



D4.1 STRATEGIC PLAN OF MARITIME CLUSTERS ALLIANCES AT REGIONAL LEVEL

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D4.1 Strategic Plan of Maritime Clusters Alliances at Regional Level

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Summary CallmeBLUE Project

Deliverable: D4.1 - STRATEGIC PLAN OF MARITIME CLUSTERS ALLIANCES AT REGIONAL LEVEL Final version: 27/02/2026

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, internationalization and innovation between SMEs, large companies, research centers, 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.

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 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

The implementation of the Maghrebian Maritime Cluster Strategy (MMCS) is part of WP4 ambition and challenges, dedicated to the promotion of North–South and South–South regional cooperation and refers to the concrete implementation of the CallmeBLUE ongoing actions. This project 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.

This report reflects the outputs of project actions acted at both local and regional level to raise awareness on the relevance of Maritime clusters as key actors for a sustainable blue economy policy. The report include the main activities launched to promote exchange of best practices and knowledge transfer between north and southern for a concrete creation of a sustainable maritime clusters alliance.

The report emphasizes how the clusters initiatives allow to enhance regional dialogue and more advanced services to be offered to Cluster Mediterranean ecosystem.

The discussion on MMCS will have the objectives to:

- Promote collaboration between the national maritime clusters of southern areas to develop joint initiatives and maximise complementarities in the maritime sector.
- Establish effective mechanisms for the exchange of experiences, data and know-how in order to improve performance and innovation in the Maghreb maritime clusters.
- Develop a joint work programme with concrete cooperation actions.
- Promote the economic, environmental and strategic assets of the Maghreb maritime clusters to Mediterranean and international players in order to attract partnerships and investment.

The new challenges of the MMCS will aim to:

- Facilitating cooperation between actors, and pooling efforts,
- Exchange experiences and information on the evolution of the blue economy and investment in the maritime domain.



Background and Introduction

Maghreb Maritime Cluster Strategy (MMCS)

The promotion of a cooperation model to define a *Maghrebian Maritime Cluster Strategy* (MMCS) is part of the ambition of *CALLMEBLUE* project. The project builds on the ‘*Malta Roadmap*’ for Southern Clusters Cooperation¹, promoted since 2022 in the context of the WestMED Initiative² for the sustainable development of the blue economy in the Western Mediterranean. It does so, with the aim to strengthen the existing WestMED Cluster Alliance – with WMCA members constituting the core partnership of the project – notably by:

- **Enhancing the existing regional dialogue** – north-south as well as south-south – and regional cooperation, including by offering advanced services offered to the blue economy cluster ecosystem active across the Mediterranean;
- **Expand the existing cluster ecosystem**, by supporting the activation of new maritime clusters (i.e. in Libya and Algeria as part of the project direct or indirect activities, as well as possibly in Morocco and Egypt in the longer term).
- **Offer training activities and a practical “toolkit”**, by addressing the organisational needs and capacity building actions for embryonic and emerging maritime clusters – with a particular focus on the southern Mediterranean – with insights on legal, structural, administrative and management aspects for a concrete creation of future maritime clusters.

As a result, *CALLMEBLUE* offers its role as an accelerator for the policy goals set by relevant regional initiatives, including notably the *UfM Ministerial Declaration*³ (and related Roadmap)⁴ for sustainable blue economy, the WestMED Initiative and more broadly the recently launched Pact for the Mediterranean by the EU Commission (DG MENA)⁵, the Blue Mediterranean

¹<https://westmed-initiative.ec.europa.eu/wp-content/uploads/2022/09/WestMED-Maritime-Clusters-Alliance-Malta-Roadmap-for-Southern-Clusters-18072022-published.pdf>

² <https://westmed-initiative.ec.europa.eu/westmed-initiative/>

³ <https://ufmsecretariat.org/wp-content/uploads/2021/02/Declaration-UfM-Blue-Economy-EN-1.pdf>

⁴ <https://westmed-initiative.ec.europa.eu/wp-content/uploads/2023/07/UfM-Advanced-Draft-Roadmap-Sustainable-Blue-Economy-April-2023.pdf>

⁵ https://ec.europa.eu/commission/presscorner/detail/en/ip_25_2838



Partnership by the EIB⁶ and the EU support to Innovation Ecosystems⁷ in the Mediterranean.

In this respect, one of the main intended achievements for CALLMEBLUE is to support the dialogue towards the emerging of strategic cooperation between maritime clusters in northern Africa. Through this Report, CALLMEBLUE therefore aims to create a strategic vision and transferable models of interregional cluster cooperation. This report reflects also the result of concrete actions promoted by CALLMEBLUE at both local and regional level, in order to actively engage and support the scaling up of Mediterranean maritime clusters as key actors for a sustainable blue economy ecosystem and the related policy initiatives for the region.

CALLMEBLUE activation of network and framework agreements

The project has promoted engagement with local, national and regional actors, facilitating the exchange of views, practices and knowledge and stakeholder engagement practices, agreements, particularly:

- In relevant countries, through dedicated workshops held (either in presence or on-line) in **Algeria** (October 15, 2024), **Tunisia** (October 14, 2024) and **Mauritania** (January 20–21, 2025) served as a dynamic platform for connecting public and private sector actors, highlighting the strategic role of the clusters and actors active in the blue economy sector. Those local initiatives have encouraged intersectoral cooperation and fostered joint initiatives between various stakeholders in the blue economy, both at national and regional level. All those events underscored the importance of sustainable practices, cooperation and innovation, and cluster development for further advancement in the Mediterranean cluster alliance ecosystem. In Algeria, these activities contributed directly to preparing the ground for the establishment of the Algerian Blue Innovation Cluster (ABIC), as a concrete outcome of CallmeBLUE's national engagement efforts. Indeed, agreements between clusters of the south and north -south have been signed in those occasion, to further confirm the willingness to consolidate the clusters alliance and regional cooperation actions.

⁶ <https://www.eib.org/en/press/all/2022-467-ebd-the-eib-and-the-ufm-with-the-political-support-from-the-european-commission-to-set-up-a-new-blue-mediterranean-partnership>

⁷ https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/european-innovation-ecosystems_en



- Across the region, notably the participation to high level events underlined opportunities for knowledge exchange, visibility, and collaboration with key actors in the blue Med ecosystem. Among events, it is important to mention the WestMED Hackathon in Portugal (October 3 2024), the **Mediterranean Day promoted by the UfM during UNOC negotiations in Nice** (June 10, 2025), *18th UfM Regional Platform on Sustainable Blue Economy* in Brussels on October 15-16, 2025; as well as during the ECOMONDO international fair held in Rimini (November 7, 2024). During those events CallmeBLUE actively engaged institutional leaders and stakeholders from experts, and innovators to accelerate cooperation on a sustainable blue economy in the Mediterranean ecosystem. Those occasion allowed the alignment of the project actions around priority themes such as maritime clusters relevance of blue skills, energy transition, while identifying concrete opportunities for new cross-border initiatives, engagements with the African Union and the African Maghreb Union and targeting clusters role towards a sustainable economy and the green transition.
- Ad-hoc actions by CALLMEBLUE project partners during the abovementioned events and as part of other relevant regional and international conferences joints initiatives have supported the establishment of effective mechanisms for the exchange of experiences, data and know-how in order to improve performance and innovation also in the scope of north-south cooperation and south-south cooperation.

The support for the MMCS is part of the ambition of the project and the strategy will be the result of clusters maritime cooperation between representatives of the national actors of Tunisia, Mauritania, Libya and Algeria. The objectives promoted also through formal agreements signed among those countries, confirm the ambition to:

- Promote collaboration between the national maritime clusters of Tunisia, Mauritania, Libya and Algeria to develop joint initiatives and maximise complementarities in the maritime sector.
- Establish effective mechanisms for the exchange of experiences, data and know-how in order to improve performance and innovation in the Maghreb maritime clusters.
- Develop a joint work programme with concrete cooperation actions.

- Promote the economic, environmental and strategic assets of the Maghreb maritime clusters to Mediterranean in the future and international players in order to attract partnerships and investment.
- Explore the development of joint governance and coordination mechanisms, to be collectively defined and validated, ensuring balanced representation and sustainability of collaboration between national maritime clusters.

In addition to these objectives, there are the new challenges of the MMCS, which aim to:

- Facilitating cooperation between actors, and pooling efforts,
- Exchange experiences and information on the evolution of the blue economy and investment in the maritime domain,
- Developing maritime governance skills and designing a collectively agreed cooperation framework,
- Developing the cross-fertilisation and innovative initiatives in the area,
- Developing and facilitating links between the two northern and southern shores of the Mediterranean,
- Engaging stakeholders around MMCS activities and projects

In this regard, national maritime clusters and cluster initiatives, including the Tunisian Maritime Cluster, the Mauritanian Maritime Cluster, the Libyan Maritime Cluster and the very recent Algerian Blue Innovation Cluster (ABIC), have contributed in different phase and stage of the project to supporting activities promoted under CALLMEBLUE, by facilitating stakeholder engagement, communication, event organization and exchange initiatives within their respective national contexts.

Methodology

The exploratory development of the proposed alliance required the adoption of a strategic and forward-looking approach. It combines contextual exploration of context relating to regional clusters with the diagnosis of the maritime profiles of partner countries. The approach is participatory and heavily invested in surveys and consultation workshops.

The relevance of this approach facilitated the formulation of a coherent strategic framework and provided a desirable and feasible roadmap and action plan in the future:

- **An ongoing process of engagement at the country and regional level:** Through workshops held with maritime cluster stakeholders and ecosystem actors in Algeria, Tunisia and Mauritania and presentation of the project and the initiative under discussion in the context of international events such as UNOC, WestMED Initiative and including pivotal regional bodies such as the UfM, African Union and Maghreb Union.
- **A two-level diagnosis:** One part focuses on diagnosing regional contexts by cluster (Algeria, Libya, Morocco, Mauritania and Tunisia). It aims to identify the local potentials, opportunities, strengths and constraints of each cluster based on the maritime profiles of the countries. This diagnosis is supplemented by data from a survey conducted with key stakeholders of the related countries. The second part is a cross-check between several data sets drawn, on the one hand, from strategic documents, (CALLMEBLUE project vision (WP2-3), UFM, WestMed initiative, African union strategy, EU, World Bank, UNCTAD, etc.), and, on the other hand, from the survey aggregated data used to establish the strategic framework.
- **The strategic framework:** is a framework for synthesis and strategic foresight based on a summary of the assessment results, it presents identified trends, preliminary challenges of the proposed MMCS, the common vision, the strategic lines of action and the priorities.
- **Additional targeted workshops:** key moments for consultation and validation of the previous stages of the strategy. It aims to present the data, consolidate what has been learned and explore new courses of action based on the validation of the vision. Feedback and stakeholder participation inform the formulation of the strategic framework, particularly the main challenges and strategic priorities.
- **Promotion of the roadmap and action plan:** as a result of previous steps, the roadmap contains possible action to be taken for future implementation of projects and actions, dashboard of evaluation indicators.

Missions and principles of the MMCS

The future establishment of MMCS is motivated by principles that have encouraged potential partners to gather around the alliance. The MMCS endorers will be engaged to:

- **Consolidate existing initiatives:** Consolidating existing or ongoing initiatives is an asset for developing Mediterranean experience in setting up and governing clusters. Capitalizing on experience provides a clearer vision of best practices to invest in improving the performance of clusters and alliances.
- **Support emerging initiatives:** Emerging initiatives are a key indicator for understanding the extent to which a country's economic, institutional, and political environment encourages the emergence and creation of clusters. They also reflect innovation efforts in terms of collaborative and strategic action for the development of blue economies in relation to the development of countries and their wealth.
- **Support committed projects:** Support for projects requires broader sharing of regional cluster action plans in order to synergize their interventions, rationalize their spending, and enhance their visibility.
- **Transmit knowledge and Know-How:** The transfer of knowledge and expertise is one of the cluster's and regional actors key missions. It is a basic principle that lies at the heart of the issue of sustainability and the long-term viability of blue action, both at the cross-border and Mediterranean levels.
- **Reduce disparities:** Sharing experiences and strengthening exchanges between the two shores helps to mitigate the various forms of vulnerability affecting both territories and populations. This principle commits partners to pooling their efforts in order to guard against the risks associated with the decline of blue economy sectors, particularly blue jobs and activities.
- **Value particularities:** Alignment with international standards and SDGs should not obscure the uniqueness of local contexts and their specific characteristics in terms of blue potential and skills. Taking geopolitical issues and local specificities into account is a major challenge for collaborative work. It is an asset for creating synergies between future cluster projects and strategic partnership frameworks.

- **Bridging and Networking with European and International:** Bridging is a first step towards networking. Networking enables the alliance to engage in a dynamic partnership strategy based on openness to European and international opportunities. Networking is also an effective way to promote the alliance's causes, defend its principles, and bring stakeholders together to achieve shared goals.
- **Capitalize on experiences, evaluate initiatives, and disseminate:** Capitalization is one of the cluster's key activities. It supports projects and promotes initiatives. It is an essential tool for monitoring, conducting evaluations, documenting processes, sharing experiences, and disseminating information.

Background: profile of Maghreb maritime clusters strategy

Facts and trends

Faced with major fluctuations in the international market, geopolitical crises, and the effects of economic and ecological transitions, blue economy indicators across MMCS countries show heterogeneous and short-term fluctuations influenced by global economic volatility, geopolitical dynamics, and structural transition processes. This is deduced from indicators published by UNCTAD, which show that:

- Gross domestic product (GDP) is declining in four out of five countries, with the exception of Tunisia, where the rate is changing slightly from 0.42% to 1.1% between 2023 and 2024.
- Despite the general economic downturn, the merchandise exports growth rate has increased slightly in Algeria, Libya, and Mauritania, with a marked increase in Morocco and an alarming decline in Tunisia. This situation can be explained by the political context, but also and above all in Tunisia by the deterioration of port infrastructure and logistics and, conversely, the rapid increase in exports in Morocco following the development of the Port of Tangier Med.
- Variations in transport services export growth rates, including fluctuations observed in Algeria (from +28.4% to -11.5%) and Tunisia (from +11.8% to -0.4%), should be interpreted in light of global shipping



market volatility, freight rate normalization following post-pandemic peaks, and transitional adjustments in maritime logistics systems.

- Variations in fleet capacity indicators reflect differing national fleet strategies, modernization cycles, and investment priorities rather than uniform structural decline. National strategies across MMCS countries reflect differentiated positioning within global maritime trade networks, including port infrastructure development, fleet optimization, and adaptation to environmental standards.

Table 1: MMCS maritime profile
(UNCTAD Key indicators 2023-2024)^a

Indicator		Algeria	Libya	Mauritania	Morocco	Tunisia
GDP Growth	2023	4.05 %	10.6 %	6.50%	3.4 %	0.42 %
	2024	3.8 %	-4.60 %	6.6%	2.7 %	1.1 %
Coast/area ratio		0.654	1.2	1.2	4.5	12.4
Merchandise exports growth rate in	2023	-15.5 %	-15.6 %	+7.6%	+0.4%	+7.7 %
	2024	-11.5 %	-12.1 %	+2.6 %	+8.6 %	-0.2 %
Transport services exports growth rate in	2023	+28.4 %	-	+3.9%	+11.5 %	+11.8 %
	2024	-11.5 %	-	-	+10.1 %	-0.4 %
Fleet growth rate in	2023	0 %	+3.3 %	0 %	+6.0 %	0 %
	2024	0 %	-41.2 %	0 %	-10.5 %	0 %
GDP	Millions current US\$	265 597	40 588	10 788	154 617	52 934
Transport services trade (e)	Millions current US\$	13 404	7 858	1 088	40 265	15 063
Merchandise trade	Millions current US\$	94.780	47.565	8 960	120 925	45 970
Ship building		-	-	-	-	-
Ship recycling		-	-	-	-	-
Fleet - National flag	Thousands DWT	652	988	4	148	279
Fleet - National flag	Ships	118	91	11	94	73
Fleet - Ownership	Thousands DWT	1.154	2140	0	75	262
Container port throughput (TEU)		-	465.168	-	9 964 410	445 755

Number of seafarers	1.434	896	89	8 081	1 069
Number of port calls	-	-	-	-	-
Main product group (export structure)	Fuels (93%)	Fuels (94%)	Ores and metals (38%)	Manufactured goods (72%)	Manufactured goods (78%)
Top 5 partners in 2024	Italy, France, Spain, Türkiye, United States	Italy, Germany, Spain, United Kingdom, UAE	China, Canada, Switzerland, Spain, UAE	Spain, France, Italy, United Kingdom, Germany	France, Italy, Germany, Spain, Libya
Top 5 ports in 2024	Algers, Skikda, Annaba, Bejaia, Oran	Misurata, Benghazi, Tripoli (LY), Khoms	Nouakchott, Nouadhibou	Tanger Med, Casablanca, Agadir, Nador	Rades, Sfax, Sousse, Bizerte, Gabes
Bilateral connectivity index (Top 5 partners: Q1 2006)	Italy, Spain, Malta, Belgium, Greece	Belgium, Germany, Malta, Italy, UAE	Spain, Brazil, Senegal, UAE, Saudi Arabia	Spain, Belgium, Netherland (Kingdom of), Italy, Germany	Belgium, Italy, Spain, Palestine/Israel, Malta

^a: Sources: <https://unctadstat.unctad.org/CountryProfile/en-GB/index.html> (consultant cross-checking, 2025)

Key features of the MMCS: structure, sectors of activity and roles

To provide an overview of potential MMC partners profile, particularly those who contributed to the diagnostic survey, a quick assessment can be made with a partner environment consisting of:

- a private body that represents 44%,
- A mainly national level of competence (67%),
- a diversified financing sources: mainly revenues from provision of services (33%) and project participation (28%). The public financing support to associations is around 17%.

