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Summary CallmeBLUE Project

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The role of maritime clusters is increasingly important in the process of connecting public and private entities working in all transversal sectors related to blue economy at both national and Mediterranean level. Maritime clusters are indeed crucial facilitators of networking, technology transfer, internationalisation and innovation between SMEs, large companies, research centres, universities etc., and they act as key actors to promote sustainable investments of the blue economy.

CALLMEBLUE aims to strengthen existing clusters alliances in the Mediterranean area in order to accelerate north-south regional cooperation processes towards the emerging of strategic maritime clusters in North Africa area (south-south cooperation). CALLMEBLUE will aim to create a strategic vision and transferable models of interregional cooperation.

In particular, CALLMEBLUE will aim to implement concrete actions at both local and regional level in order to raise awareness on the relevance of Maritime clusters as key actors for a sustainable blue economy policy. The project will indeed promote exchange of best practices and knowledge transfer between north and southern area, including piloting learning activities aimed at offering a transferable training "Toolkit", addressed to future maritime clusters in the southern area in order to be prepared on the legal, structural, administrative and management aspects for a concrete creation of future maritime clusters.

CALLMEBLUE ambition is to set-up and strengthen maritime clusters alliances (North-South cooperation) – particularly targeting southern Mediterranean countries (South-South cooperation) but also allowing to enhance regional dialogue and more advanced services offered to Cluster Mediterranean ecosystem. At this aim, CALLMEBLUE offers its role as an accelerator for the policy goals set by relevant regional initiatives such as the UfM Ministerial Declaration for sustainable blue economy and the WestMED Initiative.

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Executive summary

Dataset: methodology and objective

The last task under WP2, namely **task 2.3**, had the aim to summarise the results in a quantitative and qualitative manner emerged from the previous tasks under WP2, namely task 2.1 and 2.2, whose details are available in the Maritime Clusters Blue Economy Reporting (Deliverable 2.1).

The objective of the dataset - deliverable 2.2 - is to outline in a schematic manner the identified barriers and gaps at sea basin level in the Southern Area of the Mediterranean, outlying the results country by country.

The dataset will include results regarding:

- At least 3 selected countries
- At least 5 selected promising sectors in the blue economy
- At least 5 selected actors involved in the assessment phase per each country
- At least 5 actions and at least 5 challenges that may lead to new business opportunities and investments in the blue economy sector
- Expected results of the following WPs.

The dataset will firstly outline an introduction of results followed by a schematic overview of the results, providing an overview of countries analysed, followed by selected blue economy sectors. The identified actors will be also included in the analysis followed by actions and challenges that may lead to new business opportunities. From this overview, suggestions on potential next actions under WP3 and WP4 will be highlighted.

Analysis of results

Countries

As shown in detail in the deliverable 2.1, the countries chosen for the analysis are those countries where not only clusters initiatives have been encountered, but also those where blue economy sectors are relevant to the economic growth and where great interest is registered. Below is a summary:

Table 1 - Countries selection

Countries	Clusters initiatives	Interest in Blue Economy
Algeria	• Lack of proper cluster promotion • Mainly specialised in services industries related to logistics services transports and warehouses, sector-oriented and focused on economic activities • Great government's interest in cluster implementation • Started operating less than 25 years ago • Composed by organisations including, among others, enterprises, R&D education and training bodies, government and public administration entities, financial institutions • top-down approach aiming to achieving specific policy objectives • usually registered as non-profit-entities, or in few cases as national agencies.	• Increasing governmental strategies to implement new concrete actions in the national strategy towards 2030 • Current sectors with potential growth: marine renewable energies, cruise and shipbuilding, fishery, transport, desalination, tourism etc.
Egypt	• great potential for cluster implementation • still national-oriented and lack export clearance to access foreign markets • Focused towards production of goods and services and are mainly sector-oriented (i.e., energy, water, environment services and solutions; R&D, fashion and design). • Established less than 25 years ago • gathering various organisations (i.e., enterprises, R&D education and training bodies, government and public administration entities, financial institutions, marketing and communication entities)	• Focus on the development of a national strategy in order to achieve new blue economy standards • Support to future generations, higher standard of living, income increase and new job opportunities. • promising sectors: fisheries and aquaculture, coastal tourism, critical ecosystems, port infrastructure, offshore energy and mineral resources, desalination

