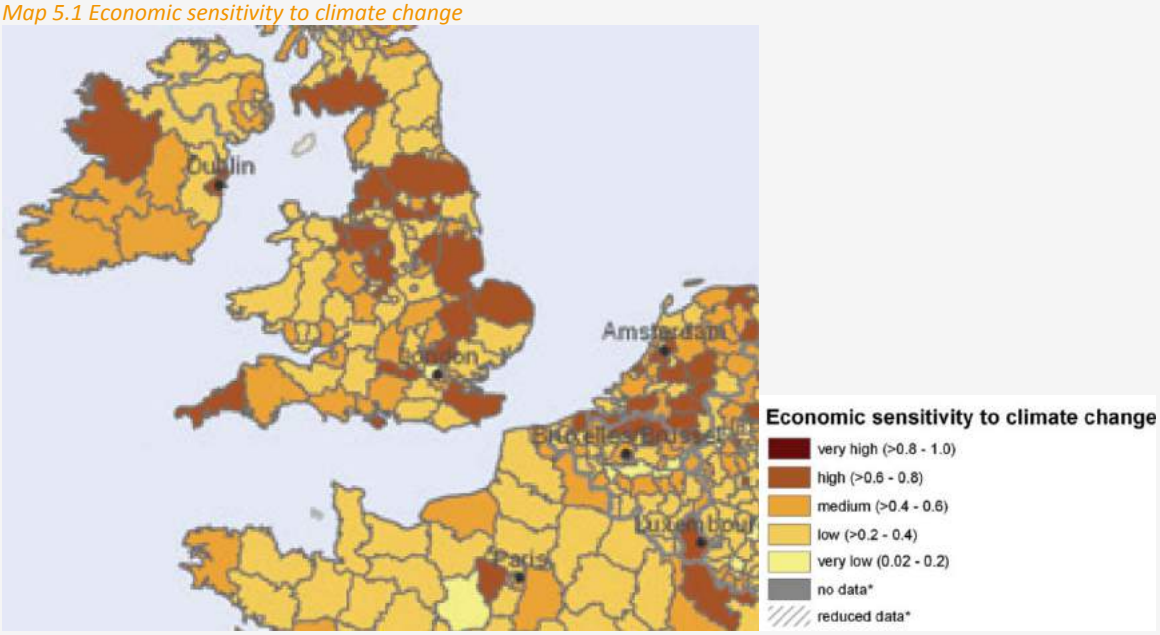
Conclusion policy analysis

The headlines of the policy approach in the two programme areas are comparable. Reducing GHG emissions and gaining energy efficiency are high on the regional policy agendas.

2.5 Theme 5: Climate change adaptation

Theme 5: Climate change adaptation	Promoting climate change adaptation, risk prevention and management *Investment priorities* Promoting climate change adaptation, risk prevention and management through: - 5A: supporting […] investment for adaptation to climate change, in particular those that are eco-system based; - 5B: promoting investment to address specific risks, ensuring disaster resilience and developing disaster management systems;
EU 2020 target	No EU2020 target is formulated in the field of climate change adaptation.
Description	In order to describe the state of play in relation to climate change adaptation, we look at: - Economic sensitivity to climate change (Climate, ESPON). This map highlights particularly those local economies which are highly dependent on a suitable climate, like tourism, energy, agriculture and forestry. - Environmental sensitivity to climate change (Climate, ESPON). This focuses on natural entities that are highly sensitive (like protected natural areas or especially fire prone forests) and relatively stable entities like soils, that have only limited capacities to adapt - Change in exposure to coastal flooding in 2100. This map indicates where sea level rise will have the biggest impact in terms of the exposure to coastal flooding events. The values are calculated on the basis of regional coastal storm surge heights projected by the DIVA model for a 100 year return event and heightened by a 1m sea level rise (in the storm). - Aggregate potential impact of climate change (Climate, ESPON). This map shows an aggregated view (weighted) combination of physical, environmental, economic and cultural sensitivity. Weights are based on a Delphi survey of the ESPON monitoring Committee. The potential impact is calculates as combination of regional exposure to climate changes and recent data on regional sensitivity. For details see also annex 9 of the Climate study of ESPON (2011). - Adaptive capacity of EU regions in regard to climate change (Climate, ESPON). Adaptive capacity is the ability or potential to respond successfully to climate change, and includes adjustments in both behaviour and in resources and technologies. Dimensions that affect a region's ability to adapt are the economic resources, infrastructure, technology, education, institutions and knowledge and awareness (weighted combination). Weights are based on a Delphi survey of the ESPON monitoring Committee. The first four maps give an indication on the degree to which the regions might be affected by climate change, and thus on the importance of adaptation. The fifth map shows the regional potential capacity to adapt to climate change.
State of play	

Map 5.1 Economic sensitivity to climate change



Source: Climate, ESPON

Conclusions in general

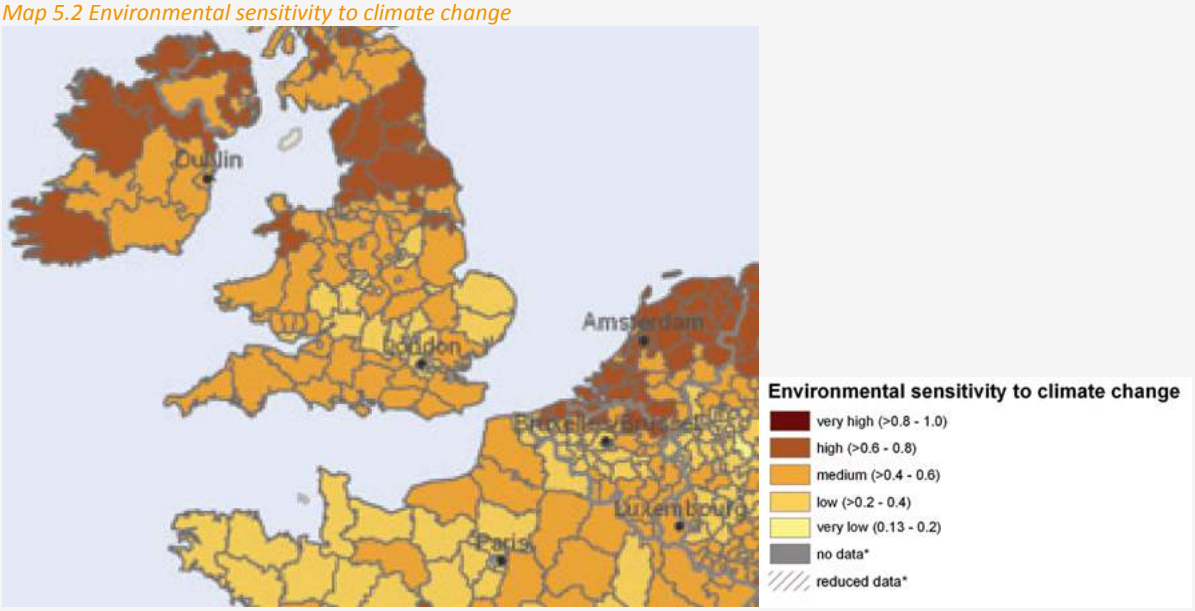
<u>Economic sensitivity to climate change</u>

Almost all regions in Europe are sensitive to climate change from an economic point of view. Sectors specifically sensitive are agriculture and forestry (whose economic goods are highly dependent on suitable climate), tourism (capitalises on specific climatic conditions) and the energy sector (power plants need water for cooling and are sensitive to flooding).

Regions particularly sensitive are Norfolk, Cambridgeshire CC, Cornwall, Isle of Wight, Westland, West-Brabant, Zeeuws-Vlaanderen, and the northern parts of Antwerpen (province), West-Vlaanderen and Oost-Vlaanderen.

State of play

Map 5.2 Environmental sensitivity to climate change



Source: Climate, ESPON

Conclusions in general

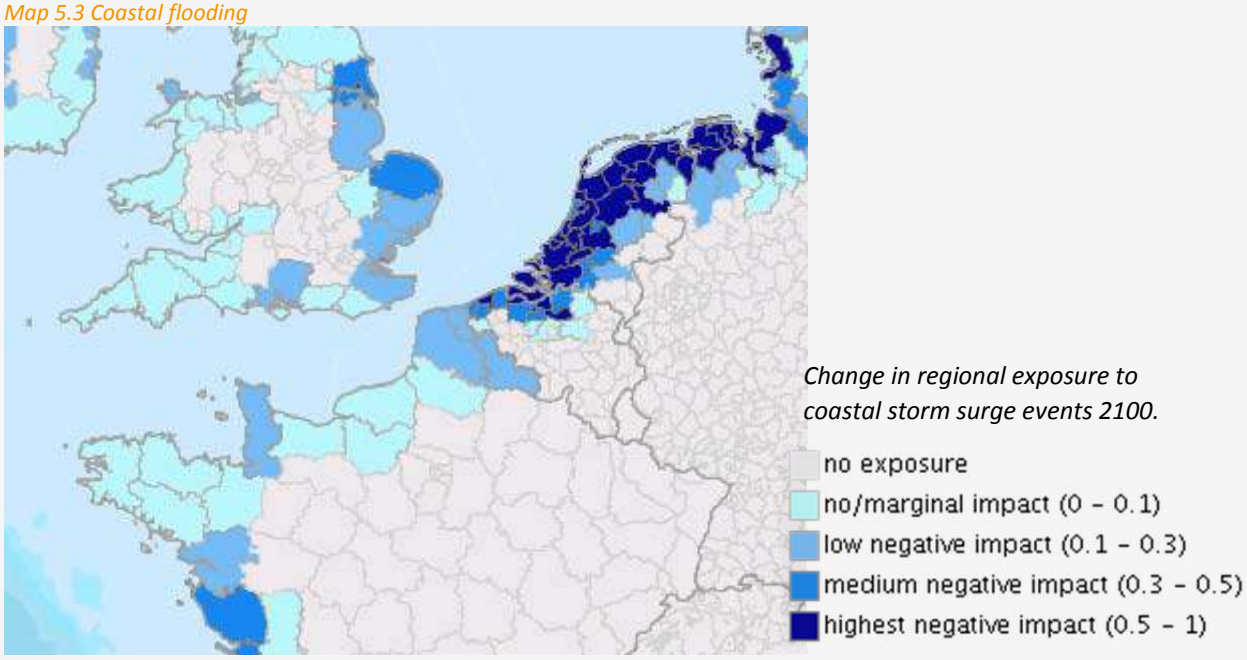
Environmental sensitivity to climate change

The environmental sensitivity dimension focuses on natural entities that are highly sensitive (like protected natural areas or especially fire prone forests) and relatively stable entities like soils, that have only limited capacities to adapt and at the same constitute the basis for animal and plant ecosystems. The regions along the North Sea belong to the most sensitive in Europe.

The climate study shows that especially mountain and river delta regions are sensitive. In the programme area we see a high sensitivity in all Dutch regions (except Westland) and bordering regions of Antwerpen (province), West-Vlaanderen and Oost-Vlaanderen. All other regions show a low of medium sensitivity to climate change. Environmental sensitivity can be increased by men-made developments, such as the growing tourist industry. Tackling an area's high sensitivity to climate change should therefore not only focus on adaption but start with focussing on more sustainable development of human activities.

State of play

Map 5.3 Coastal flooding



Source: EEA

Conclusions in general

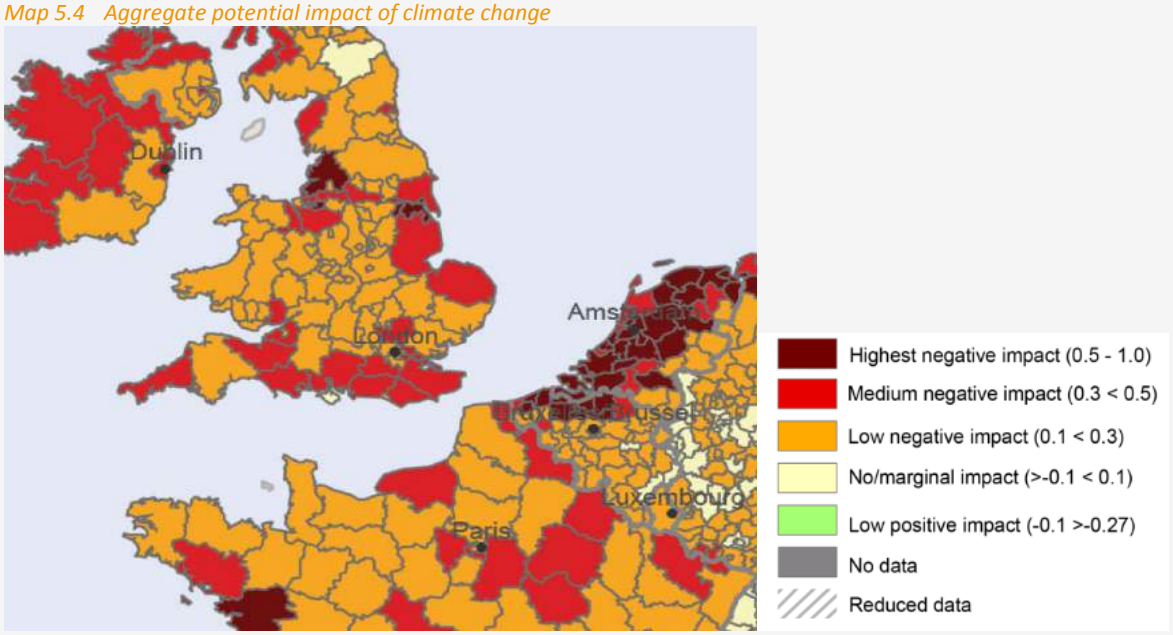
Coastal flooding

The map shows that the highest negative change in exposure to coastal storm surge events in 2100 can be found in the Netherlands and bordering Flemish regions. Also Norfolk shows a medium negative impact. Besides coastal flooding, the area is also under pressure of inland flooding. Especially the UK areas are vulnerable, as well as the French estuaries[6].

[6] Source, EEA, River flooding http://www.eea.europa.eu/data-and-maps/indicators/river-floods-1/assessment and CAMIS thematic project plate 09 https://camis.arcmanche.eu/documents/)

State of play

Map 5.4 Aggregate potential impact of climate change



Source: Climate, ESPON

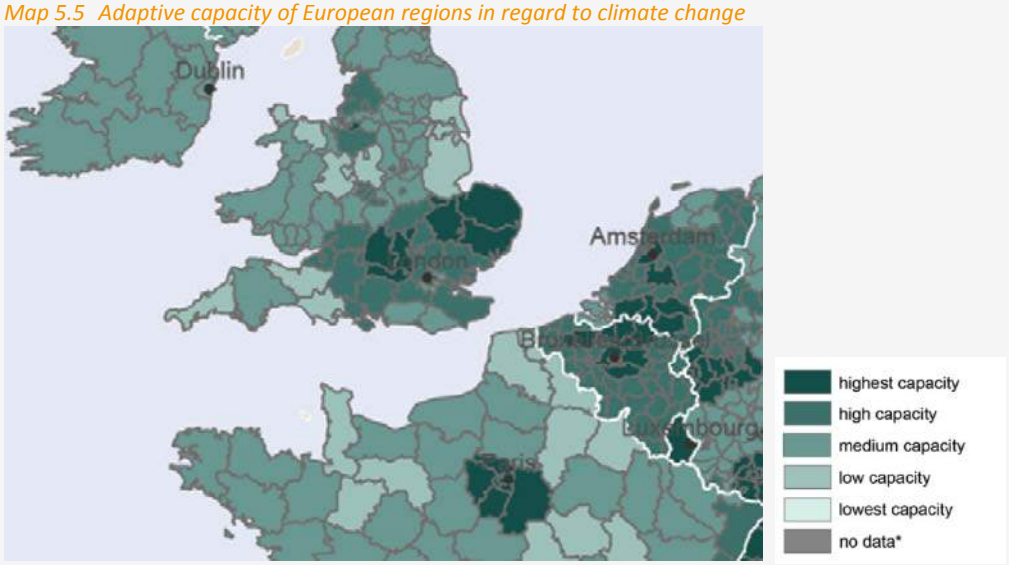
Conclusions in general

Aggregate potential impact of climate change

The weighted aggregated potential impact of climate change is highest in all Dutch regions (except Kop van Noord-Holland and Westland), the northern regions of Flanders. no / marginal impact is calculated for Isle of Wight, and low negative impact for Devon, Suffolk, Hampshire, and all French regions (except Nord, Seine Maritime and Morbihan).

State of play

Map 5.5 Adaptive capacity of European regions in regard to climate change



Source : Climate, ESPON

Conclusions in general

Adaptive capacity

The adaptive capacity in regard to climate change is highest / high in all Flemish regions, the Dutch regions (except Zeeland), and Cambridgeshire, Norfolk and Suffolk in the UK. The lowest adaptive capacity in Europe is calculated for eastern and southern European regions and doesn't occur in the programme area. Nevertheless, low capacity to adapt to climate change is calculated for Manche, Nord, Pas-de-Calais, Dorset, Somerset and Cornwall. Adaptivity-levels can be raised by establishing a regional observatory of climate change and adaption to change, which can help to (cross-border) share and exchange

	observational data and study the impact scenarios of climate change on the country, economy and environment.
Conclusions in relation to FCE and 2Seas	<u>Commonalities</u> Both regions are affected by climate change in general terms. <u>Differences</u> - The economy and the natural environment of the 2Seas area appear to be more sensitive to climate change than the FCE area. - The change in regional exposure to coastal storm events is higher in the 2Seas area, caused by the high negative impact in Flanders and the Netherlands. - The aggregated picture shows that the potential impact of climate change is higher in the 2Seas area than in the FCE area. - The regional capacity to adapt to climate change is relatively low in French regions, what results in a lower adaptability capacity in FCE.
Policy analysis	<u>European level</u> In the position papers to the member states the EC promotes climate change adaptation and management policies that center around integral water and land management, water quality, preservation of natural resources, biodiversity, ensuring climate-change resilience of sensitive marine areas. As the challenges are not confined to nations' borders, close collaboration with neighbouring countries is advocated for almost all topics (among others Maritime Spatial Planning). Prevention of natural risks connected to climate change remains largely a theme dominated at the national level. It is however described as a priority for cooperation programmes and put forward by the EC as a theme for the coming period, where specific attention was paid to marine and coastal aspects in relation to cross-border cooperation: - Managing risks related to climate change (risk of erosion, flooding, ...) - Preservation of natural resources, biodiversity, ensuring climate-change resilience, sustainable integrated management of coastal and cross-border environmental zones, adequate protection of soils and reducing air pollution. <u>Regional level</u> A majority of the local and regional authorities has specific policy to deal with climate change. Regional policy often starts with planning policies that reduce the risk of flooding and/or increase the coastal protection level. Other policies cover risk management systems related to climate change and measures to speed-up the transition to a more sustainable society. Also measures to reduce the CO2 imprint and protecting the environment by promoting resource efficiency are mentioned (although these are covered by theme 4 and 6, respectively). On regional and local level the need for cross-border cooperation on this theme is mentioned by all French coastal regions. The most common measures taken on regional and local levels are: - The integration of (innovative) risk analysis in future spatial planning, - Specific actions in water management; - Coastline defence and tidal protection. - Developing water management systems (Zeeland, Noord-Holland) - Some regions (Zeeland, Cornwall) offer supportive policies to sectors in transition and that are affected by climate change – agriculture (salt groundwater) and fisheries. <u>Conclusion policy analysis</u> Particularly relevant topics for regional cross-border cooperation include adaptation and management policy actions: - Common risk assessment and scenario planning for cross-border disasters;

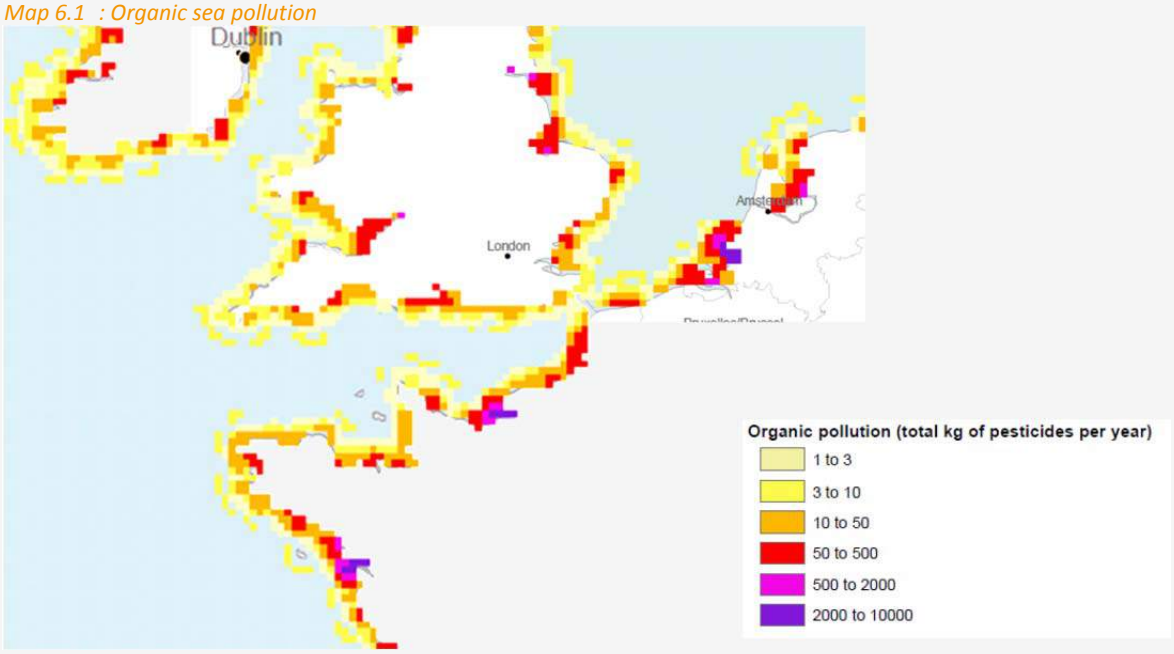
- collective mitigation measures to coastal erosion, depletion of marine resources
- Innovative climate change adapting solutions for agriculture (water), fisheries and development of aqua-culture
- Innovations in climate-proof spatial planning and coastal protection
- Maritime spatial planning

2.6 Theme 6: Sustainable environment

Theme 6: Sustainable environment	Protecting the environment and promoting resource efficiency *Investment priorities* Protecting the environment and promoting resource efficiency, through: - 6A: investing […] in the waste sector to meet at least the requirements of the Union's environmental acquis; - 6B: investing […] in the water sector to meet at least the requirements of the Union's environmental acquis; - 6C: *conserving,* protecting, promoting and developing *natural and* cultural heritage; - 6D: protecting *and restoring* biodiversity, soil protection and *restoration and* promoting ecosystem services including NATURA 2000 and green infrastructures; - 6E: action to improve the urban environment, […] regeneration and decontamination of brownfield sites and reduction of air and noise pollution; - 6F: promoting innovative technologies to improve environmental protection and resource efficiency in the waste sector, water sector, soil protection or to reduce air pollution; - 6G: supporting industrial transition towards a resource-efficient economy, […] promoting eco-innovation and environmental performance management in the public and private sectors.
EU 2020 target	For this theme no specific EU 2020 indicator / target is defined.
Description	Protecting the environment and promoting resource efficiency is a broad theme ranging from topics such as waste, soil, water, air and noise pollution, cultural heritage and biodiversity to urban environment. For the collection of data, a focus is put on topics particularly relevant for the maritime and marine character of the area. Water pollution: - Organic pollution along the coastlines (total kg of pesticides), 2008 (Source: ESaTDOR-study ESPON, thematic data: National Center for Ecological Analysis and Synthesis, Organic Pollution, 2008). Biodiversity: - Location of Natura2000 sites: bird directive and habitat directive areas, 2012 (Source: European Environmental Agency); - Status of fish stocks in International Council for Exploration of the Sea (ICES) and General Fisheries Commission for the Mediterranean (GFCM) fishing regions of Europe, 2005 (Source: European Topic Centre on Inland, Coastal and Marine waters (ICM), European Environment Agency (EEA)). Soil pollution / degradation: - Annual soil erosion risk by water. The map shows the annual soil erosion risk by water based on estimates of annual soil loss (aggregated results at NUTS3 level), 2005 (Source: European Environment Agency (EEA)); - Soil erosion is a natural process, occurring over geological time, and indeed it is a process that is essential for soil formation in the first place. With respect to soil degradation, most concerns about erosion are related to accelerated erosion, where the natural rate has been significantly increased mostly by human activity. Soil erosion by water is a widespread problem throughout Europe. Waste: - Waste recycling rate % recycled of total generation and treatment of municipal waste, 2008 (data UK 2009), at NUTS2 level (Source of original data: EUROSTAT, calculation made by Bureau BUITEN).

State of play

Map 6.1 : Organic sea pollution



Source: ESaTDOR, ESPON

Conclusions in general

Sea pollution

The first map (6.1) shows loads of pesticides reaching the coasts of the area measured in 2008. The highest loads of pesticides (above 2000 kg per year) can be observed on the coastline of the Netherlands, Normandie and the southern part of Bretagne. The situation of the area in terms of pollution by pesticides is quite similar to the situation at the European level, as described in the final report of the ESaTDOR project: as median loads of pesticides are quite common along most parts of the coastline, the heaviest pollutions are linked to rivers draining large and/or intensively developed catchments (Rhine, Seine). Concentrations of organic pollutants are largely derived from agricultural run-off and become concentrated in rivers before flowing out into the seas. Most of the areas with higher concentrations of organic pollutants are closely associated with estuaries.

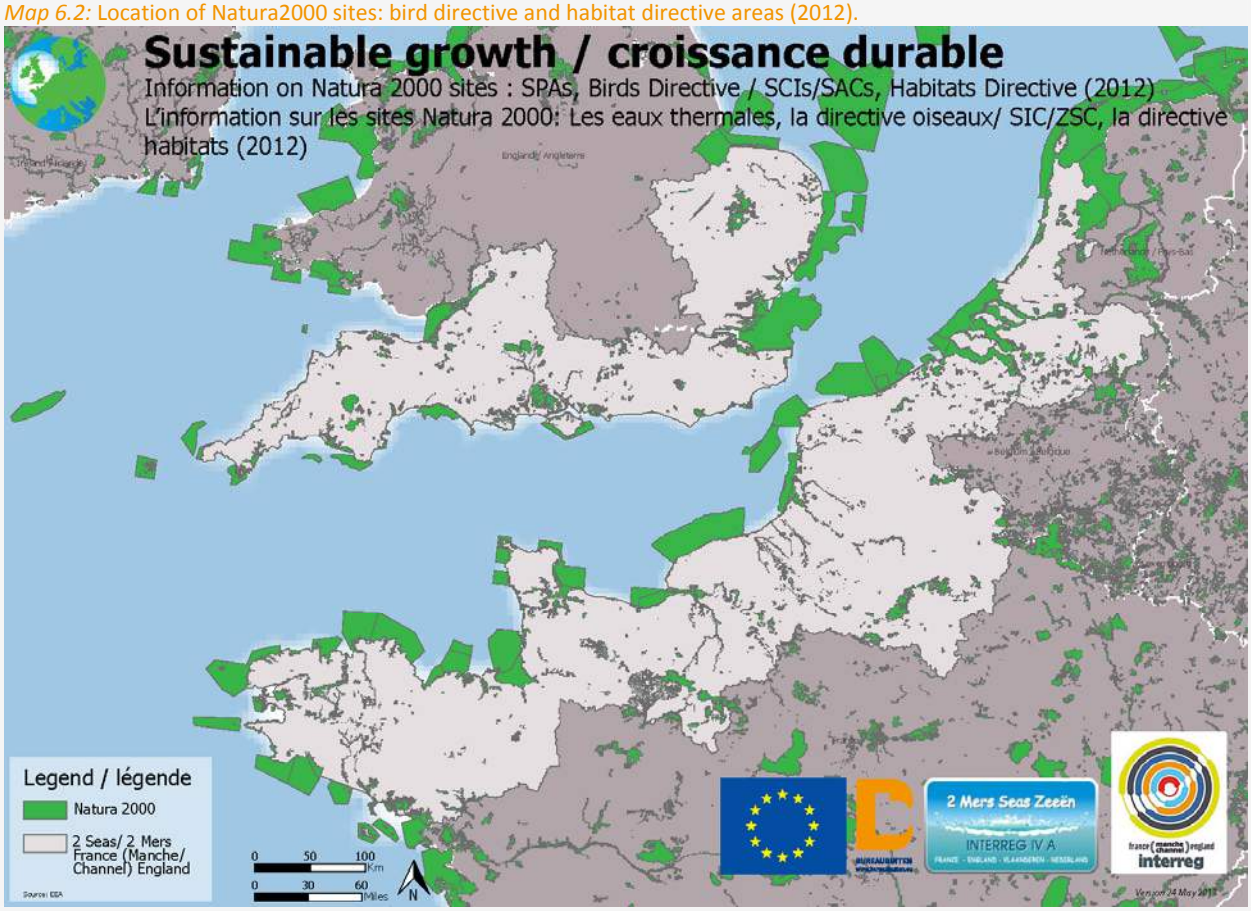
The analysis of this map can be complemented by data provided by the European Environment Agency (not reported in this analysis) about Chlorophyll-a concentrations in European coastal and open seas in 2010. According to these data, the highest concentrations of Chlorophyll-a can be found on the coastlines of Flanders and the Netherlands, and the southern part of Bretagne. A few locations in Flemish waters even show an increasing trend.

Although not included in this analysis, it is relevant to mention that the areas also contain large industrial sites with (potential) hazards risk for the environment, such as soil, water and air pollution. These potential hazard sites are largely located in the programmes' coastal areas and include Dunkerkeque, Lille, Le Havre, Southampton, Lorient, Rennes, Dover and Kent. [7]

[7] Source: CAMIS thematic project plates 09 and 10. https://camis.arcmanche.eu/documents/)

State of play

Map 6.2: Location of Natura2000 sites: bird directive and habitat directive areas (2012).



Source: EEA

Conclusions in general

Natura2000

In almost all programme area regions, the Natura2000 network covers less than 10% of the total surface, whereas the average cover of land surface in Europe reaches 18% (source : EUROSTAT). Exceptions are the territories Orne (FR), IJmond en Haarlem (NL) and West-Vlaanderen (BE).

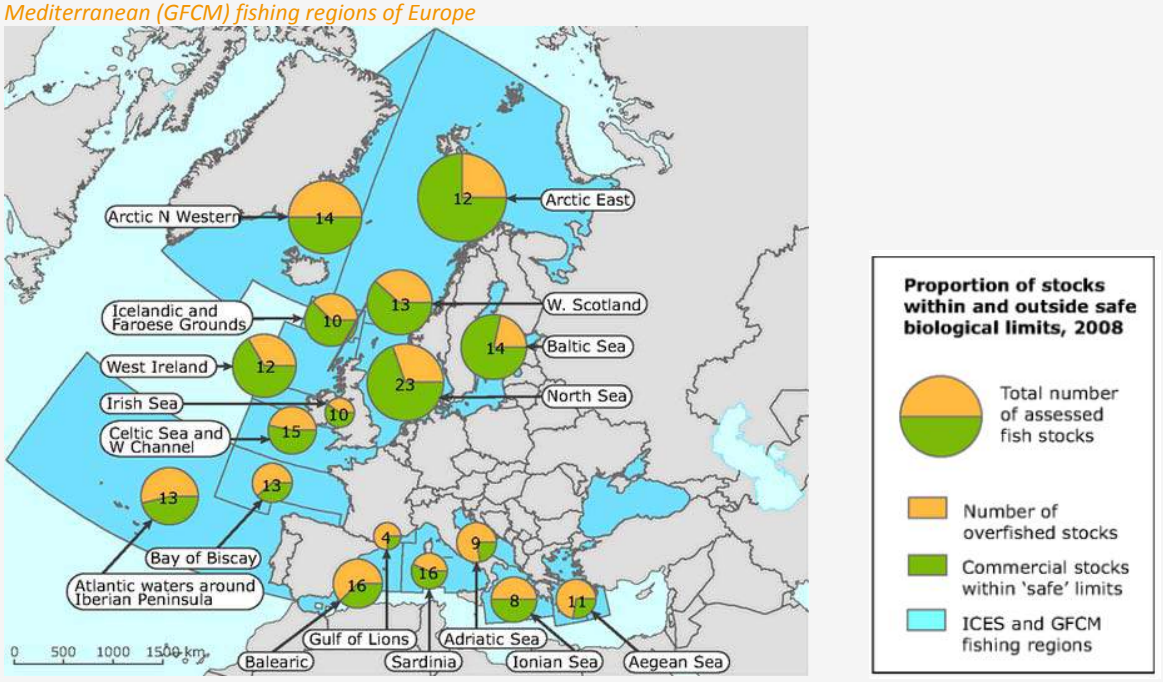
In general, the Eastern regions of the EU have more protected sites in the Natura 2000 network than their Western counterparts. The United Kingdom and France are specifically mentioned in the draft final report of the SIESTA project for not having included noticeable percentages of their regions in Natura 2000.

The Natura2000 areas and precious cultural landscapes offer attractive areas such as the Dorset and Devon coast, the Cornwall and West Devon mining landscape and the Bay of Mont Saint-Michel. The area's rich cultural heritage sites include (among others) the historic city centres, traditional fisherman villages on the French and UK-coastline, the religious sites like Canterbury and Mont Saint-Michel and military heritage like the beaches of Normandy and the fortresses of Medway. There are 15 UNESCO world heritage sites in the area (for an overview see http://whc.unesco.org/en/list). The area's natural and cultural heritage is a major attraction for tourism However, tourism puts an (increasing) pressure on the natural and cultural resources of the area[8]

[8] Source: United Nations Environment Programme and World Tourism Organization (2012), Tourism in the Green Economy – Background Report, UNWTO, Madrid.download: http://www.e-unwto.org/content/t21l16/fulltext.pdf.

State of play

Map 6.3: Status of fish stocks in International Council for Exploration of the Sea (ICES) and General Fisheries Commission for the Mediterranean (GFCM) fishing regions of Europe



Source: EEA

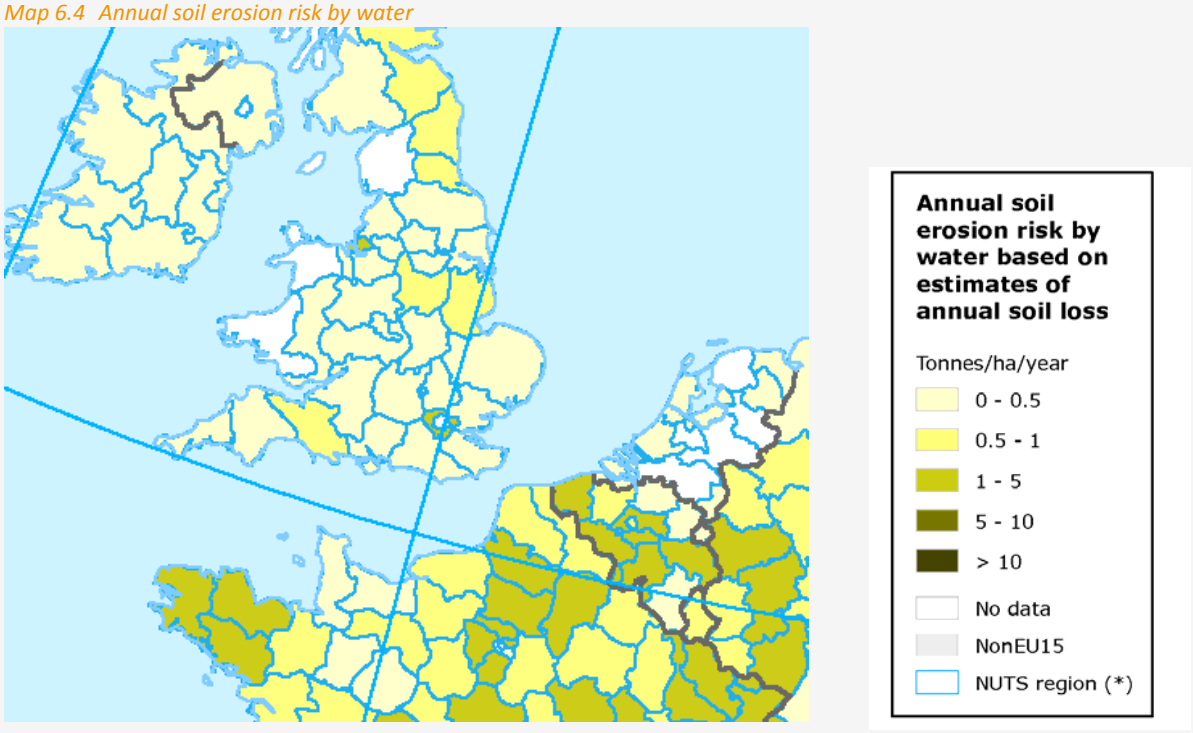
Conclusions in general

State of commercial fish stocks in North East Atlantic and Baltic Sea

The largest number of assessed fish stocks is found in the North Sea region (23). About 46 % of the assessed European commercial fish stocks are outside safe biological limits (SBL). Of the assessed commercial fish stocks in the North-East Atlantic Ocean, 25 % (Arctic Sea) to 62 % (Bay of Biscay) are outside SBL.