D4.1 Strategic Plan of Maritime Clusters Alliances at Regional Level

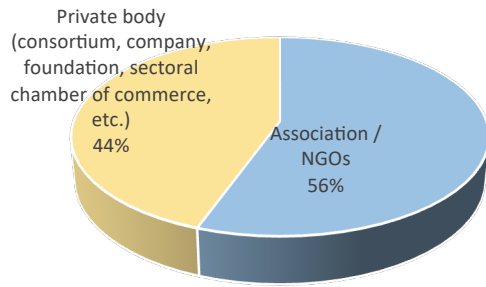


Figure 1: MMC Organization Profile

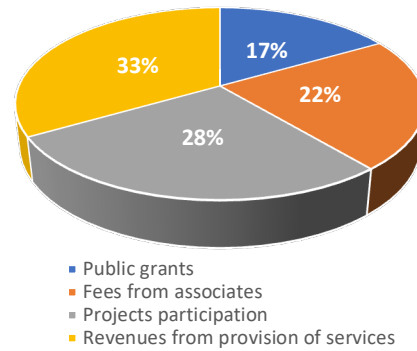


Figure 2: Source of financing

- 50% of bodies are active in the sectors of fishing, aquaculture, port activities, maritime transport and services and blue entrepreneurship.
- The sectors of fishing and aquaculture, port activities and maritime transport are best represented
- Organisations operating in sectors related to environmental protection represent 21% and bring together: water management and water desalination, blue biotechnology and green marine energy/hydrogen

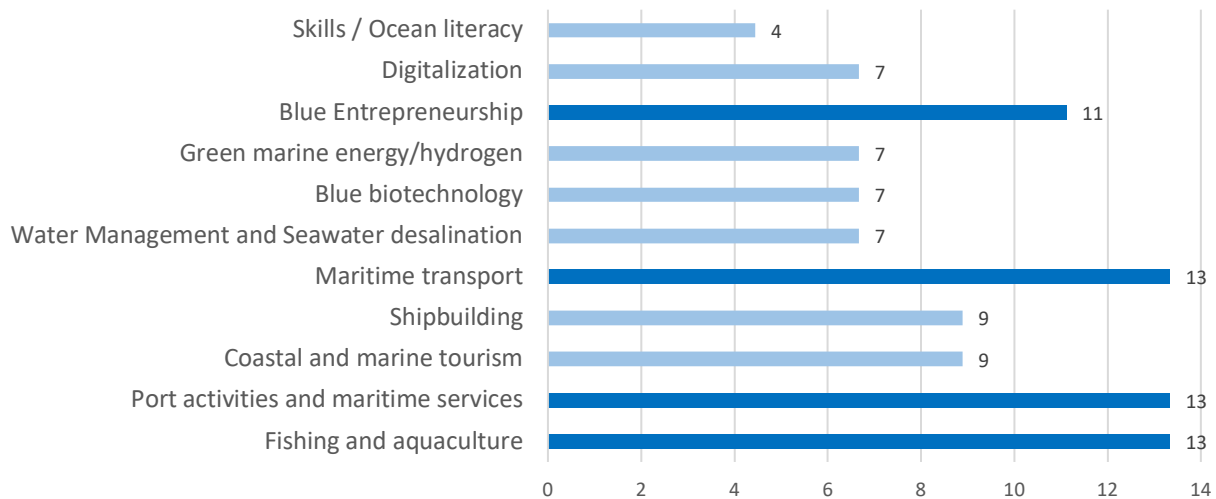


Figure 3: Sectors of activity %

Their main roles consist of:

- Supporting skills and capacity building
- Developing technological and digital solution for the Blue Economy (BE)
- Mainstreaming local communities, youth and women in maritime services
- Intersectoral coordination and technical dialogue

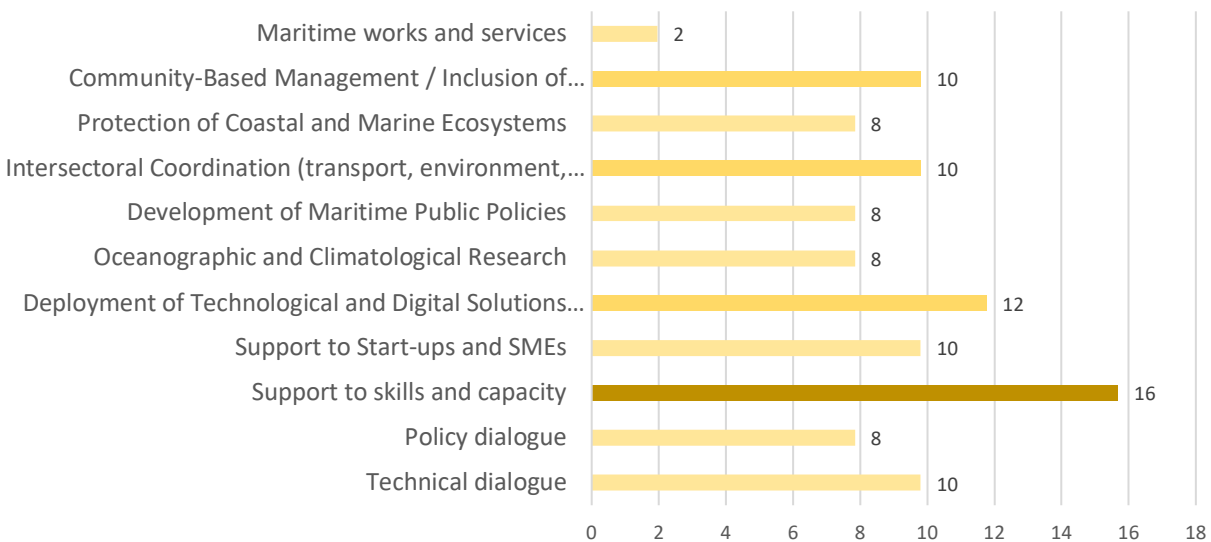


Figure 4: Role in the maritime sector (or in relation to the blue economy)

Challenges for the MMC Alliance

The challenges of implementing in the future the MMC mainly relate to three areas: governance and cross-cutting action; political and strategic challenges linked to planning methods; and sectoral challenges.



Cross-cutting challenges (governance of BE-related sectors)

- Fragmented and poorly harmonised regulatory frameworks at the Maghreb level, making regional cooperation and the pooling of good practices difficult.
- Lack of coordination between sectors and States, particularly on shared maritime areas, limiting the implementation of ICZM (Integrated Coastal Zone Management) or Marine Spatial Planning (MSP) policies.
- Lack of reliable data and integrated information systems, hampering knowledge-based decision-making.
- Low access to appropriate financing, particularly for innovative projects related to the green transition or blue entrepreneurship.
- Lack of specialised human capacity in emerging sectors such as marine hydrogen, blue biotechnology or ICT applied to the maritime economy.

Policy Challenges in Public Policy and Planning

- Insufficient MSP and ICZM strategy
- Difficulty in aligning the visions of the different authorities (environment, fisheries, urban planning, maritime transport, etc.).
- Lack of appropriate planning tools validated by all stakeholders.
- Increasing pressure on coastal areas due to urbanisation, mass tourism and climate change.
- Lack of coherence between economic planning documents and urban planning and land use documents

Sectoral challenges

- ✓ **Fishing and aquaculture**
 - Overexploitation of fishery resources and weak enforcement of existing regulations.

- Weakness of marine aquaculture in the face of health, regulatory and access to maritime land challenges.
- Persistent informality in value chains.
- ✓ **Port activities**
 - Obsolescence of infrastructure in some secondary ports.
 - Lack of green logistics and interconnection with other modes of transport.
 - Weak integration into high value-added value chains (e.g. processing, distribution).
- ✓ **Coastal and marine tourism**
 - Seasonal, centralised and not very diversified activity (dominance of the seaside resort).
 - Pressure on coastal ecosystems (erosion, pollution, artificialisation).
 - Lack of investment in ecotourism and marine science or cultural tourism.
- ✓ **Shipbuilding**
 - High dependence on imports for parts and materials.
 - Weak technical modernisation and little support for local innovation.
 - Scarcity of skilled labour.
- ✓ **Shipping**
 - Weak development of inter-Maghreb links.
 - Dominance of international players on strategic routes.
 - Need to adapt to new environmental standards (alternative fuels, emissions).
- ✓ **Seawater desalination**
 - High costs and high energy intensity.
 - Limited social acceptability in some regions.

- Environmental impacts on marine environments that are still poorly controlled.
- ✓ **Blue biotechnology**
 - Lack of dedicated R&D ecosystems.
 - Weak structuring of the link between universities, research centres and the private sector.
 - Underdeveloped or unregulated markets (marine cosmetics, blue pharmacopoeia, etc.).
- ✓ **Green Marine Energy / Hydrogen**
 - Absent or embryonic regulatory frameworks.
 - Need for pilot infrastructures to test technologies.
 - Low bankability of projects due to a lack of guarantees and feedback.
- ✓ **Blue Entrepreneurship**
 - Weak entrepreneurial culture in rural coastal areas.
 - Limited access to incubators, seed funding, and sector-specific support maritime.
 - Lack of sectoral mentoring mechanisms at the regional level.
- ✓ **ICT and digitalisation**
 - Delay in the integration of digital technology into maritime management (fishing, coastal surveillance, port logistics).
 - Lack of interoperability platforms between the data collected (fisheries monitoring, water quality, tourist flows, etc.).
 - Lack of digital skills in traditional maritime sectors.

Obstacles to Cross-Border Cooperation in the Blue Economy

In addition to structural and logistical obstacles related to specific local and regional contexts, barriers to MMC implementation emerged from the survey with partners, including:

- **Political obstacle:** lack of shared vision among leaders



- **Strategic obstacle:** Low priority given to maritime cooperation and lack of financial mechanisms to support cross-border initiatives
- **Financial obstacle:** Limited access to regional and international funding

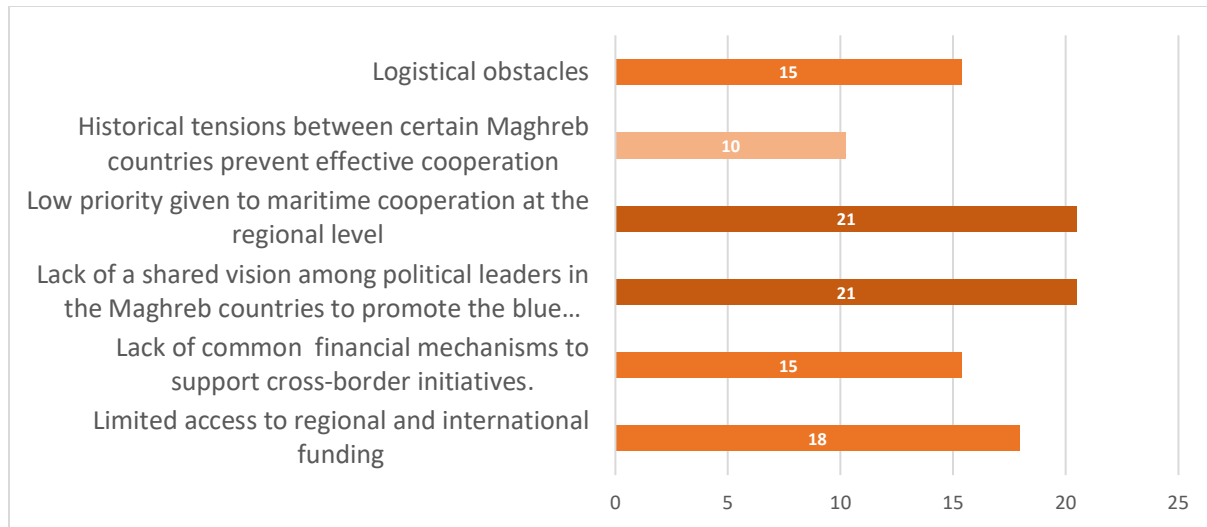


Figure 5: Main obstacles that the alliance could face in fostering cross-border cooperation between maritime clusters in the Maghreb countries (%)

Strategic framework: vision, action lines and priorities

Long-term vision for the MMCS

Making the Maghreb a pioneering region for the sustainable, innovative and inclusive blue economy in the Mediterranean, through strengthened regional cooperation between clusters. The MMC will be a positioning joint force of a strategic hub for integrated, resilient and attractive maritime development for international investors. Developing national maritime clusters into a Maghreb cluster will be considered with the view to increase the regional impact and international visibility of the blue economy.

Action Lines: Strategic axes and objectives

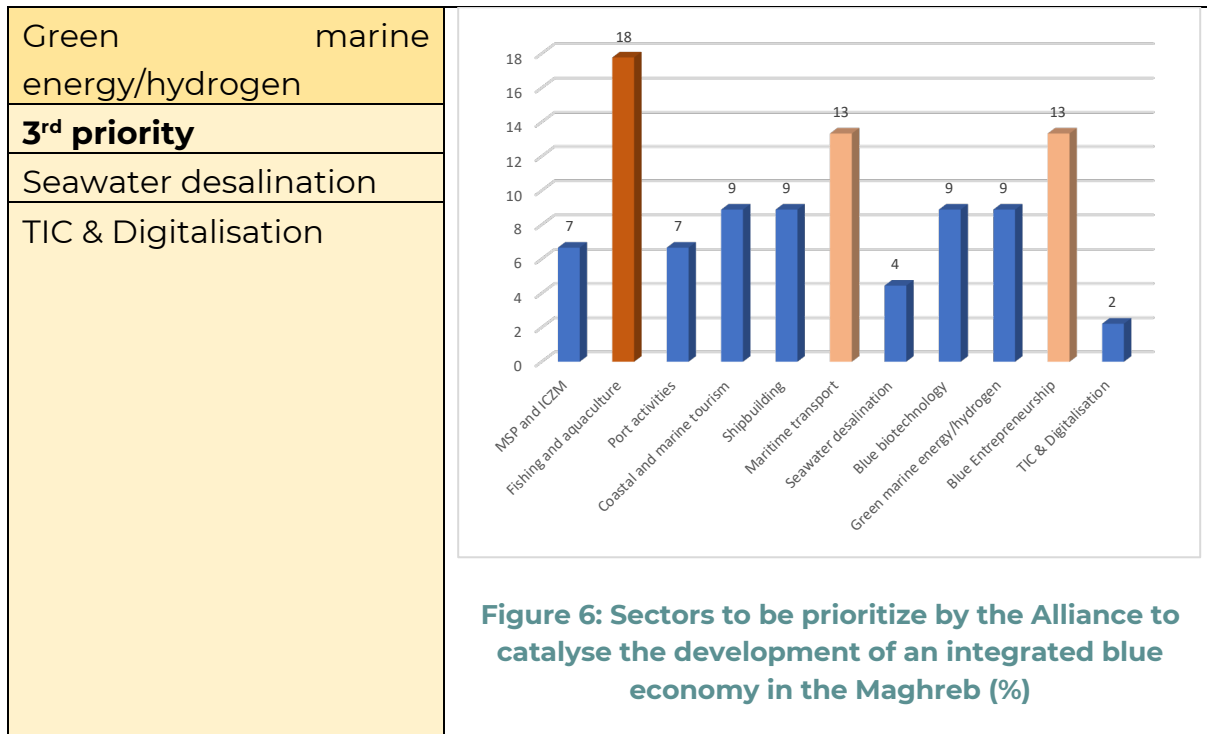
Three strategic priorities have been identified for implementing the vision:

- Seize networking and exchange opportunities,
- Promotion of value chains and investment mechanisms,
- Consolidating cooperation and political commitment to blue economies and MC.

Axe 1: Seize networking and exchange opportunities
Obj 1.1: Strengthening blue capacities and skills
Obj 1.2: Implementing regional platforms for sharing information and maritime monitoring
Obj 1.3: Promotion of inter-country projects with high economic and environmental impact
Axe 2: Promotion of value chains and investment mechanisms
Obj 2.1: Developing regional value chains in the maritime sectors
Obj 2.2: Valorizing the Maghreb coastal natural and cultural capital
Obj 2.3: Creating joint financing and investment mechanisms
Axe 3: Consolidating cooperation and political commitment to blue economies and MC
Obj 3.1: Strengthening Coordination of public policies on the blue economy
Obj 3.2: Boosting regional diplomacy to influence Euro-Mediterranean policies

A number of sectors have emerged as shared priorities across the southern area.

1st priority	
Fishing and aquaculture	
Maritime transport	
Blue Entrepreneurship	
2nd Priority	
Coastal and marine tourism	
Shipbuilding	
Blue biotechnology	



Preliminary guidelines for a concrete Roadmap for Implementation (RfI)

A number of priority areas can be considered to maximise a shared benefit from the MCCS:

✓ **Cooperation between countries**

- Encourage the establishment of joint projects between Maghreb countries, by promoting the exchange of resources and expertise
- Facilitate access to international financing for joint blue economy initiatives
- Create cross-border partnerships to share best practices and strengthen cooperation between maritime clusters
- Promote innovation and collaborative research to maximize the impact of maritime clusters

✓ **Innovation and inclusive approach**

- Promote technological exchanges between Maghreb countries to improve the innovation capacities of maritime clusters

- Facilitate research and development programs to encourage innovation within maritime clusters
 - Create partnerships with innovation and/or technology clusters
- ✓ **Visibility and competitiveness**
- Develop online platforms to promote exchanges between stakeholders in the Maghreb maritime sector
 - Organise the participation of Maghreb maritime clusters in global trade fairs and events in order to promote regional initiatives
 - Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one
 - Implement campaigns to promote Maghreb maritime products and services on an international scale

Alignment: axes and action guidelines

A number of concrete actions can be prioritized accordingly across relevant axes for cooperation.