Countries	Clusters initiatives	Interest in Blue Economy
	• bottom-up approach, hence cluster policies are addressed by local actors rather than by the government. • legal status is different from other countries as the majority are associations, qualified industrial zone (QIZ), or technological zone/parks. • Need of wider openness towards international markets, accessing to a larger network, matchmaking opportunities and international events	
Libya	• Clusters initiatives are still not developed in Libya • WestMED Clusters Alliance and Cluster maritime Tunisien play a crucial role to raise awareness on the implementation of blue economy cluster in the area • Contacts established with key government officials, including the Minister of Marine Resources that expressed enthusiastic support for the establishment of the maritime cluster • In February 2024 initiated procedures with the Civil Society Commission in Benghazi and Tripoli for cluster implementation	• One of the key countries in the Mediterranean for the sector development • Investing in sustainable blue economy, focusing on relevant promising sectors (ie., marine resources, fishery and aquaculture, transports, blue skills etc.)
Mauritania	• Marine Cluster has been established in 2023, as one of the main results of inclusion and capacity building undertaken by the WestMED • The national cluster may scale-up its activities in favour of the country's ecosystem, and its Atlantic and Mediterranean community, also through a specific range of services for local stakeholders.	• The Ministry of Fisheries and Maritime Economy is certainly the central link and the backbone of the institutional architecture of governance of the sector • Among others, fishery is one of the main sectors in the country
Morocco	• Clusters represent key pillars of economic diversification strategy, • Morocco is unlocking new opportunities for growth, job creation, and prosperity through clusters implementation • The Moroccan government actively supports the establishment and development of clusters as part of its broader economic development strategy • Cluster initiatives of different sectors, like Agriculture and Agribusiness clusters, Tourism clusters or Information Technology and Digital Services Clusters, are supported by a number of governmental enablers like policy framework,	• According to a study conducted by the World Bank, the most promising sectors are fisheries and aquaculture, coastal and maritime tourism, port infrastructure and logistics, offshore energy, marine biotechnology, marine conservation and environmental protection.

Countries	Clusters initiatives	Interest in Blue Economy
	financial incentives, infrastructure development, regulatory reforms but also skills development	
Tunisia	• Clusters initiatives are quite spread out in Tunisia, and there is a national Cluster dedicated to the Blue Economy, namely the Tunisian Maritime Cluster. • At the international level, a significant advantage of Tunisian clusters is having export certification • Still room for improvement in terms of foreign market access, and marketing and quality standards shall be improved • Tunisian Maritime Cluster, active at the international level thanks to several partnership with European countries.	• The blue economy is a hugely relevant sector in Tunisia • Not only more traditional and established sectors are of huge relevance, but also emerging sectors.

Blue economy sectors

From the desk and field analysis carried out in the previous tasks, whose results are available in detail in deliverable 2.1, for each country the most promising blue economy sectors have been analysed.

Here is a summary:

Table 2 - Most promising blue economy sectors

Countries	Most promising blue economy sectors
Algeria	• Aquaculture • Digitalisation • Sustainable Maritime Transport • Sustainable Tourism • Marine Renewables/ desalination • Blue skills
Egypt	• Aquaculture • Digitalisation • Sustainable Maritime Transport • Sustainable Tourism • Marine Renewables/ desalination • Blue skills
Libya	• Aquaculture • Digitalisation • Sustainable Maritime Transport • Sustainable Tourism • Marine Renewables/ desalination • Blue skills
Mauritania	• Fisheries/Aquaculture • Desalination • Energy/Green Hydrogen • Tourism • Port activities
Morocco	• Fishery and aquaculture • Port activities • Coastal and marine tourism • Shipbuilding • Maritime transport • Desalination • Blue biotech • Green marine energy/Hydrogen
Tunisia	• Aquaculture