State of play

Map 6.4 Annual soil erosion risk by water



Source: EEA

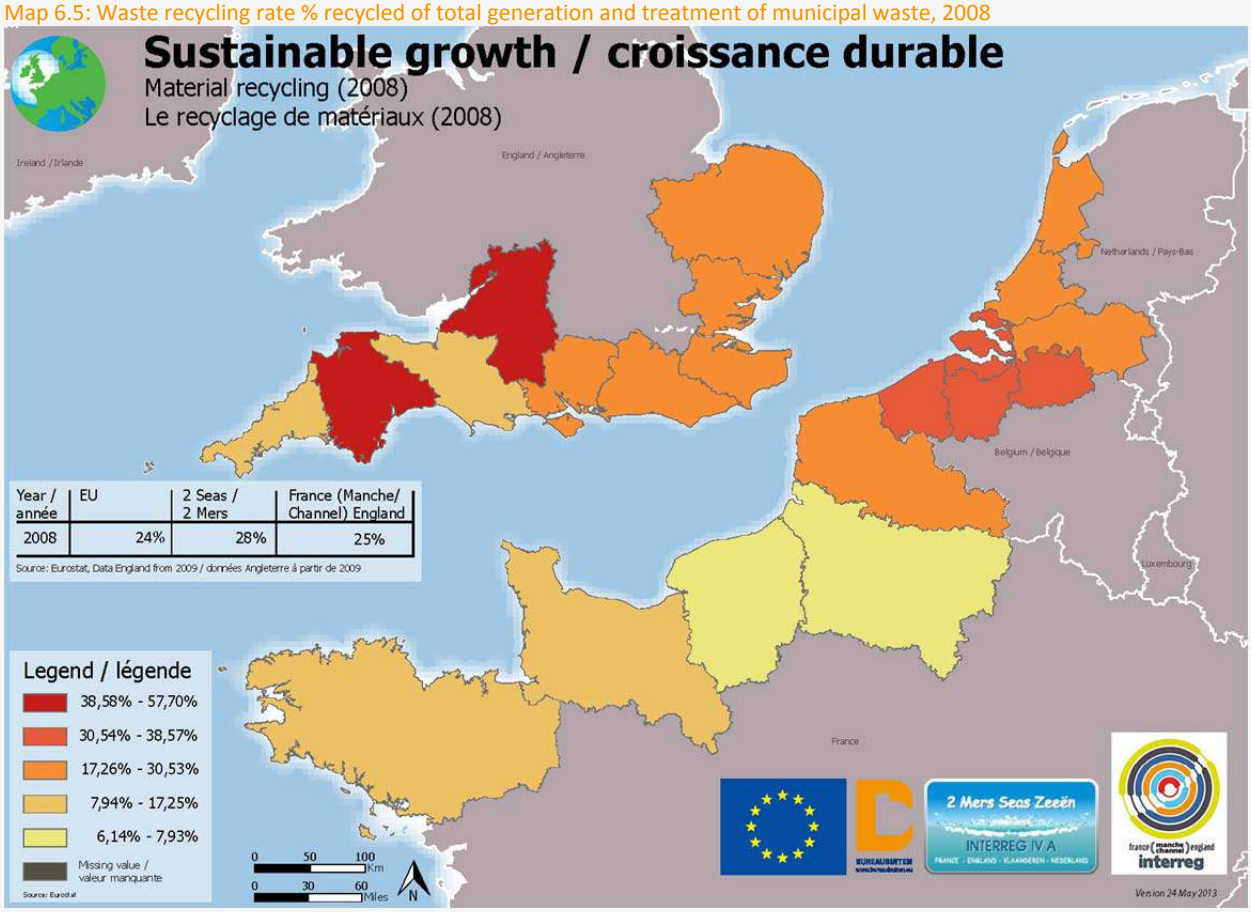
Conclusions in general

Soil erosion risk by water

Soil erosion is regarded as one of the major and most widespread forms of land degradation. About 17 % of the total land area in Europe (excluding Russia) is affected by soil erosion to some degree (EEA, 2003). Water erosion is a more common form of erosion. Wind erosion is also prevalent in some parts of Western Europe and Central and Eastern Europe, but is currently not covered by this indicator.
The highest risk on soil erosion in the programme areas can be found in Bretagne (many affection of rocks and sediments along Brittany's coastline) and Picardie (erosion in the Baie de Somme)(2012). In most Dutch and UK-regions the risk is low (estimation of annual soil loss of 0 to 0,5 tonnes/ha/ year).

State of play

Map 6.5: Waste recycling rate % recycled of total generation and treatment of municipal waste, 2008



Source: EUROSTAT, calculations made by Bureau BUITEN

Conclusions in general

<u>Generation and treatment of municipal waste</u>

At European level the share of municipal waste recycled was 24%. The European trend is a quite significant increase of recycling, as this rate only reached 11% in 1995 (: EUROSTAT).

As shown on map 6.5, the waste recycling rate is highest in Flanders and the UK. The lowest recycling rate is found in Basse-Normandie, Haute-Normandie, Picardie and Nord-Pas-de-Calais.

Conclusions in relation to FCE and 2Seas areas

<u>Commonalities</u>

- For both areas, the issue of sea pollution is a common challenge to be tackled in the domain of environmental protection; indeed they include sectors where the organic pollutants are highly concentrated (notably Bretagne, estuaries of the Seine and of the Rhine).
- Both programmes are also concerned by a low rate of Natura 2000 zones, which show the existence of improvement opportunities in terms of policies for preservation of biodiversity and natural assets. Together with the cultural heritage as-

	sets the natural assets form a basis for development of sustainable, responsible and high-quality tourism. - The topic of fisheries represents as well a prime-concern issue for the whole area, given the strong position (employment in fisheries and related processing industries of this activity in the local economies and strategies. A priority in this domain relates more particularly to the development of sustainable fisheries, as the over-exploitation of fish stocks is a global concern; though there are some situation disparities between the two programme areas (the situation is more ominous in the FCE area). <u>Differences</u> - In the FCE area, the topic of soil erosion is more eminent than in the 2Seas area, as the highest risk of erosion is located in Bretagne and Picardie (based on a.o. land use, meteorological data, relief), while in most Dutch regions this risk remains low. For the UK-regions there is less concern. - Another difference between both programme areas is the relevance of the theme of urban areas and urbanization. As the 2Seas area accounts for more urban zones, integrated urban development and promotion of natural spaces around cities is more likely to be a central issue in this area. - In terms of waste recycling, regions of the 2Seas programme appear to be generally more advanced, Flanders being one of the most advanced, and French regions in general having lower rates of recycling. However, the difference in recycling rates remains small (3%), and the average of the FCE area is influenced by the high-performance regions (Devon, Wiltshire). More generally, the analysis of cross-border projects developed within these two programmes sheds light on the different approaches being adopted, in particular on maritime-related cooperation. Whereas most of the maritime projects developed in the 2Seas programme, notably those associating partners from the UK, Flanders and the Netherlands, deal with the maritime issue from an economic point of view (a.o. accessibility and competitively of ports, development of trade relations, agro-food and fisheries, development of tourism), numerous projects which have been implemented within the FCE programme focus on more environmental issues. These include conservation and valorisation of the maritime heritage, observation and preservation of eco-systems measures, resources management, and networking of protected areas.
Policy analysis	<u>European level</u> One of the 7 EU's flagships, "A Resource-Efficient Europe", states that natural resources are prerequisites for the European and global economy and quality of life. This flagship advocates the implementation of resource-efficiency policies in various domains, such as industry, agriculture and biodiversity conservation. Several policy documents elaborate on the special position the preservation of the marine environment and its resources should have in cross-border cooperation. The maritime strategy for the Atlantic Ocean area advocates the implementation of the ecosystem approach in formulating cross-border strategies on the marine areas, by managing simultaneously all activities that have an impact on the Atlantic and by working with multi-species long-term plans. The French study on the transnational needs for 2014-2020 stresses that, while cross-border cooperation on marine and coastal issues is of the utmost importance, interstate dialogue or greater devolved State services is also necessary to develop a critical mass of regional expertise and initiatives. The position papers to Member States for the 2014-2020 period address several critical issues related to this theme that should be tackled in the coming years. In the UK regions, intervention themes include improving water quality and efficiency, enhancement of biodiversity and habitats, improvement of soil management and

forestry and improving resource efficiency in the economy.
The efforts in France should improve the protection of the environment (including biodiversity and Natura 2000 areas), and establish "green" infrastructure for adequate development of the environment and effective protection of biodiversity. Economic focus is recommended to be on developing the blue economy: diversifying the marine and fisheries sectors.

The recommendations for Belgium focus on changing the attitude of all economic actors towards the environmental challenges (water, biodiversity, land use), while improving the natural and biological quality of the environment and putting more sustainable production methods into practice in industry by promoting the development and dissemination of eco-innovation.
Resource efficiency needs to be reinforced in the Netherlands through supply chain policies (cross-border). The preservation of natural resources and biodiversity should be achieved by further connecting the NATURA 2000 and High Nature Value areas. Furthermore, focus should be on ensuring climate-change resilience, sustainable integrated management of coastal and cross-border environmental zones (sea basin, upstream regions), adequate protection of soils and reducing air pollution.

Additionally, there are several policy topics for cross-border cooperation within the Maritime strategy for the Atlantic:
- Legislative measures to improve maritime safety (reduced risk shipping accidents);
- Work on prevention and preparedness including a risk management policy linking threat and risk assessment to decision making, development of scenario planning for cross-border disasters;
- Common information sharing environment between maritime authorities

National level
National policy agendas on the theme reflect the EU ambitions and focus a.o. on strengthening nature network for biodiversity, sustainable agriculture and fisheries, improving resource efficiency in industry and the protection of environmental assets. In the UK, a transition in the preservation of environmental and cultural heritage is foreseen by the National environment white paper (2011) and the biodiversity strategy (2010); from 'piecemeal conservation' action towards a more integrated landscape-scale approach. Goals include a large-scale approach to conservation on land and at sea, putting people at the heart of the biodiversity policy, reducing environmental pressures and improving knowledge. In the French national reform programme, sectorial (building, transport etc.) objectives are defined, especially for energy efficiency, reduction of carbon emissions and to promote a more efficient use of resources. In the Netherlands and Flanders, a similar integral strategy is in place: the focus in biodiversity strategies is on connecting natural habitats and conservation areas. However, especially in the Dutch regions, ambitions have received a setback by considerable budget cuts. In the near future, maintenance of nature zones in the Netherlands should also be financed and executed by private entities.

Regional level
Regional policy and responsibilities range from spatial planning, urban regeneration, environmental management, industry policy and supply-chain organization. Urban regeneration in the UK and the Netherlands is often connected to related economic and social targets, for instance increasing social interaction and inclusion, or creating an urban environment in which business can thrive. French policies have a focus on the spatial aspect of coastal and marine environmental management, while also advocating joint environmental and biodiversity protection on both regional and cross-border levels. Economy-wise and deriving from smart-specialization, developing aspects of the 'blue economy' is mentioned in several regions (Bretagne, Haute Normandie, Zeeland, New Anglia). In Flanders, regional policy concentrates on preserving green zones around cities but also mentions sustainable fisheries, while in the Nether-

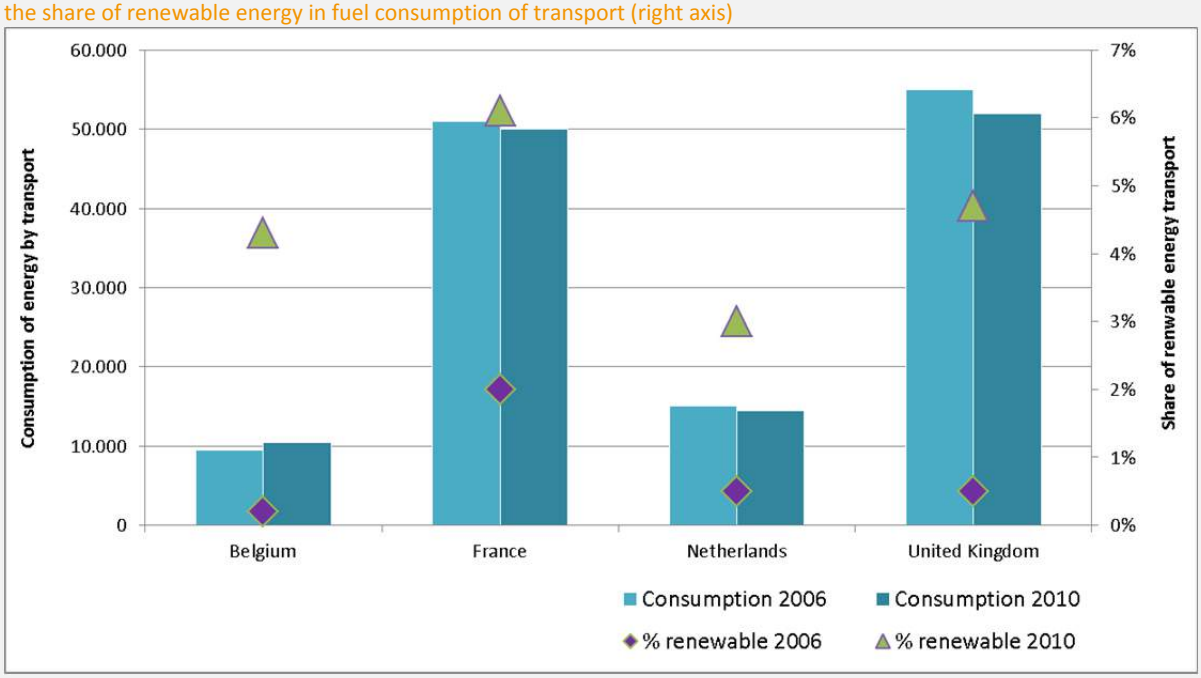
	lands and the UK the regional policies studied are more industry-oriented and focus on resource efficiency. Conclusion policy analysis As this theme covers a broad spectrum of policies with many cooperation themes, focus is put on the topics and challenges for which cross-border cooperation can make the biggest difference. Cooperation with respect to the integrated management of the coastal, marine and green environment is mentioned by governments at different levels in the programme areas. This priority of intervention (6.C / 6.D) is particularly relevant for the FCE area as the programme has already developed a strong approach oriented towards ecosystems and coastal preservation in the previous funding period. Enhancing nature networks and new ways to fund environmental management are also relevant actions to improve. In urban zones, protecting and enhancing the green zones around cities could be considered a common challenge. The priority of intervention 6.E appears to be more relevant for the 2Seas programme, as this area is more intensely urbanized and more subject to the pollutions caused by industry. Several challenges are applicable for both programme areas: in particular improving resource efficiency in the economy (priority of intervention 6.G) represents a topic on which added value could be achieved by cross-border cooperation and which should be endorsed in both programmes, although until now it is considered more in the 2Seas territories. The development of innovative technologies (priority of intervention 6.F) should also be maintained in both programmes. Additionally, cross-sectoral cooperation on establishing knowledge intensive green/blue economic sectors should be recommended, as part of the efforts in the regions to diversify the traditionally strong fisheries and agriculture sectors. While this could include management and preservation measures for the whole marine area, the national level remains the most influential with respect to this topic. Possible and desired cross-border cooperation on issues mentioned in the Maritime Strategy for the Atlantic, such as marine assessments, research, Reducing Emissions and pollution from ships, port security, and Countering illegal, unregulated and unreported fishing, will remain items to be decided on by the Member States.

2.7 Theme 7: Sustainable transport

Theme 7: Sustainable transport	Promoting sustainable transport and removing bottlenecks in key network infrastructures through: - 7A: supporting a multimodal Single European Transport Area by investing in the Trans-European Transport Network (TEN-T) network; - 7B: enhancing regional mobility through connecting secondary and tertiary nodes to TEN-T infrastructure *including multimodal nodes*; - 7C: developing and improving environment-friendly, low noise and low-carbon transport systems including inland waterways and maritime transport, ports and multimodal links, and promoting sustainable regional and local mobility; - 7D: developing and rehabilitating comprehensive, high-quality, low-noise and interoperable railway systems; - 7E: improving energy efficiency and security of supply through the development of smart gas and power distribution, storage and transmission systems and by supporting the integration of distributed generation.
EU 2020 targets	- Reduction of greenhouse gas emissions by 20% (or even 30%, if the conditions are right) compared to 1990 - 20% of energy from renewables
Description	Ambitions on sustainable transport and infrastructure at EU level differ between 'cohesion' regions and 'competitiveness' regions. Interventions in the former focus on physical infrastructure development to support the economic development of the region, while for the competitiveness regions optimizing accessibility and transport network capacities, reducing the carbon footprint and supporting more sustainable forms of transport are the key issues. Therefore, to gain insight in the state of play regarding this theme in the 2Seas and FCE programme area, indicators have been analysed that explain the situation on: Sustainability in transport: - the consumption of energy in all modes of transport (with the exception of maritime and pipelines) (Source: EUROSTAT); - the share of renewable energy in fuel consumption of transport on country level in 2006 and 2010 (Source: EUROSTAT). Accessibility by multimodal transport: - number of people that can be reached within 30 minutes of travelling multimodality (index EU 27 = 100) (Source: EUROSTAT). Maritime transport and infrastructure: - total maritime transport of freight (thousands of tonnes) (Source: EUROSTAT); - Maritime flows composite map. This map is based on four data sets: economic influence of container ports, economic influence of cruise ports, marine exposure based on volume of liquid bulk goods and influence of undersea cables (see Chapter 5 of the ESaTDOR Scientific Report for more information); - Sea ports, more specifically seaport freight export * in million tonnes, 2010 (harmonized maritime freight export data) (Source: ETIS PLUS).

State of play

Figure 7.1 The consumption of energy in all modes of transport (left axis) (with the exception of maritime and pipelines) and the share of renewable energy in fuel consumption of transport (right axis)



Source: EUROSTAT

Conclusions in general

Sustainability in transport

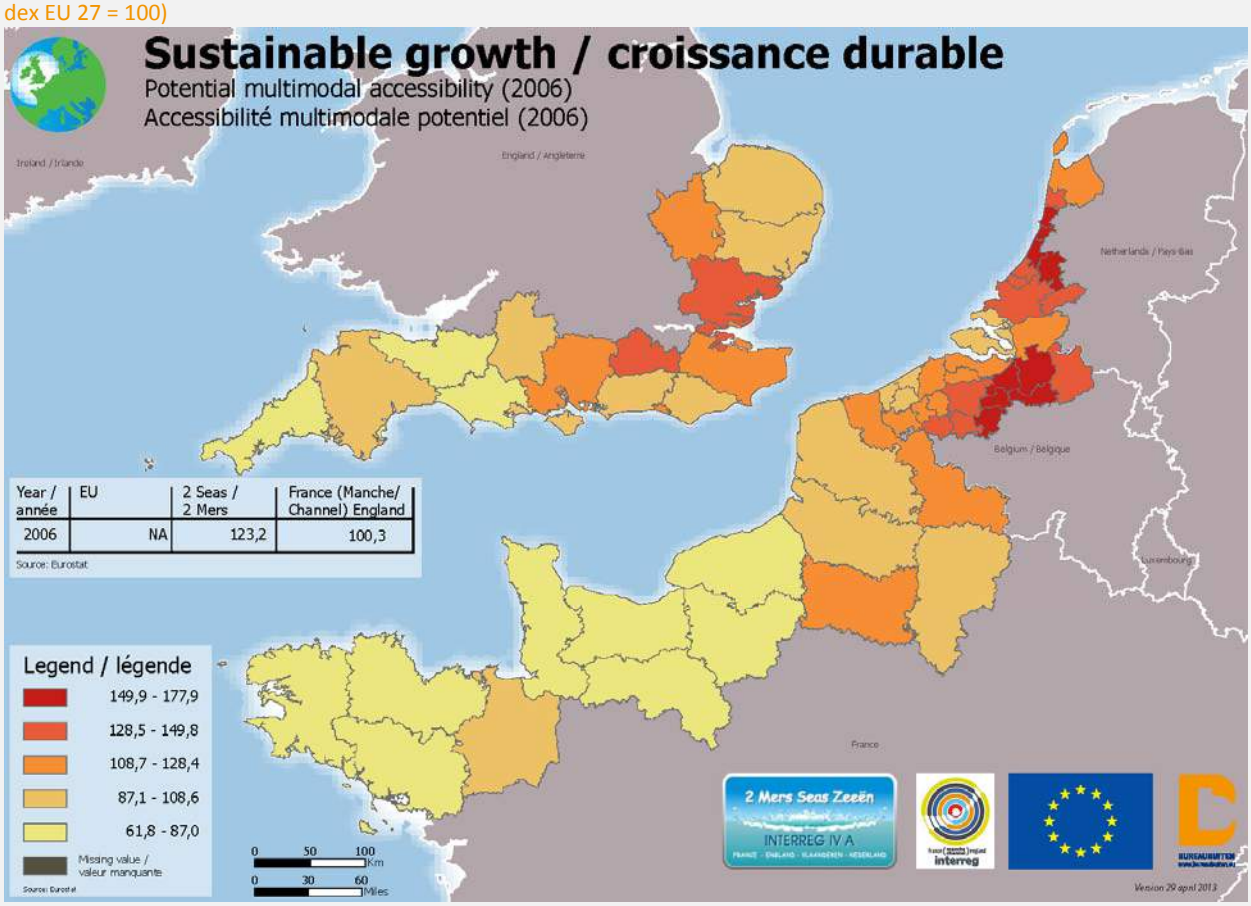
Rising energy consumption and emissions have been a hard-to-break trend in the EU, in particular due to the growth of aviation and freight transport on the road. Especially in the new Member states, emissions are rising fast, but the EU-15 also experienced a 33% rise in emissions between 1990 and 2007[9]. While there is no specific data available for the regions in the 2Seas and France (Channel) -England areas, it is probable that this trend has roughly been the same in these areas. However, the large seaports, especially those in the 2Seas area (and to a lesser extent also the ports of Le Havre and Southampton) are less responsible for rising emissions.

Figure 7.1 shows that in France, the UK and the Netherlands, energy consumption of the transport sector has declined slightly in the period 2006-2010. Furthermore, the rates of renewable energy in fuel consumption have been rising in all 4 member states concerned in the 2006-2010 period, albeit still remaining at low levels.

[9] REDUCING TRANSPORT GREENHOUSE GAS EMISSIONS, Trends & Data 2010, OECD 2010, www.internationaltransportforum.org/Pub/pdf/10GHGTrends.pdf

State of play

Map 7.1 Accessibility multimodal index EU 27 = 100) Number of people that can be reached within 30 minutes of travelling multimodal (in-



Source: EUROSTAT

Conclusions in general

<u>Accessibility by multimodal transport</u>

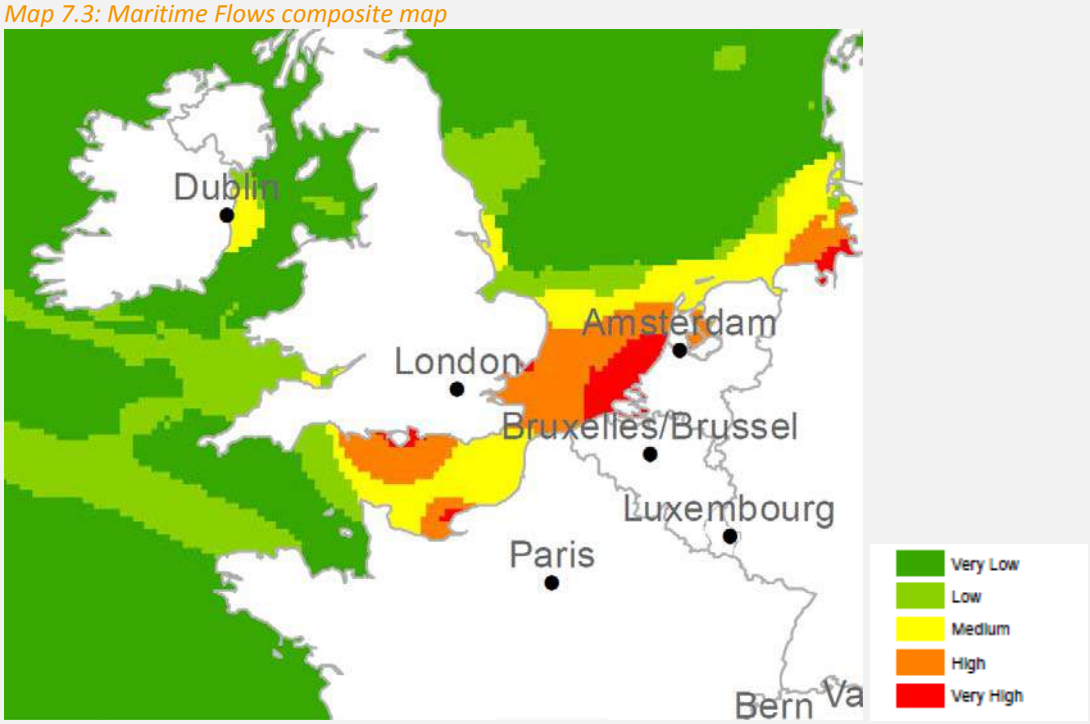
Accessibility by different transport modes can be measured by the number of people that can be reached within 30 minutes of travelling. Multimodal transport is a combination of different modes of transport (e.g. road and rail transport). Analysing multimodal accessibility creates a territorial pattern which creates a more balanced version of the traditional European core-periphery pattern. The basic core-periphery picture is constituted by road and rail transport and somehow balanced by the impact of air transport. Map 7.1 shows that potential multimodal accessibility is highest in and around the urban centres in Flanders, the Netherlands and the UK.

The trend between 2000 and 2006 has been that most European regions have improved their multimodal accessibility, which is mainly caused by the growth of air connections and rail transport[10]. Also, joint investments in cross-border areas seem to provide for enhancing improvements in road accessibility on both sides of the border.

While the highest relative changes have occurred in Eastern European and Spanish regions, 'core regions' in the UK, France, Flanders and the Netherlands have experienced smaller accessibility gains, reflecting a smaller growth or even decline in air connections. However, the reduction of accessibility by air experienced in several French regions was often compensated by a growth in rail accessibility.

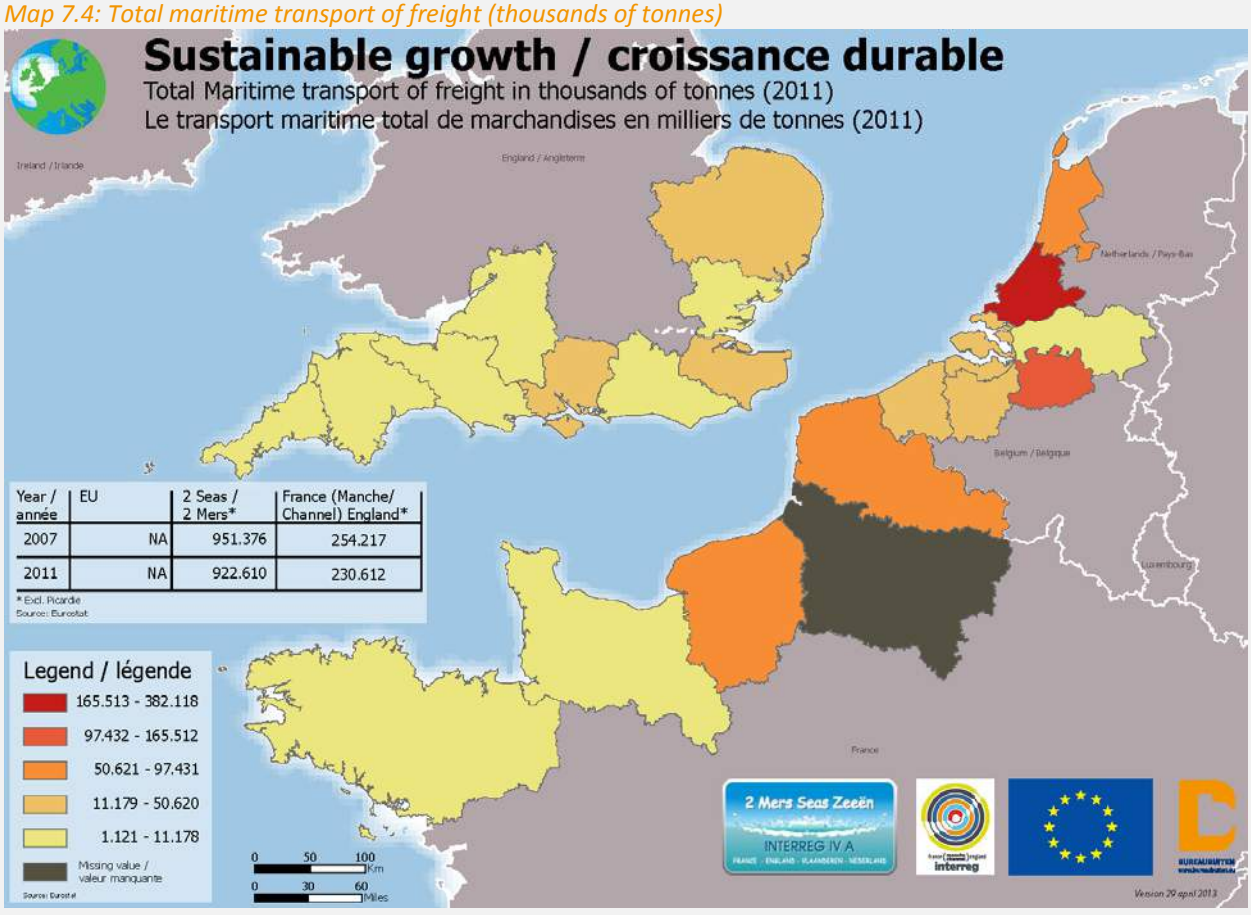
[10] Source: ESPON, Territorial Dynamics in Europe, Trends in Accessibility, Territorial Observation No. 2, 2009

Map 7.3: Maritime Flows composite map



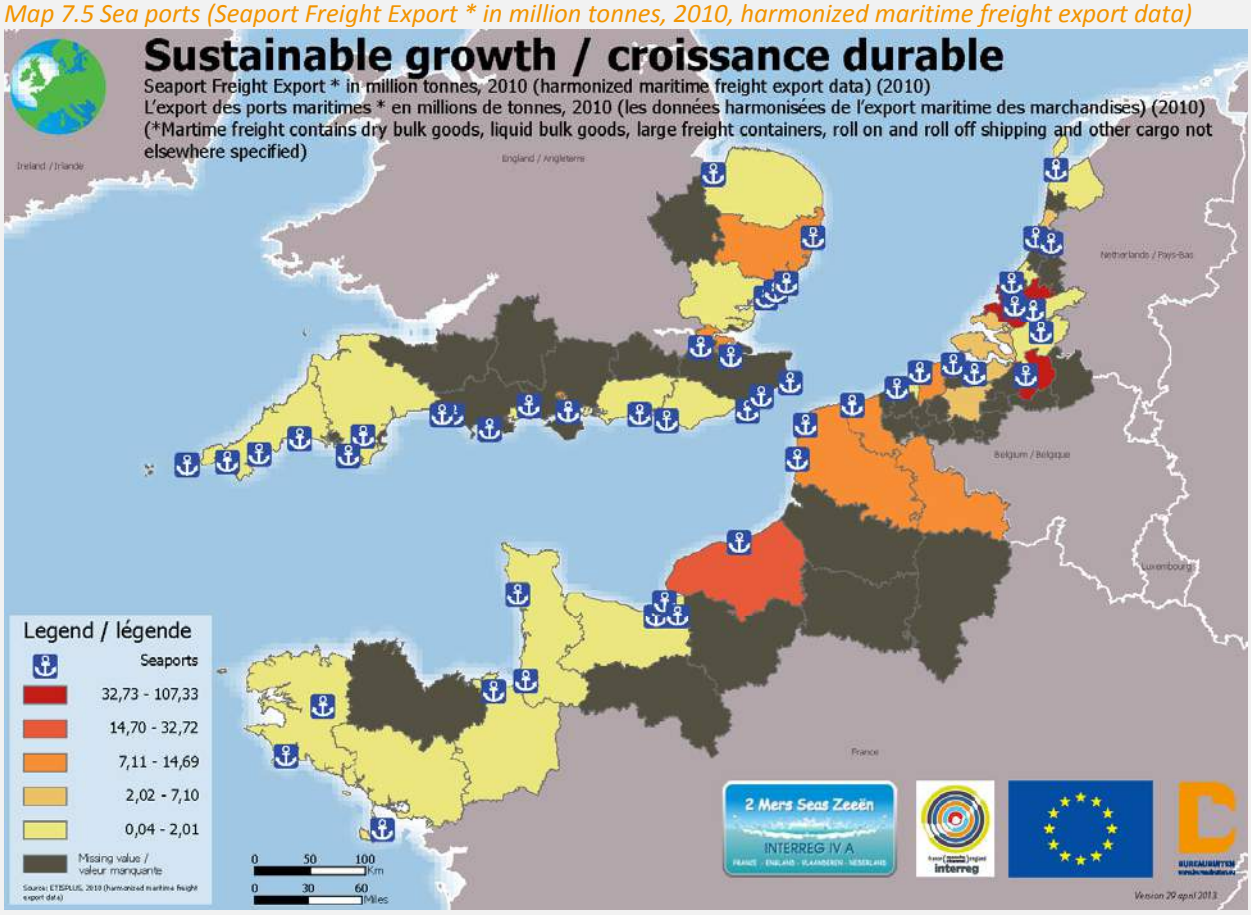
Source: ESaTDOR, ESPON

Map 7.4: Total maritime transport of freight (thousands of tonnes)



Source: EUROSTAT

*Map 7.5 Sea ports (Seaport Freight Export * in million tonnes, 2010, harmonized maritime freight export data)*



Source: ETIS PLUS

Conclusions in general

Maritime transport

Maritime transport is an important mode of transport within both programme areas, with important seaports located in Rotterdam, Antwerp, Le Havre and Southampton. Maritime, and in particular short-sea shipping, provides a viable alternative to the more polluting road transport. Map 7.3 shows that the Channel and southern North Sea area already belong to the busiest seas for maritime transport, with the Strait of Dover/Pas de Calais functioning as the busiest sea strait in the world, with over 66.000 ships passing through the channel in 2009. In map 7.4, the intensity of maritime transport (in tonnes) is shown per region (NUTS2). While the position of Rotterdam and Antwerp is reflected in the regions' scores, the other major ports have a less visible impact on the overall transport quantities. Moreover, it can be observed that in the 2Seas area transports a far larger amount of freight is transported by ship than is the case in the FCE area. Between 2007 and 2011, both regions have experienced a decline in freight volumes, which is related to less trade as a result of the financial crisis.

Since 1994, maritime transport in the Channel region is competing with the Channel Tunnel, which annually is responsible for the movement of over 13 millions tons of freight and nearly 10 million passengers (2011). In the whole Channel area, maritime freight traffic accounts for over 332 million tonnes and has a passenger traffic of more than 33 million passengers. These passengers are largely transport by the area's ferry routes, which account for circa 130 daily crossings across the channel[11].

Focusing on exports in maritime transport, map 7.5 once more underlines the importance of the major ports. Antwerp and Rotterdam are the most important ports for their regions (NUTS3 level). Seine-maritime, Nord-Pas de Calais and Suffolk and Solent have relatively high export rates, mostly because of the presence of the ports of (respectively) Le Havre-Rouen, Dunkerque, Ipswich-Felixstowe-Lowestoft and Southamp-

[11] Data derived from CAMIS project, https://camis.arcmanche.eu

	ton-Portsmouth.
Conclusions in relation to FCE and 2Seas	<u>Commonalities</u> - Common challenges are CO2 reduction and increasing renewable energy use in transport - Maritime orientation of transport – good port infrastructure of small, medium sized and larger ports, all with growth potential. - Multimodal accessibility in most regions has increased – while air connections are under pressure <u>Differences</u> - Most larger ports and maritime freight transport in 2Seas area - Multimodal accessibility highest in urban zones of 2Seas area - Growth in rail accessibility particularly in French regions
Policy analysis	<u>European level</u> While the EC's effort is to lower CO2 emissions and air pollution, the transport sector accounts for a growing share of both. Therefore, making transport more sustainable and promoting sustainable forms of transport are key to reaching the EU's environmental ambitions. In addition to sustainable transport, removing the key bottlenecks contributes to better connected regions, smoother cross border connections while reducing congestion and improving the quality of (mostly) urban areas. In both programme areas, but more specifically for the North Sea coastal area, coastal and port facilities offer more possibilities to shift from road to sea transport, according to the Maritime Strategy for the Atlantic Ocean Area. In addition, the efficiency of short sea shipping (by improving existing routes, creating new routes) could be increased further. In the position papers to the Member states, the recommendations and challenges posed differ considerably. In Belgium, efforts should be aimed towards infrastructural investments reducing the reduction of congestion around Brussels and Antwerp, while coordination between the different levels of governance should be increased. The UK and Belgium share the specific recommendation to invest in sustainable transport and connectivity in order to reduce carbon emissions. France should aim to support investment in strategic infrastructures (ports, airports) and to develop low-carbon transport systems and promote sustainable urban mobility. Besides, the density of traffic should be reduced by developing alternatives in terms of transportation, including shopping and the use of more sustainable modes of transport. For the Netherlands, R&D expedenditure on transport technologies should be raised. <u>National level</u> Connecting to the abovementioned recommendations, a Green logistics programme is included in the White paper RIS³ Flanders/New Industrial Policy Flanders. In the UK, the local growth white paper foresees a role for decentralized governments in developing local infrastructure further. For France and the Netherlands, no specific transport-related recommendations are made on EU level, but in the Netherlands a national agenda to support (sustainable) mobility planning is in place. Policy targets include developing door-to-door public transport, intelligent transport systems, multimodality, and achieving a CO2 reduction in transport. The Dutch sustainability agenda also advocates electric driving, more green road transport and rail transport and sustainable shipping. <u>Regional level</u> Regional governments in both programme areas have specific tasks and responsibilities

related to transport policy. In Flanders, the focus of the provinces is on cycling (promotion, long-distance tracks), promoting sustainable communing and identifying innovative solutions to public transport. In the Netherlands, regional policies focus on integrating multiple transport modes, enhancing links to economic core areas (airports, seaports, so-called Greenports), offering high-quality public transport services and sustainable logistics and ports. In France, attention goes to integrating local and regional transport systems into national transport networks, while border regions focus on better cross-border interconnections. Next to improving public transport for cross-border commuting, multimodal logistics, port cooperation and the development of a cross-border regional port system are advocated. In the UK, many counties focus on the improvement of the use of existing connections to London and/or the Channel. Developing sustainable transport networks forms another challenge to the counties, whereas city communities mainly focus on reducing congestion and improving of air quality.

In the specific strategies on the major ports in both programme areas, several trends can be observed that connect to the broader EU themes of sustainability and transport bottlenecks. In particular Rotterdam seeks to expand the international network of cooperation while continuing investment in location-specific innovative facilities for (sustainable) hauling of freight and combustibles. In Antwerp, connectivity between the port and the hinterland will be improved, while aiming for sustainability gains in the port itself. In Southampton, development focus is a.o. on increasing rail freight capacity to other parts of the UK. Ports in the France-Channel-England region are currently working together in the SETARMS project (Sustainable Environmental Treatment and Reuse of Marine Sediment), to find sustainable, economical and environmental solutions to the dredged sediments management in the area. The project includes a.o. the Association of the Ports Locaux de la Manche, Normandy Associates Ports (PNA) and the universiteit of Caen, Brighton and Exeter.