Axes 1: Seize networking and exchange opportunities	Action lines (alignment)
Obj 1.1: Strengthening blue capacities and skills	<ul style="list-style-type: none"> • Organise the participation of Maghreb maritime clusters in global trade fairs and events in order to promote regional initiatives for investments
Obj 1.2: Implementing regional platforms for sharing information and maritime monitoring	<ul style="list-style-type: none"> • Develop online platforms to promote exchanges between stakeholders in the Maghreb maritime sectors and Med ecosystem
Obj 1.3: Promotion of inter-country projects with high economic and environmental impact	<ul style="list-style-type: none"> • Create cross-border partnerships to share best practices and strengthen cooperation between maritime clusters

Axes 2: Promotion of value chains and investment mechanisms	Action lines (alignment)
Obj 2.1: Developing regional value chains in the maritime sectors	<ul style="list-style-type: none"> • Promote innovation and collaborative research to maximize the impact of maritime clusters • Facilitate research and development programs to encourage innovation within maritime clusters
Obj 2.2: Valorizing the Maghreb coastal natural and cultural capital	<ul style="list-style-type: none"> • Promote technological exchanges between Maghreb countries to improve the innovation capacities of maritime clusters • Implement campaigns to promote Maghreb maritime products and services on an international scale
Obj 2.3: Creating joint financing and investment mechanisms	<ul style="list-style-type: none"> • Facilitate access to international financing for joint blue economy initiatives
Axes 3: Consolidating cooperation and political commitment to blue economies and MC	Action lines (alignment)
Obj 3.1: Strengthening Coordination of public policies on the blue economy	<ul style="list-style-type: none"> • Encourage the establishment of joint projects between Maghreb countries, by promoting the exchange of resources and expertise
Obj 3.2: Boosting regional diplomacy to influence Euro-Mediterranean policies	<ul style="list-style-type: none"> • Create partnerships with innovation and/or technology clusters • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one

Proposed elements for the governance

Functioning and interactive governance

The Maghreb Maritime Clusters Strategy (MMCS) represents a **consultative framework for cooperation and coordination** that will aim to bringing together national maritime clusters across the Maghreb region – and **involving other Mediterranean clusters (e.g. WMMCA) as ‘observers’**. Each cluster therefore could retain its institutional, administrative, and strategic autonomy, while contributing to the common objectives of the MMCS.

Within this framework, several national maritime clusters and cluster initiatives — including the Tunisian Maritime Cluster, the Mauritanian Maritime Cluster, the Libyan Maritime Cluster, and the new born Algerian Blue Innovation Cluster (ABIC) — have expressed their willingness to contribute to the future cooperative model. Any coordination or facilitation arrangements should be collectively discussed and agreed upon among member clusters, in line with principles of balanced representation and shared ownership.

A possible idea of Governance to define a future Regional cooperation mechanism could consist to define for instance an operational model with a Regional secretariat responsible for ensuring coordination, monitoring joint actions, facilitating communication among national clusters, and supporting the governance bodies of the Alliance, subject to collective agreement by participating clusters, in full respect of the principles of rotation, consultation, sovereign equality, and balanced participation of all member clusters.

The operational functioning of this Alliance is a long process which will be defined also through a dedicated *Roadmap* that will be discussed with Regional actors under Callmeblue project as a possible follow up for a sustainable cooperation model. . This roadmap will aim to define a cooperation mechanism for the implementation of joint actions and the monitoring of commitments made by member clusters.

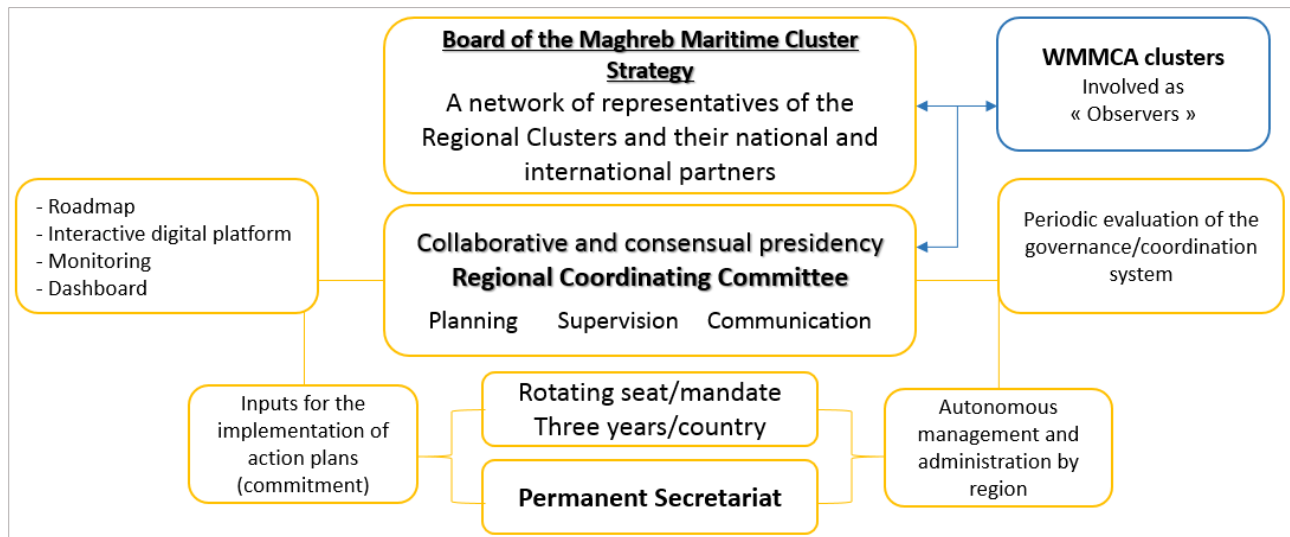
It should also be noted that the Mauritanian Maritime Cluster and the Libyan Maritime Cluster have already been established and are fully operational. The Algerian Blue Innovation Cluster (ABIC) announced during CMB project, is currently in its structuring and consolidation phase , Morocco is currently in the process of being established, and their gradual integration will further



strengthen the regional momentum of the Maghreb Alliance of Maritime Clusters.

A future Alliance will also constitute a key lever for enhancing the **visibility and recognition** of Maghreb maritime clusters at the Euro-Mediterranean and international levels. The possible follow up could consist by structuring itself around regional coordination based on national clusters, it strengthens their collective positioning and improves their visibility vis-à-vis Northern clusters, European networks, and international institutional and economic partners.

The MCCS could promote a coordinated, credible, and structured representation of Maghreb maritime ecosystems, facilitating their integration into cooperation dynamics, partnerships, and joint projects with Northern clusters, while highlighting the specificities, competencies, and complementarities of each national cluster. An **overview of the possible governance structure** to be implemented possibly in the future and to be agreed and validated under a broader framework such as Westmed or Ufm policies, is illustrated in the figure below, encompassing of a board of members, a coordinating committee and rotating presidencies – including possible co-presidencies.



Communication strategy

The implementation of a communication strategy will have a direct impact on the functioning of the MMCS and its visibility. It will provide an appropriate framework for the governance of the cluster and strengthen the commitment of partners to achieving the alliance's vision. MMC partners see this strategy as an essential tool for:

- Engaging women, youth and local communities around maritime issues
- Raise awareness among decision-makers and strategic partners of the importance of the blue economy in the region
- Create a common visual and narrative identity for the alliance on a Mediterranean and international scale
- Promote achievements and flagship projects resulting from cooperation between clusters

According to our partners, content to be priorities by the joint action's communication strategy is ordered as follows:

- Testimonies from local stakeholders and beneficiaries,
- Case studies on successful collaborative projects,
- Data and mapping on the maritime resources of the Maghreb,
- Awareness videos on the challenges of the blue economy.

To implement comm-strategy, appropriate tools should be provided including:

- Case studies on successful collaborative projects
- Data and mapping on the maritime resources of the Maghreb
- Regional and international events (trade fairs, forums, conferences)
- Regional digital platforms (website, social networks, newsletter)
- Traditional media (radio, TV, press)
- Partner networks (NGOs, academic institutions, regional organizations)
- Targeted communication campaigns for donors and investors

According to the survey results, various communication channels would be most effective in increasing the visibility of the alliance. It could be ordered as follows:

- Regional and international events (trade fairs, forums, conferences)
- Regional digital platforms (website, social networks, newsletter)



- Partner networks (NGOs, academic institutions, regional organizations)
- Traditional media (radio, TV, press)
- Targeted communication campaigns for donors and investors

Role and positioning of the communication strategy

The implementation of a structured communication strategy will constitute a central pillar for the operationalization and external positioning of the Maghreb Maritime Cluster (MMC). Beyond visibility objectives, communication is conceived as a cross-cutting enabling function that supports coordination between member clusters, strengthens institutional legitimacy, and accompanies the progressive consolidation of the Alliance.

In line with the model of the MMC — which is based on coordination— the communication strategy is designed as a shared framework, allowing each national cluster to retain its autonomy while contributing to a coherent collective narrative at regional, Mediterranean, and international levels.

- The communication strategy would contribute directly to:
- reinforcing trust and alignment among member clusters,
- supporting decision-making and coordination mechanisms,
- facilitating dialogue with institutional, economic, and technical partners, and enhancing the visibility and credibility of the MMC as a regional actor of the blue economy.

Strategic anchoring within the MMC framework

The communication strategy should be fully aligned with:

- the long-term vision of positioning the Maghreb as a pioneering region for a sustainable, innovative, and inclusive blue economy,
- the strategic axes defined under the MMC framework (networking and exchange, promotion of value chains and investment, consolidation of cooperation),
- the principles established for the Alliance, notably coordination, consultation, complementarity, and respect for national specificities.

Communication actions should therefore be conceived as support mechanisms for strategic objectives, ensuring coherence between what the Alliance does, how it operates, and how it is perceived by its stakeholders.



Communication as a driver of North–South and South–South dynamics

A distinctive feature of the MMC communication strategy lies in its explicit contribution to North–South and South–South cooperation dynamics.

Given the heterogeneous levels of maturity among Maghreb maritime clusters, communication would play a key role in:

- valorizing complementarities between clusters,
- ensuring balanced representation and visibility,
- and avoiding asymmetrical or unidirectional narratives.

The strategy promotes a co-development approach, highlighting joint initiatives, shared learning processes, and reciprocal contributions between clusters of the Southern Mediterranean and their Northern counterparts. Concrete cooperation mechanisms — such as partnership agreements, joint events, or collaborative projects — are used as narrative anchors to illustrate the operational reality of the Alliance.

Strategic communication axes of the MMC

Communication would play a key role in ensuring alignment between member clusters while respecting their institutional autonomy and national specificities.

Under this axis, communication would support the circulation of information between the engaged actors, would contribute to the harmonization of messages, and would facilitate collective decision-making processes.

By promoting shared narratives, common references, and coordinated dissemination, this axis would reduce fragmentation risks and strengthens internal cohesion within the Alliance.

Ultimately, this axis would contribute to the emergence of a clear, consistent, objectives, reinforcing the credibility of the MMC as a structured and reliable interlocutor for institutional, economic, and international partners.

Communication objectives

The primary objectives of the MMC communication strategy would focus on:

- Engaging women, youth, and local communities around maritime and blue economy issues, by promoting inclusive narratives and highlighting opportunities for participation and capacity building;



- Raise awareness among strategic partners of the blue economy in the Maghreb region;
- Enabling consistent positioning at Mediterranean and international levels while respecting national specificities;
- Promote achievements and flagship projects resulting from cooperation between member clusters, in order to demonstrate the added value of the Alliance and strengthen its credibility vis-à-vis partners and investors.

These objectives would reflect a balanced approach between internal cohesion and external attractiveness.

Target audiences

In order to effectively achieve these objectives, the communication strategy should distinguish between several categories of target audiences, each requiring adapted messages, formats, and channels.

The main target audiences of the MMC communication strategy should include:

- Internal stakeholders
- National maritime clusters and their members, including public institutions, private actors, and associated organizations involved in the MMC.
- National and regional public authorities, ministries, agencies, and regional cooperation frameworks involved in maritime affairs, blue economy, and regional development.
- Economic and financial actors
- Private sector stakeholders, investors, donors, development banks, and funding institutions interested in blue economy value chains and regional cooperation initiatives.
- Technical and knowledge actors
- Universities, research centers, training institutions, innovation hubs, and expert networks active in maritime and blue economy sectors.
- Civil society and local communities

- Coastal communities, women, youth, professional organizations, and civil society actors engaged in maritime activities or affected by blue economy policies.
- International and Northern Mediterranean partners
- Northern maritime clusters, European networks, international organizations, and cooperation programs seeking structured interlocutors in the Southern Mediterranean.

Communication tools and channels

The selection of communication tools and channels would be directly linked by the preferences and priorities expressed by MMC partners during the survey process. The communication strategy therefore favors channels that support visibility, interaction, and credibility, while remaining adaptable to the role and capacities of member clusters.

Priority communication channels

According to current survey results, communication channels are prioritized as follows:

1. Regional and international events
(trade fairs, forums, conferences, institutional meetings)
2. Regional digital platforms
(website, social networks, newsletter)
3. Partner networks
(NGOs, academic institutions, regional and international organizations)
4. Traditional media
(radio, television, press)
5. Targeted communication campaigns
(donors, investors, strategic partners)

This hierarchy reflects a preference for direct interaction and relational channels, particularly those enabling face-to-face engagement, networking, and institutional positioning.

Next steps for the action plan of the MMCS

This document is considered the preliminary background for a MMCS Roadmap for Implementation (MCCS-RfI) mainly discussed in the last Regional event organised by **CALLMEBLUE in Rome on the 24 February 2026** – event organised in hybrid mode involving relevant partners and regional actors such as Westmed and Ufm representatives, regional association, national representatives. During the event a concrete set of next steps for the implementation of the MMCS has been discussed and harmonized in order to define a preliminary action plan for the future regional cooperation model. The scope of this regional meeting was to have the representativeness of North-South Clusters of the Mediterranean Sea basin to further reflect on a shared vision for the regional Alliance of Maritime Clusters, building on the existing WestMED Cluster Alliance of which all project partners are members.

Concretely, it will do so by translating its strategic priorities, model of cooperation and mechanisms for communication, into tangible result over the project end in a long-term perspective. This approach will be strongly aligned in the frame of Westmed Alliance priorities and UfM regional cooperation.

The main scope of this meeting will be therefore to transform project's outcomes into a sustainable Roadmap for cluster collaboration and regional blue growth.

This approach has animated discussion also on how to create a concrete model where the Cluster's functions will act as boosters for innovation, identifying industry needs and engage with key stakeholders for joint actions and co-innovation projects. It also helped clarifying the relation between the future MMCS and the broader WestMED Cluster Alliance.

This cooperation model will concretely prepare the ground to establish an operational roadmap for future collaboration, outlining joint activities to foster north-south and south-south cooperation in a long-term perspective. The result of the discussion of this event has been summarized in the Annex attached to this document.

Conclusions

This document provides a reference framework for a future alliance bringing together actors from the Maghreb ecosystem. The preliminary assessment of regional contexts has highlighted the importance of sectoral challenges relating to fishing and aquaculture, port activities, coastal tourism, shipbuilding, blue biotechnology, and green marine energy. Based on a presentation of the profiles of the clusters and on an analysis of their regional contexts, the study of strategic and financial trends and constraints make possible to identify the main challenges around which the alliance would define a vision focused on sustainability, innovation and cooperation mechanisms.

The strategic framework is the key element of this document. It translates the vision into strategic priorities focused on expanding networking and exchange opportunities, promoting value chains and investment mechanisms in the blue economy consolidating cooperation models for a future Maghrebian alliance. Each priority is first broken down into objectives and then would be aligned with actions that can contribute to the realisation of the vision.

The operational strategy of the MMC has been presented according to an interactive and collaborative operating model. This form of cooperation has been envisaged with a supported by a communication strategy that would have a direct impact on stakeholder engagement, the visibility of the coalition, and the dissemination and visibility of its activities.



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https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/european-innovation-ecosystems_en



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Abbreviations

Term	Definition
BE	Blue Economy
CMT	Tunisian Maritime Cluster
DWT	Deadweight Tonnage
EIB	European Investment Bank
EU	European Union
GDP	Gross domestic product
ICZM	Integrated Coastal Zone Management
MMC	Maghreb Maritime Cluster
MSP	Marine Spatial Planning
SDGs	Sustainable Development Goals
TEU	Twenty-foot Equivalent Unit
UfM	Union for the Mediterranean
UNCTAD	United Nations conference on trade and development
UNOC	United Nations Ocean Conference
WP	Work package

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Annexes

Annex 1: Profiles of Maghreb maritime clusters

Annex 2: Survey template

Annex 3: Action Plan for Maritime Clusters Cooperation – AP4MCC (English & French versions)



Annex 1

Results on profiles of Maghreb maritime clusters

These annexes will illustrate the main aspects emerged from the survey results made to specific actors of the related southern countries and will reflect only the perspectives and opinions collected during this process.