Countries	Most promising blue economy sectors
	• Digitalisation • Sustainable Maritime Transport • Sustainable Tourism • Marine Renewables/ desalination • Blue skills

Actors' selection

In the identification of countries actors per country, the project partners, associated partners and advisory board members have actively supported the WP leader in the identification of stakeholders. The WP leaders have also taken into account all suggestions and included in the identification phase several organisations thanks to the extended internationalisation experiences gained throughout the years, in particular in the southern shore of the Mediterranean. In this process, the WestMED clusters alliance has also played a key role.

The key steps in the identification process were starting from the countries analysed in the desk research, moving forward to looking for actors at the local, regional and national levels, and classifying these per category, namely policy makers, sectoral bodies, research centres, universities and business organisations. Here is an overview:

Table 3 - Actors involved in the assessment phase per each country

Countries	Identified local, regional and national actors
Algeria	• 75 actors: policy makers, business organisations, sectoral bodies, universities and research centres
Egypt	• 7 actors: policy makers, business organisations, universities and research centres
Libya	• 25 actors: policy makers, business organisations, sectoral bodies, universities and research centres
Mauritania	• 10 actors: policy makers, business organisations, sectoral bodies
Morocco	• 30 actors: policy makers, business organisations, sectoral bodies, universities and research centres
Tunisia	• 37 actors: policy makers, business organisations, sectoral bodies, universities and research centres

For privacy purposes, the full list of actors Is available as a confidential document and will be used for project related activities, in particular for the following WPs.

Actions and challenges towards new business opportunities and investments

As highlighted in the Maritime Clusters Blue Economy Reporting (Deliverable 2.1), in each country analysed and in each related blue economy sector, there are several challenges that need to be addressed to foster growth and enhancement in the blue economy. Despite the difficulties, there are numerous actions that can lead to new opportunities in terms of business and investments, that can further support the existing initiatives. Here below is a summary, divided per country and sector.

Table 4 - Actions and challenges towards new business opportunities and investments in the blue economy sector

Countries	Blue economy sectors	Challenges	Actions towards business & investment opportunities
Algeria	Aquaculture	• Algerian banking system does not pay enough attention to the aquaculture sector, The sector, in fact, relies heavily on the support of a single funder, namely the Banque de l'agriculture et du development rurel (BADR)	• the establishment of a local industry for the production of aquaculture inputs and equipment (hatcheries, feed factories, manufacture of cages • production of marine fish hatcheries • production of off-shore floating cages for bass and sea bream (high quality materials, remote control, automatic feeding, underwater cameras) • production of marine fish farm catamarans • production of barges and conditioning units for shellfish farms • production of open sea sub-surface sectors for the farming of mussels and oysters • production of ponds, tanks and cages for breeding freshwater fish • production of fry, post-larvae, juveniles
	Digitalisation	• Lack of a common national platform that could centralise and	• analysis in a single system of a real-time Pan-Euro

Countries	Blue economy sectors	Challenges	Actions towards business & investment opportunities
		connect different data from the blue economy sectors	Mediterranean (PEM) or Integrated coastal zone management (ICZM) • establishment of a blue economy observatory • Establishment of a Geographical Information System (GIS) applied to Integrated coastal zone management (ICZM) or Maritime Spatial Planning (MSP) • Establishment of a Vessel monitoring system (VMS) to combat illegal, unreported and unregulated fishing (IUU) • production of acoustic technology for the assessment of fishery resources • increasing share of data from actors and organisation working different aspects of maritime surveillance, fisheries, security, MSP and ICZM
	Sustainable Maritime Transport	• environmental challenge • lack of connection between sub-sector of the blue economy	• production of LNG bunkering facilities, fuelled vessels, dual fuel engines, waste hear recovery system of diesel engines • modernisation of ports: energy optimisation and cold ironing • modernisation and new management tools for ports • adaptation of existing fleet to new resolution regarding air emissions • production of new shipyards
	Sustainable Tourism	• lack of priority given by the central government and local authorities to the sustainable tourism sector • lack of investment aimed at employability and entrepreneurship creation	• creation of collaborative platforms: booking & search; home sharing & rentals; touring activities; car sharing & rentals • training in sustainable tourism