<u>'Needs' and opportunities cross-border cooperation</u>

Assessing the transport challenges in both programme areas and the efforts already taken on board by national or regional policy, the following needs and opportunities for cooperation can be identified:

- especially in the 2Seas area but also for the large ports in the FCE area, cooperation by ports and transport authorities should be stepped up in order to improve interoperability, logistic chains and enhancing the efficacy of short sea shipping;
- enhancing public transport services in border areas, serving the cross-border commuters and labour markets. The main challenge is to develop a cross-border supply of transport at acceptable costs with frequencies corresponding to the mobility needs of the population;
- bringing down CO2 emissions by changing travel behaviour and advocating sustainable modes of transport;
- improvements in the organization of different transport modes, enhancing multimodality and travel times.

As a specific recommendation for cross border cooperation between the UK and France, the French study on transnational cooperation opportunities 2014-2020 sees opportunities for the implementation of an integrated territorial investment (ITI) or a regional development strategy dedicated to further develop transport links around the Channel, further integrating the economies of both coastal areas.

<u>Conclusion policy analysis</u>

- Common challenges: cooperation between ports and transport authorities, bringing down CO2 emissions;
- Specific geographic challenges:
  - Channel zone transport link development;

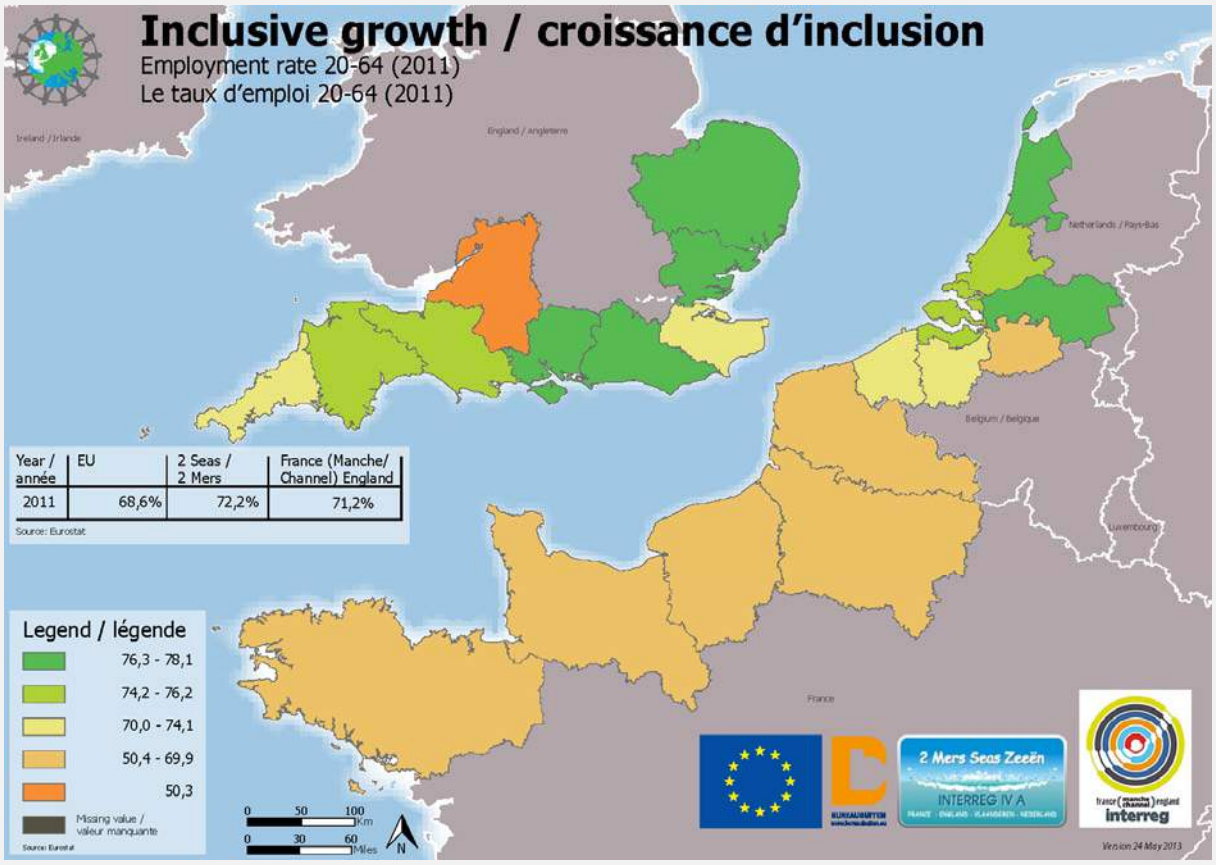
- Connecting to main urban areas (London) and economic zones (NL);
- Port cooperation (Antwerp, Rotterdam);
- Supply-chain integration;

- Organization of different transport modes (France)

2.8 Theme 8: Promoting employment and supporting labour mobility

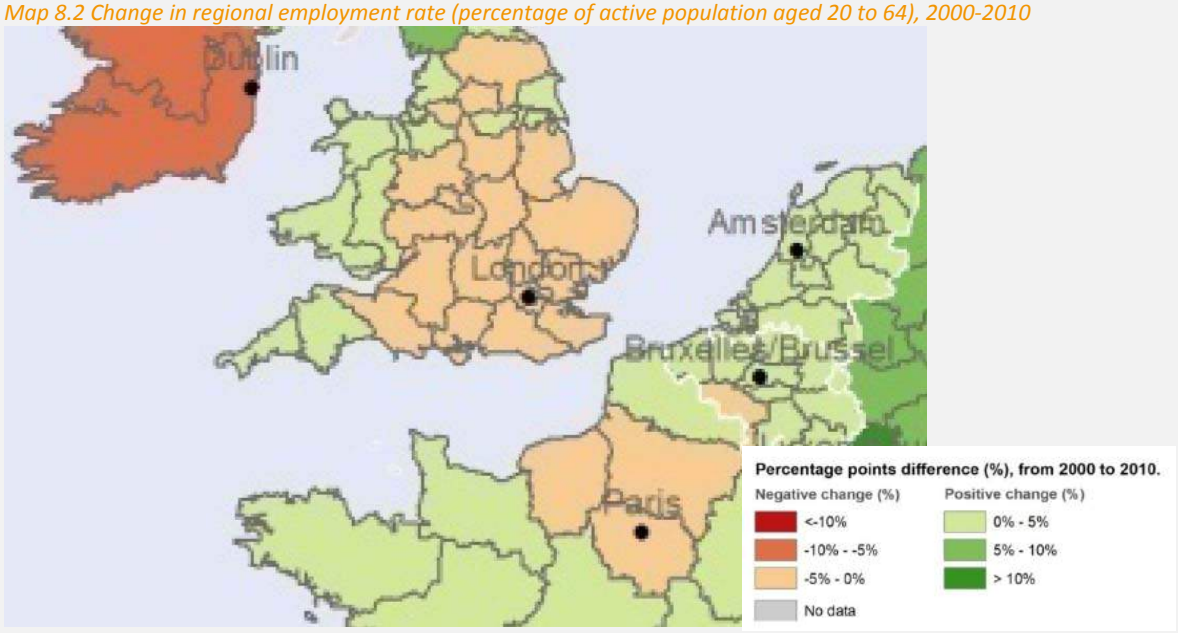
Theme 8: labour mobility Promoting employment and supporting labour mobility	*Investment priorities under theme promoting employment and labour mobility* Promoting employment and supporting labour mobility through: - 8A: Supporting the development of business incubators and investment support for self-employment, micro-enterprises and business creation;" - 8B: Supporting local development initiatives and aid for structures providing neighbourhood services to create jobs, where such actions are outside the scope of Regulation (EU) No […]/2012 [ESF];" - 8C: (Proposal) investing in infrastructure for […] employment services;
EU 2020 target	Employment: 75% of the 20-64 year-olds to be employed
Description	To gain insight in the state of play regarding the promotion of employment and labour mobility we look at: - The employment rate as percentage of active population aged 20 to 64 in 2011 (EUROSTAT); - The change in regional employment rate (percentage of active population aged 20 to 64), 2000-2010 (SIESTA, ESPON); - Maritime employment as percentage of total employment in 2012 (EASaTDOR, ESPON). - The regional youth unemployment rate as percentage of total labour force aged 15 to 24, 2011 (EUROSTAT); These indicators are only available on NUTS 2. There's no other data available on NUTS 3. - Index Cross-border mobility in 2009 (MKW Wirtschaftsforschung). The index is based on an integrative explanatory model comprising economic, legal and social aspects relevant for cross-border mobility. The employment rate describes which share of the active population between the ages of 20 to 64 is employed. This indicator is one of the EU2020 headline targets. The change in the employment rate is looked at, to have insight in whether regions are approaching the target or moving away from it. The regional youth unemployment is the share of the total labour force aged 15 to 24 that is unemployed. Prolonged unemployment for job-market entrants has a negative impact on the current and future social-economic situation. Chances on a career start will be considerably lower for those with a gap in their curriculum as they have to compete with younger graduates. The EU2020 is especially concerned about unemployment for the young generation as it is being severely hit by the economic crisis and excluded from the labour market (SIESTA, ESPON). We also take a look at the maritime employment as percentage of total employment. The data on maritime employment comes from the European Cluster Observatory and consists of the number of persons employed in "fisheries, shipbuilding, other traditional maritime sectors, sectors associated with the maritime cluster, tourism and transport" (the map is from ESaTDOR, ESPON). Finally we take a quick look at cross-border commuting. When discussing cross-border cooperation, this might be a relevant subject. Unfortunately, data on this subject is not complete and extensive.
State of play	

Map 8.1 Employment rate as percentage of active population aged 20 to 64, 2011



Source: EUROSTAT

Map 8.2 Change in regional employment rate (percentage of active population aged 20 to 64), 2000-2010



Source: ESPON, SIESTA

Conclusions in general

Employment

The average employment rate in the EU27 in 2010, 2011 and 2012 lies around 68.5% (source: EUROSTAT). This rate is lower than the EU2020-target of 75%. Within Europe there are considerable differences: the employment rates vary from 55% in Greece to rates around 80% in Norway, Sweden and Iceland (EUROSTAT, data not shown in this report).

The average employment rate in the 2Seas and the FCE area lies above the EU27 average, but under the EU2020 target. The average rate in 2Seas is 72,2%, in the FCE area the average is 71,2%.

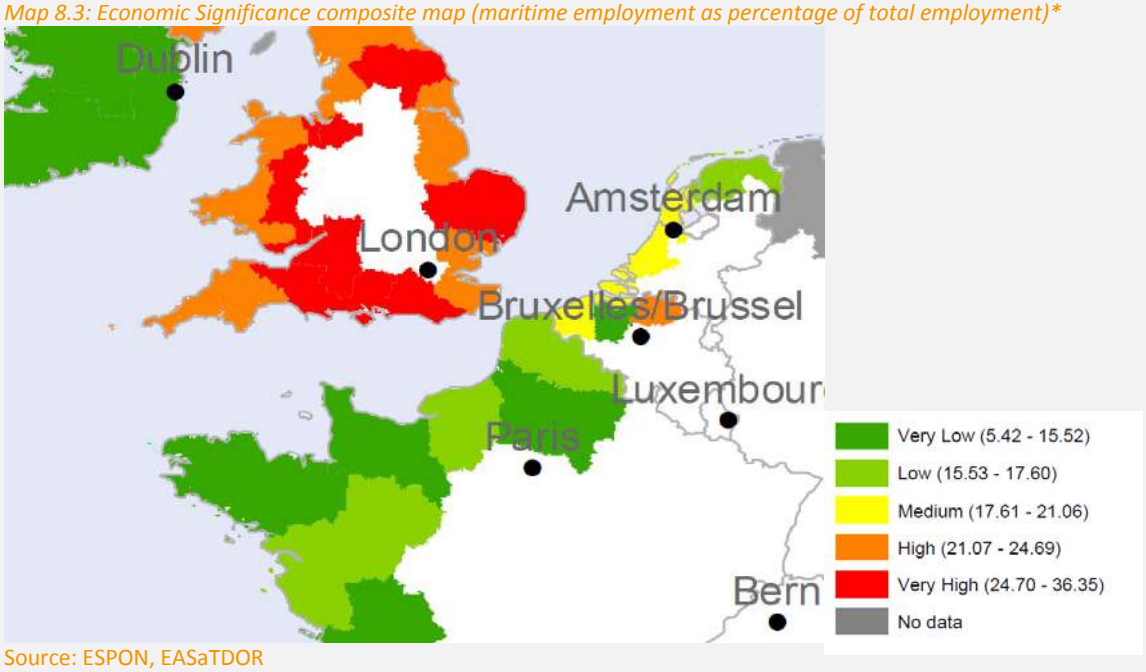
In the Dutch and UK regions within the programme area (except Cornwall and Isles of Scilly and Kent), the EU2020 target for employment is reached. The French and Flemish regions haven't reached the target of 75%. Here the employment rate varies between 63% and 75%. The lowest employment rate is found in Nord-Pas-de-Calais (62,8% in 2011).

From 2000 to 2008 the employment rate increased in Europe (EUROSTAT). It peaked in 2008 with a rate of 70,3%) and decreased to around 68,5% in the last years (2010, 2011 and 2012). Looking at the regions in the programme areas the regional employment rate increased between 2000 and 2010 in all Dutch and Flanders regions, in Devon and Cornwall (UK) and Bretagne, Basse-Normandie and Nord- Pas de Calais (FR) with 0% to 5%. In all other UK and French regions the employment rate decreased with -5% to 0% in 2000-2010.

Over the last two years (2010 to 2012) the employment rate dropped in Flanders from 67,6% to 67,2%, was stable in France and showed a small increase in the Netherlands (from 76,8% to 77,2%) and the UK (73,6% to 74,2%).

State of play

*Map 8.3: Economic Significance composite map (maritime employment as percentage of total employment)**



Source: ESPON, EASaTDOR

** The data on maritime employment consists of the number of persons employed in "fisheries, shipbuilding, other traditional maritime sectors, sectors associated with the maritime cluster, tourism and transport".*

Conclusions in general

Maritime employment

Relevant for coastal regions (like 2Seas and the FCE areas) is the employment directly and indirectly related to the maritime character of the area. Maritime employment includes fisheries, shipbuilding, other traditional maritime sectors, sectors associated with

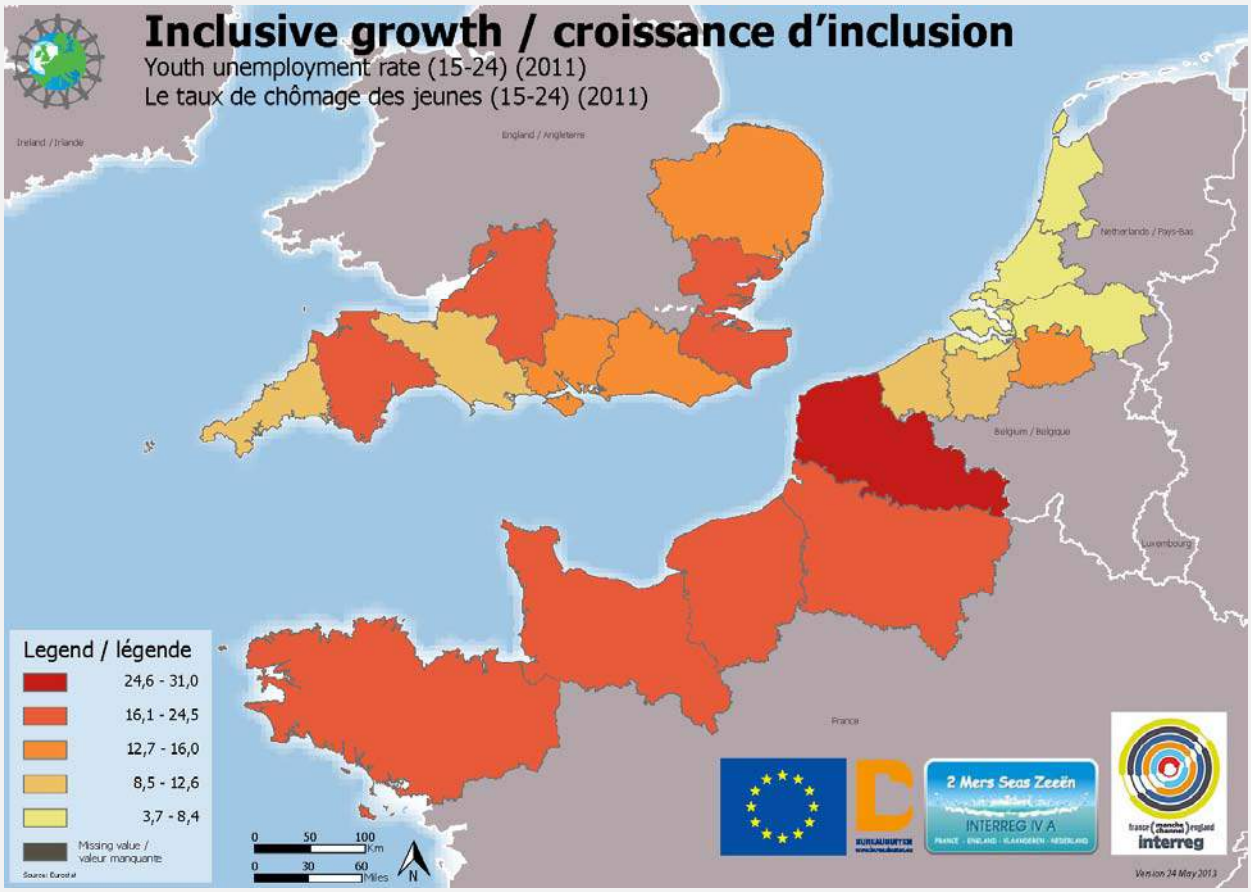
the maritime cluster, tourism and transport.

Looking at the FCE and 2Seas areas, the southern UK-regions Dorset and Somerset, Hampshire and Isle of Wight, Surrey and West and East Sussex have a relative high percentage of the total employment related to marine and maritime sectors (between 24,% and 36,4%). The underlying ESPON maps reveal the causes of these high scores. In all southern regions of the UK a very high share of the employment is related to tourism (>17%). Norfolk has high employment in several maritime related sectors like fisheries and transport. (EASaTDOR, data not included in this report Annex 3 and 7)

Looking at the maps for maritime industries (including port related industries) and transport, the mega port regions of Rotterdam and Antwerp stand out (EASaTDOR, data not included in this report, Annex 3 and 7). However proportionally maritime industries are less significant in the overall make-up of employment in these regions (because there is much other employment).

State of play

Map 8.4 Regional youth unemployment rate as percentage of total labour force aged 15 to 24, 2011



Source: EUROSTAT

Conclusions in general

<u>Regional youth unemployment</u>

In 2011 the unemployment rate in Europe was 21,4%. This is a strong increase since 2007; then the rate was 15,5%. The obvious reason is the economic crisis.

In both the FCE and 2Seas area the average unemployment is considerably lower: 18,7% (in FCE) and 16,4% (2Seas). Although this is a quite positive state of play, there are big differences within the programme areas. The highest rate is found in Nord- Pas de Calais (31%). Also the other French regions have quite high rates of youth unemployment. The lowest rate is found in the Dutch region Zeeland: 3,7%. In fact, all Dutch regions perform well: the youth unemployment is lower than 9% in all regions.

Looking at the development of the youth unemployment between 2007 and 2011, we see a considerable deterioration. In Europe the unemployment rate increased from 15,5% to 21,4%. In the programme areas there is an improvement in only a few regions: Zeeland, Haute-Normandie, Cornwall and Oost-Vlaanderen. In all other regions the youth unemployment increased.

State of play

Table 8.1 Index of cross-border commuter mobility, 2009

	Unemployment rate #		Index of mobility *
Cross-border direction (A → B)	A	B	
Belgium → France	11,5	12,4	4,34
Belgium → Netherlands	7,1	3,7	2,32
France → Belgium	12,4	11,5	2,24
Netherlands → Belgium	3,7	7,1	3,58
EU mean/median value			2,45

* The index is based on an integrative explanatory model comprising economic, legal and social aspects relevant for cross-border mobility. High values correspond with low levels of commuting.
# Unemployment rate in the border-region of the member state
Source: MKW Wirtschaftsforschung

Conclusions in general

Cross-border commuting

Finally we take a look at cross-border commuting. According to MKW[12] (data not shown in this report) cross-border commuting in EU15 has increased by 26% from about 490,000 in 1999/2000 to about 660,000 in 2006/2007. MKWstates that cross-border commuting will further increase, looking at current transformations in the working environment, especially in this highly developed area, cheap flights and train journeys, flexible working hours (e.g. home offices) and an increase in communication technology.

The index of mobility integrates social, legal, infrastructural and economic factors and is therefore a comprehensive and balanced indicator for the accessibility of cross-border labour markets. In table 8.1 low values of the 'index of mobility' correlate with high levels of commuting. High values of this index mean the accessibility of cross-border labour markets is low. A relative (compared with Europe as a whole) low level of commuting (high value in the table) is found for commuting from Belgium to France. More people are commuting from France to Belgium. Table 8.1 also shows that the level of commuting from Belgium to the Netherlands is higher than vice versa.

In addition it can be stated, according to MKW:

- Language barriers and lack of information – the latter partially related to the first – bear most problems for cross-border worker's mobility.
- No data is available for commuting between France and England and vice versa. Nevertheless the MKW workers mobility study (2009) has described the trend. English workers are acquiring lodging in France and commuting back to the UK to work. South-East England is already the second most densely populated region in Europe. Living in France is interesting because of the lower costs for housing, living and the, high quality of French health care.

Euro-commuting (commuting between France and UK) is going to keep growing, depending on the state of cross-sea transport links.

[12] MKW Wirtschaftsforschung, Scientific Report on the Mobility of Cross-Border, Workers within the EU-27/EEA/EFTA Countries

Conclusions in relation to FCE and 2Seas areas

Commonalities

- The average employment rate both in the 2Seas and the FCE area lie above the EU27 average, but under the EU2020 target.
- In both the FCE and 2Seas area the average unemployment rate is relatively low compared to Europe as a whole.

Differences

- The average employment rate in 2Seas (72,2%) is slightly higher than the rate in the FCE area (71,2%).
- The average youth unemployment in the FCE area (18,7%) is higher than in the 2Seas area (16,4%).

Policy analysis

European level

The Agenda for new skills and jobs is the main initiative to help reach the 75% employment mark. The Agenda also contributes to achieve the EU's targets to get the early school-leaving rate below 10% and more young people in higher education or equivalent vocational education (at least 40%), as well as to have at least 20 million fewer people in or at risk of poverty and social exclusion by 2020. The Agenda presents a set of concrete actions that will help:

1. Stepping up reforms to improve flexibility and security in the labour market ('flexicurity')
2. Equipping people with the right skills for the jobs of today and tomorrow
3. Improving the quality of jobs and ensuring better working conditions
4. Improving the conditions for job creation

(Source: website European Commission, EU 2020)

The EU is working to reduce youth unemployment and to increase the youth-employment rate with several actions. The concern of youth unemployment is shared by all MS, because youth unemploymentnis rising also in the FCE and 2Seas area. Share best practices, match job seekers with cross-border vacancies and skills programmes are relevant cross-border actions.

National level

As the EU2020 strategy is ambitious, the targets are aimed at a growth in employment and participation rates in all member states (see table 8.2).

Table 8.2 EU2020 Employment targets per member state

Member state	**EU 2020 target**
EU	75% of the 20-64 year-olds to be employed
FR	75% participation rate
UK	No target set
BE	73,2% participation rate
NL	80% participation rate

Looking at the EC's advice for the member states (Position Paper 2014-2020, Country recommendations 2012) regarding employment, a division can be made in four recommended interventions to strengthen employment and participation.

1. Increase job market flexibility and mobility

A more fluid job market, in which job security gradually gets replaced by 'career security', is recommended for all 4 member states. This includes more incentives to work and for life-long learning programmes, as well as a closer link between the education and business worlds in order to match skills with job availability. In the UK, focus is on supporting labour market mobility in the coastal and rural areas (like most regions included in both programme areas), and on rolling-out existing apprentice schemes for young people to advanced and high-level skills. In France, the public employment service should be

strengthened in order to enhance the adaptability of workers. Increased participation amongst second-income earners and reforms of the social system and resignation policy should impact the flexibility of the job market in the Netherlands positively. In Belgium, to conclude, the taxing system on labour including the unemployment benefit system should be reformed. In terms of measures, there are several actions on the national policy level. Examples include the digital skills programme in the Netherlands and the reinforcement of higher vocational education in Flanders.

2. Diversification of agricultural and maritime sectors.

Especially in FCE-regions , the diversification of the coastal economy into non-farming activities and marine and maritime activities other than fishing is a major challenge. Other maritime professions, for example in research, water management, aqua-culture and maritime tourism areexpected to increase. Also (coastal) tourism offers opportunities for growth, if developments meet the consumers demands (high quality accommodations and destinations. This constantly asks for investments, especially the local economic strategies of the UK regions mention the need to upgrade the facilities. Also, the development of ecotourism in Europe is lagging, while the annual growth of ecotourism is four times faster than traditional forms of tourism. Another challenge [13].

3. Increase employment amongst vulnerable groups

Also tackled by the ESF programmes, relevant EC recommendations extensively cover improving the inclusion of vulnerable groups on the job market. The needs differ between member states. In the UK, a relatively large group exists of low-skilled young people not in employment, education or training (NEETs). While the high proportion of this group should be reduced, their employability should be improved by equipping them with higher and more relevant skills. In France, measures to facilitate the labour market integration of people from jobless households should be extended. Belgium should strengthen the focus of employment support and activation policies on older workers and vulnerable groups, boost interregional labour mobility, and strengthen the coherence between education, lifelong learning, vocational training and employment policies. In The Netherlands, focus should be on the integration of the most vulnerable groups in the labour market, especially young disabled persons through active labour market measures.

4. Tapping labour potential of women

In the Netherlands, the UK and France the labour potential of women is not fully exploited, according to the EC's position papers. The main barrier in the UK and France is the access to childcare services, which is also under threat by budget cuts by central government. The Netherlands specifically needs to increase the working hours of women: while participation is high, the average amount of hours worked is far below the EU average.

Regional level

As regional governments and development agencies have a considerable role to play in boosting the regional economy and job markets, many ambitions have been voiced in the analysed policy documents. Overviewing the regional policy level, two policy trends can be observed.

1. Developing regional and local skill systems: These 'skill systems' that connect to education (theme 10) are central in the strategy of Suffolk, Portsmouth, East Flanders and Noord-Brabant.

[13] Source: United Nations Environment Programme and World Tourism Organization (2012), Tourism in the Green Economy – Background Report, UNWTO, Madrid.download: http://www.e-unwto.org/content/t21l16/fulltext.pdf.

2. Sector specific employment policies: As part of smart specialization, some regions choose to support regional or local employment systems that focus on specific sectors.

Both policy trends aim at optimizing the balance between supply and demand of labour, quantitatively as well as quantitative. Since labour markets function on local, and especially regional level, this subject is the responsibility of local and regional organisations/authorities. Moreover: differences in (regional) economic structure and context imply that optimizing supply and demand asks for a local/regional approach. E.g. the Dutch province of Noord-Brabant focuses on diminishing the shortage on (professional) craftsmanship on all educational levels. The UK region of Plymouth focuses on the development of a Skills Board to ensure access and take up of basic skills.

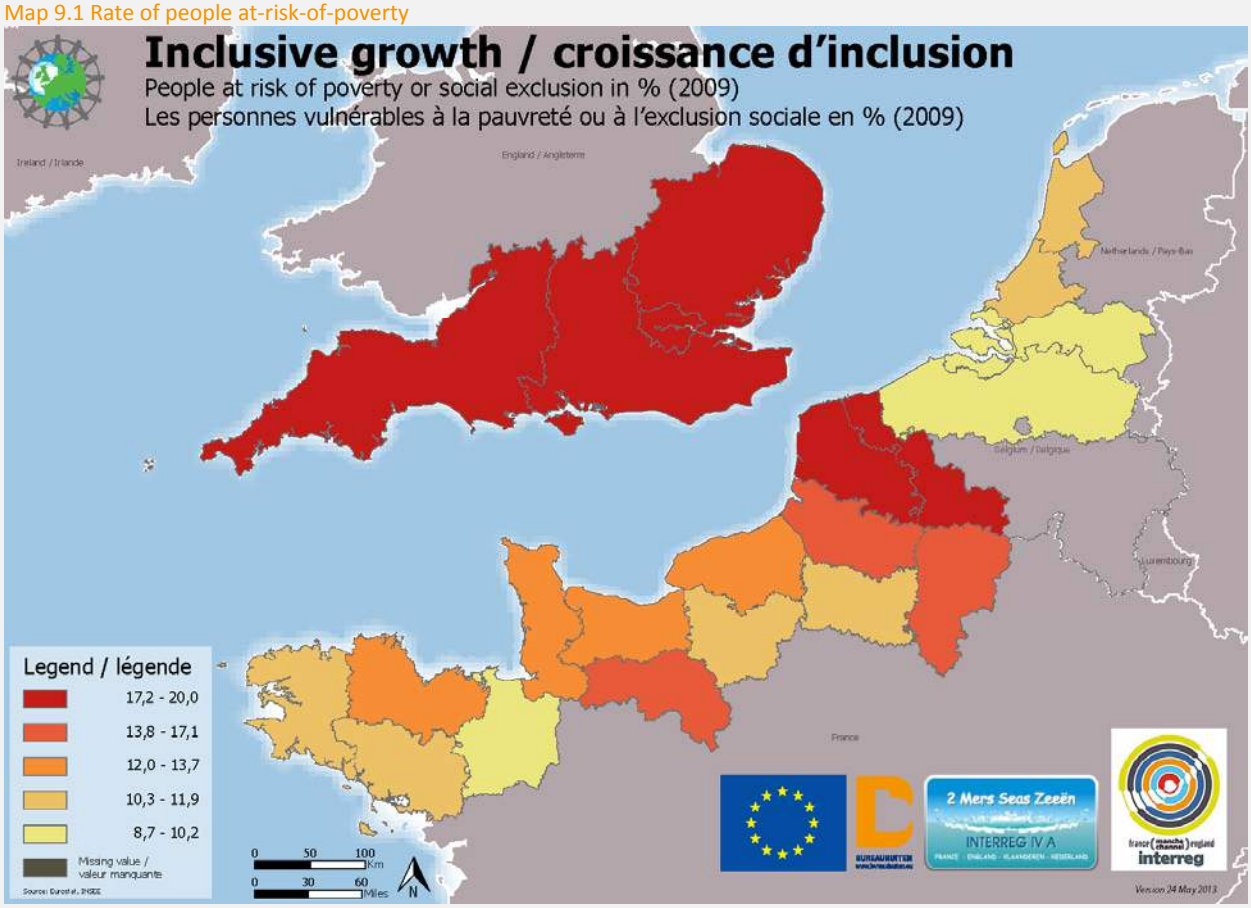
<u>Conclusion policy analysis</u>
Cross-border cooperation could be enhanced on the following themes:
1. Diversification of agricultural and maritime sectors.
2. Exchanging expertise on successfully developing a 'regional skill system'.
3. Removing barriers for cross-border employment, although many of these barriers remain subject of national policies (pension systems, taxes, standards of equivalence of diplomas and training).
4. Share best practices, match job seekers with cross-border vacancies and skills programmes (see also TO 10) to reduce youth unemployment.

2.9 Theme 9: Promoting social inclusion and combating poverty

Theme 9: Social inclusion **Promoting social inclusion and combating poverty**	*Investment priorities under this theme are:* - 9A: (Proposal) In order to promote social inclusion, reduce inequalities and combat poverty, particularly among marginalised communities, it is necessary to improve access to health, social, cultural and recreational services, including through the provision of small scale infrastructure, taking account of the specific needs of the disabled and the elderly; - 9B: (Proposal) support for physical, economic and social regeneration of deprived communities in urban and rural areas; - 9C: (Agreement) support for social enterprises; - 9D: (Proposal)investments undertaken in the context of community-led local development strategies and corresponding recital: Support under the investment priority "community-led local development" may contribute to all thematic objectives as set out in the regulation.
EU 2020 target	Poverty / social exclusion: at least 20 million fewer people in or at risk of poverty and social exclusion
Description	To gain insight in the state of play regarding the theme social inclusion we look at: - The rate of people at-risk-of-poverty in 2009 (EUROSTAT and (for France: INSEE). The rate of people-at-risk-of-poverty describes the regional share of persons with an equivalised disposable income below the risk of poverty threshold, which is set at 60% of the national median equivalised disposable income after social transfers. - Change in people at-risk-of-poverty (poverty after social transfers), 2005-2010 (SIESTA, ESPON); - Young people not in work, education or training as percentage of people aged 18 to 24), 2012 (EUROSTAT). this data is only available on N UTS 3 level; - Employment rate employees aged 55 to 65,as percentage of the total number of people aged 55 to 65in 2011 (EUROSTAT, INSEE). The data in EUROSTAT is available on NUTS2 level, For France we've completed with data on NUTS3 level from INSEE. Young people not in work, education or training (so called NEET) (as percentage of people aged 15 to 24), is a relevant indicator because not being in work, training or education increases the risk of poverty. People not in work, education or training are sometimes referred to as 'Europe's lost generation'. Employment rate 55 to 65 years: this indicator is also relevant for theme 8 (employment). On the long term it's important to keep high employment rates for older workers for both social and economic reasons.

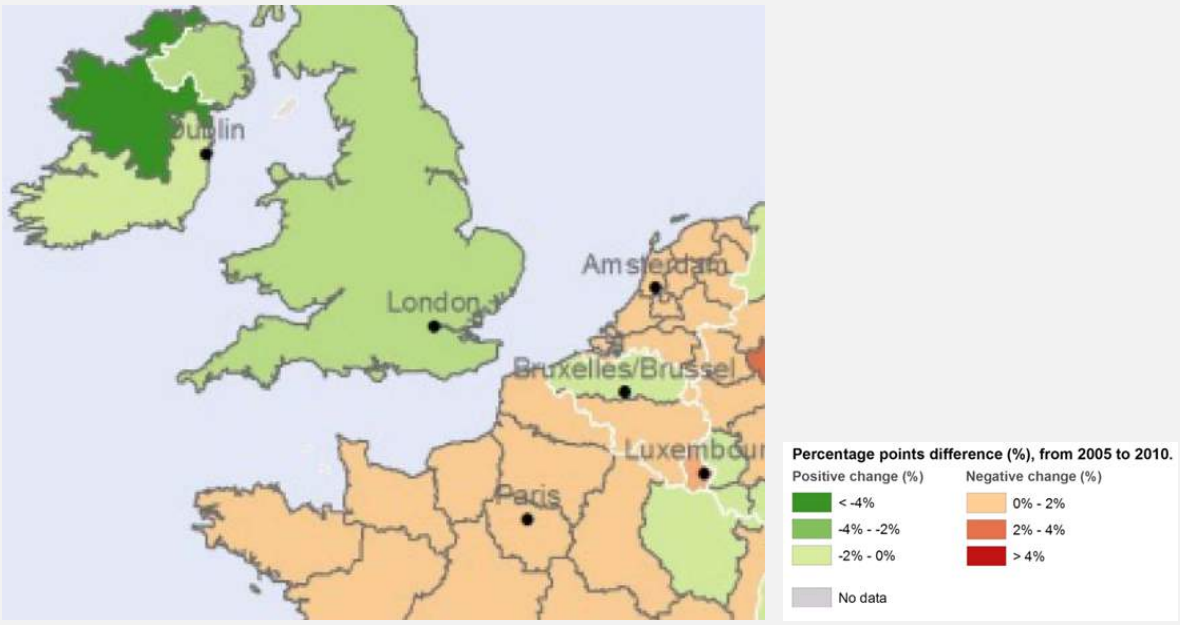
State of play

Map 9.1 Rate of people at-risk-of-poverty



Source: EUROSTAT and INSEE

Map 9.2 Change in people at-risk-of-poverty, 2005-2010



Source: SIESTA, ESPON

Conclusions in general

<u>At risk of poverty</u>

In Europe, in 2010 there were more than 115 million people officially considered poor, corresponding to 23.5% of total population (SIESTA, ESPON).

Within the programme areas the highest rates for people-at-risk-of-poverty'[14] in 2009 can be found in all UK-regions and Nord- Pas de Calais (18%-20%). Lowest rates are found in Zeeland (8,7%), Noord-Brabant (9,1%), Vlaams Gewest (10,1%) and in Ille-et-Vilaine (10,2%).