Algeria

Main potential and assets for joining the alliance

- Increased awareness among public and private stakeholders regarding the importance of establishing a MC and developing digital platforms
- Promising sectors: fishing and aquaculture, renewable energies, recreational boating, marine biotechnology, offshore

Main diagnostic elements

- Several ports and artisanal fishing
- Significant industrial and agricultural potential
- 90% of exports based on petroleum products = 19% of GDP
- More than 166 MT of fishing products (2024)
- Economic clusters of national scope
- Ongoing efforts to enhance international integration and maritime connectivity, including increased participation in regional cooperation initiatives
- Strong institutional coordination at national level, with progressive efforts toward multi-stakeholder and decentralized collaboration within the blue economy ecosystem.
- Establishment of the Algerian Blue Innovation Cluster (ABIC), currently in its structuring and consolidation phase at national level.

Table 2. SWOT analysis, cluster competences, vision and roles

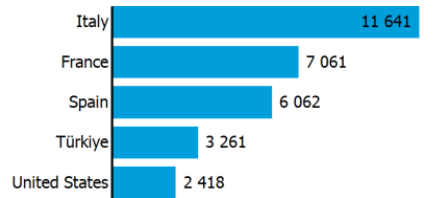
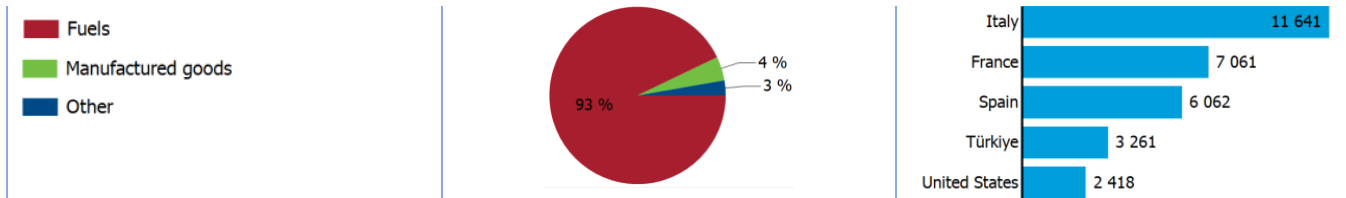
Sectors activity	of	<ul style="list-style-type: none"> • Fishing and aquaculture • Port activities • Coastal and marine tourism • Maritime transport • Blue Entrepreneurship • Digitalization
-------------------------	-----------	---

<p>Role in the maritime sector (or in relation to the blue economy)</p>	<ul style="list-style-type: none"> • Technical dialogue • Policy dialogue • Support to skills and capacity • Support to Start-ups and SMEs • Deployment of Technological and Digital Solutions for the Blue Economy • Intersectoral Coordination (transport, environment, fisheries, tourism, etc.) <p>Community-Based Management / Inclusion of Youth and Women in Maritime Activities</p>
<p>Main activity</p>	<p>Coordinating and promoting innovation projects, digital transformation, entrepreneurship, and sustainable transition in the blue economy</p>
<p>Source of financing</p>	<p>Public grants/Projects participation/Revenues from provision of services</p>
<p>Level of competence</p>	<p>National, International</p>
<p>Long-term vision of the Maghreb Joint Action of Maritime Clusters</p>	<ul style="list-style-type: none"> • Making the Maghreb a pioneering region for the sustainable, innovative and inclusive blue economy in the Mediterranean, through strengthened regional cooperation between clusters • Joining forces of the Maghreb maritime clusters to position the region as a strategic hub for integrated, resilient and attractive maritime development for international investors • Make the Joint Action a platform for regional geopolitical cooperation, consolidating solidarity between Maghreb countries around strategic maritime issues
<p>Alliance's priority strategic axes</p>	<ul style="list-style-type: none"> • Development of regional value chains in the maritime sectors (Fishing, aquaculture, transport, tourism, marine energy, etc.) • Strengthening blue capacities and skills (training, research, innovation) • Establishment of regional platforms for sharing information and maritime monitoring • Promotion of inter-country projects with high economic and environmental impact •
<p>Sectors to be prioritized by the Alliance to catalyze the</p>	<ul style="list-style-type: none"> • Fishing and aquaculture • Coastal and marine tourism • Shipbuilding • Green marine energy/hydrogen • Blue Entrepreneurship

<p>development of an integrated blue economy in the Maghreb</p>	<ul style="list-style-type: none"> • TIC & Digitalisation
<p>Main challenges</p>	<ul style="list-style-type: none"> • Alignment of policies and priorities between countries in this area
<p>Role should the alliance play in strengthening cooperation between countries in the region and promoting the blue economy</p>	<ul style="list-style-type: none"> • Create cross-border partnerships to share best practices and strengthen cooperation between maritime clusters • Organize regional platforms enabling collaboration between public and private actors in the maritime sector • Encourage the establishment of joint projects between Maghreb countries, by promoting the exchange of resources and expertise • Facilitate access to international financing for joint blue economy initiatives • Promote innovation and collaborative research to maximize the impact of maritime clusters • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one
<p>How can the alliance promote innovation and technology adoption in maritime sectors (fisheries, aquaculture, transport, etc.)</p>	<ul style="list-style-type: none"> • Promote technological exchanges between Maghreb countries to improve the innovation capacities of maritime clusters • Facilitate research and development programs to encourage innovation within maritime clusters • Create partnerships with innovation and/or technology clusters
<p>How can the alliance foster an inclusive and equitable approach to promoting the blue economy in the Maghreb countries</p>	<ul style="list-style-type: none"> • Establish training programs dedicated to women and young people to actively integrate them into the maritime sectors • Create incentives to attract investment in social and inclusive projects, in order to strengthen the impact of the blue economy on local communities. • Develop partnerships with civil society organizations to ensure an inclusive and participatory approach.
<p>Role of the Alliance in strengthening the</p>	<ul style="list-style-type: none"> • Implement campaigns to promote Maghreb maritime products and services on an international scale

<p>visibility and competitiveness of Maghreb countries in the blue economy on a global scale</p>	<ul style="list-style-type: none"> • Develop online platforms to promote exchanges between stakeholders in the Maghreb maritime sector • Establish regional certifications to promote the sustainability and quality of maritime products from the Maghreb • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one
<p>Main obstacles that the alliance could face in fostering cross-border cooperation between maritime clusters in the Maghreb countries</p>	<ul style="list-style-type: none"> • Lack of common financial mechanisms to support cross-border initiatives. • Lack of a shared vision among political leaders in the Maghreb countries to promote the blue economy • Low priority given to maritime cooperation at the regional level • Logistical obstacles

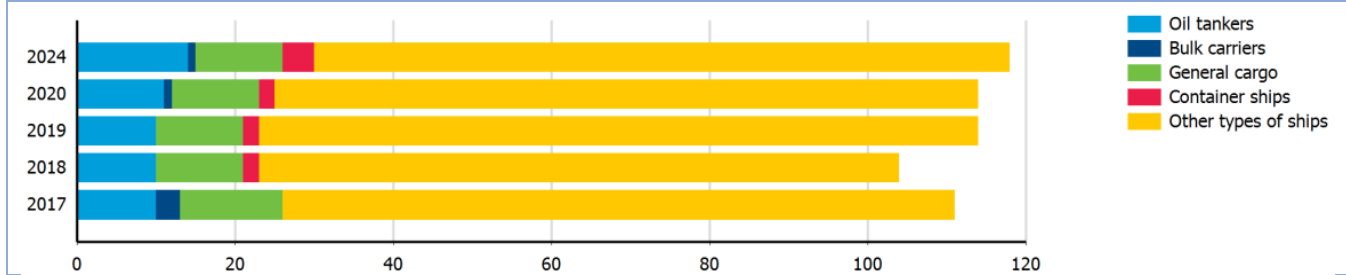
ALGERIA MARITIME PROFILE		
<p>GDP 265 597 Millions current US\$</p>	<p>Transport services trade (e) 13 904 Millions current US\$</p>	<p>Merchandise trade (e) 94 780 Millions current US\$</p>
<p>GDP Growth (3.80%)</p> <p>Coast/area ratio 0.654 m/km²</p>	<p>Ship building No value reported or collected</p>	<p>Ship recycling No value reported or collected</p>
<p>Fleet - National flag 652 Thousands DWT</p>	<p>Fleet - National flag 118 ships</p>	<p>Fleet – Ownership 1 154 Thousands DWT</p>
<p>Container port throughput No value reported or collected</p>	<p>Number of seafarers (m) 1 434</p>	<p>Number of port calls No value reported or collected</p>
<p>Merchandise exports growth rate in 2024 -11.5 %</p>	<p>Transport services exports growth rate in 2024 -11.5 %</p>	<p>Fleet growth rate in 2024 0 %</p>
<p>Export structure by product group in 2024 (as % of total exports)</p>	<p>Top 5 partners in 2024 (exports, millions of US\$)</p>	



Carrying capacity by type of ship

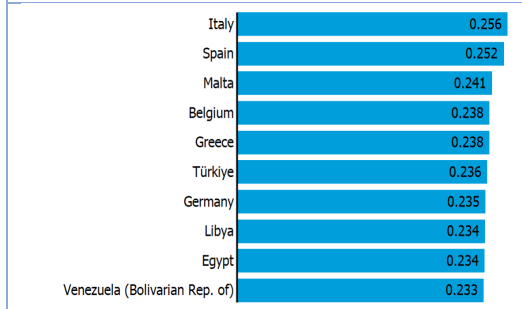
(Thousands DWT)	2005	2010	2015	2024
Total fleet	913.0	764.6	802.0	651.7
Oil tankers	47.0	25.1	17.2	72.2
Bulk carriers	288.0	204.3	149.6	53.5
General cargo	135.0	64.5	112.7	105.7
Container ships	..	..	0.0	82.6
Other types of ships	443.0	470.7	522.6	337.8

Fleet by type of ship (Number of ships)

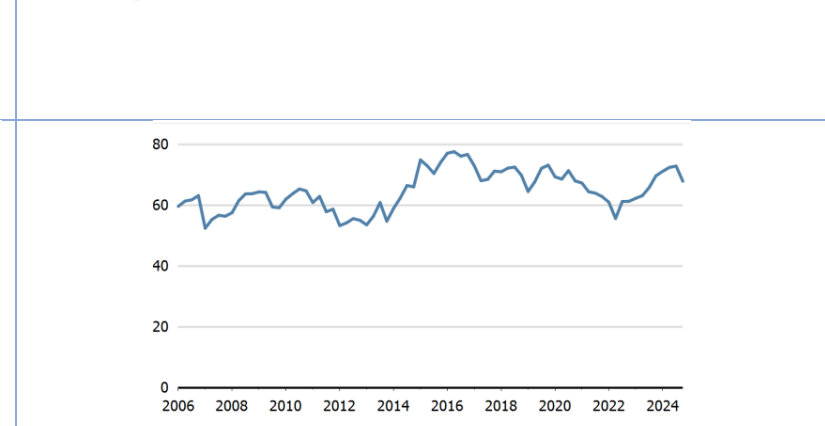


Liner shipping connectivity

Bilateral connectivity index - Top 10 partners in Q1 2006
Can only take values between 0 (minimum) and 1 (maximum)

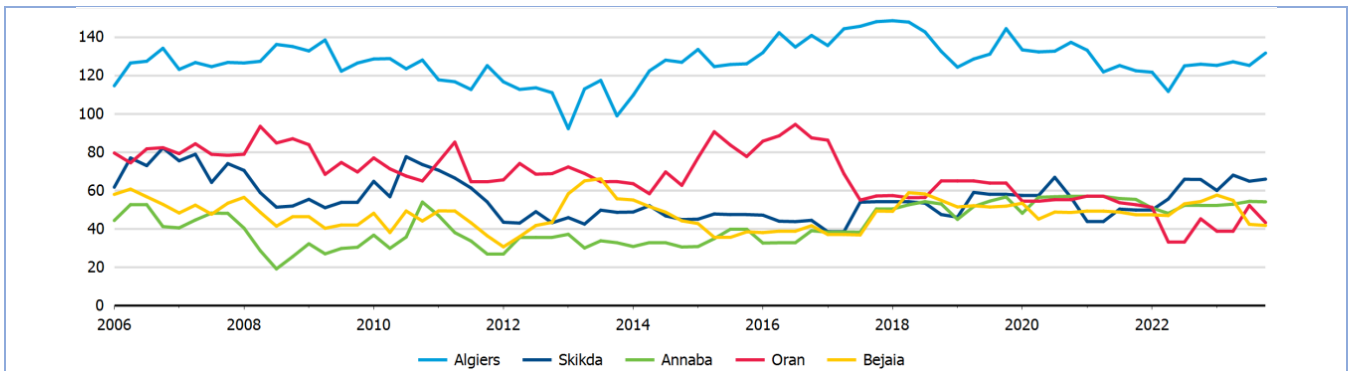


Liner shipping connectivity index
Average Q1 2023=100

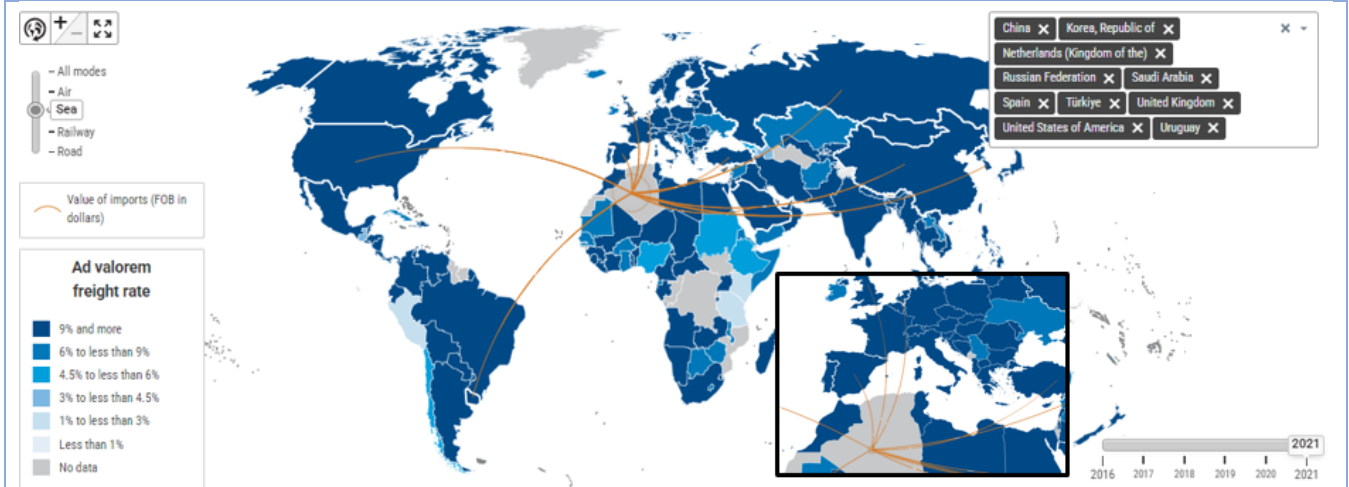


Port liner shipping connectivity index - Top 5 ports in 2024
Average Q1 2023=100

D4.1 Strategic Plan of Maritime Clusters Alliances at Regional Level



Freight rate map (mode: sea)



DWT: Dead weight tons

GT: Gross tons

GDB: Gross domestic product

TEU: Twenty foot equivalent unit

Source: <https://unctadstat.unctad.org/CountryProfile/en-GB/index.html>

Libya

Main potential and assets for joining the alliance

- Libyan actors are promoting the idea of engaging with the Tunisian cluster through an agreement signed within the framework of the Alliance Wed Med Cluster (2024)
- Promoting sectors: Marine resources, fishing and aquaculture, marine environment, maritime transport

Main diagnostic elements

- Gigantic but degraded port infrastructure
- 1,800 km of coastline, 70 coastal cities
- Political instability
- Affected banking and monetary system
- Absence of Maritime Cluster or a specific strategy

Table 3. SWOT analysis, cluster competences, vision and roles

Sectors of activity	<ul style="list-style-type: none"> • Fishing and aquaculture • Port activities • Maritime transport • Blue biotechnology • Blue Entrepreneurship • Digitalization • Skills / Ocean literacy
Role in the maritime sector (or in relation to the blue economy)	<ul style="list-style-type: none"> • Support to skills and capacity • Support to Start-ups and SMEs • Deployment of Technological and Digital Solutions for the Blue Economy • Intersectoral Coordination (transport, environment, fisheries, tourism, etc.) • Protection of Coastal and Marine Ecosystems • Community-Based Management / Inclusion of Youth and Women in Maritime Activities
Main activity	Blue Economy Development
Source of financing	Projects participation

Level of competence	Sub-national (regional/local)
Long-term vision of the Maghreb Joint Action of Maritime Clusters	<ul style="list-style-type: none"> • Developing national maritime clusters into a Maghreb cluster to increase the regional impact and international visibility of the blue economy.
Alliance's priority strategic axes	<ul style="list-style-type: none"> • Strengthening blue capacities and skills (training, research, innovation) • Establishment of regional platforms for sharing information and maritime monitoring • Promotion of inter-country projects with high economic and environmental impact
Sectors to be prioritized by the Alliance to catalyze the development of an integrated blue economy in the Maghreb	<ul style="list-style-type: none"> • MSP and ICZM • Fishing and aquaculture • Coastal and marine tourism • Green marine energy/hydrogen • Blue Entrepreneurship
Main challenges	<ul style="list-style-type: none"> • Different regulatory frameworks, levels of institutional maturity, and political will across countries. • Lack of reliable and up-to-date marine data for planning, investment, and environmental monitoring (especially for MSP and ICZM). • Shortage of qualified human resources in blue sectors like aquaculture engineering, hydrogen technologies, MSP, and tourism sustainability. • Many coastal and port facilities lack the modernization needed to support clean energy, sustainable aquaculture, and tourism. • Startups and SMEs struggle with access to affordable credit, insurance, and innovation grants tailored for blue economy sectors. • Women, youth, and small-scale actors are often excluded from decision-making and benefit-sharing.
Role should the alliance play in strengthening cooperation between	<ul style="list-style-type: none"> • Organize regional platforms enabling collaboration between public and private actors in the • maritime sector • Encourage the establishment of joint projects between Maghreb countries, by promoting the

<p>countries in the region and promoting the blue economy</p>	<ul style="list-style-type: none"> • exchange of resources and expertise • Facilitate access to international financing for joint blue economy initiatives • Promote innovation and collaborative research to maximize the impact of maritime clusters • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and • EU one
<p>How can the alliance promote innovation and technology adoption in maritime sectors (fisheries, aquaculture, transport, etc.)</p>	<ul style="list-style-type: none"> • Promote technological exchanges between Maghreb countries to improve the innovation capacities of maritime clusters • Facilitate research and development programs to encourage innovation within maritime clusters • Create partnerships with innovation and/or technology clusters
<p>How can the alliance foster an inclusive and equitable approach to promoting the blue economy in the Maghreb countries</p>	<ul style="list-style-type: none"> • Establish training programs dedicated to women and young people to actively integrate them into the maritime sectors • Encourage the participation of local communities in the management and use of maritime resources, ensuring equitable benefits
<p>Role of the Alliance in strengthening the visibility and competitiveness of Maghreb countries in the blue economy on a global scale</p>	<ul style="list-style-type: none"> • Implement campaigns to promote Maghreb maritime products and services on an international scale • Organize the participation of Maghreb maritime clusters in global trade fairs and events in order to promote regional initiatives • Develop online platforms to promote exchanges between stakeholders in the Maghreb maritime sector • Establish regional certifications to promote the sustainability and quality of maritime products from the Maghreb • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one •
<p>Main obstacles that the alliance could face in</p>	<ul style="list-style-type: none"> • Lack of common financial mechanisms to support cross-border initiatives.