Countries	Blue economy sectors	Challenges	Actions towards business & investment opportunities
			• develop training content and learning materials aligned with industry standards • implementation of clusters active in sustainable tourism and eco-tourism
	Marine Renewables/ desalination	• Climate change • increase in the density of the population • increasing internal water consumption • shortages of fresh water	• production of membrane and spare parts for desalination plants • production of technologies to minimise the impact on the marine ecosystem
	Blue skills	• lack of a national blue economy stakeholder platform • gaps between sector demands and workforce skills	• enhance connections between incubators, start-ups, investors, accelerators, entrepreneurs, business networks, universities to multiply innovative blue ecosystems • create stakeholder platform
Egypt	Aquaculture	• climate change • lack of funds available • poor quality of interaction with the R&I institutions	• implement mega-national projects in East Al Tafrea and the Suez Canal Company fish farming project • promote the development of hatcheries for the production of marine fry and the expansion of shrimp cultivation • expand integrated fish farming
	Digitalisation	• lack of qualified human resources in a sufficient quantity to satisfy the national demand • lack of funding resources	• development of communications infrastructure and postal services • Training activities on IT and software applicable to blue economy sectors • development of GIS and smart systems for environmental management • production of monitoring systems

Countries	Blue economy sectors	Challenges	Actions towards business & investment opportunities
			• development of Marine Information System (MARIS) and Port information system (PORTNET) • Development of technologies for data collection, storage and analysis in the field of marine surveillance
	Sustainable Maritime Transport	• environmental crisis • lack of funds	• bunkering, maintenance, and recycling • production of solar panels and power plants from gas and wind farms to generate clean energy and to reduce climate change impacts
	Sustainable Tourism	• potential further drawbacks due to the difficult geopolitical situation • environmental challenges: management of solid waste, fluctuation of ground water level, air pollution, water pollution and biodata	• Actions towards training to personnel to improve and elevate the skillset • Actions to diversify revenue streams and increase the resilience of the sector through new source markets, through marketing actions • Actions to elevate to international standards in around 67 tourist areas, with a focus on bringing hotel health, food safety and overall quality. • Actions to promote digitalisation and innovation in the sector, promoting the economic empowerment of women
	Marine Renewables/ desalination	• climate change trends • expected increase in population, • stability in Egypt's share of the Nile water	• production technologies for using electricity through solar and wind power • implement desalination processes with floating plants powered by wind and solar energy • local production of spare parts • training of qualified personnel for desalination plants upkeep

Countries	Blue economy sectors	Challenges	Actions towards business & investment opportunities
			(thanks to the cooperation projects with Singapore and Britain)
	Blue skills	• Environmental challenge a • limited impact of top-down policies on the vast young population	• training programmes for graduates to respond to labour market demands • encourage and promote research and innovation and Public Private Partnership (PPPs), with incentives to establish spin off companies in governmental research institutes and universities • train graduates capable of meeting the requirements of the labour market through various distinguished programs • development of more sustainable educational programs to support blue skills and develop the blue economy
Libya	Aquaculture	• political instability • lack of reliable conditions for sector development • limited knowledge about a satisfactory business model • lack of government awareness	• Improving methods of building fisheries and working on their stability • Implement growth control system • launch ecosystem services to restore biodiversity
	Digitalisation	• limited access to funding resources • lack of qualified young specialists in the digitalisation sector	• actions to modernise systems related to data collection, monitoring, digital transformation • training activities and skills enhancement
	Sustainable Maritime Transport	• international isolation of the country • ports suffer from severe shortages and from the missing advanced technologies in shipping, unloading and storage • Most ports need modernisation works	• production of advanced technologies in shipping, unloading and storage • foster modernisation and sustainable methods • training of human resources in the sector