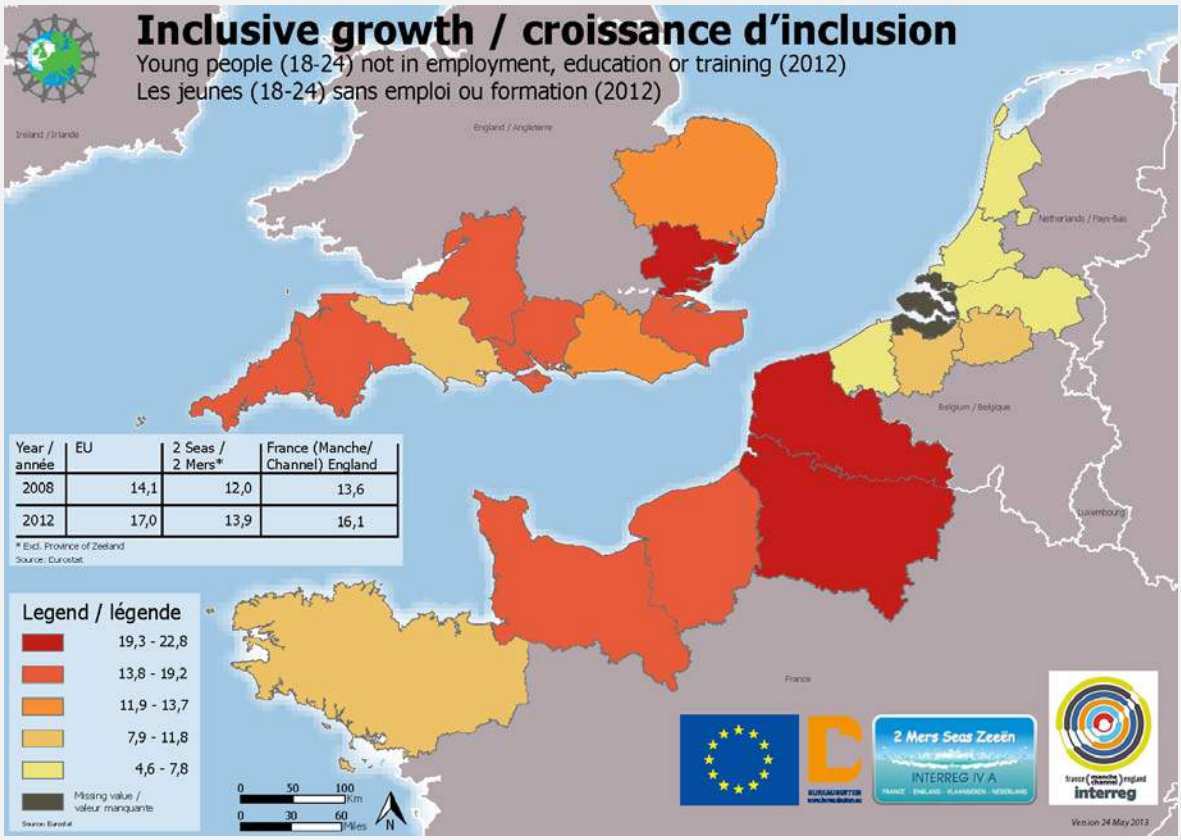
Across Europe, the change in the risk-of-poverty has a diverse spatial pattern. In general, regions in Eastern Europe are experiencing a positive change in and in contrast, most of the Western or Scandinavian regions are experiencing (soft) negative changes. The ESPON TIPSE Study (The Territorial Dimension of Poverty and Social Exclusion in Europe) suggests poverty is broadly associated with rurality in the New Member States, and in the East and South, but with urban neighbourhoods in the Old Member States and the Centre and North. This means the share of people at risk of poverty may be higher in the urban areas.

Between 2005 and 2010 a positive development (between -4% and -2%-point) took place in all UK-and Flanders- regions. In all French and Dutch regions the risk of poverty increased between 0% and 2%-point. Therefore the differences between the FCE and 2Seas area appear to be small.

State of play

Map 9.3 Young people not in work, education or training (as % of people aged 18 to 24), 2012

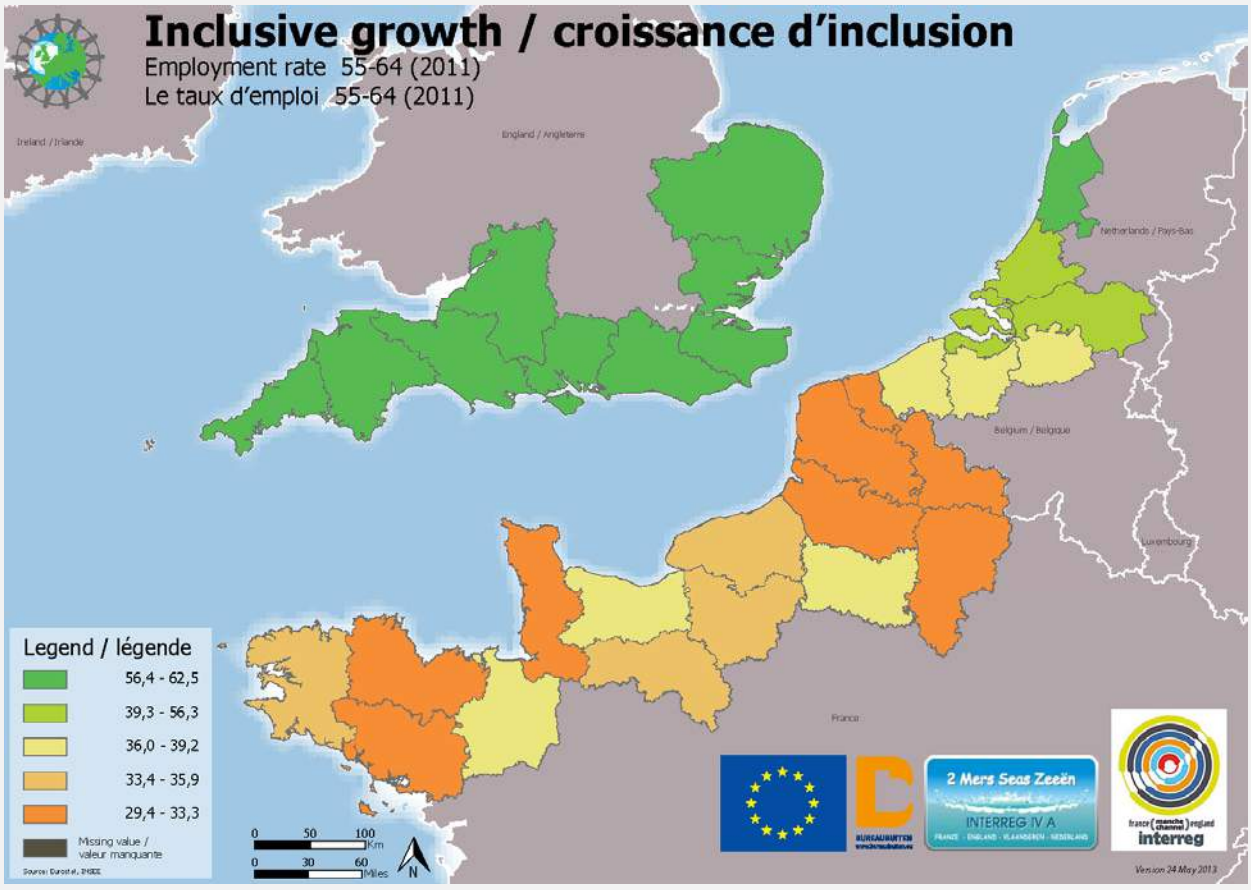
[14] Represents specifically regions with the regional share of persons with an equivalised disposable income below the risk of poverty threshold, which is set at 60% of the national median equivalised disposable income after social transfers. This is commonly known as at risk- of-poverty rate. This is a state-based indicator of poverty showing social inequalities in regions in relation to a state-based income trend.



Source: EUROSTAT

Conclusions in general	Young people not in work, education or training (NEET) (share of people aged 18-24) The EU average of NEET is 17% in 2012 (EUROSTAT). Lowest NEET-rates are to be found in the Netherlands, here the rates vary between 4,6% and 6,3%. Highest rates are found in Picardie, Nord-Pas de Calais and Essex. Because of the low rates in the Dutch and Flanders regions, the NEET-rate in the 2Seas programme area (13,9%) is lower than in the FCE-area (16,1%). The EU average of NEET has increased between 2008 and 2012 from 14% to 17%, due to the economic and financial crises. Also in the FCE and 2Seas area the NEET rate has increased in this period. In the FCE area the rate increased from 13,6% to 16,1%, in the 2Seas area the rate increased from 12,0% to 13,9%.
State of play	

Map 9.4 Employment rate 55-65 years (as percentage of people aged 55 to 65), 2011



Source: EUROSTAT, INSEE

Conclusions in general	<u>Employment rate 55-65 years (as percentage of people aged 55 to 64)</u> In Europe the employment of people aged 55 to 64 was 47,4% in 2011. Map 9.4 shows considerable differences between the regions in the programme area. In all Dutch and UK regions the average employment in this age group lies above the EU average. This rate is lower in all Flanders and French regions. Therefore the average employment rate in the 2Seas area appears to be higher than in the FCE area. Between 2007 and 2011 the employment rate 55 to 64 years increased from 44,6% to 47,4%. This rate also increased in this period in all Flanders and Dutch regions. In most UK regions (except for Devon) this rate decreased. French regions show a divers pattern: decrease in Picardie, Nord - Pas-de-Calais and Bretagne, increase in Basse-Normandie and employment rate of older workers was stable in Haute-Normandie.
Conclusions in relation to FCE and 2Seas areas	<u>Commonalities</u> - Within both the FCE and the 2Seas areas the average rate of people-at-risk-of-poverty is considerably lower than the EU-average. - The differences in change of the rate of people-at-risk-of poverty between the FCE and 2Seas area appear to be small. - Within both areas the NEET-rate lies beneath the EU average. It increased between 2008 and 2012 <u>Differences</u> - The share of people-at-risk-of-poverty in the FCE area appears to be higher than in the 2Seas area. - Because of the low rates in the Dutch and Flanders regions, the NEET-rate in the 2Seas programme area (13.9%) is lower than in the FCE-area (16.1%). - The increase in NEETs was higher in the FCE area (13.6% to 16.1%) compared to the

2Seas area (12.0% to 13.9%).
- The average employment rate in the age group of 55 to 64 appears to be higher in the 2Seas area than in the FCE area.

Policy analysis

European level

The European Platform against poverty and social exclusion sets out actions to reach the EU target of reducing poverty and social exclusion by at least 20 million by 2020. Actions include:
- Improved access to work, social security, essential services (healthcare, housing, etc.) and education
- Better use of EU funds to support social inclusion and combat discrimination
- Social innovation to find smart solutions in post-crisis Europe, especially in terms of more effective and efficient social support
- New partnerships between the public and the private sector

National level

The member states have specific targets and recommendations for policy (see table 9.1). Risk of poverty and social exclusion should be tackled by the following measures:
- Enhancing access to services (including childcare). By enhancing access to affordable, sustainable and high-quality services, in particular childcare, the risk of social exclusion in the UK can be lowered, according to the EC's advice. Specifically for the UK, the EC recommends that planned welfare reforms do not translate into increased child poverty.
- Increasing employment. In France, specific training to idle youngsters and workers should be provided, as a means to keep these vulnerable groups connected to employment. Older employees should be kept longer in the labour market by specific financial measures.
- Better coordinating policy. Flanders faces a situation in which various policy areas target the socially and economically vulnerable, while these efforts are not coordinated. In its National reform Programme, Flanders plans to act on this by developing a plan to combat child poverty.
- In addition, the UK has national initiatives on offering training and employment to coastal communities (coastal communities fund), founding local job centers and enhancing the social and economical situation of war veterans in rural areas.

Table 9.1: EU2020 Member state targets for reducing poverty

MS	EU 2020 target
EU	at least 20 million fewer people in or at risk of poverty and social exclusion
UK	fewer people are at risk of poverty or social exclusion: Child Poverty Act 2010
FR	fewer people are at risk of poverty or social exclusion: 600.000 (2007-2012)
BE	fewer people are at risk of poverty or social exclusion: 380.000
NL	fewer people are at risk of poverty or social exclusion: 100.000

Regional level

The NUTS3 level is relevant for the inclusion policy theme in all Member States in the area. The following policy ambitions can be identified
- There is high policy attention and interest for Social and Solidarity Economy and social enterprises (especially in France, the UK and Flanders and on local level also in the Netherlands) though action in this field is envisaged rather at local/regional level and not explicitly envisaged for CBC (except from exchange of best practices).
- Increasing health, well-being and autonomy of elderly: There is policy attention on enhancing access to facilities and services on regional, local and national level. Crucial actions are to be found on the Frensh side, like access to facilities and services for health (especially in Nord where the public health situation is below EU and national average), cross-border cooperation on health care in Nord-Pas-De –Calais and actions to increase the inclusion and autonomy of the growing share of elderly people. In the UK attention for supporting independence of the elderly is linked to

support for the voluntary and community sector (for example in Kent CC) and to urban regeneration including multi-functional green infrastructure (for example in South Hampshire).

- Cross border cooperation in management of (maritime) crises situations, for example cross-border health care for wounded as a result of disasters (see also TO5, risk management).
- Urban and rural regeneration is relevant for all MS and most regions, with a focus on areas with concentrations of multiple deprivation and sustainable regeneration. In France particular attention is create living environment that ensure inclusion and autonomy of several groups (disables, elderly). In the Netherlands attention is paid to specific housing for these target groups, in West-Vlaanderen on innovative forms of social housing.
- Limiting school drop-outs and developing participation programmes: In the Netherlands, and especially in Rotterdam, inclusion policy is focused on youngsters. The regional strategy is looking to limit drop-outs from professional education (connecting to theme 10)..

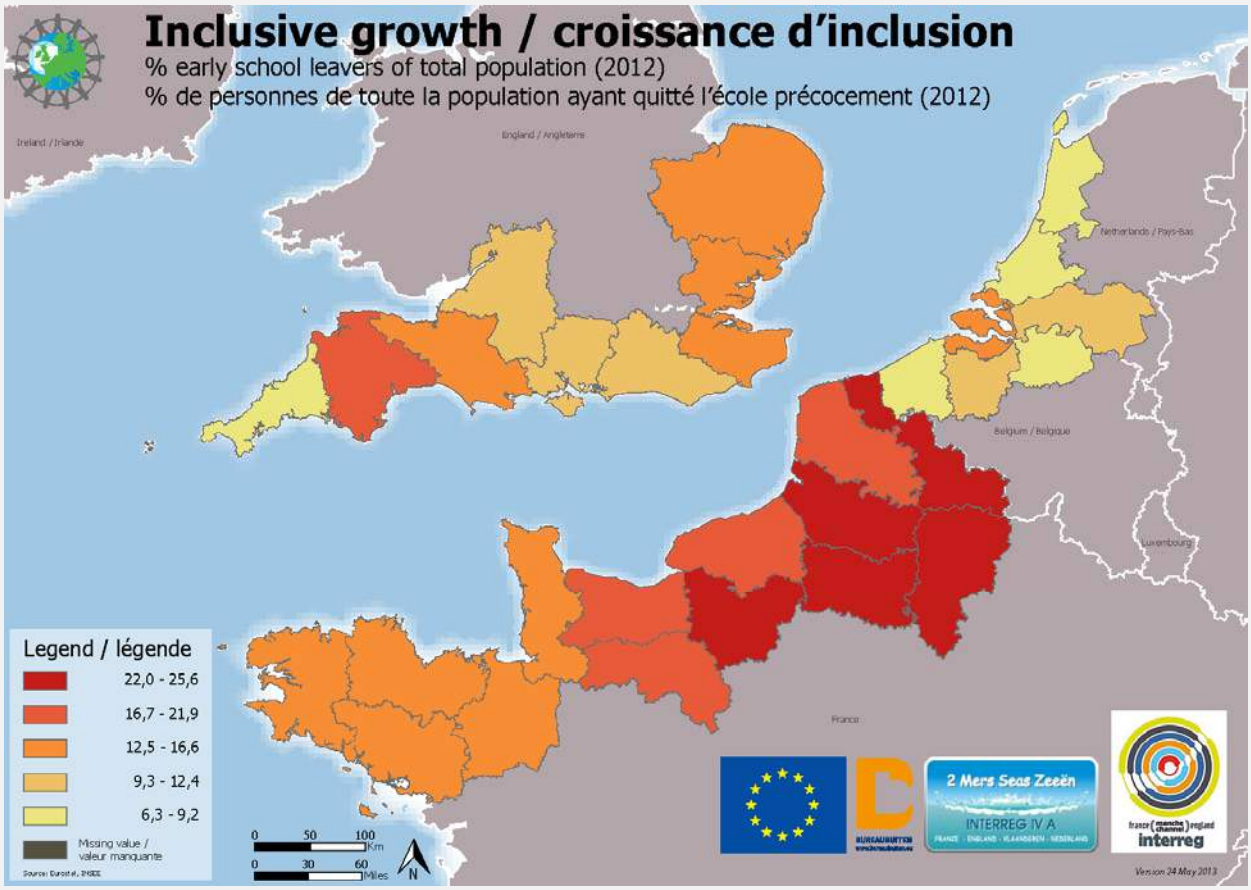
Conclusion policy analysis

Overviewing the policy ambitions and initiatives on the inclusion theme, the member states and regions show distinct differences in policy scope and approach. Nevertheless opportunities for cross-border coorperation are cross-border disaster management (see also TO 5) and exchange of best practices and innovative support for social enterprises, urban and rural regeneration, securing access to health and social facilities for elderly and other target groups, school drop-out programmes and other local measures te secure inclusion.

2.10 Theme 10: Investing in education, skills and lifelong learning

Theme 10: Education	Investing in education, skills and lifelong learning Investment priorities under theme education: - Investing in education, skills and lifelong learning by developing education and training infrastructure;
EU 2020 target	- Education: Reducing school drop-out rates below 10% - Education: at least 40% of 30-34–year-olds completing third level education
Description	To gain insight in the state of play regarding the theme education, we look at: - The number of people aged 18 to 24 that leave school and education early as a percentage of population aged 18 to 24, 2012 (For France: 2009) (EUROSTAT, INSEE) - The percentage of the population aged 25 to 64 that has attained tertiary education, 2012 (EUROSTAT, INSEE) This data is available on NUTS2. For the data on early school leavers we have collected data for France on NUTS3 level in 2009 (which was the latest available data) An early school leavers is defined as a person aged 18 to 24 whose highest level of education or training attained is ISCED 0, 1, 2 or 3c short and who received no education or training in the four weeks preceding the survey. Their number is expressed as a percentage of the total population aged 18 to 24. This is an important indicator as the EU aims at the transition towards a more knowledge-intensive economy, for which increasing levels of education is important. Also, In order for all citizens to participate fully in society and economy, to prevent poverty and to improve employability, a basic level of education is required. The second indicator looks at the proportion of the working age population (aged 25 to 64) that has attained a tertiary education. This is important when moving towards a knowledge-intensive economy, which implies higher human capital demands. It is estimated that by 2020 35% of all jobs will require high-level qualifications (SIESTA, ESPON).
State of play	

Map 10.1 Regional early school leavers as percentage of population aged 18 to 24, 2012 (French data: 2009)



Source: EUROSTAT, INSEE

Conclusions in general

Early school leavers

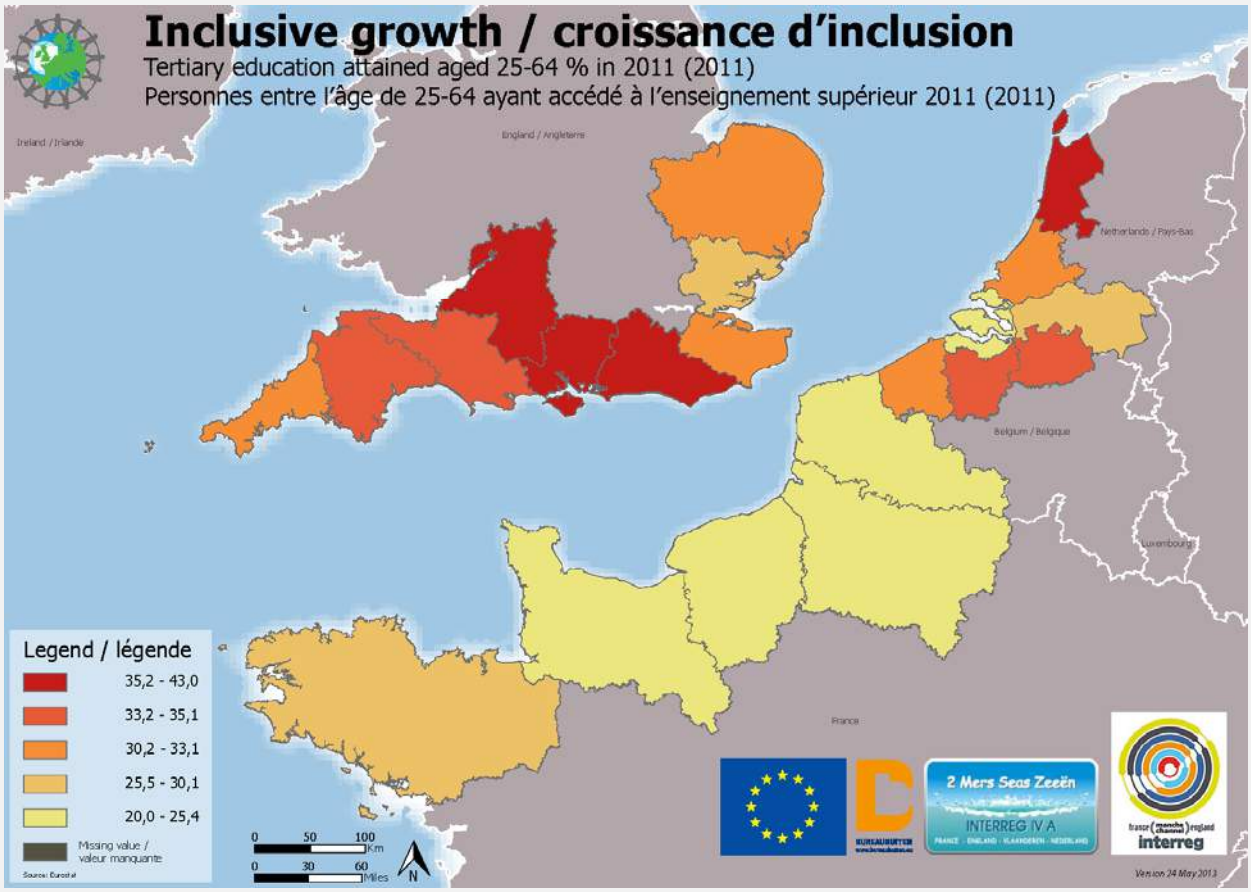
In 2012 the drop-out rate in the EU27-area was 12,8%. The percentage of early school leavers varies significantly across the EU. Some regions, like regions in Spain, are experiencing drop-out rates above 30%. Lowest drop-out rates are found mostly in Eastern Europe.

Also within the FCE and 2Seas programme areas the percentage of early school leavers varies significantly. In all French regions the drop-out rate (in 2009) was higher than the EU average (the highest in Aisne and Somme with rates of 25,6%). Except for Zeeland, all Dutch and Flemish regions score better than the EU average. The UK regions show a varied picture, ranging with rates from 6,3% in Cornwall to 20,5% in Devon. Based on this, the drop-out rate in the 2Seas area appears to be lower than in the FCE area.

Between 2008 and 2012 the drop-out rate in Europe dropped from 14,8% to 12,8%. Most of the regions in the two programme areas also experienced a positive change between 2000 and 2010 (SIESTA, ESPON, data not included in this report). Regions with a negative change were Bretagne, Picardie, Surrey, East and West Sussex and Kent (0% to -4%-points). All other regions in the FCE and 2Seas area experienced a positive change, of which Noord-Holland (where the drop-out-rate improved with more than 8 percentage points) and Zuid-Holland, East of England South West England where the rate improved with 4-8 percentage points.

State of play

Map 10.2 The percentage of the population aged 25 to 64 that has attained tertiary education (2012)



Source: EUROSTAT

Conclusions in general	<u>Tertiary education</u> In Europe, the average rate of persons (25-64 years) that has attained tertiary education in 2011 is 26,8%. All Dutch, UK and Flanders regions score better than the EU average. Exceptions are Zeeland (24,8%) and Essex (26,8%). In these countries rates vary from 24,8% in Zeeland to 43% in the region 'Surrey, East and West Sussex'. All French regions – except for Bretagne – score below the EU average. Based on this, the average rate of persons (25-64 years) that has attained tertiary education in the 2Seas area appears to be higher than in the FCE area. Between 2007 and 2011 in Europe, the average rate of persons (25-64 years) that has attained tertiary education increased from 23,5% to 26,8%. All regions in the programme areas also show an increase. Only exception is Bretagne: here a small decrease took place (although the rate still lies above the EU average).
Conclusions in relation to FCE and 2Seas areas	<u>Commonalities</u> - Overall the programme areas show an increase in the average rate of persons (25-64 years) that has attained tertiary education (only exception is Bretagne). <u>Differences</u> - The drop-out rate in the 2Seas area appears to be lower than in the FCE area. - The average rate of persons (25-64 years) that has attained tertiary education in the 2Seas area appears to be higher than in the FCE area.
Policy analysis	<u>European level</u> The EU policy initiative on **education** and **employment** for young people in Europe is

called **Youth on the Move**. Youth on the Move aims to improve young people's education and employability, to reduce high youth unemployment and to increase the youth-employment rate by

- making education and training more relevant to young people's needs
- encouraging more of them to take advantage of EU grants to study or train in another country
- Encouraging EU countries to take measures simplifying the transition from education to work.

As the EC aims to improve young people's education and employability, skills improvement and life-long learning programmes should improve the 'career security' and employability of workers. The member state's targets for education are presented in figure 10.1.

Figure 10.1: EU2020 school dropout targets

	EU 2020 target School dropout rate	**30–34-year-olds completing tertiary education**
EU	10%	40%
UK	No specific targets	
FR	9,5%	50%
BE	9,5%	47%
NL	< 8%	45%

The recommendations to the member states differ:

- In France and Belgium, efforts should be focused on retaining workers and adult participation to lifelong learning. Investments should be made in employability and adaptability of elderly workers, while skills mismatches and shortages should be tackled with targeted actions, including interregional cooperation.
- Specific for Belgium, coherence in policy areas is mentioned as attention point (as in inclusion policy). Furthermore, the planned further regionalisation of labour market competencies can be used to boost interregional labour mobility and to strengthen the coherence between education, lifelong learning, vocational training and employment policies.
- In the Netherlands regional approaches are advocated in order to adjust the supply of skills to demand, while also taking account of the programmes that influence the labour demand. Support should be provided to innovation through education, vocational training and exchange of experience. For this a support system should be created to increase the number of students especially in science and engineering, and increase attractiveness of working in technical professions at all levels.
- In the UK, specific policy is recommended to reduce the number of early school-leavers, while lifelong learning (in practice offering vocational training and apprenticeships and increasing the labour market relevance of education and training systems) should be central. Reducing the number of early school-leavers is one of the aims of the Flemish reform programme as well.

National and regional level

National and regional policy ambitions for education reflect the EC recommendations well enough, as Flanders focuses its educational policy on technical education (connecting to the employment policy). In France, the regions Nord-Pas-de-Calais, Manche, Picardie aim to develop better vocational training and higher education, responding to the needs of businesses and enhancing cross-border labour mobility. This includes the improvement in foreign language skills (Hatte-Normandie). Additionally, professional exchanges should be organized cross-border, including cross-channel research teams (Basse-Normandie). In Bretagne, national and international mobility of young Britons is promoted. Finistère's focus is mainly on the promotion of skills development. In the Netherlands, a digital skills programme is in place to enhance the IT engineering skills of

young students and employees. In the UK, the counties offer educational support programmes to enhance educational attainment (Suffolk, Portsmouth), while connecting education to the labour market needs (West Sussex, Kent, Thurrock, Cornwall & Scilly).

Conclusion policy analysis

On all policy levels, the importance of investing in education and skilss are acknowledged. And while the member states face different policy challenges in education, there are common needs that can be tackled by cross-border cooperation on education themes:

- Identifying business needs for skills and developing tailor made education programmes, in order to match demand and supply on the labour market, especially in emerging sectors (for example sustainable energy like o ff shore wind).
- Lowering lingual fragmentation by offering vocational and language training and cultural exchange

3. SYNTHESIS DATA AND POLICY ANALYSIS

This chapter provides an overview of the main elements to be considered in the socio-economic analysis of this large territory covering the current eligible areas of FCE and 2Seas programmes.

The following points are the subject of developments:
1. The changes in the socio-economic situation since 2007
2. The distance from the state of play towards the EU 2020 targets
3. Policy documents analysis
4. Commonalities /differences between both areas

3.1 The changes in the socio-economic situation since 2007

This whole territory has been impacted by several external and internal factors since 2007 when the socio-economic analysis was drafted for each programme. The major change relates to the financial and economic crisis, resulting in worsened circumstances for SMEs, the rise in the unemployment rate and an increase risk of poverty for the population in general. The crisis has also negatively influenced the R&D expenditure, from both public and private organisations. On the other hand the innovation system and regional innovation performance appears quite stable in the region. Although less sensitive to short term variations, environmental issues have become a higher priority, illustrated for instance by an increased awareness on sustainable environment in relation to economic development can be observed, illustrated by themes as Cradle to Cradle, circular economy, bleu economy, environmental technology and bio-based economy.
Other external factors relate to the increased globalisation trend, climate change, technology evolution, change in the world or European regulations, etc.

Table 3.1: Key external factors influencing socio-economic situation since 2007

TO	Some key external factors
TO 1: Knowledge economy	- Financial and economic crisis (less R&D Expenditure) +/- Increasing international competition (upcoming market such as Asia, Brazil, Middle-East) + Increase in knowledge intensity of the economy
TO 2: ICT	+ Growing ICT demand and dependency +/- Territorial impact of e-commerce and e-office on city centers (mainly negative) and rural areas (mainly positive) + Untapped potential for use in ICT in health, food, for aging society, etc… (cross overs) more possibilities for ICT applications
TO 3: SMEs	- Financial crisis has impact on growth and performance of SMEs - Lack of resources for start-ups and R&D because of financial crisis
TO 4: Low carbon economy	+/- Climate agreement (non-binding) of Copenhagen + Technological developments: possibly cheaper for sustainable energy (wind, solar, tidal, etc.) - Uncertainty on oil and energy prices and drying oil resources (in North Sea)
TO 5: Climate change adaptation	= Climate change continues and becomes visible on street level (droughts, heat waves, flooding)
TO 6: Sustainable environment	+/- Climate agreement (non-binding) of Copenhagen + More awareness on sustainable use of resources: C2C, blue economy, circular economy, bio-based economy
TO 7: Sustainable transport	+/- Climate agreement (non-binding) of Copenhagen - Increase in traffic and transport + Increase in technical possibilities and market uptake for low carbon / low(er) emission transport vehicles (e-car and e-bike)
TO 8: Employment	- Financial crisis leading to more unemployment - Government cuts with impact on public and private sectors - Higher flexibility in labour markets
TO 9: Poverty	- Financial crisis leading to more social exclusion and increased risk of poverty - Real estate market bubble in NL, UK, BE, F - Deprived neighbourhoods
TO 10: Education	- Government cuts leading to more expensive education for students = Modifications in the higher education system required by the Bologna process (continuation)

3.2 The distance from the state of play towards the EU 2020 targets

This criterion is relevant for the thematic objectives for which a EU 2020 target is defined: knowledge economy, low carbon economy, employment, poverty and education. For sustainable transport the EU 2020 targets on GHG reduction and energy efficiency are relevant, but data on these indicators in relation to transport are not available on regional level. The limit of this criterion is that it does not address all the thematic objectives.

3.3 Policy documents analysis

The key conclusions of the policy documents analysis provide for each thematic objective indications on its degree of priority at some or at all territorial levels (national, regional and local – where relevant) within each country, and the extent to which it is a shared concern by the territories. Conclusions in this field are based on the policy analysis (see factsheets chapter 2) and on the top down and bottom up analysis of the policy documents for cross-border cooperation (see annex 2).

3.4 Commonalities vs. differences between both areas

Considering that part of the eligible territory is common to both areas the emphasis is put where possible on the situation in the French territories in comparison with the Dutch and Flemish territories (specific situation for Nord-Pas-de-Calais and Picardie because these departments belong to the 2Seas area and / or the FCE area,

in order to come to some conclusions about the commonalities (or similarities) vs. differences between the FCE and 2Seas areas.
The statements included in the synthesis table are based on the detailed tables with the summary of the commonalities and differences for each of the thematic objectives.

It's worth mentioning that these statements reflect the experts team points of view and it cannot be claimed that they take into consideration all potential elements.

Table 3.2: Summary of commonalities and differences per thematic objective

	Commonalities	Differences
General indicators	- Both programme areas belong to the most populated areas of Europe, although major differences can be seen within the areas. - The population growth in both areas is more or less the same: between 2007 and 2011 the growth in the FCE area was 3,3% and in the 2Seas area 3,2%. - Both programme areas show a highly diversified picture looking at the different demographic change indicators. The area as a whole has a slightly older population compared to the EU average. Also the relative growth of the share of people older than 65 is higher than EU average (1,1% in EU27 and 1,6% in the FCE 2Seas area). - The GDP per capita in both areas is above EU 27 average, although in both areas the economy performed under EU average in the period 2006-2010. This underperformance is explained by the severe consequences of the economic and financial crisis. - Both areas have a higher share of people active in the services sector and a lower share for agriculture and industry. Sectorial patterns within both areas seem to be related to traditional industry levels, port-related activities and urbanisation rate. - The tourism capacity in absolute terms is comparable in both areas (although there is a difference if it is calculated per 1000 inhabitants, see below). The capacity (per 1000 inhabitants) in both areas is above EU average. Additionally, tourism capacity in both areas has developed faster compared to the EU average.	- The 2Seas area (323 inhabitants per km2) is much more densely populated than the FCE area (178 inhabitants per km2). The above map shows this is largely due to the concentration of population in the Netherlands and Flanders. - In average the FCE area has a slightly older population compared to the 2Seas area. In the FCE area 19,6% of the population is older than 65, in the 2Seas area 18,9% (in EU27 18,0% in 2012). - The economy of the 2Seas area is in relative and absolute terms more extensive than the economy in the FCE area. The 2Seas area represents 4.9% of the population and 5.2% of the GDP, and the FCE area accounts for 4.7% of the population and 4.6% of the GDP. This can be explained by the fact that the FCE area has a more rural and less densely populated character. - In terms of economic growth, the 2Seas area performed better than the FCE region. This is due to the fact that economic growth (2006-2010) in the FCE area is lagging behind (negative or below EU average) in all regions except Calvados, Pas-de-Calais and Somme in France. - Although on average the two areas do not differ in sector structure, clear differences can be seen between the Member States. The UK-regions have a higher share in the services sector and lower shares for agriculture and industry, Flemish regions on the Walloon border show higher shares in industry, French-regions show average shares for all sectors, with a slightly higher share in agriculture in the western-regions and industry in the north-west the urban areas in the Dutch-regions clearly show a higher share in the service economy and shares in agriculture are found to be high in the regions with a high representation of greenhouses and tillage-land. - Calculated per 1000 inhabitants, it can be noted that the tourist capacity in the FCE area is bigger than in the 2Seas area (0.94 is the EU average, 1.24 is the 2Seas aver-age and 1.54 the FCE average). - The 2Seas area has more predominantly urban areas than the FCE area. The rural / intermediate character of the FCE area is caused by the rural regions in France.

	Commonalities	Differences
TO 1: Knowledge economy	- The area as a whole functions on the same level as the EU 27 average, in terms of general expenditure in R&D (as % of the income). - Patent application: both programme areas show a great variety in the regional number of patent applications. On average there is almost no difference in the number of patent applications per million inhabitants between FCE and 2Seas (85,7 in FCE and 85,9 in 2Seas). There is however a big difference with the EU-average of 111 patents per million inhabitants (EUROSTAT).	- In the FCE area as a whole, general expenditure on R&D is lower than in the 2Seas area, although the difference is not very big. On the other hand it can be concluded that the change in expenditure on R&D (between 2003-2009) is more positive in the FCE area than in the 2Seas area (especially because the Dutch regions underperform). - Employment in high-technology sectors is lower in the FCE area, because of the low shares in Basse-Normandie and Haute-Normandie. - The Regional Innovation Scoreboard the 2Seas region has more innovation leaders, where the FCE area has more innovation followers and moderate innovators.
TO 2: ICT	- In both programme areas the regular usage of internet and the broadband penetration rate is relatively high compared to Europe as a whole.	- The average broadband penetration rate in the 2Seas area is higher than in the FCE-area (2Seas = 81% and FCE = 65% in 2009 calculated on NUTS 2 level). This is mainly caused by the relatively low broadband penetration in the French regions and in the south west UK regions (Dorset and Somerset, Cornwall and Isles of Scilly and Devon) - The share of people (age 16-74) that uses the internet regularly in the 2Seas area (85%) is a higher than the shares in the FCE-area (81%, 2011, calculated on NUTS 1 / 2 level). This is mainly caused by lower internet use in French regions.
TO 3: SMEs	- In both programme areas, there has been an increase in the number of SMEs, which in both programmes make up for the vast amount of businesses.	- The number of starters is higher in the 2Seas area, as a result of high starters levels in the Netherlands - The SMEs size distribution (national level) for employment and growth rate differs among the four Member States of the two programmes. - Divergent results for the MS are also found for SME performance, although productivity and real added value tends to be higher in the 2Seas area as a result of increases in Belgium and the Netherlands.
TO 4: Low carbon economy	- Both areas need to speed up shift to renewable energy - Probable increase in energy efficiency in both areas - Urban regions emit most CO_2 in both areas - Considerable potential for renewable energy	- Possibly more carbon emissions per capita in 2Seas area - Possibly a lower energy efficiency and less dynamism in this respect in 2Seas area - More potential for wind and solar energy production in FCE area
TO 5: Climate change adaptation	- Both regions are affected by climate change in general terms.	- The economy and the natural environment of the 2Seas area appear to be more sensitive to climate change than the FCE area. - The change in regional exposure to coastal storm events is higher in the 2Seas area, caused by the high negative impact in Flanders and the Netherlands. - The aggregated picture shows that the potential impact of climate change is higher in the 2Seas area than in the FCE area. - The regional capacity to adapt to climate change is relatively low in French regions, what results in a lower adaptability capacity in FCE.