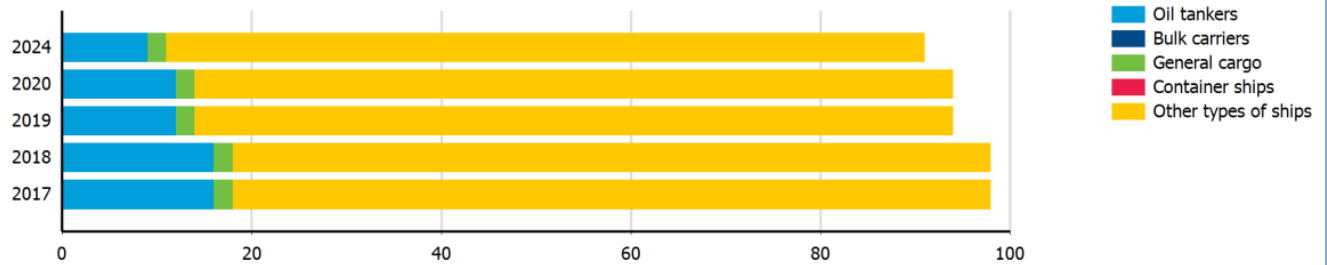
<p>fostering cross-border cooperation between maritime clusters in the Maghreb countries</p>	<ul style="list-style-type: none"> • Lack of a shared vision among political leaders in the Maghreb countries to promote the blue economy • Low priority given to maritime cooperation at the regional level • Logistical obstacles •
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LIBYA MARITIME PROFILE - 2024												
<p>GDP 40 588 Millions current US\$ GDP Growth (-4.60%)</p> <p>Coast/area ratio 1.2 m/km²</p> <p>Fleet - National flag 988 Thousands DWT</p> <p>Container throughput 465 168 TEU</p>	<p>Transport services trade (e) 7 858 Millions current US\$ (2023)</p> <p>Ship building No value reported or collected</p> <p>Fleet - National flag 91 ships</p> <p>Number of seafarers (m) 896</p>	<p>Merchandise trade 47 565 Millions current US\$</p> <p>Ship recycling No value reported or collected</p> <p>Fleet – Ownership 2 140 Thousands DWT</p> <p>Number of port calls No value reported or collected</p>										
<p>Merchandise exports growth rate in 2024 -12.1 %</p>	<p>Transport services exports growth rate in 2024 -</p>	<p>Fleet growth rate in 2024 -41.2 %</p>										
<p>Export structure by product group in 2024 (as % of total exports)</p> <p>■ Fuels ■ Other</p>		<p>Top 5 partners in 2024 (exports, millions of US\$)</p> <table border="1"> <tr><td>Italy</td><td>6 230</td></tr> <tr><td>Germany</td><td>4 194</td></tr> <tr><td>Spain</td><td>2 545</td></tr> <tr><td>United Kingdom</td><td>2 238</td></tr> <tr><td>United Arab Emirates</td><td>2 071</td></tr> </table>	Italy	6 230	Germany	4 194	Spain	2 545	United Kingdom	2 238	United Arab Emirates	2 071
Italy	6 230											
Germany	4 194											
Spain	2 545											
United Kingdom	2 238											
United Arab Emirates	2 071											
<p>Carrying capacity by type of ship</p>												

D4.1 Strategic Plan of Maritime Clusters Alliances at Regional Level

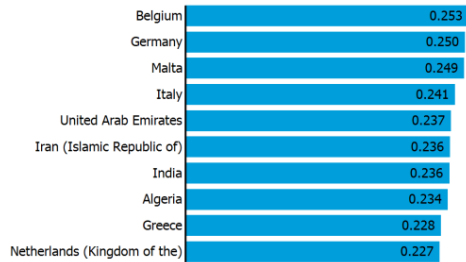
(Thousands DWT)	2005	2010	2015	2024
Total fleet	100.0	1 404.9	1 884.3	987.9
Oil tankers	10.0	1 346.2	1 401.8	497.1
Bulk carriers	..	..	0.0	0.0
General cargo	62.0	30.5	9.3	1.2
Container ships	..	..	0.0	0.0
Other types of ships	28.0	28.2	473.3	489.5

Fleet by type of ship (Number of ships)

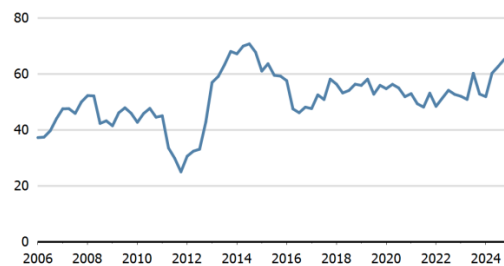


Liner shipping connectivity

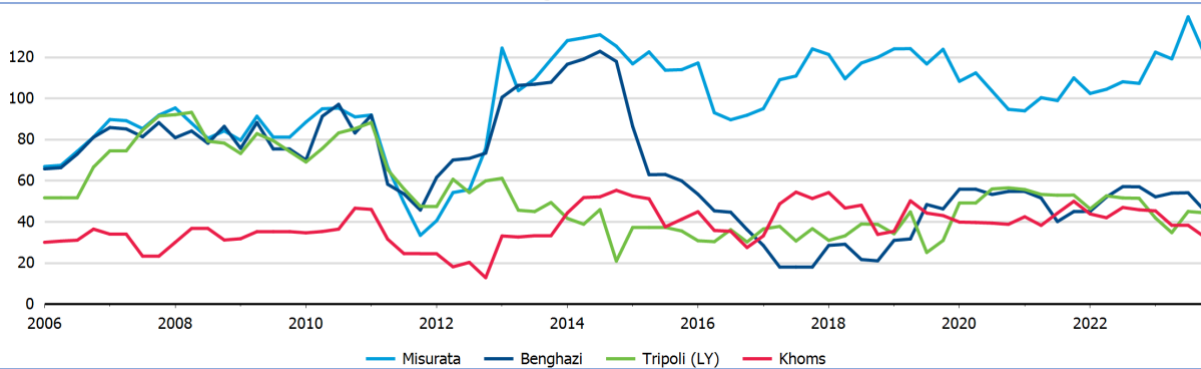
Bilateral connectivity index - Top 10 partners in Q1 2006
Can only take values between 0 (minimum) and 1 (maximum)



Liner shipping connectivity index
Average Q1 2023=100

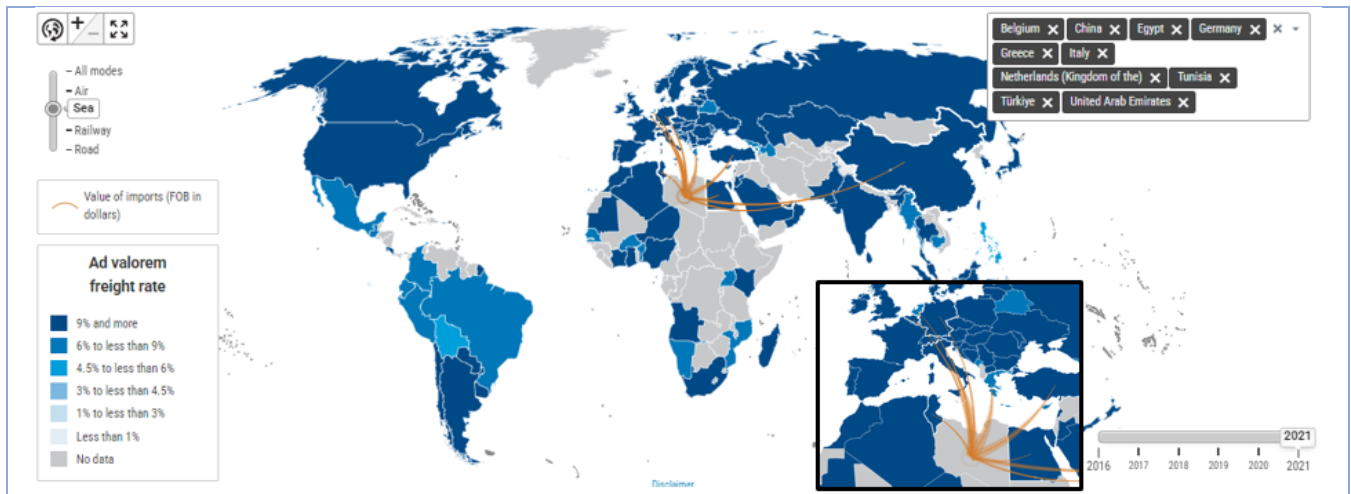


Port liner shipping connectivity index - Top 5 ports in 2024
Average Q1 2023=100



Freight rate map (mode: sea)

D4.1 Strategic Plan of Maritime Clusters Alliances at Regional Level



DWT: Dead weight tons

GT: Gross tons

GDB: Gross domestic product

TEU: Twenty foot equivalent unit

Sources: <https://unctadstat.unctad.org/CountryProfile/en-GB/index.html>

Mauritania

Main potential and assets for joining the alliance

- The fishing industry as the main economic sector.
- A coastline of 720 km and an Exclusive Economic Zone of 230,000 km².
- Abundant fishery resources, with fishing playing a central role in the country's economy.
- An extremely rich and diverse ecosystem with more than 600 marine species.
- Existence of a planning document for the management of seawater and coastal areas (it provides for the creation of protected areas, the development of sustainable fishing practices, and the implementation of measures to reduce pollution and coastal erosion)
- Promising partnerships with international donors for the development of seafood value chains (European Investment Bank).

Main diagnostic elements

- Overfishing and overexploitation of coastal waters.
- Tourism is a growing sector, but its development is hampered by security issues, particularly in the east of the country.
- Intense coastal erosion and flooding, with an impact on infrastructure.
- Coastal waters and the marine ecosystem are affected by marine pollution from various sources (oil spills, wastewater, and solid waste). (Nouakchott is the most affected coastal area).













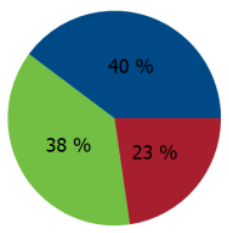
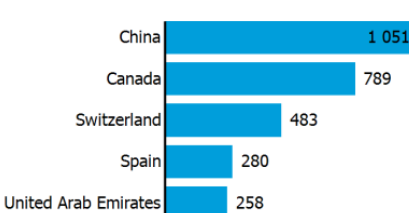
Table 4. SWOT analysis, cluster competences, vision and roles

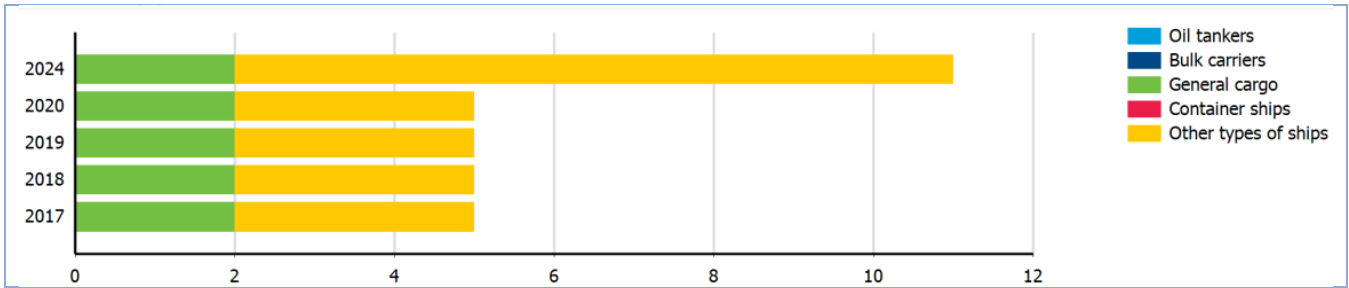
<p>Sectors of activity</p>	<ul style="list-style-type: none"> • Fishing and aquaculture • Port activities • Coastal and marine tourism • Shipbuilding • Maritime transport • Water Management and Seawater desalination • Blue biotechnology • Green marine energy/hydrogen • Blue Entrepreneurship • Digitalization • Skills / Ocean literacy
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<p>Role in the maritime sector (or in relation to the blue economy)</p>	<ul style="list-style-type: none"> • Technical dialogue • Policy dialogue • Support to skills and capacity • Support to Start-ups and SMEs • Deployment of Technological and Digital Solutions for the Blue Economy • Oceanographic and Climatological Research • Development of Maritime Public Policies • Intersectoral Coordination (transport, environment, sheries, tourism, etc.) • Protection of Coastal and Marine Ecosystems • Community-Based Management / Inclusion of Youth and Women in Maritime Activities
<p>Main activity</p>	<p>BE Development</p>
<p>Source of financing</p>	<p>Public grants/Fees from associates/Projects participation</p>
<p>Level of competence</p>	<p>National</p>
<p>Long-term vision of the Maghreb Joint Action of Maritime Clusters</p>	<ul style="list-style-type: none"> • Making the Maghreb a pioneering region for the sustainable, innovative and inclusive blue economy in the Mediterranean, through strengthened regional cooperation between clusters • Joining forces of the Maghreb maritime clusters to position the region as a strategic hub for integrated, resilient and attractive maritime development for international investors • To bring out a strong and structured Maghreb voice to weigh in on regional and international agendas of the blue economy • Make the Joint Action a platform for regional geopolitical cooperation, consolidating solidarity between Maghreb countries around strategic maritime issues • Developing national maritime clusters into a Maghreb cluster to increase the regional impact and international visibility of the blue economy. •
<p>Alliance's priority strategic axes</p>	<ul style="list-style-type: none"> • Development of regional value chains in the maritime sectors (fishing, aquaculture, transport, tourism, marine energy, etc.) • Strengthening blue capacities and skills (training, research, innovation) • Establishment of regional platforms for sharing information and maritime monitoring

	<ul style="list-style-type: none"> • Coordination of public policies on the blue economy • Promotion of inter-country projects with high economic and environmental impact • Creation of joint financing and investment mechanisms • Valorization of the Maghreb coastal natural and cultural capital • Regional diplomacy to influence Euro-Mediterranean policies
<p>Sectors to be prioritized by the Alliance to catalyze the development of an integrated blue economy in the Maghreb</p>	<ul style="list-style-type: none"> • MSP and ICZM • Fishing and aquaculture • Port activities • Maritime transport
<p>Main challenges</p>	<ul style="list-style-type: none"> • Coastal zone protection and management • Mobilize funding for the implementation of concrete actions to promote the blue economy in the Maghreb region • Organize training and awareness-raising sessions for local communities, public sector organizations, and civil society on the blue economy.
<p>Role should the alliance play in strengthening cooperation between countries in the region and promoting the blue economy</p>	<ul style="list-style-type: none"> • Create cross-border partnerships to share best practices and strengthen cooperation between maritime clusters • Inform and raise awareness among regional decision-makers about the opportunities offered by maritime clusters through networks and collaborations • Organize regional platforms enabling collaboration between public and private actors in the maritime sector • Encourage the establishment of joint projects between Maghreb countries, by promoting the exchange of resources and expertise • Facilitate access to international financing for joint blue economy initiatives • Promote innovation and collaborative research to maximize the impact of maritime clusters • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one • Advocate for greater visibility of maritime clusters in regional and international assistance mechanisms (e.g. WestMED)