Countries	Blue economy sectors	Challenges	Actions towards business & investment opportunities
		• lack of sustainability • lack of political stability • lack of proper qualified human resources	
	Sustainable Tourism	• long ongoing situation of instability • unique controller of the sector: Ministry of Tourism	• promote activities in underwater archaeology and coastal tourism • training of human resources
	Marine Renewables/ desalination	• lack of legislation regulating the energy sector • difficulties for the private sector to engage in the sector • strong instability in the country • extremely cheap price of carbon fuels	• Produce solar energy plants in remote areas isolated from the electrical grid in southern of Libya • Produce thermal and wind energy plants • Produce photovoltaic cell • Promote openness of energy production market • Promote actions towards recycling of industrial waste
	Blue skills	• situation of instability since 2011 • outdated educational and training programs, infrastructures, technologies	• adoption of latest technical devices, simulation methods, electronic models and the use of modern systems
Mauritania	Fisheries/Aquaculture Desalination Energy/Green Hydrogen Tourism Port activities	• Lack of data and political priorities for the blue economy • Financing for emerging/embryonic/sustainable practices • coordination across actors, sectors and ministries • competences and skills • research and innovation • weakness of private sector	• Support the Mauritanian Maritime Cluster (MMC) in order to strengthen its overall organizational capacity • Sustain its role as advocacy/advisor for the Mauritanian Government in capitalizing opportunities, investments and revenues to be generated in the area of energy
Morocco	Fishery and aquaculture Port activities Coastal and marine tourism Shipbuilding Maritime transport Desalination	• Fragmentation of activities, actors and policies in each sector, is hindering the potentials for cross-sectoral synergies and diversification in the development of innovative/resilient value chains	• Maritime Clusters can play a pivotal role in supporting the green and sustainable transition for the blue economy in Morocco, as they already play some key role in fostering established sectors at national level (such as for the

Countries	Blue economy sectors	Challenges	Actions towards business & investment opportunities
	Blue biotech Green marine energy/Hydrogen	• Cooperation of university and industries is still relatively limited and could be fostered • Ministerial coordination and overall vision is still limited and potentially to be reinforced through the upcoming blue economy strategies and cross-ministerial committee. • Budget available to foster proper research and development remains relatively low. • Overall state of infrastructures and competencies is still lagging behind the state of the art needed to address key challenges (greening, energy resilience and climate change).	transport and ship-building), while other clusters could be created or strategic extension of the current one could be supported in key areas of innovation (for example in the areas of biotechnologies, as well as eco-ports and for the nexus of renewable energy & desalination). • Regional clusters are currently playing a pivotal role in fostering innovation at the local level, with two pilot Regional Clusters being promoted in the region of Sousse Messah and Tangier Tétois, with the aim of testing a model that could be replicated across all regions.
Tunisia	Aquaculture	• political instability • limited access to suitable financial resources • lack of qualified human resources	• establishing national production of juvenile, feed and equipment • optimising resources and improvement of quality, in terms of SMART feeding technologies for management & control • assessment of water quality (chemical and biological) against new pathologies in fish farming companies (related to export to Europe of sea bass and sea Bream • toxicological risk assessment (pollution and climate change) • optimisation of biomolecules extraction from sea biota (algae/animals) and maximisation of their use for therapeutical aims • fish or crustaceans waste valorisation