	Commonalities	Differences
TO 6: Sustainable environment	- For both areas, the issue of sea pollution is a common challenge to be tackled in the domain of environmental protection; indeed they include sectors where the organic pollutants are highly concentrated (notably Bretagne, estuaries of the Seine and of the Rhine). - Both programmes are also concerned by a low rate of Natura 2000 zones, which show the existence of improvement opportunities in terms of policies for preservation of biodiversity and natural assets. - The topic of fisheries represents as well a prime-concern issue for the whole area, given the strong position of this activity in the local economies and strategies. A priority in this domain relates more particularly to the development of sustainable fisheries, as the overexploitation of fish stocks is a global concern; though there are some situation disparities between the two programme areas (the situation is more ominous in the FCE area).	- The FCE area is more concerned than the 2Seas area with the topic of soil erosion, as the highest risk of erosion is located in Bretagne and Picardie, while in most Dutch regions this risk remains low. - Another difference between both areas is the relevance of the theme of urban areas and urbanization. The 2Seas area presents more urban zones, integrated urban development and promotion of natural spaces around cities is more likely to be a central issue on this territory. - In terms of waste recycling, regions of the 2Seas appear to be generally more advanced (Flanders being one of the most advanced, and French regions in general having lower rates of recycling); however the recycling rate difference remains slight (3%), and the FCE area benefits from the presence of high-performance regions (Devon, Wiltshire). - More generally, the analysis of the cross-border projects developed within these two programmes sheds light on the different approaches being adopted, in particular as regards the maritime-related cooperation, in response to specific needs within each area. Whereas most of the maritime projects developed in the 2Seas programme, notably those associating partners from England, Flanders and Holland, address the maritime issue from an economic point of view (accessibility and ports competitiveness , development of trade relations, agro-food and fisheries, development of tourism, a.o.), numerous projects which have been implemented within the FCE programme focus on more environmental issues, such as conservation and valorisation of the maritime heritage, observation and preservation of eco-systems measures, resources management, and networking of protected areas
TO 7: Sustainable transport	- Common challenges in CO2 reduction and increasing renewable energy use in transport - Maritime orientation of transport – good port infrastructure of small, medium sized and lager ports, all with growth potential. - Multimodal accessibility in most regions has increased – while air connections are under pressure	- Most larger ports and maritime traffic in 2Seas area - Multimodal accessibility highest in urban zones of 2Seas area - Growth in rail accessibility particularly in French regions
TO 8: Employment	- The average employment rate both in the 2Seas and the FCE areas is above the EU27 average, but under the EU2020 target. - In both areas the average unemployment rate is relatively low compared to Europe as a whole.	- The average employment rate in 2Seas (72.2%) is slightly higher than the rate in the FCE area (71.2%). - The average youth unemployment in the FCE area (18.7%) is a bit higher than in the 2Seas area (16.4%).

	Commonalities	Differences
TO 9: Poverty	- Within both the FCE and the 2Seas areas the average rate of people-at-risk-of-poverty lies considerable lower than the EU-average. - The differences in change of the rate of people-at-risk-of poverty between the FCE and 2Seas area appear to be small. - Within both areas the NEET-rate lies beneath the EU average. It increased between 2008 and 2012.	- The share of people-at-risk-of-poverty in the FCE area appears to be higher than in the 2Seas area. - Because of the low rates in the Dutch and Flanders regions, the NEET-rate in the 2Seas programme area (13.9%) is lower than in the FCE-area (16.1%). - The increase in NEETs was higher in the FCE area (13.6% to 16.1%) compared to the 2Seas area (12.0% to 13.9%). - The average employment rate in the age group of 55 to 64 appears to be higher in the 2Seas area than in the FCE area.
TO 10: Education	- An increase in the average rate of people (25-64 years) that has attained tertiary education (except in Bretagne only) can be observed in the joint cooperation area	- The drop-out rate in the 2Seas area appears to be lower than in the FCE area. - The average rate of people (25-64 years) that has attained tertiary education in the 2Seas area appears to be higher than in the FCE area.

3.5 Overview of main criteria considered for the socio-economic analysis of both areas

The following table gives an overview of main criteria considered for the socio-economic analysis of both areas

Table 3.3: Overview of main criteria considered for the socio-economic analysis

Analysis criteria / List of TOs for the period 2014-2020	**A.** Changes in socio-economic and territorial situations since 2007	**B.** Distance to EU 2020 targets		**C.** Policy documents analysis				**D.** Commonalities vs. differences between both areas
		FCE	2Seas	UK	FR	NL	BE	
TO 1: Knowledge economy	**+/-**			++	++	++	++	
TO 2: ICT	**+**	n.a.	n.a.	0	+	0	0	
TO 3: SMEs	**--**	n.a.	n.a.	++	++	+	+	
TO 4: Low carbon economy	**+/-**			+	+	+	+	
TO 5: Climate change adaptation	**=**	n.a.	n.a.	++	++	++	++	
TO 6: Sustainable environment	**+**	n.a.	n.a.	++	++	++	++	
TO 7: Sustainable transport	**+**	n.a.	n.a.	0	+	++	+	
TO 8: Employment	**--**			0	+	+	+	
TO 9: Poverty	**--**			0	+	+	0	
TO 10: Education	**=/-**			0	+	0	0	

Interpretation of the criteria

A. Changes in socio-economic situation since 2007 (see paragraph 3.1):
- - very significant negative change
- significant negative change
= general stability
+ significant positive change
++ very significant positive change

B. Distance to EU 2020 targets (see paragraph 3.2)
Conclusion on the distance to the EU targets. 5 possibilities:

- Below EU targets
- Mixed situation difficult to say
- Mixed situation / most regions below
- Mixed situation / most regions above
- n.a. No EU2020 target set for this theme

C. Policy analysis (see paragraph 3.3)
Based on the analysis of the policy documents with an emphasis on the needs and opportunities for CBC.
++ : Thematic is a priority at all levels (national, regional and local – where relevant) and in most / all territories
+ : Thematic is a priority at some levels and in some territories
0 : Thematic is not a real priority in the MS or only in a few territories

D. Commonalities vs. differences between both areas (see paragraph 3.4)

- More commonalities than differences
- Mixed situation – difficult to interpret
- More differences than commonalities

3.6 Conclusions

General conclusions for the two programme areas are hard to give, as regional disparities are often significant and indicators and policies included are focused on a too broad variety of topics to draw non-prioritized conclusions. However, general conclusions based on the thematic objectives can be made. For more detailed conclusion we would like to refer to the conclusions per indicator in the second chapter.

The 2Seas and France (Channel) England area share many commonalities, but there are also some clear differences between the programmes. The themes that share most commonalities are the knowledge economy and low carbon economy. Differences were mainly observed for ICTs, climate change adaptation, sustainable environment, poverty and education. The largest negative changes in socio-economic and territorial situations since 2007 took place in SMEs (less investment options, more unemployment), employment and poverty rates. Sustainable transport and ICT levels positively changes since 2007. On the themes that have specific EU2020 target, most regions are behind schedule. On low carbon economy, all regions are below EU targets. In the France (Channel) England area, all regions are as well lacking behind on education targets. For the knowledge economy there is a mixed situation, with most regions below EU targets. Employment in the 2Seas area is the only target where most regions are on track, but the financial crisis will have a negative impact; in the France (Channel) England most regions are below the line.

Thematic objectives which are, based on the policy analysis, a priority at all levels (national, regional, county, cities) and in most/all territories are the knowledge economy, climate change adaptation, sustainable environment and to a lesser extent SMEs and low carbon economy. Sustainable transport is a theme that is more prioritized in the Netherlands. In France, all thematic objectives are a priority on at least some governmental level whereas predominantly the UK has a more specific focus on knowledge economy, SMEs, climate change adaption and sustainable environment. ICTs and education are the themes less prioritized.

4. SWOT FCE

Please note that these are conclusions on needs and potential opportunities for cross-border cooperation from the consultant's point of view. The SWOT is made separately for each of the programme areas (but may contain overlapping elements). Of course, also the conclusion on the needs differs between FCE and 2Seas.

4.1 Theme 1: Knowledge economy

SWOT FCE

Strengths	Weaknesses	Opportunities	Threats
5 UK regions in the area have a general expenditure on R&D higher than the EU2020 target Above average employment in high tech sectors Stable-positive RIS performance over the years. Bretagne developed positively both in 2007 and 2011 Change in expenditure on R&D is more positive	Low average number of patent applications No innovation leader in French part of the area Low performance of SMEs in R&D (see also TO3)	Refocusing R&D on major societal challenges Achieving critical mass for innovation in 'niches' like aqua culture, aerospace, boating Targeted innovation policy and cluster development: environmental & marine technology ("blue economy") logistics, transport (i.e. shipping) and ports; agro & food Globalisation; increase in global trade presents growth for the ports and their associate (maritime) sectors Cross sectoral innovation with ict, design social innovation as enablers	Climate change, in particular the rise of sea levels, acidification, increasing water temperatures, and frequency of extreme weather events is likely to cause a shift in economic activities in maritime areas and to alter Marine ecosystems Continuing financial and economic crisis might lower public and private R&D spending Outsourcing of R&D to low cost countries Shortage of technical educated personnel

Needs/actions	Common challenge		Policy attention	Governance level
	FCE	2Seas	FCE and 2Seas	FCE and 2Seas
1. Refocus R&D on major societal challenges (such as climate change, energy and resource efficiency (blue economy),, health, demographic change…)	+	++	++	Nat., reg., loc.
2. Promote cooperative approaches in research in order to achieve a "critical mass" for innovation in niche sectors	++	+	+	Reg., loc.
3. Strengthen the development of and clustering in strategic sectors to stimulate innovation creation (smart specialisation clusters)	++	++	++	Nat., reg.
4. Cross-sectoral innovation with ICT, design	+	+	+	Nat., reg.
5. Improve R&I in the SMEs (see also TO3)	+	+	+	Nat., reg.

Conclusions FCE and 2Seas

1. Refocus R&D on major societal challenges

This is a common issue in the FCE as well as in the 2 Seas area. The challenges represented by an ageing population (in terms of health and social inclusion) or energy efficiency and the production of renewable resources for example concern both programme areas, and represent fields in which cooperation could be relevant.

The opportunity to innovate and contribute to sustainable growth is especially tackled in the European recommendations (Innovation union flagship, Maritime Strategy for the Atlantic Ocean Area, position papers). According to the Maritime Strategy for the Atlantic Ocean Area research is needed for sustainable access to marine raw materials (seafloor's natural resources) and better understanding of what sea biodiversity can offer for food, fuel, pharmaceuticals. It is also addressed in national (for example in Belgium) and regional policies. This topic is the responsibility of national as well as regional authorities. Environmental technology, green tech and 'blue growth' are mentioned as a smart specialisation sector in over 15 regions in the area (see chapter 2.1)

This is a relevant need for cross-border cooperation in both programme areas.

2. Promote cooperative approaches in terms of research in order to achieve a "critical mass" for innovation in niche sectors

This challenge is particularly relevant for the FCE area, as it presents a lower number of "innovation leaders" and therefore should take advantage of potential cooperation between research actors. This cooperation could be in particular developed in very specific sectors such as aerospace, automotive or tourism (boating). This topic is mainly addressed in regional policies. This topic is mainly the responsibility of regional/local authorities.

This is a relevant need for cross-border cooperation in both areas, but more particularly within the FCE area.

3. Strengthen the development of and the clustering in strategic (smart specialisation) sectors to stimulate innovation

This challenge is a major one for both programme areas, in order to strengthen the creation of innovations (to tackle the average low number of patent applications and improve the innovation performance) as well as its link to regional economic needs and potentials of development. This need is also relevant for the FCE area because of the lower number of "innovation leaders" and the advantages of cooperation in this perspective. European recommendations for the area advocate in particular clustering of maritime industries (Maritime strategy for the Atlantic Ocean area) and for example the development of an international marine database. Sectors where opportunities for cooperation seem to appear include: ports & logistics (both areas), marine and environmental technologies (2 Seas, in the FCE programme potentials for cooperation between UK and Normandie/Bretagne), agro-food (both areas), communication, digital and creative industries (2 Seas). There is policy attention for this topic on national, and regional and local level. Clustering in strategic sectors is the responsibility of national as well as regional authorities.

This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.

3. Cross-sectoral innovation with ICT, design

This challenge concerns more precisely the ICT (FCE area, in the 2 Seas area notably Belgium) and design sectors (in the FCE area). Cross-sectoral innovation is mainly addressed in European recommendations for Member States and in some regional strategies. This topic is the responsibility of national as well as regional authorities.

This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.

4. Improve R&I in the SMEs (also see TO 3)

This challenge is common to both areas in the context of the financial and economic crisis which puts pressure on the R&I investment. Actions to promote better cooperation between SMEs and the science and research world and to facilitate access to finance for innovative business opportunities could be targeted. This topic is mainly addressed in the national and regional policy. This topic is the responsibility of national as well as regional authorities. CBC in this topic might be aimed at cross-border relations between SMEs and research institutes and improving effectiveness of instruments stimulating R&I in SMEs and on cooperation in specific clusters (see also need 3).

This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.

4.2 Theme 2: ICT

SWOT FCE			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Above average position in terms of broadband penetration and the use of ICT ICT is smart specialisation sector in Suffolk, Swindon, Wiltshire, Dorset, Poole, Devon (& Exeter), Nord-Pas-de-Calais, Finistère, Bretagne, Basse-Normandie	Slower broadband penetration (even decrease) in Nord-Pas-de-Calais Relatively low broadband penetration and use of ICT in French regions	Speed up the roll-out of broadband in FCE area: realising penetration >75%; creation of very high speed networks, awareness and ICT training and strengthening the ICT sector. Empower people to reap the rewards of internet for growth, jobs, sustainable development and inclusion. Innovative demand-driven ICT-applications and services (cross-overs), stimulating the regional economy in rural areas, esp. in France and tackling societal challenges (e.g. health, energy / smart grids, connectivity in transport, security, inclusion)	Insufficient investments by both public and private organisations delaying roll-out of broadband, while new technologies are developing faster than infrastructure Continuing existence of digital inclusion gap as a result of low incomes (affordability), lack of ITC skills Low reliability of ICT systems that are vital for society. Negative spatial and societal effect of the increase in online shipping and other services (e.g. real estate vacancy)

Needs/action	**Common challenge**		**Policy attention**		**Governance level**
	FCE	**2Seas**	**FCE**	**2Seas**	
1. ICT applications for tackling societal challenges (enabler and smart specialisation) see also TO1	+	++	++	++	reg. loc.
2. ICT for stimulating the economy in rural areas	++	+	+	0	reg. loc.
3. Roll out of broadband	+	0	0	0	Loc.
4. Empowering people to reap the rewards of internet, see also TO 10	+	+	0	0	Loc.

Conclusions FCE and 2Seas

1. ICT applications for tackling societal challenges (enabler and smart specialisation) (see also TO1)

ICT applications can contribute to tackling societal challenges as it can provide new and smart solutions to deal with i.e. energy distribution, smart grids, connectivity in transport, but can also help to monitor (congestion, pollution), increase safety or provide medics with smart tools to increase society's health. In the 2Seas area most regions already have fast internet, so that innovative demand-driven ICT-applications and services can be developed to tackle societal challenges. This challenge is especially tackled in the European recommendations (digital agenda for Europe). On regional level the focus is mainly on ICT as an enabler for innovation and smart specialisation sector (see also TO1). In France we also see development of ICT applications and services aimed at supporting social change and inclusion (see also TO1, need 1).

This is a relevant need for cross-border cooperation in both areas.

2. ICT for stimulating the economy in rural areas

ICT can stimulate the regional economy in rural areas (by awareness raising and ICT training and strengthening the ICT sector) as soon as the broadband penetration rate is sufficient (>75% in all regions). Policy attention for this topic is to be found in Bretagne / Finistère and the UK.

This is a relevant need for cross-border cooperation in the FCE area and to a lesser extent in the 2Seas area

3. Roll out of broadband

Roll out of broadband is a need in certain rural areas in France and the UK, but CBC in this field might not be relevant. **This might not be a relevant need for cross-border cooperation in both areas.**

4. Empowering people to reap the rewards of internet (see also TO10)

This needs is related to stimulate digital inclusion with training or support. this need is expressed on EU level (EU Digital Agenda for Europe) and in some regions in France and the UK. CBC in this field might only be relevant for 'capacity building' on the best approaches.

This might be a relevant need for cross-border cooperation in the FCE and the 2Seas area

4.3 Theme 3: SMEs

SWOT FCE			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
SMEs are an important part of the European economy Growing number of starters Increase in number of SMEs Several mechanism to support start-ups are available	Increasing failure-levels due to financial crisis Decreases in productivity and real added value Probably relative low start up rate in parts of France and the UK	Improving SME competitiveness and entrepreneurship through provision of funding and business advisory services (UK), connecting SMEs with academia and support schemes to SMEs (France) Accelerate the on-going structural changes and diversification of the fisheries and agriculture sector Drivers for labour productivity growth of SMEs are the shares of high /medium tech and knowledge intensive employment	Strong influence of local economic climate (financial crisis) on local-focuses SMEs Difficulties for start-up as banks are more reluctant to provide loans Unnecessary competition between regions

Needs/action	**Common challenge**		**Policy attention**		**Governance level**
	FCE	**2Seas**	**FCE**	**2Seas**	
1. Connecting SMEs with academia	+	+	+	+	reg. loc.
2. Business advisory services	+	+	+	+	reg. loc.
3. Diversification of fisheries and agriculture sector	+	0	++	0	Nat. reg. loc.
4. Providing access to capital	+	+	+	+	Nat. reg. loc.
5. Creating cross-border business environment	+	+	+	++	Nat. reg. loc.
6. Promoting R&D investment and valorisation in SMEs	++	++	++	++	Nat. reg. loc.

Conclusions FCE and 2 Seas

1. Connecting SMEs with academia

This link can stimulate innovations by SMEs and foster the implementation of scientific knowledge in society (see also TO1). This topic is the responsibility regional as well as local authorities.

This need might be relevant for cross-border cooperation in the FCE and 2Seas areas.

2. Businesses advisory services

SMEs can suffer from i.e. start-up problems. Business advisory services can help to lower SME failure rate and encourage entrepreneurship. The analysis of policies in both programme areas shows a multitude of initiatives exist to promote self-employment and start-ups, innovation and the growth of SMEs, from the European (CIP and from 2014 COSME) and national (financing schemes) to the regional (mostly networking or internationalization services and business zones) level. Opportunities for CBC are advice on cross-border business and exchange of best practices This topic is the responsibility regional as well as local authorities.

This need might be relevant for cross-border cooperation in the FCE and 2Seas areas.

3. Diversification of fisheries and agriculture sector

Diversification is needed to accelerate the on-going structural changes, by providing business skills courses, fostering entrepreneurship and the introduction of new technologies and organisational know-how. On national, regional as well as EU level attention is paid to this issue. Because of the economic structure (see chapter 2.0 and 2.1), this need is particularly relevant for the FCE area.

This need is relevant for cross-border cooperation in the FCE area, and in a lesser extend it might be relevant for the 2Seas area.

4. Providing access to capital

Creating the right conditions for SMEs forms an important part of the EU's growth and job strategy. Capital accumulation should not only come from the public (nat.. reg., local) or finance (bank) sector, but also from private non-financial sectors. Opportunities for CBC can be exploring the increase of cross-border investments and exchange of best practices.

This need might be relevant for cross-border cooperation in the FCE and 2Seas areas

5. Creating cross-border SME business environment

International trade and internationalisation of small businesses often starts in the region. Doing business across the border expands the opportunities for growth. CBC can also help to stimulate inspiration and to develop new business ideas. Opportunities for CBC are the development of cross-border business ideas, internationalisation of SMEs and projects to improve the international performance of business. This need is expressed by most regions in all member states within the area. The relevant policy level for business support is regional and local, regulation (for example tax) is a national responsibility.

This need is relevant for cross-border cooperation in the FCE and 2Seas areas.

6. Promoting R&D investment by SMEs and valorisation of R&D outcomes (see also TO1)

SMEs are a specific target group in vast majority of innovation and economic strategies within the area, because SMEs are such an important part of the economy. Therefore this need is related to TO1. Needs in this field are connecting SMEs with academia, promoting R&D investments in order to create a cross-border innovation environment (especially in maritime sectors), increase the possibilities for innovation and learn from each other and make policies more effective. The relevant policy levels are national, regional and local.

This need is relevant for cross-border cooperation in the FCE and 2Seas areas.

4.4 Theme 4: Low carbon economy

SWOT FCE			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
(More) favourable geographic conditions for both solar and wind Energy efficiency gains achieved in UK and France Specific regional policy in place to reduce GHG emissions and achieve energy efficiency gains Regional attention for supporting eco-industries in Picardie, Bretagne, Devon and Cornwall Annual per capita carbon emissions lower than the European average (except for the Haute-Normandie region)	Renewable energy production behind on schedule for 2020 albeit high potential Energy efficiency gains France lags behind	Offshore wind developments New forms of renewables, i.e. high potential for tidal energy Ambitious national renewables targets in UK and France Greenhouse-gas reduction in agriculture CO_2 reduction in urban areas and harbours Consumer activation on energy market and as prosumers supporting environmental technologies and bio-economy as smart specialisation sectors	Low acceptance of decentralized energy production Low investment level due to economic situation Pressure on energy security on islands and peninsulas

Needs/action	**Common challenge**		**Policy attention**		**Governance level**
	FCE	**2Seas**	**FCE**	**2Seas**	
1. Stimulating sustainable (decentralised) energy generation on land and coasts (including development of necessary infrastructure, storage, distribution systems e.g. port facilities)	+	+	++	++	Nat. reg. loc.
2. Stimulating sustainable energy generation offshore	++	++	++	++	Nat.
3. Stimulating environmental technologies and bio-economy, e.g. by knowledge development and pilot projects (see also TO1)	+	+	++	++	Nat. reg. loc.
4. Stimulating public acceptance and use of renewable energy	+	+	0	0	Nat. reg. loc.
5. Cooperation on international energy connections, generation and management of joint energy supply	++	++	+	+	Nat. reg?
6. Carbon storage in empty oil and gas fields	0	+	0	0	Nat.
7. Smart systems for supply and demand of (decentralized) energy	++	++	+	+	Reg. loc.
8. Stimulating energy efficiency (reduction emission of GHG) in urban areas, enterprises and agriculture	+	+	+	+	Nat. reg. loc.

Conclusions FCE and 2Seas

Most needs are relevant for both programme areas. For each topic we conclude on the relevance for CBC per programme area.

1. Stimulating sustainable (decentralised) energy generation on land and coasts

Stimulating sustainable energy generation (and necessary services and facilities) is a common challenge in the FCE as well as the 2Seas area.

Cross-border cooperation can be valuable in e.g. developing cross-border distribution systems for renewable energy, exchanging best practices on prosumer-activities and common knowledge development and shared development and implementation of innovative new techniques for renewable energy (tidal wave energy). This topic is addressed on all levels through the areas on local, regional and national level. Stimulating sustainable energy generation on land is the responsibility of national as well as regional and local authorities.

This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

2. Stimulating sustainable energy generation offshore (wind)

By its nature, this is a common challenge in challenge in the FCE as well as the 2Seas area. The Atlantic and North Sea offer opportunities for production of energy. But it is getting busier at the sea, Cross-border maritime spatial planning might be helpful to coordinate these (new) functions, however, spatial planning on sea is a national responsibility (see also TO6). There is policy attention for this topic on national, regional and local level. Stimulating sustainable offshore energy generation is mainly the responsibility of national authorities. However, regional authorities do have responsibilities with regards to supporting services (e.g. port facilities).

This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

3. Stimulating environmental technologies and bio-economy (see also TO1)

This is a common challenge for the FCE as well as the 2Seas area, although the realisation of a low carbon economy is especially relevant for 2 Seas area because of the high levels of GHG emissions.

Stimulating low-carbon industry is the responsibility of national as well as regional and local authorities. This challenge is especially tackled in the European recommendations (Innovation union flagship, Maritime Strategy for the Atlantic Ocean Area, position papers). According to the Maritime Strategy for the Atlantic Ocean Area research is needed for sustainable access to marine raw materials (seafloor's natural resources) and better understanding of what sea biodiversity can offer for food, fuel, pharmaceuticals. It is also addressed in national (for example in Flanders) and regional policies. This topic is the responsibility of national as well as regional authorities.

This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

4. Stimulating public acceptance and use of renewable energy

This is a common challenge in the FCE as well as the 2Seas area. On-land, the foreseen growth of decentralized energy production will see an increase of required storage and transportation infrastructure. This will generate common societal and spatial challenges, for example raising local acceptance for windmills.. Activating citizens to become more aware of their consumption and (small-scale) production possibilities will be essential in order to create the acceptance for renewable energy generation. There is little policy attention for this topic. The responsibility of stimulating public acceptance and use of renewable energy is not very clear.

This might not be a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

5. Cooperation on international energy connections, generation and management of joint energy supply

Cooperation on international energy connections is a need in both areas. Issues are the 'landing' of off-shore energy on land, connections between countries and the energy sensitivity of islands and peninsula's. This need is addressed on European and national level. The responsibility lies mainly on national level. Possibilities for regional intervention might be explored.

This might be a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

6. Carbon storage in empty oil and gas fields

Carbon storage in empty oil and gas fields is addressed in the ESaTDOR study (ESPON 2012), but the responsibility for this topic is on national level.

This need is not relevant for FCE as and might be relevant (limited) for the 2Seas area.

7. Smart systems for supply and demand of (decentralized) energy

The need for energy doesn't always exactly meet the peaks in supply of energy from renewable sources. Better possibilities to match demand and supply is crucial for competiveness of renewable energy. Smart ICT applications (smart grids) could be developed and tested in order to match supply and demand. This topic is relevant for both 2 Seas and FCE. Policy objectives are mentioned in European, national and regional documents.

This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

8. Stimulating energy efficiency (reduction emission of GHG) in urban areas, enterprises and agriculture

This is a common challenge in the FCE as well as the 2Seas area. However, the need for energy efficiency gains seems to be higher in the 2Seas area (more densely populated) than in the FCE area. Cross border cooperation might be relevant in exchange of best practices on energy efficiency schemes, as well as in cooperative approaches on eco-innovation projects (see need 3 and TO1). There is policy attention for this topic on national and regional and local level. Stimulating energy efficiency is the responsibility of national as well as regional and local authorities.

This might be a relevant need for cross-border cooperation in the FCE as well as 2Seas area, but more particularly within the 2 Seas area.

4.5 Theme 5: Climate change adaptation

SWOT FCE

Strengths	Weaknesses	Opportunities	Threats
Relative low economic and environmental sensitivity to climate change (except Norfolk, Cambridgeshire CC, Cornwall and Isle of Wight in UK) No to low exposure to coastal flooding events in 2100 (only exception is Norfolk with medium exposure). This implies low risks in relation to climate change for new investments Low to medium negative potential impact of climate change (economic, cultural, environmental and physical). This implies low risks in relation to climate change for new investments	Relative low capacity to adapt to climate change in certain French and UK regions (Manche, Pas de Calais, Dorset, Somerset and Cornwall) Intense channel traffic, includin of dangerous goods	Common information sharing and developing between maritime authorities related to climate change (Cross border) Maritime spatial planning, including legislative measures and risk management policy) (Although the national level is the most relevant governance level.) Collective mitigation measures to coastal erosion, depletion of marine resources Development of scenario planning for cross-border disasters Integrated management of coastal and cross-border environmental zones Improve maritime safety, potentially through cooperation	Climate change, in particular the rise of sea levels, acidification, increasing water temperatures, and frequency of extreme weather events, is likely to cause a shift in economic activities in maritime areas and to alter marine ecosystems. More extreme weather events are increasing the risks for inland flooding. Low awareness of the impact and risks of climate change Increase of natural risks and environmental sensitivity due to the effects of climate change and urban developments along the coast and rivers. Industrial areas, mostly located on the coastline, form a potential threat to soil, air and water and population.

Needs/action	Common challenge		Policy attention		Governance level
	FCE	2Seas	FCE	2Seas	
1. Innovations in climate-proof spatial planning and coastal protection (including legislative measures and risk management policy) to improve the preparedness and resilience of climate change impacts	+	++	++	++	National, regional and local
2. Integrated water management (water quality, preservation of natural resources, biodiversity) ensuring climate-change resilience of sensitive marine areas	+	++	+	++	National, regional and local
3. Development of scenario planning for (cross-border) disasters, esp. flooding, also droughts	++	++	0	0	Regional and local
4. Innovative climate change adapting solutions for agriculture (water), fisheries and development of aqua-culture	++	++	+	+	Regional
5. Maritime spatial planning	++	++	+	0	National and EU
6. Common information sharing and developing between maritime authorities related to climate change, incl. the improvement of cross border marine and coastal observing systems	++	++	++	0	National and regional
7. Prevention of inland flooding	+	0	+	0	Nat. reg. loc.

Conclusions FCE and 2Seas

1. Innovations in climate-proof spatial planning and coastal protection

This is a need both in the FCE as well as the 2Seas area, although the challenges differ: In the FCE area prevention and managing coastal erosion is a topic, as well as sea defence measures. The 2Seas area is more sensitive to climate change, environmentally as well as economically, topics are flooding, sea-level rising, as well as droughts and heat waves in urban areas.
This theme is addressed on all policy levels and is the responsibility of national as well as regional authorities.
This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.

2. Integrated water management ensuring climate-change resilience of sensitive marine areas

Integrated water management is a need for estuary areas in particular where rivers and the sea come together and result in several challenges such as fresh water supply, resilience to flooding events from both the sea and rivers, integration with urban areas (space for ports and recreation). These situations can be found in in the 2Seas area more than in the FCE area. Integrated water management also includes prevention of risks by promoting sustainable (or no) buildings activities in sensitive areas.
This topic is mainly addressed in the EU position papers and regional and local policy and is the responsibility of local and regional authorities.
This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.

3. Scenario planning for cross-border disasters

This challenge is relevant for both areas, but the 2Seas area is more sensitive and has a higher (potential) exposure to storm events than FCE. On the other hand the regional adaptation capacity appears to be lower in the FCE area.
The kind of (cross border) disasters where scenario planning would be made differs between FCE and 2Seas.
This topic is addressed in the Maritime strategy for the Atlantic. On regional level the focus lies on *prevention* of disasters. Some regions in the area mention CBC on health care in case of disasters (see also TO 9)
This topic is the responsibility of national as well as regional authorities.
This is a relevant need for cross-border cooperation in the 2Seas area as well as in the FCE area.

4. Innovative climate change adapting solutions for agriculture (water), fisheries and development of aqua-culture
This challenge is relevant in all coastal regions. However, in nature it is very heterogeneous, depending on the local situation. In the 2Seas area the economic and environmental sensitivity is quite high, therefore this topic is more urgent for the 2Seas area. In policy, this topic is addressed mainly on regional level. This topic is the responsibility of regional authorities.
This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.

5. Maritime Spatial planning (MSP)
This challenge is relevant for all coastal regions especially in busy seas regions like the FCE and 2Seas programme areas. MSP aims for sustainable use of the marine resources including coordination of production of renewable energy on sea (due to it's integrated nature also relevant for also TO6). MSP is the responsibility of national authorities, therefore possibilities for cross-border cooperation on Maritime Spatial Planning within INTERREG could be explored.
This topic is addressed in EU policy documents (the Maritime strategy for the Atlantic).
This need might not be relevant for cross-border cooperation in the FCE and the 2Seas areas.

6. Common information sharing and developing between maritime authorities related to climate change
This challenge is relevant for both areas, but mentioned in particular for the FCE area in policy documents on EU and regional level. This topic is mainly the responsibility of regional as well as national authorities.
This is a relevant need for cross-border cooperation in the FCE area.

7. Prevention of inland flooding
This challenge is particularly relevant for the UK and the French estuaries where regions are vulnerable and increase in adaptation capacity is needed.
This is a relevant need for cross-border cooperation particularly in the FCE area.

4.6 Theme 6: Sustainable environment

SWOT FCE

Strengths	Weaknesses	Opportunities	Threats
Substantial natural heritage: several locations classified as World Heritage Sites Know-how and important project development in terms of protection of natural areas and management of the environment "Water and energy" and "Environmental technologies" are smart specialization sectors for several regions (see TO1) High level of cooperation on environmental marine projects in current programme Quality of bathing water significantly improved in most areas Rich cultural, natural and historical heritage	Coastal zones with high concentrations of sea pollution Relative low rate of Natura 2000 land surface (except Orne) Overexploitation of most fish stocks (esp. Bay of Biscay) Estuaries with large biodiversity threatened by polluted river water and invasive species	Develop resource-efficiency policies, and changing attitudes of economic actors to more sustainable behaviour Strengthen the economy and environmental quality by developing the 'Blue economy' and 'green tourism' Promote sustainable agriculture and fisheries Development of environmental technologies, resource efficient economy Develop green and blue infrastructures Promote the area's rich cultural, natural and historical heritage for green tourism	High risk of erosion which could be a threat for natural conservation as well as economic activities (farming, tourism) Increase of pollution, poor water quality, which can affect biodiversity, natural and cultural heritage, ecosystem services and economic activities (tourism, investments) Fresh water supply concerns, in particular in UK Deterioration of the fishing resources

Needs/action	Common challenge/problem		Policy attention		Governance level
	FCE	2Seas	FCE	2Seas	
1. Integrated management of coastal and cross-border environmental zones	++	++	++	++	regional (environmental protection & management)
2. Mitigate erosion and natural risks	+	0	0	0	Local, regional
3. Improve maritime safety, potentially through cooperation	++	++	0	0	National
4. Develop resource-efficiency policies and changing attitudes of economic actors to more sustainable behaviour	++	++	+	+	National, Regional
5. Strengthen the economy and environmental quality by developing the "Blue economy"	++	+	++	++	Regional
6. Network approaches, connecting Natura 2000 areas	+	+	O	0	Regional
7. Development of high quality green tourism using the area's rich cultural, natural and historical heritage	++	+	++	++	Regional

Conclusions FCE and 2Seas

1. Integrated management of coastal and cross-border environmental zones

This topic is of importance to both the FCE and the 2seas programme areas, as both have a significant coastline and environmental heritage that is, especially in the 2 seas area, increasingly under pressure by other land uses. River estuaries and coastal wetlands are under threat of sea pollution, while marine areas are being used intensively by shipping lanes, offshore drilling and wind parks. This topic is a priority both on the EU / national level, as on the regional level – albeit mostly in France. While planning and management of the marine area usually remains on the national policy level, regional authorities manage the coastal area, while spatial planning is a responsibility of either the regional or the local government.

This need is relevant for cross-border cooperation in the FCE-area and the 2Seas area.

2. Mitigate erosion and natural risks

This topic is of importance mostly to the FCE area, especially the French regions. Climate change, with rising sea levels and erratic weather conditions will increase risks for erosion and natural hazards. This topic is mostly on the agenda at the regional policy level, especially in France and Western UK regions. However, scope of policies seems to be different: In the UK the focus seems to be more on adding risk analysis in spatial planning, while in France erosion and natural hazard protection is a separate field for regional authorities.

This need is of limited relevance for cross-border cooperation in the FCE area.

3. Improve maritime safety, potentially through cooperation

This topic is of importance for both areas. Further globalization and increasing flows of freight will lead to a rise of sea shipping and marine traffic.

However, the topic does not seem to be high on the regional policy agenda's. Maritime safety legislation is on the national authorities' responsibility.

This might not be a relevant need for cross-border cooperation because the relevant governance level for this theme is the national level.

4.Develop resource-efficiency policies and changing the attitude of economic actors to a more sustainable behaviour

Designing a more resource-efficient society and changing behaviour of economic actors is a challenge for both FCE

and 2Seas regions, and related to EU2020. The regional and local government level, with their role a spatial planners and connection to business, has a big role to play in making society more resource efficient.
While being a European priority (operationalized in the position papers to the member states), and picked up by national policy, the topic does not yet seem to be high on all regional policy agenda's however (except in Suffolk, Finistère, Rotterdam, Zeeland). Therefore this seems to be an 'upcoming topic' that should get a broader uptake on regional level in the coming programme period.
This need is relevant for cross-border cooperation in the FCE-area and the 2Seas area.

5.Strengthen the economy and environmental quality by developing the 'circular economy' and 'green tourism'
Supporting the circular economy in order to create positive spin-offs for economy, environment and preserving regional (natural and cultural) heritage is a topic that is advocated by regional governments in regions in both programme areas. In fact, regions in UK, FR, NL and BE support parts of the circular economy. On a national level the focus is on creating economic opportunities. The focus of CBC might be on improved effectiveness of practices and closing cross-border 'cycles'.
This need is relevant for cross-border cooperation in both the FCE-area and the 2Seas areas.

6.Network approaches, connecting Natura 2000 areas
This topic is of importance mostly to the 2Seas area, where Natura2000 areas compromise a relatively low % of total terrain and are under bigger pressure of other land uses. Creating connections can improve the overall quality of the areas and safeguard biodiversity. It is a policy priority notably in the Netherlands and Flanders, while in the UK an integral approach to nature conservation is advocated. In France, the network approach is less apparent. Nature conservation of maritime Nature 2000 areas has an important cross-border perspective (see also Maritime Spatial Planning), although the management of N2000 areas at sea is the responsibility of national authorities. Next to national legislation, the responsibility to create the spatial connections on land is mostly on the regional level.
This might be a relevant need for cross-border cooperation in both programme areas, especially in the 2 Seas area.

7. Development of high quality green tourism using the area's rich cultural, natural and historical heritage. This opportunity answers the need for more (economically as well as environmentally and socially) sustainable management of natural and cultural heritage and the need for more a competitive tourism industry. Opportunities for cross border cooperation can be found in a joint approach for boating and cruise tourism, transnational tourism products, exchange on best practices for example on innovation and sustainability. **This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area** (see also need 2, TO 8).

4.7 Theme 7: Sustainable transport

SWOT FCE			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Good connectivity with main population centres (London, Paris) via high-speed train network Many ports (large, medium, small) with multimodal platforms and good connections to their economically important hinterlands Many regions with recent gains in accessibility (i.e. France in rail accessibility) Policy focus on interregional transport links (London, France regions) Good connectivity via water, road, rail and air, with the Channel as the world's busiest sea strait and the Channel Tunnel as fast gateway to the European mainland and vice versa.	Lesser accessibility in rural zones (Western French and UK-regions) Weak interconnection between different transport modes High levels of energy consumption and CO2 emissions by transport	Continuation of (slight) decline in energy consumption, lesser demand for (car) traffic as a result of the financial crisis Developing short sea shipping instead of road transport Supply-chain integration (ports) Further developing Channel zone connections Further increasing renewable energy in fuel consumption Promotion of more sustainable modes of transport and travel behaviour	Increased competition between ports worldwide High carbon dependency, congestion and CO2-emission levels threaten environmental quality, accessibility and economic prosperity Lower maritime freight volumes due to economic downturn High volumes of sea traffic, especially in the Calais/Dover strait are risks for population and nature Administrative burdens for short sea shipping

Needs/actions	**Common challenge**		**Policy attention**		**Governance level**
	FCE	**2Seas**	**FCE**	**2Seas**	
1. Improving cooperation by ports and transport authorities in order to improve interoperability, logistic chains	++	++	+	+	Reg. Loc
2. Promotion and development of more sustainable modes of transport, multimodal and intelligent transport systems and travel behaviour (low noise, less congestion, less CO2-emission), especially in urban areas.	++	++	++	++	Nat. Reg. Loc
3. Enhancing public transport services in border areas, serving the cross-border commuters and labour markets.	+	++	0	0	Reg. Loc
4. Improving interregional and multimodal transport connections, especially between urban areas / ports and their hinterland. This includes a.o. improving better organization of different transport modes and stimulating the use of existing connections.	++	+	0/+	0/+	Reg. Loc
5. Remove administrative burdens for short sea shipping	++	++	+	+	national

Conclusions FCE and 2Seas

1. Improving cooperation by ports and transport authorities

Creating effective and efficient international logistic chains by improving cooperation between ports and transport authorities in order to improve interoperability, logistic chains and enhancing the efficiency of short sea shipping is a common challenge in both the FCE and 2Seas area. This challenge is addressed mainly by regional and local authorities, especially in regions with (large) ports. Additionally, as a specific recommendation for cross border cooperation between the UK and France, a French study on 'transnational cooperation opportunities' sees chances for the implementation of an integrated territorial investment (ITI) or to further develop a regional development strategy dedicated to transport links around the Channel, further integrating the economies of both coastal areas. This challenge is the main responsibility of the regional and local authorities.