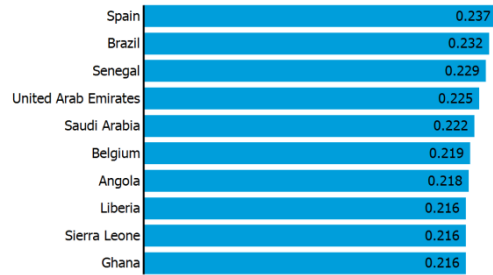
<p>How can the alliance promote innovation and technology adoption in maritime sectors (fisheries, aquaculture, transport, etc.)</p>	<ul style="list-style-type: none"> • Promote technological exchanges between Maghreb countries to improve the innovation capacities of maritime clusters • Facilitate research and development programs to encourage innovation within maritime clusters • Create partnerships with innovation and/or technology clusters
<p>How can the alliance foster an inclusive and equitable approach to promoting the blue economy in the Maghreb countries</p>	<ul style="list-style-type: none"> • Establish training programs dedicated to women and young people to actively integrate them into the maritime sectors • Encourage the participation of local communities in the management and use of maritime resources, ensuring equitable benefits • Create incentives to attract investment in social and inclusive projects, in order to strengthen the impact of the blue economy on local communities. • Develop partnerships with civil society organizations to ensure an inclusive and participatory approach.
<p>Role of the Alliance in strengthening the visibility and competitiveness of Maghreb countries in the blue economy on a global scale</p>	<ul style="list-style-type: none"> • Implement campaigns to promote Maghreb maritime products and services on an international scale • Organize the participation of Maghreb maritime clusters in global trade fairs and events in order to promote regional initiatives • Develop online platforms to promote exchanges between stakeholders in the Maghreb maritime sector • Establish regional certifications to promote the sustainability and quality of maritime products from the Maghreb • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one
<p>Main obstacles that the alliance could face in fostering cross-border cooperation between maritime clusters in the Maghreb countries</p>	<ul style="list-style-type: none"> • Limited access to regional and international funding • Lack of common financial mechanisms to support cross-border initiatives. • Lack of a shared vision among political leaders in the Maghreb countries to promote the blue economy • Low priority given to maritime cooperation at the regional level • Historical tensions between certain Maghreb countries prevent effective cooperation • Logistical obstacles • The lack of political commitment

MAURITANIA MARITIME PROFILE - 2024				
 <p>GDP 10 788 Millions current US\$ GDP Growth (6.6%)</p>  <p>Coast/area ratio 1.2 m/km²</p>  <p>Fleet - National flag 4 Thousands DWT</p>  <p>Container port throughput No value reported or collected</p>	 <p>Transport services trade (e) 1 088 Millions current US\$</p>  <p>Ship building No value reported or collected</p>  <p>Fleet - National flag 11 ships</p>  <p>Number of seafarers (m) 89</p>	 <p>Merchandise trade 8 960 Millions current US\$</p>  <p>Ship recycling No value reported or collected</p>  <p>Fleet – Ownership 0 Thousands DWT</p>  <p>Number of port calls No value reported or collected</p>		
<p>Merchandise exports growth rate in 2024 +2.6 %</p>		<p>Transport services exports growth rate in 2024 -</p>		
<p>Fleet growth rate in 2024 0 %</p>				
<p>Export structure by product group in 2024 (as % of total exports)</p> <ul style="list-style-type: none"> ■ All food items ■ Ores and metals ■ Other 				
		<p>Top 5 partners in 2024 (exports, millions of US\$)</p> 		
Carrying capacity by type of ship				
<i>(Thousands DWT)</i>	2005	2010	2015	2024
Total fleet	24.0	24.7	15.0	4.1
Oil tankers	0.0	0.0
Bulk carriers	13.5	0.0
General cargo	1.0	0.9	1.0	1.0
Container ships	0.0	0.0
Other types of ships	23.0	23.8	0.4	3.1
Fleet by type of ship (Number of ships)				

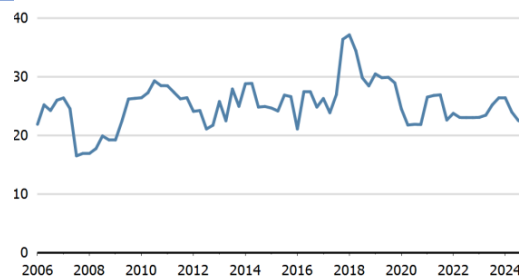


Liner shipping connectivity

Bilateral connectivity index - Top 10 partners in Q1 2006
Can only take values between 0 (minimum) and 1 (maximum)

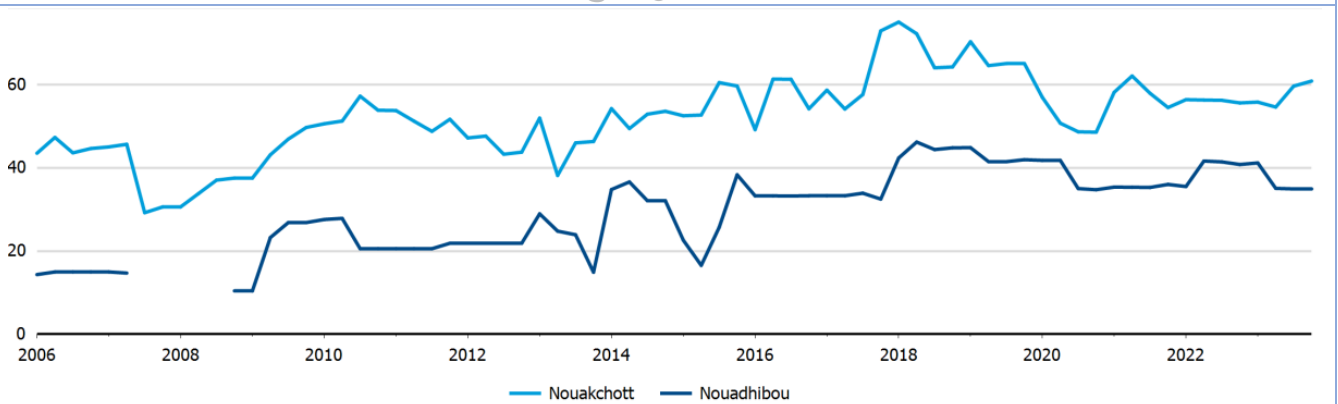


Liner shipping connectivity index
Average Q1 2023=100



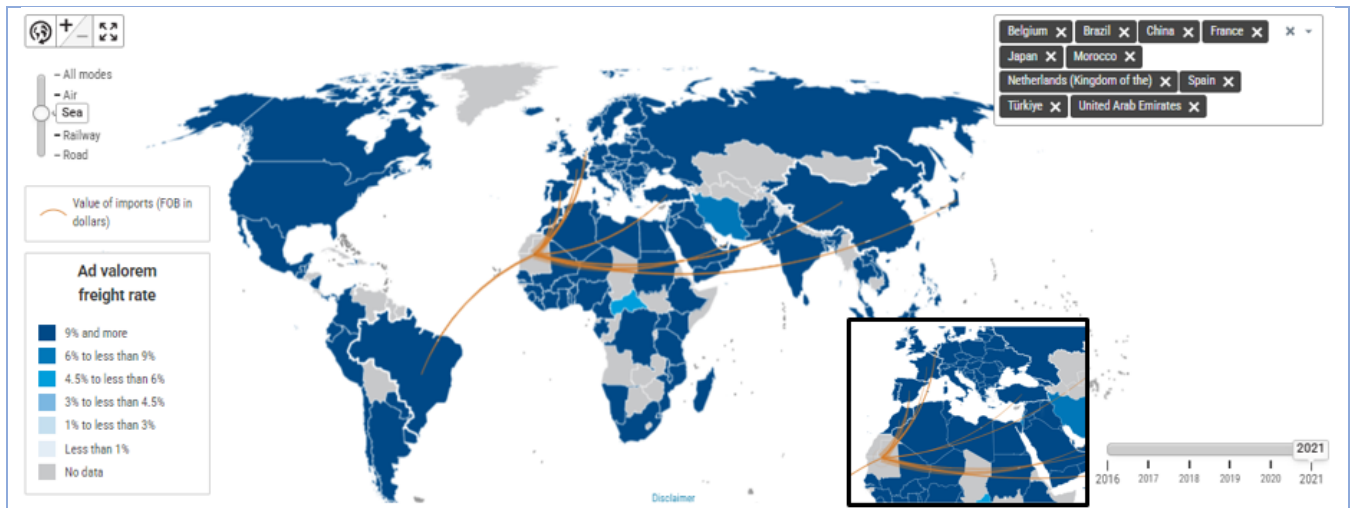
Port liner shipping connectivity index - Top 5 ports in 2023

Average Q1 2023=100



Freight rate map (mode: sea)

D4.1 Strategic Plan of Maritime Clusters Alliances at Regional Level



Biotrade map



<https://unctadstat.unctad.org/EN/Biotrade.html>

DWT: Dead weight tons

GT: Gross tons

GDB: Gross domestic product

TEU: Twenty foot equivalent unit

Source: <https://unctadstat.unctad.org/CountryProfile/en-GB/index.html>

Morocco

Main potential and assets for joining the alliance

- Promoting sectors: fishing, aquaculture, coastal and maritime tourism, logistics and ports, offshore energy, marine biotechnology,

Main diagnostic elements

- Modernization of port infrastructures (Tangier Med: deep waters) Casablanca, and 11 international ports- Highly developed cluster
- Experience and a pillar of the economy and innovation

Table 5. SWOT analysis, cluster competences, vision and roles













Sectors of activity	<ul style="list-style-type: none"> • Fishing and aquaculture • Blue Entrepreneurship • BE consulting
Role in the maritime sector (or in relation to the blue economy)	<ul style="list-style-type: none"> • Technical dialogue • Policy dialogue • Support to skills and capacity • Support to Start-ups and SMEs • Deployment of Technological and Digital Solutions for the Blue Economy • Development of Maritime Public Policies • Intersectoral Coordination (transport, environment, fisheries, tourism, etc.) • Protection of Coastal and Marine Ecosystems • Community-Based Management / Inclusion of Youth and Women in Maritime Activities
Main activity	Maritime and strategic consulting
Source of financing	Public grants/Revenues from provision of services/Fees from associates/Projects participation
Level of competence	National
Long-term vision of the Maghreb Joint Action of Maritime Clusters	<ul style="list-style-type: none"> • Making the Maghreb a pioneering region for the sustainable, innovative and inclusive blue economy in the Mediterranean, through strengthened regional cooperation between clusters • Joining forces of the Maghreb maritime clusters to position the region as a strategic hub for integrated, resilient and attractive maritime development for international investors

	<ul style="list-style-type: none"> • To bring out a strong and structured Maghreb voice to weigh in on regional and international agendas of the blue economy • Make the Joint Action a platform for regional geopolitical cooperation, consolidating solidarity between Maghreb countries around strategic maritime issues • Developing national maritime clusters into a Maghreb cluster to increase the regional impact and international visibility of the blue economy.
Alliance's priority strategic axes	<ul style="list-style-type: none"> • Development of regional value chains in the maritime sectors (fishing, aquaculture, transport, tourism, marine energy, etc.) • Strengthening blue capacities and skills (training, research, innovation) • Establishment of regional platforms for sharing information and maritime monitoring • Coordination of public policies on the blue economy • Promotion of inter-country projects with high economic and environmental impact • Creation of joint financing and investment mechanisms • Valorization of the Maghreb coastal natural and cultural capital • Regional diplomacy to influence Euro-Mediterranean policies
Sectors to be prioritized by the Alliance to catalyze the development of an integrated blue economy in the Maghreb	<ul style="list-style-type: none"> • MSP and ICZM • Fishing and aquaculture • Maritime transport • Coastal and marine tourism • Blue Entrepreneurship • Port activities • Shipbuilding • Blue biotechnology • Green marine energy/hydrogen • TIC & Digitalisation
Main challenges	<ul style="list-style-type: none"> • Fragmented and poorly harmonized regulatory frameworks making it difficult to cooperate regionally and share best practices. • Lack of intersectoral and inter-state coordination, particularly in shared maritime areas, limiting the implementation of ICZM (Integrated Coastal Zone Management) or Marine Spatial Planning (MSP) policies.

	<ul style="list-style-type: none"> • Insufficient reliable data and integrated information systems, hindering knowledge-based decision-making. • Limited access to appropriate financing, particularly for innovative projects related to the green transition or blue entrepreneurship. • Lack of specialized human resources in emerging sectors such as marine hydrogen, blue biotechnology, or ICT applied to the maritime economy.
<p>Role should the alliance play in strengthening cooperation between countries in the region and promoting the blue economy</p>	<ul style="list-style-type: none"> • Create cross-border partnerships to share best practices and strengthen cooperation between maritime clusters • Inform and raise awareness among regional decision-makers about the opportunities offered by maritime clusters through networks and collaborations • Organize regional platforms enabling collaboration between public and private actors in the maritime sector • Encourage the establishment of joint projects between Maghreb countries, by promoting the exchange of resources and expertise • Facilitate access to international financing for joint blue economy initiatives • Promote innovation and collaborative research to maximize the impact of maritime clusters • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one • Advocate for greater visibility of maritime clusters in regional and international assistance mechanisms (e.g. WestMED)
<p>How can the alliance promote innovation and technology adoption in maritime sectors (fisheries, aquaculture, transport, etc.)</p>	<ul style="list-style-type: none"> • Promote technological exchanges between Maghreb countries to improve the innovation capacities of maritime clusters • Facilitate research and development programs to encourage innovation within maritime clusters • Create partnerships with innovation and/or technology clusters
<p>How can the alliance foster an inclusive and equitable approach to promoting the</p>	<ul style="list-style-type: none"> • Establish training programs dedicated to women and young people to actively integrate them into the maritime sectors • Encourage the participation of local communities in the management and use of maritime resources, ensuring equitable benefits

<p>blue economy in the Maghreb countries</p>	<ul style="list-style-type: none"> • Create incentives to attract investment in social and inclusive projects, in order to strengthen the impact of the blue economy on local communities. • Develop partnerships with civil society organizations to ensure an inclusive and participatory approach.
<p>Role of the Alliance in strengthening the visibility and competitiveness of Maghreb countries in the blue economy on a global scale</p>	<ul style="list-style-type: none"> • Implement campaigns to promote Maghreb maritime products and services on an international scale • Organize the participation of Maghreb maritime clusters in global trade fairs and events in order to promote regional initiatives • Develop online platforms to promote exchanges between stakeholders in the Maghreb maritime sector • Establish regional certifications to promote the sustainability and quality of maritime products from the Maghreb • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one
<p>Main obstacles that the alliance could face in fostering cross-border cooperation between maritime clusters in the Maghreb countries</p>	<ul style="list-style-type: none"> • Limited access to regional and international funding • Lack of common financial mechanisms to support cross-border initiatives. • Lack of a shared vision among political leaders in the Maghreb countries to promote the blue economy • Low priority given to maritime cooperation at the regional level • Historical tensions between certain Maghreb countries prevent effective cooperation • Logistical obstacles • The lack of political commitment

MOROCCO MARITIME PROFILE - 2024

 <p>GDP 154 617 Millions current US\$</p>	 <p>Transport services trade (e) 42 265 Millions current US\$</p>	 <p>Merchandise trade 120 925 Millions current US\$</p>
 <p>GDP Growth (2.7%) Coast/area ratio 4.5 m/km²</p>	 <p>Ship building No value reported or collected</p>	 <p>Ship recycling No value reported or collected</p>
 <p>Fleet - National flag 148 Thousands DWT</p>	 <p>Fleet - National flag 94 ships</p>	 <p>Fleet – Ownership 75 Thousands DWT</p>
 <p>Container port throughput 9 964 410 TEU</p>	 <p>Number of seafarers 8 081</p>	 <p>Number of port calls</p>

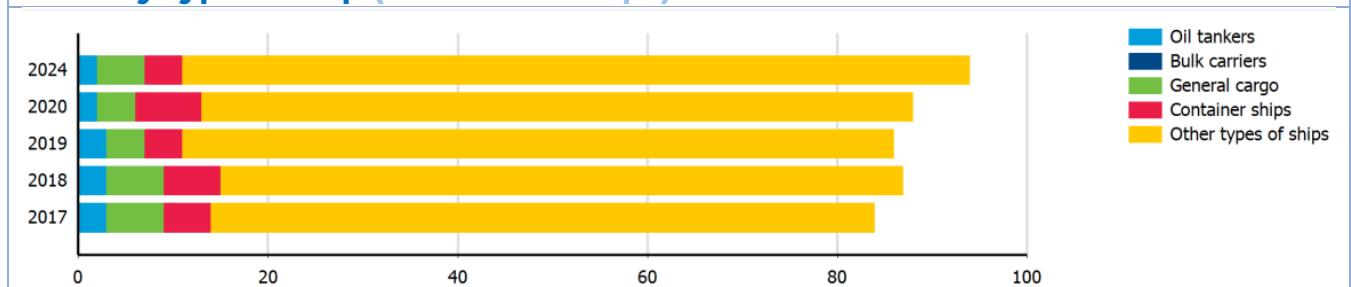


		No value reported or collected
Merchandise exports growth rate in 2024 +8.6 %	Transport services exports growth rate in 2024 +10.1 %	Fleet growth rate in 2024 -10.5 %
Export structure by product group in 2024 (as % of total exports)		Top 5 partners in 2024 (exports, millions of US\$)
<ul style="list-style-type: none"> ■ All food items ■ Manufactured goods ■ Other 		