Countries	Blue economy sectors	Challenges	Actions towards business & investment opportunities
	Digitalisation	• digitalisation processes have been slowed down by the revolution in 2011 • no sufficient development in MSP and ICMZ	• boost processes related to collection of spatio-temporal data from different parties in a single digital data bank • production of a MSP simulator
	Sustainable Maritime Transport	• national and international politics	• production of the OPS (on-shore power supply) systems • foster port digitalisation • promote intelligent mobility and transport • creation of new ports high waters • boost yachting field
	Sustainable Tourism	• political instability • difficult access to funding sources • missing MSP & ICZM process • institutional fragility • littoralisation and urbanisation of tourist areas	• promotion of collaborative platforms for reservation • Develop the sector of nautical activities and nautical services • Maximise the expenses of stays of international boaters • Reach 8000 rings with the construction and development of the 13 ports and marinas planned by the marina master plan • skills enhancement in tourism sector
	Marine Renewables/ desalination	• political instability • limited access to financial resources	• production of hydrogen-based desalination plants
	Blue skills	• negative trend in terms of young students' freedom to choose Blue Skills and relevant courses • lack of advanced legislation • lack of coordination among all national contributors • lack of blue training • weak co-operation and exchange programs with the other African and European countries	• foster coordination among all national contributors • promote actions in blue training • foster co-operation and exchange programs with the other African and European countries

Conclusion: expected results of the following WPs

Considering the points highlighted in the WP2, concerning the desk and field analysis of the southern Med Blue ecosystem, as well as the assessment of interest in blue economy and in clusters initiatives In the southern shore of the Mediterranean, the next steps of the project shall be to focus on the efforts towards the suggested actions highlighted in this document, by involving selected actors in order to guarantee enhancement in the sector, foster new clusters initiatives and face the emerged challenges.

The work on WP3, namely the empowerment towards setting up and strengthening emerging maritime clusters ecosystem, will foresee a focus on the territorial with specific piloting actions is the main objective. This would see the involvement and active of all relevant local actors identified in the WP2 work. The way to address these objectives will be to organise workshops organised at the local level that will see the involvement of blue economy stakeholders. Among the stakeholders, a good balance among young operators and women active in the blue economy will be also considered. The expected output from these actions would be gathered in an *ad hoc* proposal of a strategic plan outlining the approach to involving local territories and the economic and social impact of maritime clusters, along with a brief paper with results and outcomes of the matchmaking events.

In addition, feasibility studies on embryonic local cluster will be conducted, in particular for Egypt and Morocco.

Moreover, online learning labs will be organised with the aim to offering a transferable “Toolkit” addressed to future maritime clusters actors to be prepared on the legal, structural, administrative and management aspects for a concrete creation of future maritime clusters, and educating a group of professionals who could lead the establishment and management of maritime clusters in the region.

Lastly, other online workshops will aim to develop areas of collaboration in research programmes, and foster new business agreements between cluster members on main following topics of discussion, including but not limited to: strategy & key concepts for the sustainability of business support organizations; funding & financing mechanisms; internal and external funding mobilisation; public-private integration strategy; regional Development. Actors involved in the local workshops mentioned above will be the main target audience.

As for WP4, namely strengthening regional cooperation and policy support, the actions shall be focused taking into account the main Interest In blue economy and clusters Initiatives emerged. Considering these aspects, there will be a focused engagement of relevant regional/sub-regional policy bodies in order to raise awareness on the relevance of maritime clusters and of the blue economy sector in the policymaking process and plans of investments including attractiveness of the sector.

Starting from the emerged priorities, a regional dialogue process will be implemented in order to define the regional strategic orientations of the blue economy and to identify the priorities of the sector, toward the opportunity of strategic pan-northern-African alliance and joint strategic plan of south maritime clusters. Among the main actions: defining an engagement plan based on the main institutional and policymaking bodies active at regional and sub-regional bodies; structured online meetings with relevant bodies and policy makers to promote and advocate the role of maritime clusters in effective regional policymaking; actions toward southern shore blue economy clusters; promotion and synergies development with existing cooperation tools and mechanisms.

All the listed actions under both WP3 and WP4 will be addressed by taking into account the results of Deliverable 2.1 and Deliverable 2.2, in terms of countries selected, interest in the blue economy sectors and in clusters initiatives, expected actions to face the emerged challenges, to address new business opportunities and to enhance governance capacity and existing initiatives.

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