This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.

2 Promotion and development of sustainable transport

CO2 reduction and increasing renewable energy use in transport is a common challenge in the FCE as well as the 2Seas area. This is especially relevant for greater cities/densely populated areas. Therefore this challenge is especially relevant to the 2Seas area. This challenge is addressed by national, regional and local authorities. Measures mentioned are promoting clean shipping, 'soft' modes of transport, public transport and electric transport modes. The main responsibility lies with the regional and local authorities. Due to high investments needed (relative to the available EU budgets) added value of the programme mainly lies in knowledge transfer and developing innovations in sustainable transport.

This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.

3. Enhancing public transport services in border areas

By its nature, this is a cross-border challenge. This challenge is relevant for the borders between NL and BE, BE and FR and for the possible needs related to the cross Channel and North Sea Ferries. In general, based on the analysis, policy attention on this subject seems little in both programme areas (except in Nord-Pas-de-Calais). Responsibilities lie mainly with regional and local authorities (transport on land) and national authorities (ferries and Channel tunnel).

This is a relevant need for cross-border cooperation in the 2Seas area.

4. Improving interregional and multimodal transport connections

This is a common challenge in both programme areas. In French regions attention goes to integrating local and regional transport systems into national transport networks. In the UK, many counties focus on the improvement of the use of existing connections to London and/or the Channel and the development of sustainable transport networks. Also promotion of inland waterways is mentioned. This challenge is mainly addressed on regional level. Responsibilities lie mainly with regional and local authorities.

This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the FCE programme.

5. Remove administrative burdens for short sea shipping

Administrative burdens form a bottleneck for the development of short sea shipping. Removing these administrative burdens (especially in customs) is important for realising true 'Blue lanes' and giving way to short sea shipping realising its potential. Therefore this is a challenge for both 2Seas and FCE area. This need is particular addresses on European level, responsibility lies with national authorities. Therefore is doesn't seem to be a relevant topic for cross-border cooperation.

This is not a relevant need for cross-border cooperation in one of the programme areas.

4.8 Theme 8: Employment

SWOT FCE			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
The average employment rate lies above the EU27 average (but below the EU2020 target) The average youth unemployment is lower than the EU-average	The employment rate is relatively low in all French regions compared to UK. The lowest employment rate in the area is found in Nord-Pas-de-Calais The economy in the Southern UK-regions is highly dependent on maritime (related) activities High rates of youth unemployment in the French regions	The percentage of the employment in maritime related industries of the total employment in the UK-regions is relatively high. Within this cluster tourism is an important economic sector. This sector is expected to grow Stimulating cross-border commuting/employment by resolving language barriers, providing better information and lowering ticket prices (UK-France) Increase job market flexibility and mobility. Focus UK: supporting labour market mobility in the coastal and rural areas, Focus FRANCE: public employment service. Another example is developing regional and local skill systems The diversification of the coastal economy into non-farming activities and marine and maritime activities other than fishing and promotion of coastal tourism Developing skills in Smart Specialisation Sectors with shortage op people Stimulating the labour potential of women	On-going economic crisis which negatively influences the employment rate and increases the youth unemployment and employment of elderly Government cuts which negatively influences the employment in public and private sectors Risk of disappearance of traditional activities related to the agriculture, forestry, sea and fishing sectors

Needs/actions	Common challenge		Policy attention	Governance level
	FCE	2Seas		
1. The diversification of the coastal economy into non-farming activities and marine and maritime activities other than fishing	+	+	++	Regional and local
2. Stimulating employment in tourism (growth sector)	+	+	+	Regional, local
3. Remove barriers to labour mobility, e.g. by developing skill systems (see also TO10)	+	0	++	National and regional
4. Sector specific (economic) employment policies	0	0	+	Regional and Local
5. Stimulating cross-Channel commuting / employment by resolving language barriers (see also TO10), providing better information and lowering ticket prices (Channel UK-France)	+	+	+	National, regional, local
6. Stimulating the labour potential of women	0	0	+	National
7. Actions reducing youth unemployment (cross border commuting (see also need 5), sharing best practices and skills programmes.	++	++	++	National, regional, local

Conclusions FCE and 2Seas

1. The diversification of the coastal economy

This challenge is especially of importance for the FCE area. This challenge is the main responsibility of the regional and local authorities.

This need is relevant for cross-border cooperation in the FCE-area.

2. Stimulating employment in tourism (growth sector)

Stimulating employment in tourism is an opportunity in both the FCE and the 2Seas area. Cross border cooperation is particularly relevant in relation to the (still growing) cruise sector and in boating. Several regions in both areas invest in the (sustainable) development of tourism industry (see TO1 smart specialisation and general indicators for the capacity of collective tourist accommodation), on national and regional level.

This challenge is the main responsibility of the regional and local authorities (although the UK and Flanders also have national policies).

This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area (see also need 7, theme 6).

3. Increase job market flexibility and mobility

This is a challenge in the FCE as well as the 2Seas programme area. However: in the 2Seas area this challenge originates mainly from a mismatch between the supply and demand of labour, therefore skills and education (TO10) are particularly relevant. In the FCE area job market mobility is relevant because of the dependency of the economy on specific sectors like industry, agriculture and fisheries.

This topic is mainly addressed in the EU position papers and regional and local policy. Relevant measures mentioned are developing skills and education, attracting foreign talent and cross-border employment.

This topic is the responsibility of national as well as regional authorities. Many of the barriers for cross-border employment remain subject of national policies (pension systems, taxes, standards of equivalence of diplomas and training).

This need might be relevant for cross-border cooperation in the FCE and is not relevant for 2Seas.

4. Stimulating employment by sector specific employment policies

In order to increase employment rates, sector specific employment policies are a challenge in the FCE as well as the 2Seas programme area. However, this challenge is highly influenced by local and regional circumstances which makes cross-border cooperation not necessarily effective. This topic is mainly addressed in regional and local policy. This topic is the responsibility of regional and local authorities.

This need might not be relevant for cross-border cooperation in the FCE as well as the 2Seas area.

5. Stimulating cross-border commuting/employment

Lowering barriers for cross-border commuting/employment increases job market flexibility (see also need 3). This is therefore and opportunity for the FCE area as well as the 2Seas programme area, especially for border-regions. This topic is mainly addressed in regional and local policy.

This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.

6. Stimulating the labour potential of women

The labour participation of women lags behind in the Netherlands (in terms of weekly hours worked). This topic is addressed in EU level in national reform programme recommendations. The responsibility is on national level (legislation).

This need is not relevant for cross-border cooperation in none of the areas.

7. Actions reducing youth unemployment

Fighting youth unemployment is a major issue in EU, national and regional level. Opportunities for CBC might be promoting cross border commuting (see also need 5), skills programmes and sharing best practices. Policy levels involved are the national and regional level.

This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.

4.9 Theme 9: Promoting social inclusion and combating poverty

SWOT FCE

Strengths	Weaknesses	Opportunities	Threats
Compared to Europe, the rates for people-at-risk-of-poverty are relatively low The NEET-rate in the programme area is slightly lower than the European average, Relatively (compared to Europe) high employment rates in the age group 55-65 years in all UK regions	Compared to the French regions, the UK regions have relatively high rates of people-at-risk-of-poverty. In addition, rates have increased in French regions between 2005 and 2010 Highest NEET-rates (and above the EU-average) are found in Picardie, Nord-Pas de Calais and Essex Relatively (compared to Europe) low employment rates in the age group 55-65 years in all French regions	Enhancing access to services for health, well being, housing for target groups like the elderly, disables, etc. Stimulating social enterprises / social and solidarity economy Cross border cooperation in providing health care during disasters. Urban and rural regeneration tackling concentrations of multiple deprivation	On-going increase of the NEET-rate due to the economic and financial crises On-going economic crisis leads to more social exclusion and more people in risk of poverty

Needs/actions	Common challenge		Policy attention	Governance level
	FCE	2Seas	FCE / 2Seas	
1. Enhancing access to facilities and services (health, well being,) for target groups like the elderly	+	+	+	National, regional, local
2. Stimulating employment of vulnerable groups (elderly, youngsters) (see also TO8)	0	0	+	National Local
3. Stimulating social enterprises / social and solidarity economy	+	+	++	National, regional, local
4. Urban and rural regeneration tackling concentrations of multiple deprivation	+	+	++	Regional, local

Conclusions FCE and 2Seas

1. Enhancing access to facilities and services (health, well being) for target groups

Integrated cross border services include possible cooperation on offering medical services to elderly living in border areas, as well as sharing best practices and innovative approaches. This need is also related to need 4 (urban and rural regeneration). This topic is addressed in European, national, regional and local policy. This topic is the responsibility of national as well as regional and local authorities.

This need might be relevant for cross-border cooperation in the FCE and in the 2Seas area.

2. Stimulating employment of vulnerable groups (elderly, youngsters)

Although both the 2Seas and FCE area score around or better than the average NEET[15]-rate and employment rate for older workers, the on-going economic crisis threatens inclusion of these groups. This topic is addressed mainly on European and national policy level. This topic is mainly the responsibility of national authorities, CBC might only be relevant on sharing best practices, therefore CBC on this theme might not be relevant.

This need might not be relevant for cross-border cooperation in the FCE as well as the 2Seas area.

3. Stimulating social enterprises / social and solidarity economy

Stimulating social enterprises and the social and solidarity economy is a common opportunity in both areas. Exchange of best practices is relevant for cross border cooperation. Policy attention on this topic is found on national, regional and local level in France, the UK and Flanders, and in the Netherlands mainly on local level (but is seen as an emerging theme).

This need is relevant for cross-border cooperation in the FCE and in the 2Seas area

4. Urban and rural regeneration tackling concentrations of multiple deprivation

Urban and rural regeneration is linked to enhancing access to social and health facilities, multi-functional green infrastructure, housing, commercial services and social enterprises (other needs within this theme). Policy attention is to be found on regional and local level, with specific accents in the different regions and cities (see chapter 2.9 and annex 2). This topic is mainly the responsibility of regional and local authorities.

This need is relevant for cross-border cooperation in the FCE and in the 2Seas area

[15] NEET is a young person who is not in education, employment, or training.

4.10 Theme 10: Investing in education, skills and lifelong learning

SWOT FCE			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
All regions (except for Bretagne) show an increase in the average rate of persons that has attained tertiary education	In all French regions the drop-out rate (in 2009) was higher than the EU average All French regions, except Bretagne, score below the EU average with regards to the average rate of persons that has attained tertiary education. Bretagne is the only region in which a small decrease in this rate took place (2007-2011) Mismatch in demand and supply in the labour market	Integrating education and labour markets, by improving (cross border) mobility and exchanges Identifying business needs for skills and developing tailor made education programmes Lowering lingual fragmentation by offering vocational and language training and cultural exchange Cooperation between institutions for higher education (for internationalisation of education and innovation, see also TO1)	Not enough people with higher education for development of knowledge economy Knowledge intensive economy demands increasing knowledge and capacities

Needs/action	Common challenge		Policy attention		Governance level
	FCE	2Seas	FCE	2Seas	
1. Integrating (higher) education and labour markets, by improving (cross border)mobility and exchanges, including lowering lingual fragmentation	+	0	+	+	Nat. reg. loc.
2. Identifying business needs for skills and developing tailor made and demand oriented programmes for skills and training	+	+	+	+	regional
3. Stimulating cross-border exchange (language learning)	+	+	0	0	Nat. reg. loc.

Conclusions FCE and 2Seas

1. Integrating (higher) education and labour markets, by improving (cross-border) mobility and exchanges, including lowering lingual fragmentation

An international education environment and improving language skills can help to improve this mobility. An international education environment also prepares for an international innovation environment. The relevant governance level in this need is regional and local. There is policy attention for this need on European and regional level, specifically in Nord-Pas-de-Calais. Other regions (including other French regions as well as UK, Flemish and Dutch regions) place internationalisation of higher education within the perspective of 'triple helix' cooperation and innovation (TO1).

This need might be relevant for cross-border cooperation in the FCE and 2Seas area

2. Identifying business needs for skills and developing tailor made programmes for skills and training

To counteract the mismatch between labour offer en demand, education should work together in closer cooperation with businesses so that they can 'deliver' the right labour force for the right sectors. Working on (cross-border) skill programmes and exchange of best practices are relevant within this perspective (see also TO 8), espe-

cially for growth sectors (in relation to smart specialisation, see chapter 2.1). The regional governance level is relevant for this need (because labour markets tend to function regionally).
This need is might be relevant for cross-border cooperation in the FCE and 2Seas area.

3. Stimulating cross-border exchange (language learning)
Cross-border exchanges help to broaden the horizon and learn about other cultures and languages. This need is expressed in most French regions.
This need is relevant for cross-border cooperation in the FCE and 2Seas area

4.11 General indicators

SWOT FCE

Strengths	Weaknesses	Opportunities	Threats
Central location within Europe and proximate to the metropolitan areas of London and Paris The area is one of the most populated areas of Europe (179 inhabitants p/km²) and its population grew over the last years High tourism capacity- levels in the UK-regions, average above EU-level	Share of older people higher than EU average, high old age dependency expected especially in the Northern French regions Areas of shrinkage and ageing in rural regions, as young people move to the urban areas Regional disparities in population growth, with low growth rates in the French region (excl. Bretagne) Contrast in GDP-levels between urban and rural areas Economic growth 2006-2010 lagging behind Negative migration balance in some French regions	Growth tourism sector and tourism demand	Low population growth in rural areas can lead to a loss of facilities and services Influence of financial crisis on GDP and GDP growth Crisis in the automotive industry in French regions Declining government expenditures Ageing population leads to shortage on labour market, and pressure on social and medical services

5. SWOT 2SEAS

Please note that these are conclusions on needs and potential opportunities for cross-border cooperation from the consultant's point of view. The SWOT is made separately for each of the programme areas (but may contain overlapping elements). Of course, also the conclusion on the needs differs between FCE and 2Seas.

5.1 Theme 1 : Knowledge economy

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
5 UK regions in the area have a general expenditure on R&D higher than the EU2020 target Above average employment in high tech sectors Stable-positive RIS performance over the years. Innovation leaders in UK, Flanders and Netherlands	Low average number of patent applications Low performance of SMEs in R&D (see also TO3)	Refocusing R&D on major societal challenges Achieving critical mass for innovation in ' niches' like aqua culture, aerospace, boating Potential targeted innovation policy and cluster development in: - logistics, transport (i.e. shipping) and ports; - environmental & marine technology ("blue economy") - agro-food; - life sciences & health - communication, digital and creative industries. Cross-sectoral innovation with ICT	Continuing financial and economic crisis might lower public and private R&D spending Outsourcing of R&D to low cost countries Shortage of technical educated personnel

Needs/actions	**Common challenge**		**Policy attention**	**Governance level**
	FCE	**2Seas**	**FCE and 2Seas**	**FCE and 2Seas**
1. Refocus R&D on major societal challenges (such as climate change, energy and resource efficiency (blue economy),, health, demographic change…)	+	++	++	Nat., reg., loc.
2. Promote cooperative approaches in research in order to achieve a "critical mass" for innovation in niche sectors	++	+	+	Reg., loc.
3. Strengthen the development of and clustering in strategic sectors to stimulate innovation creation (smart specialisation clusters)	++	++	++	Nat., reg.
4. Cross-sectoral innovation with ICT, design	+	+	+	Nat., reg.
5. Improve R&I in the SMEs (see also TO3)	+	+	+	Nat., reg.

Conclusions FCE and 2Seas

1. Refocus R&D on major societal challenges

This is a common issue in the FCE as well as in the 2 Seas area. The challenges represented by an ageing population (in terms of health and social inclusion) or energy efficiency and the production of renewable resources for example concern both programme areas, and represent fields in which cooperation could be relevant.

The opportunity to innovate and contribute to sustainable growth is especially tackled in the European recommendations (Innovation union flagship, Maritime Strategy for the Atlantic Ocean Area, position papers). According to the Maritime Strategy for the Atlantic Ocean Area research is needed for sustainable access to marine raw materials (seafloor's natural resources) and better understanding of what sea biodiversity can offer for food, fuel, pharmaceuticals. It is also addressed in national (for example in Belgium) and regional policies. This topic is the responsibility of national as well as regional authorities. Environmental technology, green tech and ' blue growth' are mentioned as a smart specialisation sector in over 15 regions in the area (see chapter 2.1)

This is a relevant need for cross-border cooperation in both programme areas.

2. Promote cooperative approaches in terms of research in order to achieve a "critical mass" for innovation in niche sectors

This challenge is particularly relevant for the FCE area, as it presents a lower number of "innovation leaders" and therefore should take advantage of potential cooperation between research actors. This cooperation could be in particular developed in very specific sectors such as aerospace, automotive or tourism (boating). This topic is mainly addressed in regional policies. This topic is mainly the responsibility of regional/local authorities.

This is a relevant need for cross-border cooperation in both areas, but more particularly within the FCE area.

3. Strengthen the development of and the clustering in strategic (smart specialisation) sectors to stimulate innovation

This challenge is a major one for both programme areas, in order to strengthen the creation of innovations (to tackle the average low number of patent applications and improve the innovation performance) as well as its link to regional economic needs and potentials of development. This need is also relevant for the FCE area because of the lower number of "innovation leaders" and the advantages of cooperation in this perspective. European recommendations for the area advocate in particular clustering of maritime industries (Maritime strategy for the Atlantic Ocean area) and for example the development of an international marine database. Sectors where opportunities for cooperation seem to appear include: ports & logistics (both areas), marine and environmental technologies (2 Seas, in the FCE programme potentials for cooperation between UK and Normandie/Bretagne), agro-food (both areas), communication, digital and creative industries (2 Seas). There is policy attention for this topic on national, and regional and local level. Clustering in strategic sectors is the responsibility of national as well as regional authorities.

This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.

3. Cross-sectoral innovation with ICT, design

This challenge concerns more precisely the ICT (FCE area, in the 2 Seas area notably Belgium) and design sectors (in the FCE area). Cross-sectoral innovation is mainly addressed in European recommendations for Member States and in some regional strategies. This topic is the responsibility of national as well as regional authorities.

This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.

4. Improve R&I in the SMEs (also see TO 3)

This challenge is common to both areas in the context of the financial and economic crisis which puts pressure on the R&I investment. Actions to promote better cooperation between SMEs and the science and research world and to facilitate access to finance for innovative business opportunities could be targeted.

This topic is mainly addressed in the national and regional policy. This topic is the responsibility of national as well as regional authorities. CBC in this topic might be aimed at cross-border relations between SMEs and research institutes and improving effectiveness of instruments stimulating R&I in SMEs and on cooperation in specific clusters (see also need 3).

This is a relevant need for cross-border cooperation in the FCE as well as 2 Seas area.

5.2 Theme 2: ICT

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Relatively good global positioning of in terms of broadband penetration, the use of ICT and the overall ability of individuals to access & use ICT. ICT is smart specialisation sector in Noord-Holland, Zeeland , Zuid-Holland, Suffolk, Swindon, Wiltshire, Dorset, Poole, Devon (& Exeter), Antwerp, Nord-Pas-de-Calais	Slower broadband penetration (even decrease) in Nord-Pas-de-Calais Relatively low broadband penetration and use of ICT in French regions	Empower people to reap the rewards of internet for growth, jobs, sustainable development and inclusion Innovative demand-driven ICT-applications and services (cross-overs), tackling societal challenges (e.g. health, energy / smart grids, connectivity in transport, security, inclusion) Speed up the roll-out of broadband in regions with penetration >75%	Insufficient investments by both public and private organisations delaying roll-out of broadband, while new technologies are developing faster than infrastructure Continuing existence of digital inclusion gap as a result of low incomes (affordability), lack of ITC skills Low reliability of ICT systems that are vital for the society Negative spatial and societal effect of the increase in online shipping and other services (e.g. real estate vacancy)

Needs/action	Common challenge		Policy attention		Governance level
	FCE	2Seas	FCE	2Seas	
1. ICT applications for tackling societal challenges (enabler and smart specialisation) see also TO1	+	++	++	++	reg. loc.
2. ICT for stimulating the economy in rural areas	++	+	+	0	reg. loc.
3. Roll out of broadband	+	0	0	0	Loc.
4. Empowering people to reap the rewards of internet, see also TO 10	+	+	0	0	Loc.

Conclusion FCE and 2 Seas

1. ICT applications for tackling societal challenges (enabler and smart specialisation) (see also TO1)

ICT applications can contribute to tackling societal challenges as it can provide new and smart solutions to deal with i.e. energy distribution, smart grids, connectivity in transport, but can also help to monitor (congestion, pollution), increase safety or provide medics with smart tools to increase society's health. In the 2Seas area most regions already have fast internet, so that innovative demand-driven ICT-applications and services can be developed to tackle societal challenges. This challenge is especially tackled in the European recommendations (digital agenda for Europe). On regional level the focus is mainly on ICT as an enabler for innovation and smart specialisation sector (see also TO1). In France we also see development of ICT applications and services aimed at supporting social change and inclusion (see also TO1, need 1).

This is a relevant need for cross-border cooperation in both areas.

2. ICT for stimulating the economy in rural areas

ICT can stimulate the regional economy in rural areas (by awareness raising and ICT training and strengthening the ICT sector) as soon as the broadband penetration rate is sufficient (>75% in all regions). Policy attention for this topic is to be found in Bretagne / Finistère and the UK.

This is a relevant need for cross-border cooperation in the FCE area and to a lesser extent in the 2Seas area

3. Roll out of broadband

Roll out of broadband is a need in certain rural areas in France and the UK, but CBC in this field might not be relevant.

This might not be a relevant need for cross-border cooperation in both areas.

4. Empowering people to reap the rewards of internet (see also TO10)

This needs is related to stimulate digital inclusion with training or support. this need is expressed on EU level (EU Digital Agenda for Europe) and in some regions in France and the UK. CBC in this field might only be relevant for 'capacity building' on the best approaches.

This might be a relevant need for cross-border cooperation in the FCE and the 2Seas area

5.3 Theme 3: SMEs

SWOT 2SEAS

Strengths	Weaknesses	Opportunities	Threats
SMEs are an important part of the European economy Growing number of starters High increases in number of SMEs Several mechanism to support start-ups are available High number of starters in the Dutch regions High levels of early stage entrepreneurship Increases in real added value and productivity in the Netherlands and Flanders	Increasing failure-levels due to financial crisis Drop in annual growth employment in the Netherlands and Flanders Probably relative low start up rate in the UK	Improving SME competitiveness and entrepreneurship through access to finance (all MS), supporting entrepreneurship, strategy training and enhancing entrepreneurial attitude (Flanders), business advisory services (UK) and innovation and competitiveness through R&I investment, in particular eco-innovation and resource-efficiency (NL) Drivers for labour productivity growth of SMEs are the shares of high /medium tech and knowledge intensive employment. Accelerate the on-going structural changes and diversification of the fisheries and agriculture sector	Strong influence of local economic climate (financial crisis) on local-focuses SMEs Difficulties for start-up as banks are more reluctant to provide loans Unnecessary competition between regions

Needs/action	Common challenge		Policy attention		Governance level
	FCE	2Seas	FCE	2Seas	
1. Connecting SMEs with academia	+	+	+	+	reg. loc.
2. Business advisory services	+	+	+	+	reg. loc.
3. Diversification of fisheries and agriculture sector	+	0	++	0	Nat. reg. loc.
4. Providing access to capital	+	+	+	+	Nat. reg. loc.
5. Creating cross-border business environment	+	+	+	++	Nat. reg. loc.
6. Promoting R&D investment and valorisation in SMEs	++	++	++	++	Nat. reg. loc.

Conclusion FCE and 2 Seas

1. Connecting SMEs with academia

This link can stimulate innovations by SMEs and foster the implementation of scientific knowledge in society (see also TO1). This topic is the responsibility regional as well as local authorities.

This need might be relevant for cross-border cooperation in the FCE and 2Seas areas.

2. Businesses advisory services

SMEs can suffer from i.e. start-up problems. Business advisory services can help to lower SME failure rate and encourage entrepreneurship. The analysis of policies in both programme areas shows a multitude of initiatives exist to promote self-employment and start-ups, innovation and the growth of SMEs, from the European (CIP and from 2014 COSME) and national (financing schemes) to the regional (mostly networking or internationalization services and business zones) level. Opportunities for CBC are advice on cross-border business and exchange of best practices This topic is the responsibility regional as well as local authorities.

This need might be relevant for cross-border cooperation in the FCE and 2Seas areas.

3. Diversification of fisheries and agriculture sector

Diversification is needed to accelerate the on-going structural changes, by providing business skills courses, fostering entrepreneurship and the introduction of new technologies and organisational know-how. On national, regional as well as EU level attention is paid to this issue. Because of the economic structure (see chapter 2.0 and 2.1), this need is particularly relevant for the FCE area.

This need is relevant for cross-border cooperation in the FCE area, and in a lesser extend it might be relevant for the 2Seas area.

4. Providing access to capital

Creating the right conditions for SMEs forms an important part of the EU's growth and job strategy. Capital accumulation should not only come from the public (nat.. reg., local) or finance (bank) sector, but also from private non-financial sectors. Opportunities for CBC can be exploring the increase of cross-border investments and exchange of best practices.

This need might be relevant for cross-border cooperation in the FCE and 2Seas areas

5. Creating cross-border SME business environment

International trade and internationalisation of small businesses often starts in the region. Doing business across the border expands the opportunities for growth. CBC can also help to stimulate inspiration and to develop new business ideas. Opportunities for CBC are the development of cross-border business ideas, internationalisation of SMEs and projects to improve the international performance of business. This need is expressed by most regions in all member states within the area. The relevant policy level for business support is regional and local, regulation (for example tax) is a national responsibility.

This need is relevant for cross-border cooperation in the FCE and 2Seas areas.

6. Promoting R&D investment by SMEs and valorisation of R&D outcomes (see also TO1)

SMEs are a specific target group in vast majority of innovation and economic strategies within the area, because SMEs are such an important part of the economy. Therefore this need is related to TO1. Needs in this field are connecting SMEs with academia, promoting R&D investments in order to create a cross-border innovation environment (especially in maritime sectors), increase the possibilities for innovation and learn from each other and make policies more effective. The relevant policy levels are national, regional and local.

This need is relevant for cross-border cooperation in the FCE and 2Seas areas.

5.4 Theme 4: Low carbon economy

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Considerable potential for solar power generation Specific regional policy in place to reduce GHG emissions and achieve energy efficiency gains High regional attention for renewable power generation	Low gains in energy efficiency in the recent past High level of carbon emissions per capita in the Netherlands and Belgium Renewable energy production behind schedule in all regions Energy efficiency gains Netherlands low, Belgium lags behind on 2020 target France, Belgium and the Netherlands need to speed up the transition of their economies to low-carbon in order to meet their targets	Development of offshore wind farms New forms of renewables, i.e. (high) potential for tidal energy Further developing environmental technologies and bio-economy as smart specialisation sectors Greenhouse-gas reduction in agriculture CO_2 reduction in urban areas and harbours Consumer activation on energy market and as prosumers Carbon capture and storage in exhausted oil and gas fields	Low acceptance of decentralized energy production Drying oil and gas fields Low investment level due to economic situation

Needs/action	**Common challenge**		**Policy attention**		**Governance level**
	FCE	**2Seas**	**FCE**	**2Seas**	
1. Stimulating sustainable (decentralised) energy generation on land and coasts (including development of necessary infrastructure, storage, distribution systems e.g. port facilities)	+	+	++	++	Nat. reg. loc.
2. Stimulating sustainable energy generation offshore	++	++	++	++	Nat.
3. Stimulating environmental technologies and bio-economy, e.g. by knowledge development and pilot projects (see also TO1)	+	+	++	++	Nat. reg. loc.
4. Stimulating public acceptance and use of renewable energy	+	+	0	0	Nat. reg. loc.
5. Cooperation on international energy connections, generation and management of joint energy supply	++	++	+	+	Nat. reg?
6. Carbon storage in empty oil and gas fields	0	+	0	0	Nat.
7. Smart systems for supply and demand of (decentralized) energy	++	++	+	+	Reg. loc.
8. Stimulating energy efficiency (reduction emission of GHG) in urban areas, enterprises and agriculture	+	+	+	+	Nat. reg. loc.

Conclusions FCE and 2Seas

Most needs are relevant for both programme areas. For each topic we conclude on the relevance for CBC per programme area.

1. Stimulating sustainable (decentralised) energy generation on land and coasts

Stimulating sustainable energy generation (and necessary services and facilities) is a common challenge in the FCE as well as the 2Seas area.

Cross-border cooperation can be valuable in e.g. developing cross-border distribution systems for renewable energy, exchanging best practices on prosumer-activities and common knowledge development and shared development and implementation of innovative new techniques for renewable energy (tidal wave energy).

This topic is addressed on all levels through the areas on local, regional and national level.

Stimulating sustainable energy generation on land is the responsibility of national as well as regional and local authorities.

This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

2. Stimulating sustainable energy generation offshore (wind)

By its nature, this is a common challenge in challenge in the FCE as well as the 2Seas area.

The Atlantic and North Sea offer opportunities for production of energy. But it is getting busier at the sea, Cross-border maritime spatial planning might be helpful to coordinate these (new) functions, however, spatial planning on sea is a national responsibility (see also TO6). There is policy attention for this topic on national, regional and local level.

Stimulating sustainable offshore energy generation is mainly the responsibility of national authorities. However, regional authorities do have responsibilities with regards to supporting services (e.g. port facilities).

This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

3. Stimulating environmental technologies and bio-economy (see also TO1)

This is a common challenge for the FCE as well as the 2Seas area, although the realisation of a low carbon economy is especially relevant for 2 Seas area because of the high levels of GHG emissions.

Stimulating low-carbon industry is the responsibility of national as well as regional and local authorities. This challenge is especially tackled in the European recommendations (Innovation union flagship, Maritime Strategy for the Atlantic Ocean Area, position papers). According to the Maritime Strategy for the Atlantic Ocean Area research is needed for sustainable access to marine raw materials (seafloor's natural resources) and better understanding of what sea biodiversity can offer for food, fuel, pharmaceuticals. It is also addressed in national (for example in Flanders) and regional policies. This topic is the responsibility of national as well as regional authorities.

This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

4. Stimulating public acceptance and use of renewable energy

This is a common challenge in the FCE as well as the 2Seas area. On-land, the foreseen growth of decentralized energy production will see an increase of required storage and transportation infrastructure. This will generate common societal and spatial challenges, for example raising local acceptance for windmills.. Activating citizens to become more aware of their consumption and (small-scale) production possibilities will be essential in order to create the acceptance for renewable energy generation.

There is little policy attention for this topic.

The responsibility of stimulating public acceptance and use of renewable energy is not very clear.

This might not be a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

5. Cooperation on international energy connections, generation and management of joint energy supply

Cooperation on international energy connections is a need in both areas. Issues are the 'landing' of off-shore energy on land, connections between countries and the energy sensitivity of islands and peninsula's. This need is addressed on European and national level. The responsibility lies mainly on national level. Possibilities for regional intervention might be explored.

This might be a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

6. Carbon storage in empty oil and gas fields

Carbon storage in empty oil and gas fields is addressed in the ESaTDOR study (ESPON 2012), but the responsibility for this topic is on national level.

This need is not relevant for FCE as and might be relevant (limited) for the 2Seas area.

7. Smart systems for supply and demand of (decentralized) energy

The need for energy doesn't always exactly meet the peaks in supply of energy from renewable sources. Better possibilities to match demand and supply is crucial for competiveness of renewable energy. Smart ICT applications (smart grids) could be developed and tested in order to match supply and demand. This topic is relevant for both 2 Seas and FCE. Policy objectives are mentioned in European, national and regional documents.

This is a relevant need for cross-border cooperation in the FCE as well as 2Seas area.

8. Stimulating energy efficiency (reduction emission of GHG) in urban areas, enterprises and agriculture

This is a common challenge in the FCE as well as the 2Seas area. However, the need for energy efficiency gains seems to be higher in the 2Seas area (more densely populated) than in the FCE area. Cross border cooperation might be relevant in exchange of best practices on energy efficiency schemes, as well as in cooperative approaches on eco-innovation projects (see need 3 and TO1)..

There is policy attention for this topic on national and regional and local level.

Stimulating energy efficiency is the responsibility of national as well as regional and local authorities.

This might be a relevant need for cross-border cooperation in the FCE as well as 2Seas area, but more particularly within the 2 Seas area.

5.5 Theme 5: Climate change adaption

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Relatively high adaptive capacity with regard to climate change (low capacity only in Cornwall, Somerset and Dorset and in Nord- Pas de Calais)	High economic sensitivity to climate change High environmental sensitivity, especially in (almost all) Dutch regions and bordering regions in Flanders Highest negative potential impact of climate change (economic, cultural, environmental and physical) in (almost all) Dutch regions and Flanders. Highest risk on coastal flooding events in 2100 along Dutch and Flanders' coasts and Norfolk	Common information sharing environment between maritime authorities (Cross border) Maritime spatial planning, including legislative measures and risk management policy. (Although the national level is the most relevant governance level.) Collective mitigation measures to coastal erosion, depletion of marine resources Development of scenario planning for cross-border disasters Integrated management of coastal and cross-border environmental zones Moderate to serious drought and floods in some parts of the area	Climate change, in particular the rise of sea levels, acidification, increasing water temperatures, and frequency of extreme weather events, is likely to cause a shift in economic activities in maritime areas and to alter marine ecosystems. More extreme weather events are increasing the risks for inland flooding. Low awareness of the impact and risks of climate change Increase of natural risks and environmental sensitivity due to the effects of climate change and urban developments along the coast and rivers. Industrial areas, mostly located on the coastline, form a potential threat to soil, air and water and population.

Needs/action	Common challenge		Policy attention		Governance level
	FCE	2Seas	FCE	2Seas	
1. Innovations in climate-proof spatial planning and coastal protection (including legislative measures and risk management policy) to improve the preparedness and resilience of climate change impacts	+	++	++	++	National, regional and local
2. Integrated water management (water quality, preservation of natural resources, biodiversity) ensuring climate-change resilience of sensitive marine areas	+	++	+	++	National, regional and local
3. Development of scenario planning for (cross-border) disasters, especially flooding, and also droughts	++	++	0	0	Regional and local
4. Innovative climate change adapting solutions for agriculture (water), fisheries and development of aqua-culture	++	++	+	+	Regional
5. Maritime spatial planning	++	++	+	0	National and EU
6. Common information sharing and developing between maritime authorities related to climate change, including the improvement of cross-border marine and coastal observing systems	++	++	++	0	National and regional
7. Prevention of inland flooding	+	0	+	0	National, regional and local

Conclusions FCE and 2Seas

1. Innovations in climate-proof spatial planning and coastal protection

This is a need both in the FCE as well as the 2Seas area, although the challenges differ: In the FCE area prevention and managing coastal erosion is a topic, as well as sea defence measures. The 2Seas area is more sensitive to climate change, environmentally as well as economically, topics are flooding, sea-level rising, as well as droughts and heat waves in urban areas.

This theme is addressed on all policy levels and is the responsibility of national as well as regional authorities.

This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.

2. Integrated water management ensuring climate-change resilience of sensitive marine areas

Integrated water management is a need for estuary areas in particular where rivers and the sea come together and result in several challenges such as fresh water supply, resilience to flooding events from both the sea and rivers, integration with urban areas (space for ports and recreation). These situations can be found in in the 2Seas area more than in the FCE area. Integrated water management also includes prevention of risks by promoting sustainable (or no) buildings activities in sensitive areas.

This topic is mainly addressed in the EU position papers and regional and local policy and is the responsibility of local and regional authorities.

This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.

3. Scenario planning for cross-border disasters

This challenge is relevant for both areas, but the 2Seas area is more sensitive and has a higher (potential) exposure to storm events than FCE. On the other hand the regional adaptation capacity appears to be lower in the FCE area. The kind of (cross border) disasters where scenario planning would be made differs between FCE and 2Seas.

This topic is addressed in the Maritime strategy for the Atlantic. On regional level the focus lies on *prevention* of disasters. Some regions in the area mention CBC on health care in case of disasters (see also TO 9)

This topic is the responsibility of national as well as regional authorities.
This is a relevant need for cross-border cooperation in the 2Seas area as well as in the FCE area.

4. Innovative climate change adapting solutions for agriculture (water), fisheries and development of aqua-culture
This challenge is relevant in all coastal regions. However, in nature it is very heterogeneous, depending on the local situation. In the 2Seas area the economic and environmental sensitivity is quite high, therefore this topic is more urgent for the 2Seas area. In policy, this topic is addressed mainly on regional level. This topic is the responsibility of regional authorities.
This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.

5. Maritime Spatial planning (MSP)
This challenge is relevant for all coastal regions especially in busy seas regions like the FCE and 2Seas programme areas. MSP aims for sustainable use of the marine resources including coordination of production of renewable energy on sea (due to it's integrated nature also relevant for also TO6). MSP is the responsibility of national authorities, therefore possibilities for cross-border cooperation on Maritime Spatial Planning within INTERREG could be explored.
This topic is addressed in EU policy documents (the Maritime strategy for the Atlantic).
This need might not be relevant for cross-border cooperation in the FCE and the 2Seas areas.