Carrying capacity by type of ship

(Thousands DWT)	2005	2010	2015	2024
Total fleet	387.0	332.0	138.9	148.0
Oil tankers	113.0	20.1	7.1	9.9
Bulk carriers	..	..	0.0	0.0
General cargo	66.0	19.4	9.1	4.5
Container ships	82.0	69.3	70.5	67.7
Other types of ships	126.0	223.3	52.2	66.0

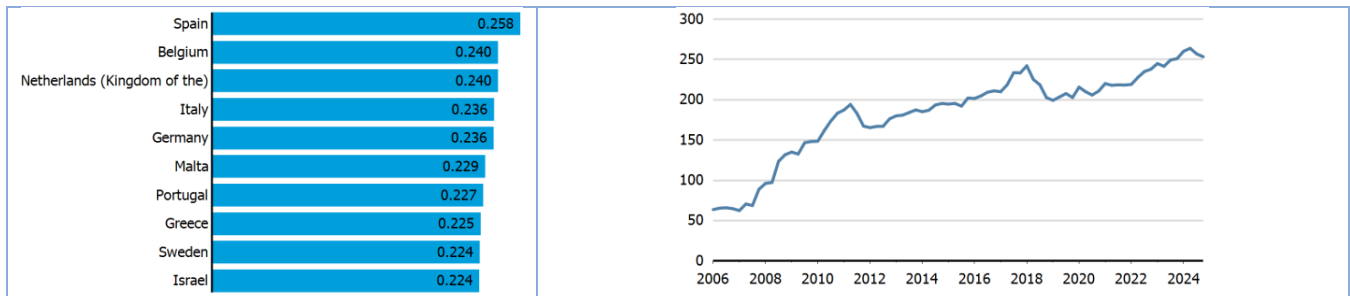
Fleet by type of ship (Number of ships)



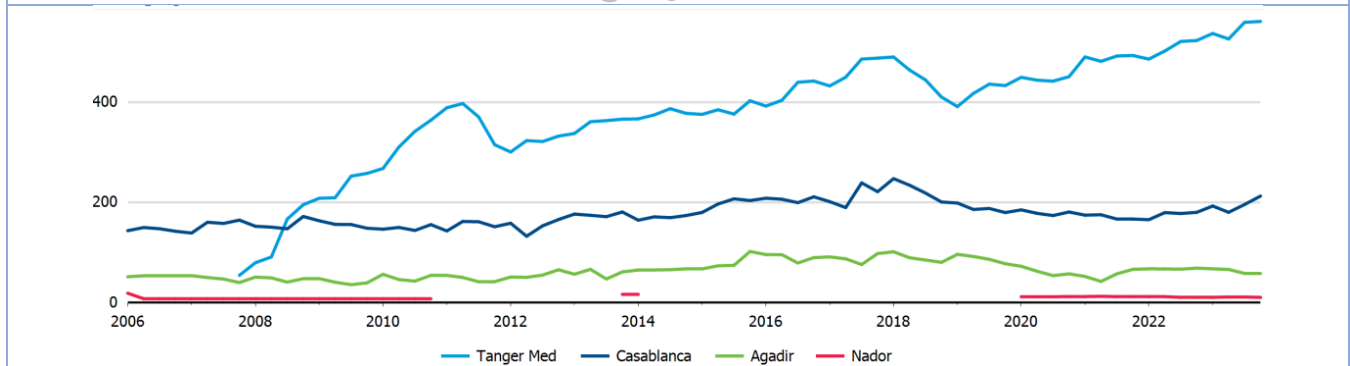
Liner shipping connectivity

Bilateral connectivity index - Top 10 partners in Q1 2006 Can only take values between 0 (minimum) and 1 (maximum)	Liner shipping connectivity index Average Q1 2023=100
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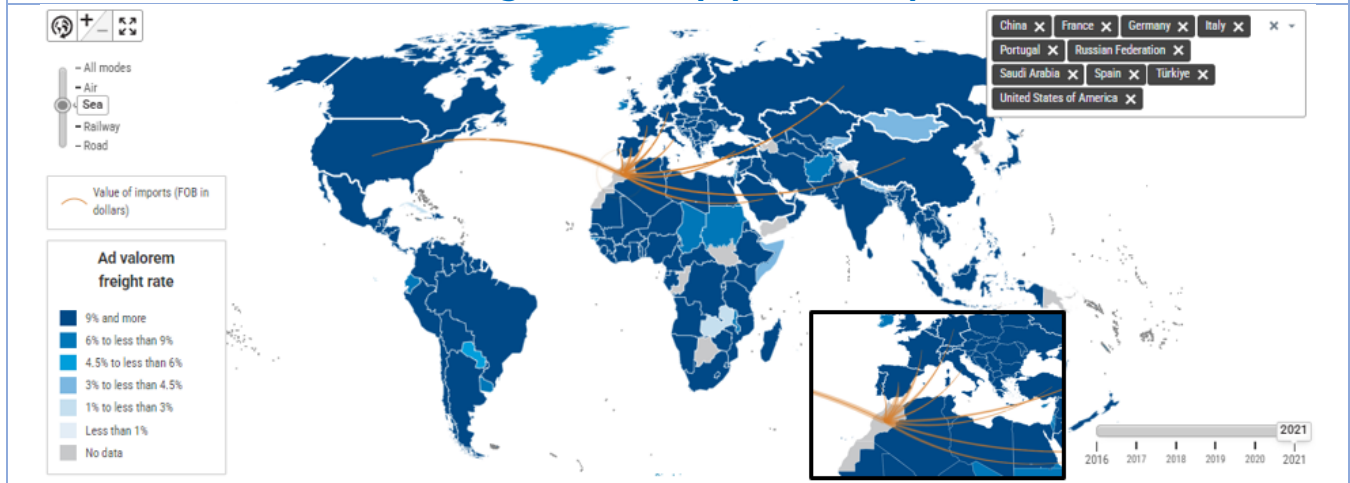
D4.1 Strategic Plan of Maritime Clusters Alliances at Regional Level



Port liner shipping connectivity index - Top 5 ports in 2024
Average Q1 2023=100



Freight rate map (mode: sea)



DWT: Dead weight tons
GDB: Gross domestic product

GT: Gross tons
TEU: Twenty foot equivalent unit

Tunisia

Main potential and assets for joining the alliance

- Promoting sectors: fishing and aquaculture, offshore oil products, maritime transport, maritime and coastal tourism, renewable marine energy, underwater connections, maritime defense, blue biotechnology

Main diagnostic elements

- 8 ports with decreasing profitability and deteriorating infrastructure
- Concentration of Goods and Passenger flows in Rades and La Goulette
- The TMC is a promising initiative for the Blue economy and the development of the maritime sector.

Table 6. SWOT analysis, cluster competences, vision and roles

Sectors of activity	<ul style="list-style-type: none"> • Fishing and aquaculture • Port activities • Coastal and marine tourism • Shipbuilding • Maritime transport • Water Management and Seawater desalination • Blue Entrepreneurship
Role in the maritime sector (or in relation to the blue economy)	<ul style="list-style-type: none"> • Technical dialogue • Policy dialogue • Support to skills and capacity • Support to Start-ups and SMEs • Deployment of Technological and Digital Solutions for the Blue Economy • Development of Maritime Public Policies • Oceanographic and Climatological Research • Intersectoral Coordination (transport, environment, fisheries, tourism, etc.) • Protection of Coastal and Marine Ecosystems • Community-Based Management / Inclusion of Youth and Women in Maritime Activities
Main activity	Ship repair/Maritime consulting/Coastal logistics and oceanographic engineering/Intersectoral Coordination (transport, environment, fisheries, tourism)
Source of financing	Revenues from provision of services/Fees from associates

<p>Level of competence</p>	<p>National/International</p>
<p>Long-term vision of the Maghreb Joint Action of Maritime Clusters</p>	<ul style="list-style-type: none"> • Making the Maghreb a pioneering region for the sustainable, innovative and inclusive blue economy in the Mediterranean, through strengthened regional cooperation between clusters • Joining forces of the Maghreb maritime clusters to position the region as a strategic hub for integrated, resilient and attractive maritime development for international investors • To bring out a strong and structured Maghreb voice to weigh in on regional and international agendas of the blue economy • Make the Joint Action a platform for regional geopolitical cooperation, consolidating solidarity between Maghreb countries around strategic maritime issues • Developing national maritime clusters into a Maghreb cluster to increase the regional impact and international visibility of the blue economy.
<p>Alliance's priority strategic axes</p>	<ul style="list-style-type: none"> • Development of regional value chains in the maritime sectors (fishing, aquaculture, transport, tourism, marine energy, etc.) • Strengthening blue capacities and skills (training, research, innovation) • Establishment of regional platforms for sharing information and maritime monitoring • Coordination of public policies on the blue economy • Promotion of inter-country projects with high economic and environmental impact • Creation of joint financing and investment mechanisms • Valorization of the Maghreb coastal natural and cultural capital • Regional diplomacy to influence Euro-Mediterranean policies
<p>Sectors to be prioritized by the Alliance to catalyze the development of an integrated blue economy in the Maghreb</p>	<ul style="list-style-type: none"> • Fishing and aquaculture • Maritime transport • Coastal and marine tourism • Blue Entrepreneurship • Port activities • Shipbuilding • Blue biotechnology • Green marine energy/hydrogen • TIC & Digitalisation

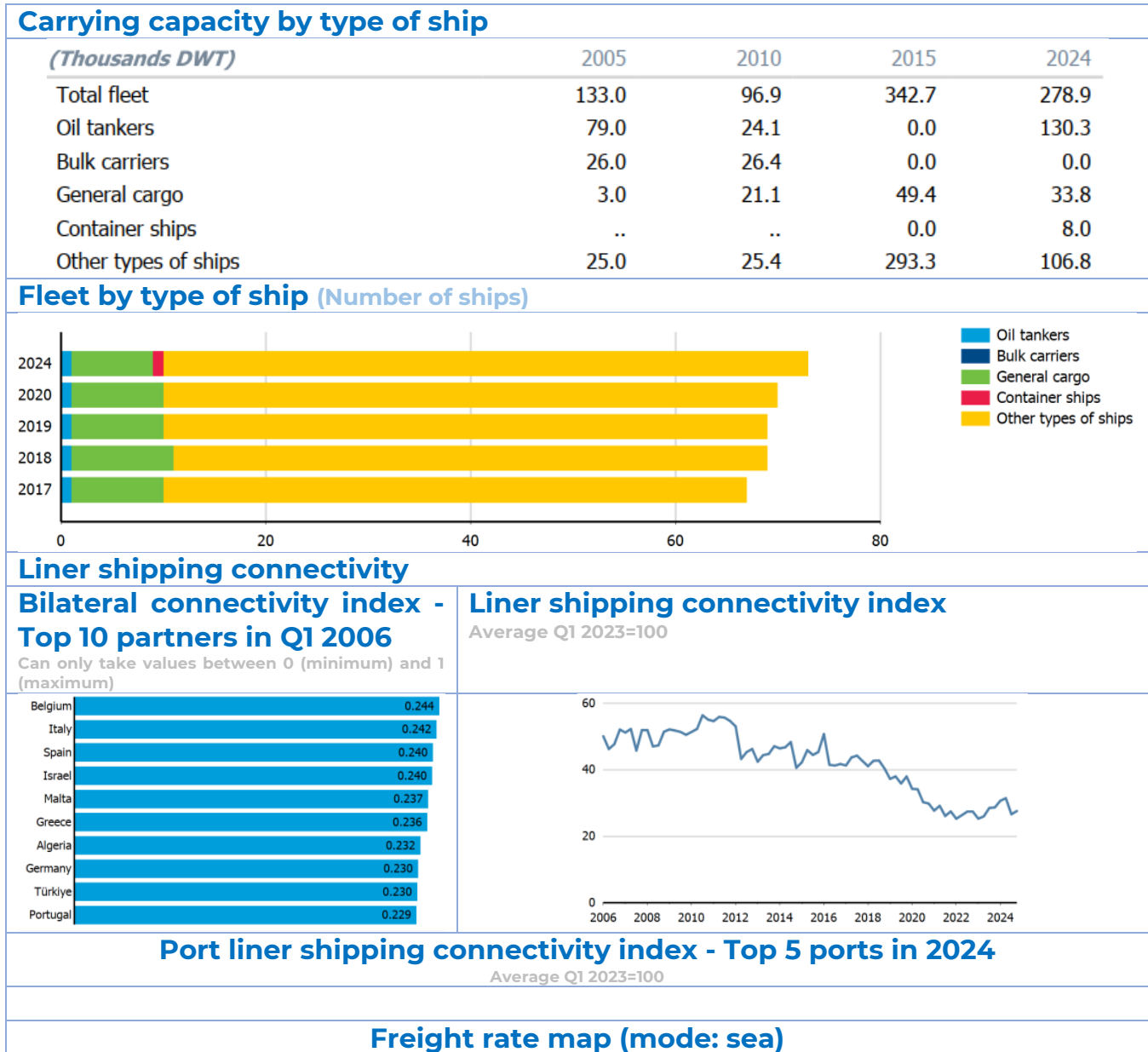
<p>Main challenges</p>	<ul style="list-style-type: none"> • Convincing political leaders • Port activities modernisation • Sustainable development of the Blue Economy.
<p>Role should the alliance play in strengthening cooperation between countries in the region and promoting the blue economy</p>	<ul style="list-style-type: none"> • Create cross-border partnerships to share best practices and strengthen cooperation between maritime clusters • Inform and raise awareness among regional decision-makers about the opportunities offered by maritime clusters through networks and collaborations • Organize regional platforms enabling collaboration between public and private actors in the maritime sector • Encourage the establishment of joint projects between Maghreb countries, by promoting the exchange of resources and expertise • Facilitate access to international financing for joint blue economy initiatives • Promote innovation and collaborative research to maximize the impact of maritime clusters • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one • Advocate for greater visibility of maritime clusters in regional and international assistance mechanisms (e.g. WestMED)
<p>How can the alliance promote innovation and technology adoption in maritime sectors (fisheries, aquaculture, transport, etc.)</p>	<ul style="list-style-type: none"> • Promote technological exchanges between Maghreb countries to improve the innovation capacities of maritime clusters • Facilitate research and development programs to encourage innovation within maritime clusters • Create partnerships with innovation and/or technology clusters
<p>How can the alliance foster an inclusive and equitable approach to promoting the blue economy in the Maghreb countries</p>	<ul style="list-style-type: none"> • Establish training programs dedicated to women and young people to actively integrate them into the maritime sectors • Encourage the participation of local communities in the management and use of maritime resources, ensuring equitable benefits • Create incentives to attract investment in social and inclusive projects, in order to strengthen the impact of the blue economy on local communities. • Develop partnerships with civil society organizations to ensure an inclusive and participatory approach.
<p>Role of the Alliance in</p>	<ul style="list-style-type: none"> • Implement campaigns to promote Maghreb maritime products and services on an international scale

<p>strengthening the visibility and competitiveness of Maghreb countries in the blue economy on a global scale</p>	<ul style="list-style-type: none"> • Organize the participation of Maghreb maritime clusters in global trade fairs and events in order to promote regional initiatives • Develop online platforms to promote exchanges between stakeholders in the Maghreb maritime sector • Establish regional certifications to promote the sustainability and quality of maritime products from the Maghreb • Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one
<p>Main obstacles that the alliance could face in fostering cross-border cooperation between maritime clusters in the Maghreb countries</p>	<ul style="list-style-type: none"> • Limited access to regional and international funding • Lack of common financial mechanisms to support cross-border initiatives. • Lack of a shared vision among political leaders in the Maghreb countries to promote the blue economy • Low priority given to maritime cooperation at the regional level • Historical tensions between certain Maghreb countries prevent effective cooperation • Logistical obstacles

TUNISIA MARITIME PROFILE - 2024

<p>GDP 52 934 Millions current US\$ GDP Growth (1.10%)</p> <p>Coast/area ratio 12.4 m/km²</p> <p>Fleet - National flag 279 Thousands DWT</p> <p>Container throughput port 445 755 TEU</p>	<p>Transport services trade (e) 15 063 Millions current US\$</p> <p>Ship building</p> <p>Fleet - National flag 73 ships</p> <p>Number of seafarers 1 069</p>	<p>Merchandise trade 45 970 Millions current US\$</p> <p>Ship recycling</p> <p>Fleet – Ownership 262 Thousands DWT</p> <p>Number of port calls</p>
<p>Merchandise exports growth rate in 2024 -0.2 %</p>	<p>Transport services exports growth rate in 2024 -0.4 %</p>	<p>Fleet growth rate in 2024 0 %</p>
<p>Export structure by product group in 2024 (as % of total exports)</p> <ul style="list-style-type: none"> All food items Fuels Manufactured goods Other 		<p>Top 5 partners in 2024 (exports, millions of US\$)</p> <ul style="list-style-type: none"> France: 4 929 Italy: 3 893 Germany: 2 695 Spain: 1 136 Libya: 974





Annex 2

Survey template

General Information

2. **First and last name ***

3. **Organization ***

Plusieurs réponses possibles.

- Association / NGOs
- Private body (consortium, company, foundation, sectoral chamber of commerce, etc.)
- Public body (consortium, company, foundation, sectoral chamber of commerce, etc.)
- Autre : _____

4. **Country ***

Une seule réponse possible.

- Tunisia
- Mauritania
- Libya
- Algeria
- Egypt
- Morocco

5. Sectors of **activity** **Plusieurs réponses possibles.*

- Fishing and aquaculture
- Port activities
- Coastal and marine tourism
- Shipbuilding
- Maritime transport
- Water Management and Seawater desalination
- Blue biotechnology
- Green marine energy/hydrogen
- Blue Entrepreneurship
- Digitalization
- Skills / Ocean literacy
- Autre : _____

6. Your role in the maritime sector (or in relation to the blue economy): *

Plusieurs réponses possibles.

- Technical dialogue
- Policy dialogue
- Support to skills and capacity
- Support to Start-ups and SMEs
- Deployment of Technological and Digital Solutions for the Blue Economy
- Oceanographic and Climatological Research
- Development of Maritime Public Policies
- Intersectoral Coordination (transport, environment, fisheries, tourism, etc.)
- Protection of Coastal and Marine Ecosystems
- Community-Based Management / Inclusion of Youth and Women in Maritime Activities
- Autre : _____

7. What are your main activities? *

8. Your source of financing *

Plusieurs réponses possibles.

- Public grants
- Fees from associates
- Projects participation
- Revenues from provision of services
- Autre : _____

9. Your level of competence *

Plusieurs réponses possibles.

- National
- Sub-national (regional/local)
- Autre : _____

Vision

10. 1. What do you think could be the long-term vision of the Maghreb Joint Action of Maritime Clusters? *

Plusieurs réponses possibles.

- Making the Maghreb a pioneering region for the sustainable, innovative and inclusive blue economy in the Mediterranean, through strengthened regional cooperation between clusters
- Joining forces of the Maghreb maritime clusters to position the region as a strategic hub for integrated, resilient and attractive maritime development for international investors
- To bring out a strong and structured Maghreb voice to weigh in on regional and international agendas of the blue economy
- Make the Joint Action a platform for regional geopolitical cooperation, consolidating solidarity between Maghreb countries around strategic maritime issues
- Developing national maritime clusters into a Maghreb cluster to increase the regional impact and international visibility of the blue economy.
- Autre : _____

11. **1. What do you think should be the Alliance's priority strategic axes? ***

(rank them in order of priority)

Plusieurs réponses possibles.

- Development of regional value chains in the maritime sectors (fishing, aquaculture, transport, tourism, marine energy, etc.)
- Strengthening blue capacities and skills (training, research, innovation)
- Establishment of regional platforms for sharing information and maritime monitoring
- Coordination of public policies on the blue economy
- Promotion of inter-country projects with high economic and environmental impact
- Creation of joint financing and investment mechanisms
- Valorization of the Maghreb coastal natural and cultural capital
- Regional diplomacy to influence Euro-Mediterranean policies
- Autre : _____

12. **2. Which sectors should the Alliance prioritize to catalyze the development of an integrated blue economy in the Maghreb? (Check up to 4 choices) ****Plusieurs réponses possibles.*

- MSP and ICZM
- Fishing and aquaculture
- Port activities
- Coastal and marine tourism
- Shipbuilding
- Maritime transport
- Seawater desalination
- Blue biotechnology
- Green marine energy/hydrogen
- Blue Entrepreneurship
- TIC & Digitalisation
- Autre : _____

13. **3. What do you think are the main challenges to be addressed in the sectors chosen as priorities (in the previous question) to enable their development on a Maghreb scale?** *

Section 4: Role of the Joint Action in Promoting and Strengthening the Blue Economy in the Maghreb

14. **1. What role should the alliance play in strengthening cooperation between countries in the region and promoting the blue economy?** *

Plusieurs réponses possibles.

- Create cross-border partnerships to share best practices and strengthen cooperation between maritime clusters
- Inform and raise awareness among regional decision-makers about the opportunities offered by maritime clusters through networks and collaborations
- Organize regional platforms enabling collaboration between public and private actors in the maritime sector
- Encourage the establishment of joint projects between Maghreb countries, by promoting the exchange of resources and expertise
- Facilitate access to international financing for joint blue economy initiatives
- Promote innovation and collaborative research to maximize the impact of maritime clusters
- Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one
- Advocate for greater visibility of maritime clusters in regional and international assistance mechanisms (e.g. WestMED)
- Autre : _____

15. **2. How can the alliance promote innovation and technology adoption in maritime sectors (fisheries, aquaculture, transport, etc.)?** *

Plusieurs réponses possibles.

- Promote technological exchanges between Maghreb countries to improve the innovation capacities of maritime clusters.
- Facilitate research and development programs to encourage innovation within maritime clusters.
- Create partnerships with innovation and/or technology clusters.
- Autre : _____

16. **3. How can the alliance foster an inclusive and equitable approach to promoting the blue economy in the Maghreb countries?** *

Plusieurs réponses possibles.

- Establish training programs dedicated to women and young people to actively integrate them into the maritime sectors.
- Encourage the participation of local communities in the management and use of maritime resources, ensuring equitable benefits.
- Create incentives to attract investment in social and inclusive projects, in order to strengthen the impact of the blue economy on local communities.
- Develop partnerships with civil society organizations to ensure an inclusive and participatory approach.
- Autre : _____

17. **4. What role should the alliance play in strengthening the visibility and competitiveness of Maghreb countries in the blue economy on a global scale?** *

Plusieurs réponses possibles.

- Implement campaigns to promote Maghreb maritime products and services on an international scale
- Organise the participation of Maghreb maritime clusters in global trade fairs and events in order to promote regional initiatives
- Develop online platforms to promote exchanges between stakeholders in the Maghreb maritime sector
- Establish regional certifications to promote the sustainability and quality of maritime products from the Maghreb
- Enhance harmonization of regulatory frameworks, integrating Maghreb into the international and EU one
- Autre : _____

Section 5: Obstacles to Cross-Border Cooperation in the Blue Economy

18. What are the main obstacles that the alliance could face in fostering cross-border cooperation between maritime clusters in the Maghreb countries? *

Plusieurs réponses possibles.

- Limited access to regional and international funding
- Lack of common financial mechanisms to support cross-border initiatives.
- Lack of a shared vision among political leaders in the Maghreb countries to promote the blue economy
- Low priority given to maritime cooperation at the regional level
- Historical tensions between certain Maghreb countries prevent effective cooperation
- Logistical obstacles
- Autre : _____

19. In your opinion, how can this be addressed/Solved? *

20. Recommendations *

21. 1. What role can communication play in strengthening the alliance of Maghreb maritime clusters? *

Plusieurs réponses possibles.

- Raise awareness among decision-makers and strategic partners of the importance of the blue economy in the region
- Promote achievements and flagship projects resulting from cooperation between clusters
- Create a common visual and narrative identity for the alliance on a Mediterranean and international scale
- Engaging women, youth and local communities around maritime issues
- Autre : _____

22. 2. What communication channels would be most effective in increasing the visibility of the alliance? *

Plusieurs réponses possibles.

- Regional digital platforms (website, social networks, newsletter)
- Traditional media (radio, TV, press)
- Regional and international events (trade fairs, forums, conferences)
- Targeted communication campaigns for donors and investors
- Partner networks (NGOs, academic institutions, regional organizations)
- Autre : _____

23. **3. What content should the joint action’s communication strategy prioritise?** *

Une seule réponse possible.

- Testimonies from local stakeholders and beneficiaries
- Case studies on successful collaborative projects
- Data and mapping on the maritime resources of the Maghreb
- Awareness videos on the challenges of the blue economy
- Autre :

24. **Recommendations** *

Annex 3

Action Plan for Maritime Clusters Cooperation – AP4MCC (English & French versions)

INTRODUCTION

The project **CALLMEBLUE supported the set-up, scaling-up and cooperation of Maritime Clusters across the Mediterranean region, with a focus on cooperation across Maghreb Maritime Clusters within the broader context of the WestMED Cluster Alliance.** Some important achievements of the project include the support for the set-up of Maritime Clusters in Libya and Algeria, besides greater capacity building and synergies identification amongst all project partners.

During the closing Regional Meeting, held in Rome at ForMare premises on the 24th February 2026, a number of concrete actions for greater cooperation and synergies amongst all partners and regional actors have been discussed, with an extension of the collaboration to the relevant experience of Morocco – i.e. Souss-Massa Regional Cluster. These include the concrete sharing of relevant services already provided by individual clusters, so to move towards a shared ecosystem amongst all involved Maritime Clusters – further presented in the next section of the Action Plan.

Given the different level of development and stage of maturity of involved clusters, it was agreed that the **WestMED Cluster Alliance+ (WMCA+) remains the main platform for such closer cooperation,** expanded to the **participation of Moroccan cluster experiences,** in the context of the **Union for Mediterranean (UfM) Ministerial Declaration,** as well as a broader **pan-African cooperation to be discussed with the African Union (AU)** in the context of the



EU-Africa Partnership.

An essential **priority for Maritime Clusters is the support to sustainable innovation addressing the needs and challenges of coastal communities** across the region. In this respect it is important to further **engage with local constituencies of each Maritime Clusters and understand their needs and potentials to be supported by valuable services, while using the WestMED Cluster Alliance+ as a support mechanism** allowing for cross-synergies and sharing of ideas. While broader cooperation is to be further discussed with regional partners, a number of key areas for joint synergies are presented in the next section.

COMMITMENT FOR GREATER SHARING OF RELEVANT SERVICES

The services to be shared across Mediterranean Clusters as part of the WMCA+ could be summarized as follows:

CLUSTERS	SERVICES TO BE SHARED	TYOPOLOGY
CLUSTER BIG	Innovation, Acceleration and Incubation Services, Training, Investment support, Internationalization, Sectoral Analysis, Matchmaking Support	Customized
FORUM OCEANO	HUB AZUL Dealroom, Portugal Blue REGIONAL DIGITAL HUB	Package
	Innovation, Acceleration and Incubation Services, Training, Investment support,	Customized



	Internationalization, Sectoral Analysis, Matchmaking	
STRATEGIS	Innovation, Acceleration and Incubation Services, Training, Investment support, Internationalization, Sectoral Analysis, Matchmaking Support	Customized
	HERON Robotics	Package
LEANCUBATOR	Innovation, Acceleration and Incubation Services, Training, Investment support, Internationalization, Sectoral Analysis, Matchmaking Support	Customized
FORMARE	Master in Shipping, Terminal Management Programme	Package
	Open Innovation	Customized
ANIMA INVESTMENT NETWORK	Cluster Connect	Package
FEDERAZIONE DEL MARE	Regulatory Framework, Taxonomy in Shipbuilding, Shipping, Ports	Customized
CLUSTER MARITIME ANDALUCIA	Innovation, Acceleration and Incubation Services, Training, Investment support, Internationalization, Sectoral Analysis, Matchmaking Support	Customized

TUNISIA MARITIME CLUSTER	North-South Mobility	Package
	Training	Customized
POLE MER MEDITERRANEE	Innovation, Acceleration and Incubation Services, Training, Investment support, Internationalization, Sectoral Analysis, Matchmaking Support	Customized

NEXT STEPS

Building on this Action Plan and the overall commitment for cooperation within the WMCA+, **CALLMEBLUE project partners and Mediterranean Maritime Clusters will actively scope financial opportunities** for follow-up project in support of regional synergies and cooperation.

Overview of **regional and international financing opportunities will allow to structure future projects that will capitalize achievements** so far. These will be essential to strengthen Maritime Clusters capacity to deliver valuable services to their constituencies and coordinate regionally.

Advancements will be **discussed and reported as part of the WMCA+ activities – including its quarterly coordination meetings – and maximisation of results will be achieved in line with the WestMED Initiative** national and regional events and communication/dissemination support.

INTRODUCTION

Le projet **CALLMEBLUE** a soutenu la mise en place, le développement et la coopération des Clusters Maritimes à travers la région méditerranéenne, avec un accent particulier sur la coopération entre les Clusters Maritimes du Maghreb, dans le cadre plus large de la **WestMED Cluster Alliance**. Parmi les principales réalisations du projet figurent le soutien pour la création de Clusters Maritimes en Libye et en Algérie, ainsi que le renforcement des capacités et l'identification de synergies entre l'ensemble des partenaires du projet.

Lors de la réunion régionale de clôture, tenue à Rome dans les locaux de ForMare le 24 février 2020, plusieurs actions concrètes visant à renforcer la coopération et les synergies entre tous les acteurs ont été discutées, avec un élargissement de la collaboration à l'expérience pertinente du Maroc – à savoir le Cluster régional Souss-Massa. Celles-ci incluent notamment le partage concret de services pertinents déjà fournis par les clusters individuels, afin de progresser vers un écosystème partagé entre tous les Clusters Maritimes concernés – présenté plus en détail dans la section suivante du Plan d'action.

Compte tenu des différents niveaux de développement et de maturité des clusters impliqués, il a été convenu que la **WestMED Cluster Alliance+ (WMCA+)** demeure la principale plateforme pour cette coopération renforcée, élargie à la participation des expériences marocaines, dans le cadre de la Déclaration ministérielle de **l'Union pour la Méditerranée (UpM)**, ainsi qu'à une coopération panafricaine plus large à discuter avec **l'Union africaine (UA)** dans le contexte du Partenariat UE-Afrique.

Une **priorité essentielle pour les Clusters Maritimes est le soutien à l'innovation durable répondant aux besoins et aux défis des communautés côtières** de la région. À cet égard, il est important de **renforcer l'engagement avec les parties prenantes locales de chaque Cluster Maritime et de comprendre leurs besoins et leur potentiel, afin de les soutenir par des services à forte valeur ajoutée, tout en utilisant la WestMED Cluster Alliance+ comme mécanisme de soutien** permettant des synergies croisées et le partage d'idées. Alors qu'une coopération plus large doit être approfondie avec les partenaires régionaux, un certain nombre de domaines clés pour des synergies conjointes sont présentés dans la section suivante.



ENGAGEMENT EN FAVEUR D'UN PARTAGE ACCRU DES SERVICES PERTINENTS

Les services à partager entre les Clusters méditerranéens dans le cadre de la WMCA+ sont résumés comme ci-dessous:

CLUSTERS	SERVICES À PARTAGER	TYOLOGIE
CLUSTER BIG	Services d'innovation, d'accélération et d'incubation, Formation, Soutien à l'investissement, Internationalisation, Analyse sectorielle, Soutien à la mise en relation (matchmaking)	Personnalisé
FORUM OCEANO	HUB AZUL, HA Dealroom, Portugal BLUE DIGITAL HUB	Standard
	Services d'innovation, d'accélération et d'incubation, Formation, Soutien à l'investissement, Internationalisation, Analyse sectorielle, Soutien à la mise en relation (matchmaking)	Personnalisé
STRATEGIS	Services d'innovation, d'accélération et d'incubation, Formation, Soutien à l'investissement, Internationalisation, Analyse sectorielle, Soutien à la mise en relation (matchmaking)	Personnalisé
	HERON Robotics	Standard
LEANCUBATOR	Services d'innovation, d'accélération et d'incubation, Formation, Soutien à l'investissement, Internationalisation, Analyse sectorielle, Soutien à la mise	Personnalisé

	en relation (matchmaking)	
FORMARE	Master en transport maritime, Programme de gestion des terminaux portuaires	Standard
	Open Innovation	Personnalisé
ANIMA INVESTMENT NETWORK	Cluster Connect	Standard
FEDERAZIONE DEL MARE	Cadre réglementaire, taxonomie dans la construction navale, le transport maritime et les ports	Personnalisé
CLUSTER MARITIME ANDALUCIA	Services d'innovation, d'accélération et d'incubation, Formation, Soutien à l'investissement, Internationalisation, Analyse sectorielle, Soutien à la mise en relation (matchmaking)	Personnalisé
TUNISIA MARITIME CLUSTER	Mobilité Nord-Sud	Standard
	Formation	Personnalisé
POLE MER MEDITERRANEE	Services d'innovation, d'accélération et d'incubation, Formation, Soutien à l'investissement, Internationalisation, Analyse sectorielle, Soutien à la mise en relation (matchmaking)	Personnalisé

PROCHAINES ÉTAPES

S'appuyant sur le présent Plan d'action et sur l'engagement global de coopération au sein de la WMCA+, **les partenaires du projet CALLMEBLUE ainsi que les Clusters Maritimes méditerranéens identifieront activement des opportunités de financement pour des projets** de suivi visant à soutenir les synergies régionales et la coopération.

Un aperçu des **opportunités de financement régionales et internationales permettra de structurer les projets futurs afin de valoriser les résultats obtenus jusqu'à présent.**

Ces projets seront essentiels pour renforcer la capacité des clusters maritimes à fournir des services de qualité à leurs parties prenantes et à assurer la coordination au niveau régional.

Les avancées seront examinées et rapportées **dans le cadre des activités de WMCA+, notamment lors de ses réunions de coordination trimestrielles. La maximisation des résultats sera assurée en cohérence avec les événements nationaux et régionaux de l'Initiative WestMED** ainsi qu'avec le soutien à la communication et à la diffusion.



CallmeBLUE

Cluster ALLiance MEd BLUE

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