6. Common information sharing and developing between maritime authorities related to climate change
This challenge is relevant for both areas, but mentioned in particular for the FCE area in policy documents on EU and regional level. This topic is mainly the responsibility of regional as well as national authorities.
This is a relevant need for cross-border cooperation in the FCE area.

7. Prevention of inland flooding
This challenge is particularly relevant for the UK and the French estuaries where regions are vulnerable and increase in adaptation capacity is needed.
This is a relevant need for cross-border cooperation particularly in the FCE area.

5.6 Theme 6: Sustainable environment

SWOT 2 SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Diverse natural and build environment "Water and energy" and "Environmental technologies" are smart specialization sectors for numerous programme territories Increasing trend in the volume of waste recycled High level of cooperation on marine and economic topics: between ports and agro/fisheries sectors Quality of bathing water significantly improved in most areas Rich cultural, natural and historical heritage	Coastal zones with high concentrations of sea pollution Estuaries with large biodiversity threatened by polluted river water and invasive species Low rate of Natura 2000 land surface (except IJmond en Haarlem and West-Vlaanderen) High pressure on landscape and nature; loss of biodiversity natural and cultural heritage Landscape fragmentation	Increase cooperation for biodiversity protection and connection of natural habitats (on sea and land) Promote integrated management of coastal and cross-border environmental zones Develop resource-efficiency policies, and changing attitudes of economic actors to more sustainable behaviour Strengthen the economy and environmental quality by developing the "Blue economy" and 'green tourism' Development of the environmental technologies, resource efficient economy Promote sustainable agriculture and fisheries Network approaches, connecting Natura 2000 areas green and blue infrastructures Promote the area's rich cultural, natural and historical heritage for green tourism	Effects of climate change, such as rising sea water level, on biodiversity, ecosystem services and economic activities Increase of pollution, poor water quality, which can affect biodiversity, natural and cultural heritage, ecosystem services and economic activities (aquaculture, fisheries, tourism) Fresh water supply concerns, in particular in UK and Zeeland, South Zuid-Holland Increase of the overexploited fish stocks (Air, water and noise) pollution affecting urban environment negatively

Needs/action	**Common challenge/problem**		**Policy attention**		**Governance level**
	FCE	**2Seas**	**FCE**	**2Seas**	
1. Integrated management of coastal and cross-border environmental zones	++	++	++	++	regional (environmental protection & management)
2. Mitigate erosion and natural risks	+	0	0	0	Local, regional
3. Improve maritime safety, potentially through cooperation	++	++	0	0	National
4. Develop resource-efficiency policies and changing attitudes of economic actors to more sustainable behaviour	++	++	+	+	National, Regional
5. Strengthen the economy and environmental quality by developing the "Blue economy"	++	+	++	++	Regional
6. Network approaches, connecting Natura 2000 areas	+	+	O	0	Regional
7. Development of high quality green tourism using the area's rich cultural, natural and historical heritage	++	+	++	++	Regional

Conclusions FCE and 2Seas

1. Integrated management of coastal and cross-border environmental zones

This topic is of importance to both the FCE and the 2seas programme areas, as both have a significant coastline and environmental heritage that is, especially in the 2 seas area, increasingly under pressure by other land uses. River estuaries and coastal wetlands are under threat of sea pollution, while marine areas are being used intensively by shipping lanes, offshore drilling and wind parks. This topic is a priority both on the EU / national level, as on the regional level – albeit mostly in France. While planning and management of the marine area usually remains on the national policy level, regional authorities manage the coastal area, while spatial planning is a responsibility of either the regional or the local government.

This need is relevant for cross-border cooperation in the FCE-area and the 2Seas area.

2. Mitigate erosion and natural risks

This topic is of importance mostly to the FCE area, especially the French regions. Climate change, with rising sea levels and erratic weather conditions will increase risks for erosion and natural hazards. This topic is mostly on the agenda at the regional policy level, especially in France and Western UK regions. However, scope of policies seems to be different: In the UK the focus seems to be more on adding risk analysis in spatial planning, while in France erosion and natural hazard protection is a separate field for regional authorities.

This need is of limited relevance for cross-border cooperation in the FCE area.

3. Improve maritime safety, potentially through cooperation

This topic is of importance for both areas. Further globalization and increasing flows of freight will lead to a rise of sea shipping and marine traffic.

However, the topic does not seem to be high on the regional policy agenda's. Maritime safety legislation is on the national authorities' responsibility.

This might not be a relevant need for cross-border cooperation because the relevant governance level for this theme is the national level.

4.Develop resource-efficiency policies and changing the attitude of economic actors to a more sustainable behaviour

Designing a more resource-efficient society and changing behaviour of economic actors is a challenge for both FCE and 2Seas regions, and related to EU2020. The regional and local government level, with their role a spatial planners and connection to business, has a big role to play in making society more resource efficient.

While being a European priority (operationalized in the position papers to the member states), and picked up by national policy, the topic does not yet seem to be high on all regional policy agenda's however (except in Suffolk, Finistère, Rotterdam, Zeeland). Therefore this seems to be an 'upcoming topic' that should get a broader uptake on regional level in the coming programme period.

This need is relevant for cross-border cooperation in the FCE-area and the 2Seas area.

5.Strengthen the economy and environmental quality by developing the 'circular economy' and 'green tourism'

Supporting the circular economy in order to create positive spin-offs for economy, environment and preserving regional (natural and cultural) heritage is a topic that is advocated by regional governments in regions in both programme areas. In fact, regions in UK, FR, NL and BE support parts of the circular economy. On a national level the focus is on creating economic opportunities. The focus of CBC might be on improved effectiveness of practices and closing cross-border 'cycles'.

This need is relevant for cross-border cooperation in both the FCE-area and the 2Seas areas.

6.Network approaches, connecting Natura 2000 areas

This topic is of importance mostly to the 2Seas area, where Natura2000 areas compromise a relatively low % of total terrain and are under bigger pressure of other land uses. Creating connections can improve the overall quality of the areas and safeguard biodiversity. It is a policy priority notably in the Netherlands and Flanders, while in the UK an integral approach to nature conservation is advocated. In France, the network approach is less apparent. Nature conservation of maritime Nature 2000 areas has an important cross-border perspective (see also Maritime

Spatial Planning), although the management of N2000 areas at sea is the responsibility of national authorities. Next to national legislation, the responsibility to create the spatial connections on land is mostly on the regional level.
This might be a relevant need for cross-border cooperation in both programme areas, especially in the 2 Seas area.

7. Development of high quality green tourism using the area's rich cultural, natural and historical heritage. This opportunity answers the need for more (economically as well as environmentally and socially) sustainable management of natural and cultural heritage and the need for more a competitive tourism industry. Opportunities for cross border cooperation can be found in a joint approach for boating and cruise tourism, transnational tourism products, exchange on best practices for example on innovation and sustainability. **This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area** (see also need 2, TO 8).

5.7 Theme 7: Sustainable transport

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
(potential) high speed train connections with main population centres (London, Paris, Ruhr-area) Several major ports and a number of small and medium sized ports with multimodal platforms and good connections to their economically important hinterlands Many regions with strong multimodal accessibility, high multimodal potential Integrated transport policy & regional-economic planning Good connectivity via water, road, rail and air, with the Channel as the world's busiest sea strait and the Channel Tunnel as fast gateway to the European mainland and vice versa.	Weak cooperation between ports High level of CO2 emissions from transport Weak transport links for cross-border commuting and weak interconnection between different transport modes High levels of congestion on roads around major populated areas.	Continuation of (slight) decline in energy consumption, lesser demand for (car) traffic as a result of the financial crisis. Developing short sea shipping instead of road transport Supply-chain integration (ports) Further developing Channel zone connections Further increasing renewable energy in fuel consumption Promotion of more sustainable modes of transport and travel behaviour Room for improvement in co-operation between ports Enhancing public transport services in border areas, serving the cross-border commuters and labour markets. Development of multimodal and intelligent transport systems	Increased competition between ports worldwide Lower maritime freight volumes due to economic downturn High carbon dependency, congestion and CO2-emission levels threaten environmental quality, accessibility and economic prosperity High maritime traffic could have dangerous side-effects on populations and the environment on the coasts Population growth and increase in passenger kilometres can further increase congestion problems and reduce accessibility Administrative burdens for short sea shipping

Needs/actions	Common challenge		Policy attention		Governance level
	FCE	2Seas	FCE	2Seas	
1. Improving cooperation by ports and transport authorities in order to improve interoperability, logistic chains	++	++	+	+	Reg. Loc
2. Promotion and development of more sustainable modes of transport, multimodal and intelligent transport systems and travel behaviour (low noise, less congestion, less CO2-emission), especially in urban areas.	++	++	++	++	Nat. Reg. Loc
3. Enhancing public transport services in border areas, serving the cross-border commuters and labour markets.	+	++	0	0	Reg. Loc
4. Improving interregional and multimodal transport connections, especially between urban areas / ports and their hinterland. This includes a.o. improving better organization of different transport modes and stimulating the use of existing connections.	++	+	0/+	0/+	Reg. Loc
5. Remove administrative burdens for short sea shipping	++	++	+	+	national

Conclusions FCE and 2Seas

1. Improving cooperation by ports and transport authorities

Creating effective and efficient international logistic chains by improving cooperation between ports and transport authorities in order to improve interoperability, logistic chains and enhancing the efficiency of short sea shipping is a common challenge in both the FCE and 2Seas area. This challenge is addressed mainly by regional and local authorities, especially in regions with (large) ports. Additionally, as a specific recommendation for cross border cooperation between the UK and France, a French study on 'transnational cooperation opportunities' sees chances for the implementation of an integrated territorial investment (ITI) or to further develop a regional development strategy dedicated to transport links around the Channel, further integrating the economies of both coastal areas. This challenge is the main responsibility of the regional and local authorities.

This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.

2 Promotion and development of sustainable transport

CO2 reduction and increasing renewable energy use in transport is a common challenge in the FCE as well as the 2Seas area. This is especially relevant for greater cities/densely populated areas. Therefore this challenge is especially relevant to the 2Seas area. This challenge is addressed by national, regional and local authorities. Measures mentioned are promoting clean shipping, 'soft' modes of transport, public transport and electric transport modes. The main responsibility lies with the regional and local authorities. Due to high investments needed (relative to the available EU budgets) added value of the programme mainly lies in knowledge transfer and developing innovations in sustainable transport.

This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the 2 Seas programme.

3. Enhancing public transport services in border areas

By its nature, this is a cross-border challenge. This challenge is relevant for the borders between NL and BE, BE and FR and for the possible needs related to the cross Channel and North Sea Ferries. In general, based on the analysis, policy attention on this subject seems little in both programme areas (except in Nord-Pas-de-Calais). Responsibilities lie mainly with regional and local authorities (transport on land) and national authorities (ferries and Channel tunnel).

This is a relevant need for cross-border cooperation in the 2Seas area.

4. Improving interregional and multimodal transport connections

This is a common challenge in both programme areas. In French regions attention goes to integrating local and regional transport systems into national transport networks. In the UK, many counties focus on the improvement of the use of existing connections to London and/or the Channel and the development of sustainable transport networks. Also promotion of inland waterways is mentioned. This challenge is mainly addressed on regional level. Responsibilities lie mainly with regional and local authorities.

This is a relevant need for cross-border cooperation in both programme areas, but more particularly within the FCE programme.

5. Remove administrative burdens for short sea shipping

Administrative burdens form a bottleneck for the development of short sea shipping. Removing these administrative burdens (especially in customs) is important for realising true 'Blue lanes' and giving way to short sea shipping realising its potential. Therefore this is a challenge for both 2Seas and FCE area. This need is particular addresses on European level, responsibility lies with national authorities. Therefore is doesn't seem to be a relevant topic for cross-border cooperation.

This is not a relevant need for cross-border cooperation in one of the programme areas.

5.8 Theme 8: Employment

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
The average employment rate lies above the EU27 average (but below the EU2020 target). In the Dutch and UK regions within the programme area (except Cornwall and Isles of Scilly and Kent), the EU2020 target for employment is reached The average youth unemployment is lower than the EU-average. Especially the rates in the Dutch regions are low	The economy in the Southern UK-regions seems to be dependent on maritime (related) activities.	The percentage of the employment in maritime related industries of the total employment in the UK-regions is relatively high. Within this cluster tourism is an important economic sector. This sector is expected to grow Stimulating cross-border commuting/employment by resolving language barriers, providing better information Increase job market flexibility and mobility. Focus UK: supporting labour market mobility in the coastal and rural areas, Focus NL: participation amongst second-income earners and reforms of the social system and resignation policy. Another example is developing regional and local skill systems Developing skills in Smart Specialisation Sectors with shortage op people Stimulating the labour potential of women	On-going economic crisis which negatively influences the employment and increases the youth unemployment Government cuts which negatively influences the employment in public and private sectors

Needs/actions	Common challenge		Policy attention	Governance level
	FCE	2Seas		
1. The diversification of the coastal economy into non-farming activities and marine and maritime activities other than fishing	+	+	++	Regional and local
2. Stimulating employment in tourism (growth sector)	+	+	+	Regional, local
3. Remove barriers to labour mobility, e.g. by developing skill systems (see also TO10)	+	0	++	National and regional
4. Sector specific (economic) employment policies	0	0	+	Regional and Local
5. Stimulating cross-Channel commuting / employment by resolving language barriers (see also TO10), providing better information and lowering ticket prices (Channel UK-France)	+	+	+	National, regional, local
6. Stimulating the labour potential of women	0	0	+	National
7. Actions reducing youth unemployment (cross border commuting (see also need 5), sharing best practices and skills programmes.	++	++	++	National, regional, local

Conclusions FCE and 2Seas

1. The diversification of the coastal economy

This challenge is especially of importance for the FCE area. This challenge is the main responsibility of the regional and local authorities.

This need is relevant for cross-border cooperation in the FCE-area.

2. Stimulating employment in tourism (growth sector)

Stimulating employment in tourism is an opportunity in both the FCE and the 2Seas area. Cross border cooperation is particularly relevant in relation to the (still growing) cruise sector and in boating. Several regions in both areas invest in the (sustainable) development of tourism industry (see TO1 smart specialisation and general indicators for the capacity of collective tourist accommodation), on national and regional level.

This challenge is the main responsibility of the regional and local authorities (although the UK and Flanders also have national policies).

This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area (see also need 7, theme 6).

3. Increase job market flexibility and mobility

This is a challenge in the FCE as well as the 2Seas programme area. However: in the 2Seas area this challenge originates mainly from a mismatch between the supply and demand of labour, therefore skills and education (TO10) are particularly relevant. In the FCE area job market mobility is relevant because of the dependency of the economy on specific sectors like industry, agriculture and fisheries.

This topic is mainly addressed in the EU position papers and regional and local policy. Relevant measures mentioned are developing skills and education, attracting foreign talent and cross-border employment.

This topic is the responsibility of national as well as regional authorities. Many of the barriers for cross-border employment remain subject of national policies (pension systems, taxes, standards of equivalence of diplomas and training).

This need might be relevant for cross-border cooperation in the FCE and is not relevant for 2Seas.

4. Stimulating employment by sector specific employment policies

In order to increase employment rates, sector specific employment policies are a challenge in the FCE as well as the 2Seas programme area. However, this challenge is highly influenced by local and regional circumstances which makes cross-border cooperation not necessarily effective. This topic is mainly addressed in regional and local policy. This topic is the responsibility of regional and local authorities.

This need might not be relevant for cross-border cooperation in the FCE as well as the 2Seas area.

5. Stimulating cross-border commuting/employment

Lowering barriers for cross-border commuting/employment increases job market flexibility (see also need 3). This is therefore and opportunity for the FCE area as well as the 2Seas programme area, especially for border-regions. This topic is mainly addressed in regional and local policy.

This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.

6. Stimulating the labour potential of women

The labour participation of women lags behind in the Netherlands (in terms of weekly hours worked). This topic is addressed in EU level in national reform programme recommendations. The responsibility is on national level (legislation).

This need is not relevant for cross-border cooperation in none of the areas.

7. Actions reducing youth unemployment

Fighting youth unemployment is a major issue in EU, national and regional level. Opportunities for CBC might be promoting cross border commuting (see also need 5), skills programmes and sharing best practices. Policy levels involved are the national and regional level.

This need is relevant for cross-border cooperation in the FCE as well as the 2Seas area.

5.9 Theme 9: Promoting social inclusion and combating poverty

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Compared to Europe, the rates for people-at-risk-of-poverty are relatively low. In addition, the rates have decreased between 2005 and 2010 in Flemish regions The NEET-rate in the programme area is lower than the European average; this is especially the case in the Dutch and Flemish regions Relatively (compared to Europe) high employment rates in the age group 55-65 years in all Dutch and UK regions	Compared to the French, Dutch and Flemish regions, the UK regions have relatively high rates of people-at-risk-of-poverty. In addition, rates have increased in Dutch regions between 2005 and 2010 Relatively (compared to Europe) low employment rates in the age group 55-65 years in all Flemish regions	Enhancing access to services for health, well being, housing for target groups like the elderly, disables, etc. Stimulating social enterprises / social and solidarity economy Cross border cooperation in providing health care during disasters. Urban and rural regeneration tackling concentrations of multiple deprivation	On-going increase of the NEET-rate due to the economic and financial crises On-going economic crisis leads to more social exclusion (incl higher risk of poverty)

Needs/actions	Common challenge		Policy attention	Governance level
	FCE	2Seas	FCE / 2Seas	
1. Enhancing access to facilities and services (health, well being,) for target groups like the elderly	+	+	+	National, regional, local
2. Stimulating employment of vulnerable groups (elderly, youngsters) (see also TO8)	0	0	+	National Local
3. Stimulating social enterprises / social and solidarity economy	+	+	++	National, regional, local
4. Urban and rural regeneration tackling concentrations of multiple deprivation	+	+	++	Regional, local

Conclusions FCE and 2Seas

1. Enhancing access to facilities and services (health, well being) for target groups

Integrated cross border services include possible cooperation on offering medical services to elderly living in border areas, as well as sharing best practices and innovative approaches. This need is also related to need 4 (urban and rural regeneration). This topic is addressed in European, national, regional and local policy. This topic is the responsibility of national as well as regional and local authorities.

This need might be relevant for cross-border cooperation in the FCE and in the 2Seas area.

2. Stimulating employment of vulnerable groups (elderly, youngsters)

Although both the 2Seas and FCE area score around or better than the average NEET[16]-rate and employment rate for older workers, the on-going economic crisis threatens inclusion of these groups. This topic is addressed mainly on European and national policy level. This topic is mainly the responsibility of national authorities, CBC might only be relevant on sharing best practices, therefore CBC on this theme might not be relevant.

This need might not be relevant for cross-border cooperation in the FCE as well as the 2Seas area.

3. Stimulating social enterprises / social and solidarity economy

Stimulating social enterprises and the social and solidarity economy is a common opportunity in both areas. Exchange of best practices is relevant for cross border cooperation. Policy attention on this topic is found on national, regional and local level in France, the UK and Flanders, and in the Netherlands mainly on local level (but is seen as an emerging theme).

This need is relevant for cross-border cooperation in the FCE and in the 2Seas area

4. Urban and rural regeneration tackling concentrations of multiple deprivation

Urban and rural regeneration is linked to enhancing access to social and health facilities, multi-functional green infrastructure, housing, commercial services and social enterprises (other needs within this theme). Policy attention is to be found on regional and local level, with specific accents in the different regions and cities (see chapter 2.9 and annex 2). This topic is mainly the responsibility of regional and local authorities.

This need is relevant for cross-border cooperation in the FCE and in the 2Seas area

[16] NEET is a young person who is not in education, employment, or training.

5.10 Theme 10: Investing in education, skills and lifelong learning

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Relative low drop-out rate in Dutch and Flemish regions (except Zeeland) Almost all Dutch, UK and Flemish regions have a relative high rate of persons that attained tertiary education All regions show an increase in the average rate of persons tertiary education	High drop out rates in Nord and Devon Mismatch in demand and supply in the labour market	High potential for developing a strong competitive position in Europe within a knowledge-intensive economy Integrating education and labour markets, by improving (cross border)mobility and exchanges Identifying business needs for skills and developing tailor made education programmes, especially in smart specialisation sectors Cooperation between institutions for higher education (for internationalisation of education and innovation, see also TO1)	Knowledge intensive economy demands increasing knowledge and capacities to keep up with other well developed /developing regions

Needs/action	**Common challenge**		**Policy attention**		**Governance level**
	FCE	**2Seas**	**FCE**	**2Seas**	
1. Integrating (higher) education and labour markets, by improving (cross border)mobility and exchanges, including lowering lingual fragmentation	+	0	+	+	Nat. reg. loc.
2. Identifying business needs for skills and developing tailor made and demand oriented programmes for skills and training	+	+	+	+	regional
3. Stimulating cross-border exchange (language learning)	+	+	0	0	Nat. reg. loc.

Conclusions FCE and 2Seas

1. Integrating (higher) education and labour markets, by improving (cross-border) mobility and exchanges, including lowering lingual fragmentation

An international education environment and improving language skills can help to improve this mobility. An international education environment also prepares for an international innovation environment. The relevant governance level in this need is regional and local. There is policy attention for this need on European and regional level, specifically in Nord-Pas-de-Calais. Other regions (including other French regions as well as UK, Flemish and Dutch regions) place internationalisation of higher education within the perspective of 'triple helix' cooperation and innovation (TO1).

This need might be relevant for cross-border cooperation in the FCE and 2Seas area

2. Identifying business needs for skills and developing tailor made programmes for skills and training

To counteract the mismatch between labour offer en demand, education should work together in closer cooperation with businesses so that they can 'deliver' the right labour force for the right sectors. Working on (cross-

border) skill programmes and exchange of best practices are relevant within this perspective (see also TO 8), especially for growth sectors (in relation to smart specialisation, see chapter 2.1). The regional governance level is relevant for this need (because labour markets tend to function regionally).
This need is might be relevant for cross-border cooperation in the FCE and 2Seas area.

3. Stimulating cross-border exchange (language learning)
Cross-border exchanges help to broaden the horizon and learn about other cultures and languages. This need is expressed in most French regions.
This need is relevant for cross-border cooperation in the FCE and 2Seas area

5.11 General indicators

SWOT 2SEAS			
Strengths	**Weaknesses**	**Opportunities**	**Threats**
Central location within Europe and included the economically important areas of the Randstad and the Flemish Diamond. Proximate to London and the German Ruhr-area (export) The area is one of the most populated areas of Europe (323 inhabitants p/km²) and its population grew over the last years Above EU-average GDP-levels in predominately urban areas High tourism capacity- levels in the UK-regions, average above EU-level	Share of older people higher than EU average, high old age dependency expected especially in the Netherlands Areas of shrinkage and ageing in rural regions, as young people move to the urban areas Contrast in GDP-levels between urban and rural areas Negative migration balance in Southern Dutch Regions Decreasing tourism capacity in regions in the Netherlands	Export-dependent regions (the Netherland, Flanders) can profit from economic recover Germany and world market Growth tourism sector and tourism demand	Low population growth in rural areas can lead to a loss of facilities and services Pressure of high population density on a.o. the environment, infrastructure and housing affordability Influence of financial crisis on GDP and GDP growth Declining government expenditures Ageing population leads to shortage on labour market, and pressure on social and medical services

6. METHODOLOGY

6.1 Methodological approach

Table 4.1 below gives an overview of the analyses to be made. In the following paragraphs the methodology of each of the analyses is described.

Table 4.1 Overview of analyses

<table>
<tr><td rowspan="3">1. Situation analysis</td><td rowspan="3">Understanding the ‘big picture’ of the environment in which each of the 2 Programmes is operating:
▪ the state of play
▪ main trends
▪ policies impacting cross-border territories involved
▪ distinctiveness 2 programmes
▪ needs (general, within the programme areas)</td><td>1a. Data analysis
Create a baseline for future intervention in the area.
▪ state of play
▪ main trends affecting the programme area</td></tr>
<tr><td>1b. Policy context analysis
Overview of the relevant policies at the main “governance” levels (EU level, programme level, national level, regional / local level)
▪ Main driving forces in terms of policy impacting the cross-border territories involved.</td></tr>
<tr><td>1c. Identification of the joint needs
Laying the foundation of strategy development at programme level (for 2 seas and FCE)</td></tr>
<tr><td>2. SWOT analysis
2 Seas
FCE progr. area</td><td colspan="2">Short list of potential topics for cooperation
Identify needs and potential topics for cooperation within each programme area, with a focus on the main issues which are of a ‘true cooperation nature’ and which are better suited for territorial cooperation programme interventions (added value of cross-border cooperation, for example in relation to smart specialisation). Specific attention to cross-border dynamics and the opportunities linked to this aspect (cross-border mobility, cross-border services etc.).
▪ internal analysis (strengths and weaknesses)
▪ external analysis (opportunities and threats)
▪ confrontation matrix: added value of cross-border cooperation
▪ conclusions: short list of potential topics for cross-border cooperation</td></tr>
</table>

Remarks data en policy analysis (1A and 1B)

Points of attention for both the policy and data analysis (1a and 1B) are:

- both analyses are structured by the 11 themes as mentioned in the ETC regulation; theme 11 (enhancing institutional capacity and an efficient public administration) has been left out of the analyses.
- were possible, data collection and analysis took place on NUTS3 level; if the information on this level was not available we used information on NUTS2-level, and/or searched for alternative data(sources);

6.2 Data analysis

6.2.1 Data collection

We've constructed a tailor made database, of which we extract figures, illustrations and maps. the data is collected from different sources:

- Eurostat
- European Commission
- ETISplus (European Transport policy Information System)
- EEA (European environment Agency)
- national sources for regional statistic data

The Data is collected on NUTS 3 level, or the lowest level available. In case NUTS 2 level was the lowest available from European databases, we've collected regional (NUTS3) data from national data sources where possible.

We have analysed ESPON[17] studies and made summaries of the relevant ones. The most crucial maps from the ESPON studies are included in the analysis. See for an overview of the ESPON studies annex 3

The following table presents the set of **indicators** included in the analysis. This collection of indicators is based on:

- Linkages to the 11 themes: all themes must be represented:
- Relevance for the 2 Seas and France (Channel) England area.
- Data availability and resolution (NUTS level).

This list has been discussed at the inception meeting, then adapted according to the needs of the MAs, PPGs and JTSs and has been included in the final inception report (26 April 2012).

[17] European Observation Network for Territorial Development and Cohesion

Table 6.2: **Collection of indicators**

	Subject	Indicator	Nuts level	Source	Presentation
General	1. Population	Population per region	2	Eurostat	Circle diagram
	2. Population density	Inhabitants per km2	3	Eurostat	Map
	3. Economic density	GDP (millions of Euro's) per capita	3	Eurostat	Map
	4. GDP	GDP at market prices	3	Eurostat	Map
	5. Area typology	Urban-rural typology (Dijkstra-Poelman Urban-Rural Typology)	3	Eurostat	Map from Espon
	6. Working population	Change working population (2000-2007)	2	ESPON	Map from Espon
	7. Ageing	Share people older than 65	3	ESPON	Map from Espon
	8. Sectoral distribution	Share of agriculture, industry and service sector	3	Eltisplus	3 maps, %agri, % industry, % service
	9. Tourism	Number of establishments, bedrooms and bed-places by NUTS 3 regions - annual data	2	Eurostat	Map
Smart growth	**1. Strengthening research, technological development and innovation**				
	10. R&D-intensity	Expenditure in Research and Development (R&D) as % of GDP	2	MS / ESPON	Map
	11. Patents applications	Number of patents per million inhabitants	3	MS/ESPON	Map
	12. Knowledge Intensive Services	Employment in High-technology sectors (high-technology manufacturing and knowledge-intensive high-technology services)	2	Eurostat	Graph
	13. Innovation	Territorial patterns of innovation	2	ESPON	Map from Espon
	14. 2. Enhancing access to and use and quality of ICT				
	15. Regular internet usage	Internet usage once a week[18] 2010	2	ESPON	Graph
	16. Broadband access	Broadband penetration rate as percentage of total households, 2006-2009 % households with broadband access	2	ESPON	Map from Espon
	3. Enhancing the competitiveness of SMEs				
	17. Starters/ Failures	Amount of starters and failures and failure rate	1/3	various	3 / 4 maps (per country)
	18. Starters	Amount of starters per 10.000 inhabitants	1/3	BUITEN based on various sources	1 map
	19. Size distribution, firms	Employment by sector and size band	0	EC	Graphs 4x (per country)
	20. SME performance	Growth in employment, real value added and real productivity	0	EC	Graph
Sustainable growth	**4. Supporting the shift towards a low-carbon economy in all sectors**				
	21. Renewable energy potential	Wind-energy potential in Europe 2020-2030 Solar energy potential	other other	Espon Espon	2x Map from Espon
	22. Greenhouse gas emissions	Greenhouse gas emissions (CO_2 equivalent)	3	ESPON, Siesta (2008)	

[18] For France data is only available on NUTS1-level

	5. Promoting climate change adaptation, risk prevention and management				
	23. Economic sensitivity to climate change	Economic sensitivity to climate change			
	24. Environmental sensitivity to climate change	Environmental sensitivity to climate change	3	ESPON	Map from Espon
	25. Coastal flooding	Change in exposure to coastal storm surge events	3	ESPON	Map from Espon
	26. Potential impact climate change	Aggregated potential impact of climate change		ESPON	Map from Espon
	27. Adaptive capacity to Climate change	Adaptive capacity to Climate change	3	ESPON	Map from Espon
	6. Protecting the environment and promoting resource efficiency				
	28. Soil erosion risk	Soil erosion risk by water	3	EEA	Map from EEA
	29. Generation and treatment of municipal waste	Material recycling	2	ESPON	Map from Espon
	30. Natura 2000	Information on Natura 2000 sites : SPAs, Birds Directive / SCIs/SACs, Habitats Directive	Other	EEA	Map
	31. Sea pollution	Concentrations in European Seas	other	EEA	Map from EEA
	32. Fish stocks	Status of fish stocks in International Council for Exploration of the Sea (ICES) and General Fisheries Commission for the Mediterranean (GFCM) fishing regions of Europe	other	EEA	Map from EEA
	7. Promoting sustainable transport and removing bottlenecks in key network infrastructures				
	33. Accessibility and economy	Potential accessibility multimodal and GDP-PPS per Capita (2006)	3	Espon	Map
	34. Accessibility multimodal	Number of people that can be reached within 30 minutes of travelling multimodal (index EU 27 = 100)	3	Espon	Map
	35. Total Maritime transport of freight	Thousands of tonnes	2	EltisPlus	Map
	36. Sea ports	Seaport Freight Export * in million tonnes, 2010 (harmonized maritime freight export data)	3	EltisPlus	Map
	37. Energy consumption by transport mode	The consumption of energy in all modes of transport, with the exception of maritime and pipelines.	0	EltisPlus	Table
Inclusive growth	**8. Promoting employment and supporting labour mobility**				
	38. Employment	Employment (in 1.000 persons)	3	Eurostat	Map
	39. Youth unemployment	Youth unemployment rate (15-24)	3	Eurostat	Map
	40. Older workers	Employment rate 55-64	2	Eurostat / insee	Map
	41. Cross-border commuting	Index of cross-border mobility UK not in the database	Other	MKW Wirtschaftsforschung	Table

	9. Promoting social inclusion and combating poverty				
	42. Poverty and social exclusion[19]	People at risk of poverty or social exclusion 2005 and 2010, %	2	Eurostat insee	Map
	43. Young people (15-24) not in employment, education or training	Young people (15-24) not in employment, education or training	2	Eurostat insee	Map
	10. Investing in education, skills and lifelong learning by developing education and training infrastructure				
	44. Tertiary education	Tertiary education attained aged 25-64 % 2011	2	Eurostat insee	Map
	45. early school leavers	% early school leavers of total population	2	Eurostat insee	Map

note:

Regional data is not available for important indicators within the theme "low carbon economy". Apart from calculated values for GHG emissions, there is no regional data available on EU and national level. We have contacted data specialists at ECN (leading knowledge institute on sustainable energy management, www.ecn.nl) and EUROSTAT, they confirmed this absence of regional data.

[19] For UK/BE only on NUTS1 level

6.2.2 Analysis and deliverables

Database and benchmark
With the final tailor made database we extract figures, illustrations and maps. The usage of maps, data and graphs give insights in specificities for of the area and within the area.

Factsheets
The data analysis (and also the policy analysis) is structured by the 11 themes as mentioned in the draft regulation. Based on the data analysis (indicators and ESPON-studies), we've make factsheets by theme with relevant tables, charts and maps.

6.3 Analysis of the policy context

Second part of the situation analysis is the policy analysis (Annex 2). This analysis consists of an analysis of documents on EU level, National Level and Regional level.

In the analysis of the policy context, the key focus is on:

- the 11 themes
- smart specialisation
- objectives for cross-border cooperation.

We analyse the documents on:

1. Main policy aims (in general terms), 'hot topics' in terms of policies on EU level, National level and regional level;
2. Specific policy objectives for cross-border cooperation;
3. Inventory of the governance levels involved in each of the themes.

The overview of policy aims is presented in large excel sheets on smart, sustainable and inclusive growth.

Annex 5 gives an overview of the documents included in the analysis. They are selected on the basis of their relevance for the 11 themes mentioned in the (Draft) Regulation and because of their actual or potential territorial impacts. The MAs, PPGs and JTSs of both 2 Seas and FCE have provided feedback on the draft overview (draft inception report). We combined both lists into a coherent list for the 2 Seas – FCE area. This list was included in the final inception report.

The following points have to be kept in mind:

- The planning horizon of most policy documents doesn't reach 2020, only 2014 or 2015. This means that the policy objectives don't give a topical picture of today's policy's objectives towards 2020 or might be 'outdated'.
- In all involved member states decentralisation processes are taking place. The (renewed) decentralised policy objectives are not always available when the discussion about the division of tasks is just finished or is still running.

6.4 SWOT analysis

Based on the socio-economic analysis and policy analysis of the FCE and 2Seas programme areas the strengths, weaknesses, opportunities and threats are listed *for both programme areas separately*. Both SWOT analyses contain the same elements (SWOT, needs/actions, relevance of needs), whereby the SWOT is ordered by the 10 the-

matic objectives and the needs also identify common challenges/opportunities, policy attention and governance level. Although different SWOT analyses are made for the two programmes, their content for a large extent overlaps. The table with articulated needs/actions is similar in both SWOT chapters; the conclusions and relevance of the needs however differs between the two programme areas

Drafting the SWOT existed of 2 steps:

1. **Internal analysis:** first step in the SWOT are the strengths and weaknesses (internal analysis). The weaknesses and strengths relate to the state of play, benchmark and policy context (where we keep in mind the objectives of the ERDF / ETC regulations).

2. **External analysis:** second step in the SWOT analysis are the opportunities and threats (external analysis). Important inputs for this are the trends, next to the literature analysis, data and policy context.

It has to ne noted that all elements of the SWOT are derived from the previous analyses.

Analytic framework for conclusion of the SWOT analysis

For drafting the conclusions of the SWOT analysis we designed an analytical framework which is based on four steps.

First step is the extraction of the needs from the data and policy analysis

Second step is the analysis of the cross-border nature of the need (challenge, opportunity). We base this conclusion on the socio-economic analysis.

- ++ a common need in the programme area
- \+ a common need in a part of the programme area
- 0 a need articulated on country level only or a need not relevant in CBC programmes.

Third step is the analysis of need on the agenda of the policy agenda for CBC (policy analysis)

- ++ priority in most of the regions and governance levels
- \+ priority in a part of the regions and governance levels
- • priority on only a few of the regions or governance levels

Fourth step is the analysis of the appropriate governance level for the need.

- nat. national level
- reg. regional level
- loc. local level

Based on these steps, we drafted a conclusion on the relevance of this need for the FCE and 2Seas area from our point of view following the below template.

Needs/actions	**Common challenge / opportunity**		**Policy attention**		**Governance level**
	FCE	**2Seas**	**FCE**	**2Seas**	
Need 1 Need 2…					

The document addresses each of the 10 themes included in the list of potential Thematic Objectives to be selected in the future programmes 2014-2020. **In total, 54 cross-border cooperation needs or actions to be considered in the future are reviewed**.

ANNEXES

Annex 1 Overview NUTS-levels

NUTS0	NUTS2	NUTS3		2 Seas	Channel
BE Belgium	BE21 Prov. Antwerpen	Arr. Antwerpen	BE211	2 Seas	
		Arr. Mechelen	BE212	2 Seas	
		Arr. Turnhout	BE213	2 Seas	
	BE23 Prov. Oost-Vlaanderen	Arr. Aalst	BE231	2 Seas	
		Arr. Dendermonde	BE232	2 Seas	
		Arr. Eeklo	BE233	2 Seas	
		Arr. Gent	BE234	2 Seas	
		Arr. Oudenaarde	BE235	2 Seas	
		Arr. Sint-Niklaas	BE236	2 Seas	
	BE25 Prov. West-Vlaanderen	Arr. Brugge	BE251	2 Seas	
		Arr. Diksmuide	BE252	2 Seas	
		Arr. Ieper	BE253	2 Seas	
		Arr. Kortrijk	BE254	2 Seas	
		Arr. Oostende	BE255	2 Seas	
		Arr. Roeselare	BE256	2 Seas	
		Arr. Tielt	BE257	2 Seas	
		Arr. Veurne	BE258	2 Seas	
FR France	FR22 Picardie	Aisne	FR221	2 Seas	
		Oise	FR222		Channel
		Somme	FR223	2 Seas	Channel
	FR23 Haute-Normandie	Eure	FR231		Channel
		Seine-Maritime	FR232		Channel
	FR25 Basse-Normandie	Calvados	FR251		Channel
		Manche	FR252		Channel
		Orne	FR253		Channel
	FR30 Nord - Pas-de-Calais	Nord (FR)	FR301	2 Seas	
		Pas-de-Calais	FR302	2 Seas	Channel
	FR52 Bretagne	Côtes-d'Armor	FR521		Channel
		Finistère	FR522		Channel
		Ille-et-Vilaine	FR523		Channel
		Morbihan	FR524		Channel
NL Nether-lands	NL32 Noord-Holland	Kop van Noord-Holland	NL321	2 Seas	
		Alkmaar en omgeving	NL322	2 Seas	
		IJmond	NL323	2 Seas	
		Agglomeratie Haarlem	NL324	2 Seas	
	NL33 Zuid-Holland	Aggl.Leiden en Bollenstreek	NL331	2 Seas	
		Agglomeratie 's-Gravenhage	NL332	2 Seas	
		Delft en Westland	NL333	2 Seas	
		Oost-Zuid-Holland	NL334	2 Seas	
		Groot-Rijnmond	NL335	2 Seas	
		Zuidoost-Zuid-Holland	NL336	2 Seas	
	NL34 Zeeland	Zeeuwsch-Vlaanderen	NL341	2 Seas	
		Overig Zeeland	NL342	2 Seas	
	NL41 Noord-Brabant	West-Noord-Brabant	NL411	2 Seas	

UK United Kingdom	UKH1 East Anglia	Cambridgeshire CC	UKH12	2 Seas	Channel
		Norfolk	UKH13	2 Seas	Channel
		Suffolk	UKH14	2 Seas	Channel
	UKH3 Essex	Southend-on-Sea	UKH31	2 Seas	Channel
		Thurrock	UKH32	2 Seas	Channel
		Essex CC	UKH33	2 Seas	Channel
	UKJ2 Surrey, East & West Sussex	Brighton and Hove	UKJ21	2 Seas	Channel
		East Sussex CC	UKJ22	2 Seas	Channel
		Surrey	UKJ23	2 Seas	Channel
		West Sussex	UKJ24	2 Seas	Channel
	UKJ3 Hampshire & Isle of Wight	Portsmouth	UKJ31	2 Seas	Channel
		Southampton	UKJ32	2 Seas	Channel
		Hampshire CC	UKJ33	2 Seas	Channel
		Isle of Wight	UKJ34	2 Seas	Channel
	UKJ4 Kent	Kent CC	UKJ41	2 Seas	Channel
		Medway	UKJ42	2 Seas	Channel
		Wiltshire CC	UKK15	2 Seas	Channel
	UKK2 Dorset and Somerset	Bournemouth and Poole	UKK21	2 Seas	Channel
		Dorset CC	UKK22	2 Seas	Channel
		Somerset	UKK23	2 Seas	Channel
	UKK3 Cornwall & Isles of Scilly	Cornwall and Isles of Scilly	UKK30	2 Seas	Channel
	UKK4 Devon	Plymouth	UKK41	2 Seas	Channel
		Torbay	UKK42	2 Seas	Channel
		Devon CC	UKK43	2 Seas	Channel

Annex 2 Policy analysis cooperation themes

A2.1 Bottom up cooperation themes

The table below includes the analysis on cross-border (European) cooperation from national and regional level.

UK (national level)	
Local growth white paper:	Support for Inward Investment, support international trade
France (national level)	
National reform programme	Measures to support "RDT, innovation, entrepreneurship" (EU classification) guide ERDF programming in virtually all regions and this trend should be maintained with the implementation of the Regional Innovation Strategies (see Guideline 4). Language learning is one of the priorities of the secondary school reform in progress since 2010. The dual targets are having each secondary school graduate master two living languages and having each secondary school forge a lasting partnership with a foreign school based on genuine educational cooperation.
Cross-border cooperation policy	- focus on specific cross border issues, especially for metropolitan and rural borders - Strengthen governance instruments - strategic observation of border regions and capitalize on successful experiences
Synthesis of regional innovation strategies	Innovation, support to international trade, economic communication.
Belgium (national level)	
White paper RIS³ Flanders/New Industrial Policy Flanders	image campaigns, **strategic knowledge networking**
Concept note on Smart Specialization, Flemish Government 2013	active search on **international partners for priority clusters, structural connections in production chains**
Netherlands (national level)	
Sustainability agenda	**sustainable water and soil management in international cooperation networks**, proactively supporting the international climate policy agenda, creating more **sustainable international value chains**
Digital agenda	more advisory support to companies entering European ICT market, **secure consumer services**, targeted ICT related investment promotion
SVIR	**international energy connections, international logistics networks, retain cultural heritage of international fame,**
UK (regional level)	
Dorset	Promote inward investment
North Dorset economic strategy	**internationalization of small business**
Cornwall RIS3	Supporting international research facility on environment, **projects to improve in the international performance of companies**, attract international investment, Marketing showcasing Cornwall and Isles of Scilly
East Sussex	Influence, lobby and apply for funding (EU and national) to support **enterprise creation and growth**
West-Sussex	coordinated approach to European Union funding applications
Essex	help businesses increase their ability to trade internationally
Swindon & Wiltshire	Raise the awareness internationally of the area that is 'open for business
Medway	European funded business support projects to facilitate **cross-channel trade and business environmental sustainability**.
Solent	attract inward investment
Isle of Wight core strategy	inward real estate investments
LEP Heart of the southwest	Champion the case for additional funds with EU and central government, Facilitate a programme of activity to promote export opportunities
Plymouth	Active bidding for European cooperation programmes
Thurrock	Attract European funding for **climate change & business engagement schemes**
France (regional level)	
Nord-Pas-de-Calais	Permanent cross-border partnerships. Education (high level). Cross-border employment (connectivity), cross-border services (transport, health, culture), sustainable environment, cross-border strategies.
Picardie	Permanent cross-border partnerships. Education (high level), research, economy.
Haute Normandie	Permanent cross-border partnerships. Education (high level), support to innovation

	and innovative businesses (blue economy) management of risks and sustainable management of the common maritime space
Basse Normandie	Research. *diagnostic stratégique territorial* not available
Bretagne	Realising maritime ambitions, research, clusters development, protection of the marine environment and its biodiversity. Marine energy. Strengthen maritime safety (freight) and for boaters (tourism). Common image in relation to international boating (tourism, cruises) Promote international mobility of young people. Education (high level)
Belgium (regional level)	
Governmental agreement Provincie Antwerpen	**Governmental cooperation with partner regions in Europe, close cooperation in the flemish0-dutch delta,** more use of European financing means, co-financing fund, communication and education pilots
Policy Objectives for 2014-2019 for the Province of West-Flanders	**international recreational route network, international green-blue nature network, European financing of nature development,** cooperation in the Flemish-Dutch delta
Governmental agreement East Flanders 2013–2018	European financing for **agricultural reform (spatial dimension)**, pro active policy towards European funding, platform for acquisition of companies, image building, targeted investment promotion,
RIS³ Flanders/New Industrial Policy for West-Flanders:	international promotion of **factories of the future**, cross border clustering, focus on interreg projects
City of Antwerp	European funding for **reconstruction of historic urban water structure**
Netherlands (regional level)	
Vision on Mainport Rotterdam	**international cooperation for innovation in sustainability and efficiency - supply chains and clean shipping,**
Economic vision Rotterdam 2020	Acquisition of international port companies, focusing on spinoffs for the city
Economic agenda South Randstad 2012-2015	promotion by Rotterdam investment agency
Economic agenda 2012-2015 NH	Acquisition for international congresses and meetings, attract inward investment, image campaign
Economic agenda 2013-2015 Zeeland	Attract foreign talent to work in Zeeland, cooperation with Flanders on **seaport developments** and in Schelde channel zone
Economic programme Brabant	acquisition of companies and knowledge in priority sectors, pro active European strategy, more focus on European funding possibilities, **targeted cluster networking (international),** maximizing trade with Developing economies worldwide, expansion of **business networks**, **international technological and innovation knowledge exchange,** cross-border cooperation, image building and creation of international environment.
Smart specialization strategy South Holland	Attract foreign talent, image building, **cooperation in open innovation networks**

Note: All documents listed in the glossary are processed, however not all processed documents are listed. In this table we focused on documents that clearly mention international policy targets or ambitions. Where a cross-border / international ambition is connected with a distinct choice (theme / subject), texts are made bold.

A2.2 Top down cooperation themes

The creation of integrated spaces is one of the objectives of territorial cooperation. To do this, the harmonization of legal provisions and generally smoothing the border effect is a priority, especially through macro-regional development strategies (specific guidelines for the Atlantic macro-regional strategy). European territorial cooperation can be mobilized to improve the coherence and coordination of policies and instruments affecting on the maritime economy and the marine environment.

The Position papers mainly proposes international cooperation on innovation policies, maritime issues and the improvement of resource efficiency. International cooperation on inclusive growth themes such as labour market participation, social inclusion and learning and education are less mentioned.

The table below includes the complete analysis on cross-border (European) cooperation from European level.

UK (European level)	
Position paper	Cooperative approaches developed in coherence with country-specific programmes in areas such as **fostering innovation, eco-innovation projects**. Encourage more **clustering and cooperation mechanisms between complementary sectors and between research and economic actors**, both nationally and in a transnational context; Identify and realise the **smart specialisation potential of cooperative cluster nodes in Europe**; Need for more **consistent sharing of latest and best practice of innovative approaches**, between business, research and education, at national and international level. Leveraging the **economic potential of the maritime border areas** by bringing about cooperation synergies; Stimulating growth and jobs in the marine and maritime economy; Improving **resource efficiency in the economy** in both the national and broader transnational context with **appropriate network, training and advisory programmes and services**; Cooperative approaches on eco-innovation projects, including **comprehensive observation of the ocean environment, renewable energy, energy efficiency and environmental protection** Transnational cooperation on **coastal protection and sea defence measures**: Maritime Strategy for the Atlantic Ocean.
France (European level)	
Position paper	focus on **cross-border SME environment**, **transport services** and communication, the generation and management of **joint energy supply**, **protection of environmental assets** (including the sustainable management of the fish resource), the **maritime economy**, joint waste management and water distribution and the prevention of natural hazards **Atlantic Strategy**: opportunities for **maritime economy** and creating economies of scale. European territorial cooperation can be mobilized to improve the implementation coherence and **coordination of policies and instruments that have an impact on the maritime economy and marine environment**. Prio6 – objective 2: Reduce the uncertainty about the impacts of climate change through improved **marine and coastal observing systems**. Cooperation at the level of sea basin should be sought to improve the **preparedness and resilience** of these impacts. Implement actions for **prevention and management of risks** (coastal and marine pollution, climate change, etc.), particularly in coastal areas. Improving the knowledge of this type of risks through coastal and marine observation systems could stimulate investment.
Belgium (European level)	
Position paper	Cross-border and transnational actions should promote **business R&I investment, product and service development, technology transfer, social innovation and public services application, networking, clusters, open innovation through smart specialisation and remove barriers to labour mobility**. European territorial co-operation actions could serve to unlock the **potential of the blue economy** and generating sustainable growth and new jobs in maritime sectors. Help **changing the attitude of all economic actors**, included in the rural areas, transnationally and across borders towards the **environmental challenges (water, biodiversity, land use**), the improvement of the natural and biological quality and putting more **sustainable production methods** into practice. The potential transnational dimension of measures on **adaptation to climate change** and **prevention of natural disasters** should be taken into account where relevant.
Netherlands (European level)	
Position paper	International cooperation on **research, technological development and innovation**. Support **cooperation between SMEs and actors from the science and research world**, between cluster organisations, cooperative partnerships, knowledge institutions, education and potential innovation actors including R&I business advisory services both domestically and **internationally**. Mobilise co-investments and unleash the **smart specialisation potential of cooperative cluster nodes** in Europe . Contribute to leverage the **maritime economic potential (blue growth initiative)** of the maritime border areas by bringing about cooperation synergies. National and international cooperation and investment in/on **resource efficiency** in the areas of sustainable **land and water management**, preservation of natural resources, biodiversity, ensuring climate-change resilience, sustainable integrated management of coast and cross-border environmental zones (sea basin, upstream regions), soil protection and air pollution. Cooperation in the area of **labour market integration and participation** as well as in **cross-border healthcare provision**.

A2.3 Top down and bottom up analysis needs for cross border cooperation FCE and 2Seas

Table A.1 Needs for cross border cooperation
Bottom up (needs formulated on national, regional and local level) in relgular text.
Top down (needs formulated on EU level) in **Bold**

	BE	NL	UK	FR
TO 1: Knowledge economy	image campaigns, strategic knowledge networking active search on international partners for priority clusters, structural connections in production chains (BE) factories of the future, cross border clustering **promote business R&I investment, product and service development, technology transfer, social innovation and public services application, networking, clusters, open innovation through smart specialisation.** **European territorial co-operation actions could serve to unlock the potential of the blue economy and generating sustainable growth and new jobs in maritime sectors.**	international logistics networks targeted cluster networking (international), expansion of business networks, international technological and innovation knowledge exchange, **International cooperation on research, technological development and innovation** **Support cooperation between SMEs and actors from the science and research world, between cluster organisations, cooperative partnerships, knowledge institutions, education and potential innovation actors including R&I business advisory services both domestically and internationally.** **Mobilise co-investments and unleash the smart specialisation potential of cooperative cluster nodes in Europe .** **Contribute to leverage the maritime economic potential (blue growth initiative)**	Supporting international research facility on environment enterprise creation and growth **fostering innovation, eco-innovation** **Encourage more clustering and cooperation mechanisms between complementary sectors and between research and economic actors, both nationally and in a transnational context** **Identify and realise the smart specialisation potential of cooperative cluster nodes in Europe** **sharing of latest and best practice of innovative approaches, between business, research and education, at national and international level** **Leveraging the economic potential of the maritime border areas by bringing about cooperation synergies** **Stimulating growth and jobs in the marine and maritime economy**	implementation of the Regional Innovation Strategies research, economy support to innovation and innovative businesses (blue economy) Realising maritime ambitions research, clusters development *Common image in relation to international boating (tourism, cruises)* **the maritime economy** **Atlantic Strategy: opportunities for maritime economy and creating economies of scale** **improve the implementation coherence and coordination of policies and instruments that have an impact on the maritime economy and marine environment.**
TO 2: ICT		more advisory support to companies entering European ICT market *secure consumer services*		*NPDC: cross-border services (transport, health, culture*)

TO 3: SMEs		creation of international environment **Support cooperation between SMEs and actors from the science and research world**	support international trade internationalization of small business projects to improve in the international performance of companies enterprise creation and growth help businesses increase their ability to trade internationally Raise the awareness internationally of the area that is 'open for business facilitate cross-channel trade facilitate business environmental sustainability promote export opportunities business engagement schemes	support to international trade research, economy **cross-border SME environment** **CBC in transport services and communication**
TO 4: Low carbon economy	**Help changing the attitude of all economic actors towards the environmental challenges (water, biodiversity, land use), the improvement of the natural and biological quality and putting more sustainable production methods into practice.**	proactively supporting the international climate policy agenda NL creating more sustainable international value chains international energy connections	Climate change (mitigation) schemes **eco-innovation for renewable energy, energy efficiency** **Improving resource efficiency in the economy in both the national and broader transnational context with appropriate network, training and advisory programmes and services Cooperative approaches on eco-innovation projects**	support to innovation and innovative businesses (blue economy) Marine energy **generation and management of joint energy supply**
TO 5: Climate change adaptation and risk management	close cooperation in the Flemish-Dutch delta **transnational / cross border dimension of measures on adaptation to climate change and prevention of natural disasters should be taken into account where relevant**	sustainable water management in international cooperation networks proactively supporting the international climate policy agenda creating more sustainable international value chains **resource efficiency in the areas of sustainable land and water management, ensuring climate-change resilience, sustainable integrated management of coast and cross-border environmental zones (sea basin, upstream regions)**	Climate change (adaptation) schemes **comprehensive observation of the ocean environment, renewable energy, energy efficiency** **Transnational cooperation on sea defence measures: Maritime Strategy for the Atlantic Ocean.**	management of risks Strengthen maritime safety (freight) and for boaters (tourism) **the prevention of natural hazards** **Reduce the uncertainty about the impacts of climate change through improved marine and coastal observing systems. And improve the preparedness and resilience of these impacts.** **Implement actions for prevention and management of risks (coastal and marine pollution, climate change, etc.), particularly in coastal areas. Improving the knowledge of this type of risks through coastal and marine observation systems could stimulate investment**
TO 6: Sustainable environ-	close cooperation in the Flemish-Dutch delta international recreational route network	sustainable water and soil management in international cooperation networks	**eco-innovation** **Leveraging the economic potential of the**	support to innovation and innovative businesses (blue economy)

ment	international green-blue nature network, nature development agricultural reform (spatial dimension) **unlock the potential of the blue economy and generating sustainable growth and new jobs in maritime sectors** **Help changing the attitude of all economic actors towards the environmental challenges (water, biodiversity, land use), the improvement of the natural and biological quality and putting more sustainable production methods into practice.**	retain cultural heritage of international fame **Contribute to leverage the maritime economic potential (blue growth initiative) of the maritime border areas by bringing about cooperation synergies.** **resource efficiency in the areas of sustainable land and water management, preservation of natural resources, biodiversity, sustainable integrated management of coast and cross-border environmental zones (sea basin, upstream regions), soil protection and air pollution**	**maritime border areas by bringing about cooperation synergies** **Stimulating growth and jobs in the marine and maritime economy** **Cooperative approaches on eco-innovation projects, including comprehensive observation of the ocean environment, renewable energy, energy efficiency and environmental protection** **Transnational cooperation on coastal protection and sea defence measures: Maritime Strategy for the Atlantic Ocean.**	and sustainable management of the common maritime space Realising maritime ambitions protection of the marine environment and its biodiversity **protection of environmental assets (including the sustainable management of the fish resource), the maritime economy, joint waste management and water distribution** **improve the implementation coherence and coordination of policies and instruments that have an impact on the maritime economy and marine environment.** **Implement actions for prevention and management of risks (coastal and marine pollution, climate change, etc.)**
TO 7: Sustainable transport		international logistics networks international cooperation for innovation in sustainability and efficiency - supply chains and clean shipping, cooperation with Flanders on seaport developments and in Schelde Channel zone		NPDC: cross-border services (transport) Common image in relation to international boating (tourism, cruises) **CBC in transport services**
TO 8: Employment	**remove barriers to labour mobility**	**labour market integration and participation** Attract foreign talent		NPDC: Cross-border employment (connectivity),
TO 9: Poverty / inclusion		**cross-border healthcare provision**		NPDC: cross-border services (transport, health, culture) Promote international mobility of young people.
TO 10: Education	communication and education pilots			Language learning Education (high level) Education (high level) Education (high level) Education (high level)

Annex 3 Reference list

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Relevant ESPON studies

TERREVI, Territorial Evidence Packs for Structural Funds Programmes (factsheets)
SIESTA, Spatial indicators for a Europe 2020 Strategy Territorial Analysis
EDORA, European Development Opportunities for Rural Areas
CLIMATE, Climate Change and Territorial Effects on Regions and Local Economies in Europe
TIPTAP, Territorial impact assessment of policies.
CAEE, The Case for Agglomeration Economies in Europe
TRANSMEC, Transnational Support Method for European Cooperation
SEMIGRA, Selective Migration and Unbalanced Sex Ratio in Rural Regions
KIT, Knowledge, Innovation, Territory
Cities FOCI, Future Orientation for Cities
DEMIFER, Demographic and Migratory Flows Affecting European Regions and Cities
ECR2, Economic Crisis: Resilience of Regions
AMCER, Advanced Monitoring and Coordination of EU R&D Policies at Regional Level
SGPTD, Secondary Growth Poles and Territorial Development in Europe; Performance, Policies and Pro-spects
ATTREG, Attractiveness of European Regions and Cities for Residents and Visitors
EDORA, European Development Opportunities in Rural Areas
GEOSPECS, Geographic Specificities and Development Potentials in Europe
RE-RISK, Regions at Risk of Energy Poverty
EASaTDOR, European Seas and Territorial Development, Opportunities and Risks
POLYCE, Polycentric Development in Central Europe
EU LUPA, European Land Use Patterns
TeDi, Territorial Diversity

Annex 4: Overview of policy documents

1. EU level

- COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS. Developing a Maritime Strategy for the Atlantic Ocean Area
- Towards a macro-regional strategy for the Atlantic – ***European Parliament - 2012***
- COMMUNICATION FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS. Action Plan for implementing a Maritime Strategy in the Atlantic Ocean area. Delivering smart, sustainable and inclusive growth *NOT YET AVAILABLE*
- Belgium, Council recommendation on national reform programme ***- European Commission – 2012***
- Belgium, Position of the Commission Services on the development of Partnership Agreement and programmes in Belgium for 2014-2020 period - ***European Commission – 2012***
- United Kingdom, Council recommendation on national reform programme ***- European Commission – 2012***
- United Kingdom, Position of the Commission services on the development of the Partnership Agreement and programmes in the United Kingdom for the period 2014-2020 – ***European Commission – 2012***
- The Netherlands, Council recommendation on national reform programme ***- European Commission – 2012***
- The Netherlands, , Position of the Commission Services on the development of Partnership Agreement and programmes in The Netherlands for 2014-2020 period - ***European Commission – 2012***
- France, Council recommendation on national reform programme ***- European Commission – 2012***
- "Integrated maritime strategy - Channel" - CAMIS project

Policy documents – Belgium

Regional level

- EU2020 Flemish Reforme Programme Flemish Government 2012:
- Flemish Reform Programme 2013, Flemish Government 2013
- White paper RIS³ Flanders/New Industrial Policy for Flanders Flemish Government 2012
- Concept note on Smart Specialization Flemish Government 2013 done
- General principles regarding Cohesion Funding Programmes 2014-2020 Flemish Government 201
- (see annex) done
- Territorial structural plan (Ruimtelijk Structuurplan) Vlaanderen - Flemish Government, 2011
- Flemish strategy sustainable development 2014 Flemish Government, 2010

Provincial level

Provincie Antwerpen

- Governmental agreement 2012-2018 - Provincie Antwerpen, 2012
- VNDelta studie + Deltamonitor
- Analyse Sociale Economie provincie Antwerpen 2007-2010
- Conclusies Jaarboek Armoede 2012
- Economische speerpuntenstudie

Provincie Oost-Vlaanderen

- Governmental agreement 2013–2018 - Provincie Oost-Vlaanderen, 2013
- Social economic situation analysis 2012 – Provincie Oost-Vlaanderen, 2012
- Resilience of Eastern Flemish Economy 2012 - Provincie Oost-Vlaanderen, 2012
- SWOT & action plan creative and cultural industries - Provincie Oost-Vlaanderen, 2013
- Insteeknota's Oost-Vlaanderen 2013

- Oost-Vlaanderen, Uitmuntende kennisregio

Provincie West-Vlaanderen

- Policy Objectives for 2014-2019 for the Province of West-Flanders for Economics, Tourism and recreation and Agriculture and Fisheries/
- RIS³ Flanders/New Industrial Policy for West-Flanders- Factories for the Future- Economic knowledge Clusters // nieuw industrieel beleid-fabrieken voor de toekomst-economische kennisclusters (2012)
- Coastal Navigation Plan // Navigatieplan KUST (2012)
- Policy Objectives 2014-2019 territorial development department // Beleidsplanning Gebiedsgerichte werking 2014-2019 (2013)

Policy documents – United Kingdom

National level

- Biodiversity 2020: A strategy for England's wildlife and ecosystem services – Department for Environment, Food and Rural Affairs – 2011
- Climate Change Act 2008 - Parliament of the United Kingdom – 2008
- Flood and Water Management Act2010 - Parliament of the United Kingdom – 2010
- National Planning Policy Framework - Department for Communities and Local Government – 2012
- Local growth: realising every place's potential – HM Government – 2010
- Using Industrial Strategy to help the UK economy and business compete and grow 2013
- Boosting private sector employment in England 2013
- Stimulating economic growth in rural - 2013
- Increasing the UK's exports and attracting inward investment (-2013
- Improving high streets and town centres (https://www.gov.uk/government/policies/improving-high-streets-and-town-centres) 2012
- Supporting economic development projects in coastal and seaside areas – done 201320
- Sustaining a thriving maritime sector (2012)

Local Enterprise Partnership (LEP)

- Leading business prosperity across Dorset – Framework 2012-2015 – Dorset Local Enterprise Partnership– 2012
- Our Strategy to Growth – Coast to Capital Local Enterprise partnership – 2012
- Enterprise M3 Local Enterprise Partnership Local Economy – Hampshire County Council – 2012
- Solent Lep: a strategy for growth – Solent Local Enterprise Partnership – 2012
- Plan for Growth – Local Enterprise Partnership for Norfolk and Suffolk – 2013
- Sector Growth Strategy – Local Enterprise Partnership for Norfolk and Suffolk – 2013
- Business Plan Presentation - Local Enterprise Partnership for Norfolk and Suffolk – 2013
- Business Plan 2012-2015 – South East Local Enterprise Partnership – 2012
- Mission and Vision Statement - South East Local Enterprise Partnership – 2012
- Economic Growth Strategy for Cornwall & Isles of Scilly 2012-2020 – Cornwall and isles of Scilly Local Enterprise Partnership – 2012
- Enabling Growth and Prosperity – Heart of the South West Local Enterprise Partnership – 2012
- Strategy for Growth – Enterprise M3 - 2012
- S&W LEP business plan 2012-15

[20] https://www.gov.uk/government/policies/supporting-economic-development-projects-in-coastal-and-seaside-areas--4

County level

- Bournemouth core strategy - Bournemouth Borough Council, 2012
- Bournemouth Dorset & Poole Draft Local Economic Assessment
- Bournemouth, Dorset & Poole Investment Plan
- Bournemouth, Dorset and Poole Local Transport Plan
- Bournemouth, Poole and Dorset Renewable Energy Strategy to 2020

- Brighton & Hove City Council Corporate Plan
- Brighton & Hove City Employment and Skills Plan 2011-14
- Brighton & Hove city plan – Brighton & Hove borough council, 2013
- Brighton & Hove Economic Strategy
- Brighton and Hove, Sustainable Community Strategy (SCS)

- Cornwall Connecting Cornwall: 2030 - moving towards a green peninsula – *Cornwall Council -2011*
- Cornwall Economic Growth Strategy for Cornwall & Isles of Scilly2012 – 2020 - *Cornwall and Isles of Scilly Local Enterprise Partnership – 2012*
- Cornwall Future Cornwall 2010 – 2030 – *Cornwall Council 2010*
- Cornwall Introducing Cornwall - Smart Specialisation Peer Review – *Cornwall Council 2012*

- Devon Devon Economic Strategy - *The Devon Economic Partnership – 2010*
- Devon Economic Development Strategy 2008 – 2013 - *Exeter and the Heart of Devon* -
- Devon Enabling Growth and Prosperity
- Devon, Somerset, Plymouth and Torbay Devonomics
- Devon, Somerset, Plymouth and Torbay Draft Strategy for Growth
- Devon, Somerset, Plymouth and Torbay Torbay Development Agency: Economy factsheets

- Dorset Community Strategy documents - Dorset County Council
- Dorset LEA
- Dorset Local Authorities Local Climate Impact Profile (LCLIP) –
- Dorset, Economic &Tourism Development Strategy 2010 – 2015 – Weymouth and Portland Borough Council – 2010
- Dorset, Economic Development Strategy for Action 2010 – 2013 – *North Dorset District Council – 2010*
- Dorset, Economic Development Strategy for Action 2012 – 2015 – *North Dorset District Council – 2012*

- East Sussex Economic Development Strategy - *East Sussex County Council – 2012*
- East Sussex Local Economic Assessment
- East Sussex, Adult Learning and Skills Strategy 2010

- Essex , Integrated County Strategy – *Essex County Council – 2010* Essex transport strategy, *Essex County Council – 2011*

- Hampshire Economic Assessment 2011 – *Hampshire County Council – 2011*
- Hampshire South Hampshire Strategy: A framework to guide sustainable development and change to 2026 - *Partnership for Urban South Hampshire – 2012*
- Hampshire Sustainability Review of the South Hampshire Strategy – *Lepus Consulting – 2012*

- Isle of Wight core strategy - Isle of Wight council, 2006

- Kent Consultation on the draft scope of the Kent and Medway Local Economic Assessment – *Kent & Meday County Councils – 2010*
- Kent Innovation for Growth Towards a new approach to innovation in Kent – *Kent County Council – 2012*
- Kent Low Carbon Opportunities for Growth – *Kent County Council – 2010*

- Kent prospects 2007 to 2012 – *Kent Partnership – 2007*
- Kent Rebalancing Kent? – *Kent County Council - 2010*
- Kent Unlocking Kent's Potential – *Kent County Council – 2009*
- Kent, 21st Century Kent: A BLUEPRINT FOR THE COUNTY'S FUTURE, Kent County Council 2010
- Kent, Bold Steps for Kent The Medium Term Plan to 2014/15 Kent County Council
- Kent, North Kent Growth Plan, March 2012
- Kent, Open for Growth, East Kent Growth Plan, February 2013
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- Medway core strategy – Medway council, 2011
- Medway Medway Economic Development Strategy 2009-12 – *ERS – 2009*

- Norfolk County Council Growth Plan 2012 - 2017
- Norfolk County Council Local Economic Assessment 2012
- Norfolk Infrastructure plan 2012
- Norfolk Norfolk County Council Plan 2012-15 – *Norfolk County Council – 2012*
- Norfolk, Economic Intelligence Rural Report
- Norfolk, Rural Economy Norfolk
- Norfolk, Rural Share of Deprivation Norfolk (Rural Economy Breckland; Rural Economy Broadland; Rural Economy Great Yarmouth; Rural Economy KingsLynn; Rural Economy South Norfolk; Rural Economy North Norfolk)
- Norfolk_Children and Mental Health Strategy, Children Services Plan 2012-15
- Norfolk County Council – Sustainability
- tomorrow's Norfolk, today's challenge A climate change strategy for Norfolk
- Norfolk County Council: Equality of Opportunity Statement
- Norfolk Transport Strategy, Transport Implementation Plan
- Norfolk Troubled Families Proposals

- Plymouth local development framework - Plymouth city council, 2007
- Plymouth Local Economic Strategy 2006 – 2021 & Beyon

- Poole core strategy – Poole council

- Portsmouth City Council Shaping the future Strategy - Portsmouth City Council
- Portsmouth Climate Strategy - Portsmouth City Council
- Portsmouth core strategy 'the Portsmouth Plan" – Portsmounth city council, 2012
- Portsmouth Employment, Learning and Skills Plan
- Portsmouth NEETS
- Portsmouth Strategy for growth and prosperity_ Shaping the future
- Portsmouth Tackling poverty Assessment

- Somerset DRAFT Health and Wellbeing Strategy for Somerset
- Somerset Economic Assessment 2011
- Somerset Economic Value of Tourism – tourism data specifically requested by consultants
- Somerset Flood and Water Management Strategic Business Plan
- Somerset Heart of the South West Business Survey 2012
- Somerset Preliminary Flood Risk Assessment Report and Annex
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- Southampton core strategy – Southampton city council, 2010

- Suffolk (the 'hidden need' in Suffolk) For information on deprivation and need
- Suffolk Growth Strategy (The full report is here: done
- Suffolk NALEP Green Economy Pathfinder manifesto
- Suffolk State of Suffolk
- Suffolk's Community Strategy

- Thurrock core strategy – Thurrock council, 2010

- Torbay core strategy, Torbay council, 2009

- West Sussex Supporting Economic Growth in West Sussex An Economic Strategy for West Sussex 2012-2020 – *West Sussex City Council – 2012*

- Wiltshire, Enterprise Wiltshire Economic Strategy 2012-15 (includes delivery plan)

Policy documents – The Netherlands

National level

- Draft National reform programme 2013
- Government agreement 2012 -2015 (Regeerakkoord) - VVD / PvdA, 2012
- Agreement on sectoral policy for knowledge and innovation 'topsectoren' – Ministry of economic affairs – 2012
- Sustainability agenda summary ('Duurzaamheidsagenda') – 2012
- Digital agenda 2011-2015 (Digitale agenda – ICT voor innovatie en economische groei) - Ministry of economic affairs, 2011
- Structuurvisie infrastructuur en Ruimte 2012-2040 – Ministry of infrastructure and environment, 2012
- Mobility policy 2008-2020 (MobiliteitsAanpak) – Ministry of Transport, Public Works and Water Management, 2008
- Information letter on future environmental policy - Ministry of economic affairs – 2013

Interregional level

- National delta programme (deelprogramma Zuidwestelijke Delta, plan van aanpak) - Ministry of Transport, Public Works and Water Management, 2010
- Agenda Biobased economy – Southwest Holland - Province of Zeeland, North Brabant, 2011
- Smart specialization strategy 2014-2020– South Holland – Province of Zeeland, North Brabant and Limburg, 2013

Provincial level

- Territorial vision (structuurvisie) Noord-Holland, Province of Noord-Holland, 2010
- Economic agenda 2012-2015, Province of Noord-Holland, 2012

- Collegeaccoord Zuid-Holland
- Territorial vision (structuurvisie) Zuid-Holland, Province of Zuid-Holland, 2012
- Economic agenda Zuid-Holland and Rijnland, Province of Zuid-Holland, 2012

- Territorial vision (structuurvisie) Noord-Brabant, Province of Noord-Brabant, 2010
- Economic programme Brabant 2020, Province of Noord-Brabant
- Agenda van Brabant

- Territorial vision (omgevingsvisie) Zeeland, Province of Zeeland, 2006
- Economic agenda 2013-2015, Province of Zeeland, 2012
- Socio-economic diagnosis, Province of Zeeland, 2011
- Collegeprogramma Zeeland
- Strategische visie strategic board
- Strategische visie scheldemondraad

- Economic agenda South Randstad (Zuidvleugel) 2012-2015, Bestuurlijk Platform Zuidvleugel, 2013
- Strategic agenda West-Brabant 2012-2016, Regio West-Brabant, 2011

- Economic vision Rotterdam 2020, Economic development board Rotterdam, 2008
- Vision on Mainport Rotterdam, Ministry of Economic affairs, 2009
- Havenvisie Rotterdam (HBR,2012)

Policy documents – France

National level

- National reform programme - General secretariat for European affairs - 2012
- Position of the Commission Services on the development of Partnership Agreement and programmes in France for 2014-2020 period - European Commission - 2012
- Synthesis of regional innovation strategies (case studies for each participating region in the two areas) - DATAR - 2012
- Methodological guide - MOT (Mission opérationnelle transfrontalière)
- Crossborder policy report - French parliament -2010

Regional level (régions)

- "Channel spaces: a world within Europe" - Regional Council of Haute-Normandie and Basse-Normandie – 2008
- "Integrated maritime strategy - Channel" - CAMIS project (https://camis.arcmanche.eu/home/
- Contribution des villes atlantiques à l'appel à suggestions sur les priorités clés d'investissement et recherche
- Mobilité et accessibilité de l 'Eurométropole Lille - Kortrijk – Tournai
- programme de travail 2013 du GECT Flandre-Dunkerque Côte d'Opale

Départements / regions

Nord Pas de Calais

Territorial strategic diagnosis
Nord-Pas-De-Calais Regional innovation strategy
Regional scheme for planning and sustainable development of territories Regional Council of Nord-Pas-De-Calais (version 2012, en cours de réactualisation) including thematic components:

- regional scheme for transports and mobility
- regional scheme for biodiversity (Trame verte et Bleue)
- regional scheme for higher education and research
- regional scheme for economic development
- regional scheme for "climact "

Project d'action stratégique de l'Etat en Nord- Pas De Calais (PASE) 2011-2013
Charte de Développement du Littoral Côte d'Opale, SMCO, 2008

Nord

Diagnostic de forces et faiblesses du Département du Nord
Projet politique 2011-2014 du Département du Nord
Mobility and accessibility - EGCT Lille - KortrijK - Tournai

Pas de Calais

Le Projet stratégique départemental 2008-2020 du Pas-de-Calais
DIAGNOSTIC TERRITORIAL STRATEGIQUE PROGRAMMES EUROPEENS 2014-2020
Livre blanc sur l'économie sociale et solidaire en Pas-de-Calais

Picardie

DST Le diagnostic territorial Picardie
Etat des lieux des territoires picards au regard de la programmation 2007-2013 et post 2013
EVALUATION DE LA CONTRIBUTION DU PROGRAMME OPERATIONNEL FEDER ET DU CPER A LA MISE EN OEUVRE DU SYSTEME REGIONAL DE RECHERCHE ET D'INNOVATION EN PICARDIE
Contrat de projet Etat –Région 2007-2013

stratégie régionale de l'innovation
le FSE et l'offre d'insertion dans les territoires
évaluation à mi parcours du PO Compétitivité - Picardie
CPRDF – Contrat de plan régional de développement des formations professionnelles
PREDD – Plan régional d'élimination des déchets dangereux
SRDC : Schéma régional de développement Culturel
SRDE : Schéma régional de développement économique
SRPN : Stratégie régionale pour le patrimoine naturel
SRADDT Picardie Schéma Régional d'Aménagement et de Développement Durable du Territoire adopté

Normandie
Livre Blanc "Normandie 2020" – 2011

Haute Normandie
Le diagnostic territorial
le résumé de l'évaluation initiale pour le plan d'action pour le mileu marin
La stratégie intégrée pour la Manche (ci-jointe)
Aperçu des activités économiques importantes dans les régions de Manche et du Sud de la mer du Nord" / Overview of significant economic activities in the English Channel and Southern North Sea regions
l'atlas transmanche
Regional innovation strategy
Regional scheme for planning and sustainable development of territories

Basse-Normandie
Livre blanc "Normandie 2020" – 2011
Schéma Régional de Développement Economique (SRDE) – 2005
Stratégie Régionale pour l'Innovation (SRI) - 2011
Schéma Régional d'Aménagement et de Développement du Territoire (SRADT) - 2005
Schéma Interrégional de Développement Tourististique (SRDT) - 2009 (Haute et Basse-Normandie)
Agenda 21 régional
le Plan Stratégique Régional (PSR)
Le diagnostic territorial stratégique de la Basse-Normandie pour alimenter l'analyse de situation et l'analyse AFOM

Bretagne
Bretagne Territorial strategic diagnosis
Bretagne Regional innovation strategy
Bretagne plan énergie
Bretagne Diagnostic territorial stratégique Synthèse des principaux enjeux pour la Bretagne
Bretagne Emploi maritime
Bretagne Plan peche et aquaculture
Bretagne schéma régional de développemen économique
Bretagne Utilisation des fonds FEDER en Bretagne pour la biodiversité Analyse et recommandations pour la préparation de la future programmation européenne (2014-2020)
Bretagne Schéma régional du tourisme en Bretagne

Finistère
Conseil général Finistère - Participation au diagnostic régional stratégique

Seine Maritime
LES ORIENTATIONS STRATÉGIQUES SEINE MARITIME, SESSION PLÉNIÈRE DU CONSEIL GÉNÉRAL - AVRIL 2012