

SPECIFICATION

ESPON Targeted Analysis Based on User Demand 2013/2/2

The development of the Islands- European Islands and Cohesion Policy (EUROISLANDS) (2009-2010)

(o) Targeted analyses within the ESPON 2013 Programme

The ESPON 2006 Programme provided integrated analysis and long-term spatial scenarios which enriched the European policy debate and knowledge base. Tying in with the achievements of the previous programme period, the ESPON 2013 Programme continues conducting applied research on European territorial development, competitiveness and cohesion. At the same time, a new type of projects is carried out in the form of targeted analyses based on specific demands expressed by stakeholders and making use of existing ESPON results.

The priorities describing the work-programme of the ESPON 2013 Programme are structured in four strands:

- 1. Applied research on territorial development, competitiveness and cohesion: Evidence on European territorial trends, perspectives and policy impacts**
The applied research projects will create information and evidence on territorial challenges and opportunities for success in the development of regions. Cross-thematic applied research will be a major activity integrating existing thematic analysis and adding future analysis of new themes. Territorial impact studies of EU policies will be another focus under this priority.
- 2. Targeted analysis based on user demand: European perspective on development of different types of territories**
This priority responds to a clear demand of practitioners for user and demand driven actions within the ESPON 2013 Programme. By convening an analytical process where ESPON findings are integrated with more detailed information and practical know-how, new understanding of future development opportunities and challenges may arise, which could be transformed into projects and actions.
- 3. Scientific platform and tools: Territorial indicators and data, analytical tools and scientific support**
The scientific platform and analytical tools built up within the ESPON 2006 Programme will be maintained and further expanded. New actions shall be undertaken to develop current achievements and make use of existing indicators, data and tools.

4. Capitalisation, ownership and participation: Capacity building, dialogue and networking

Under this priority, actions are foreseen that will make the evidence and knowledge already developed operational through raising awareness and involving stakeholders in the results and practical application of the m.

Targeted analyses under Priority 2 enable stakeholders to obtain customised and up-to-date information on their particular territorial context and opportunities for development which can be used for policy development. Given the targeted focus of these projects on specific territorial entities, targeted analyses will contribute to the use of ESPON results in practise and to the involvement of policy makers, practitioners and scientists in a joint synergetic process.

(i) General objectives of targeted analyses under Priority 2

The general objectives of targeted analyses within the ESPON 2013 Programme are the following:

- Provision of evidence and knowledge based on ESPON results on the strengths and weaknesses of individual regions and/or larger territories seen from a European perspective, or a global context, giving European regions the option to compare themselves to other regions and hereby finding competitive advantages for development and cooperation.
- Improvement of the usefulness of ESPON results by testing new, experimental and innovative options such as (1) analysis of themes of interest for groups of regions, partly based on case studies, (2) methodological frameworks for translating territorial development goals and policy aims into concrete actions and (3) technical, methodological and analytical support to territorial planning processes and spatial programming and visions.
- Provision of analytical support and evidence based on ESPON results on thematic priorities in cooperation with other Structural Funds Programmes.

The aim is to carry through targeted analyses in partnership with policy makers and/or practitioners showing an interest in gaining awareness of European evidence, information, experience and/or knowledge on common challenges related to their territorial and/or urban development.

The individual targeted analysis shall support better informed policy decisions by:

- Integrating ESPON findings with more detailed information and practical know-how, either from a territorial part of Europe or from a sector authority.
- Contributing to a sound knowledge of territorial development perspectives/trends through new understanding of future development potentials and challenges for the respective territorial and/or urban development.

This project shall contribute to these objectives during its implementation by ensuring a close cooperation and partnership with the stakeholders who expressed their need for this targeted analysis.

(ii) Types of Action under Priority 2

Projects under Priority 2 can have different foci and accordingly vary in their content. In order to have a clear distinction between the various possible project orientations, each project needs to be clearly allocated to one of the following types of action:

1) Integrated studies and thematic analysis

This type of action is foreseen to follow a “traditional” analytical approach using existing results of ESPON applied research and other studies. The analysis can integrate several themes relevant for certain types of territories, regions and/or cities or they can be less comprehensive in the approach by focusing on one or a few themes.

The main objectives are:

- a) To provide added value for territorial development of specific types of territories¹ by offering new comparative insight and understanding on territorial potentials and challenges from a European perspective;
- b) To ensure that other (similar) types of territories/regions can benefit from the output of the analysis.

2) Knowledge support to experimental and innovative actions

This type of action clearly allows for the implementation of projects that differ from the mainstream of the ESPON 2013 Programme by being more experimental and/or innovative in character. It is in a way a laboratory for developing ways of meeting main territorial challenges that Europe is confronted with.

The objectives are:

- a) To support experimental and innovative actions carried through in partnership with stakeholders with European knowledge on territorial structures, trends, perspectives and policy impact;
- b) To provide methodological support to experiments and innovative efforts.

3) Joint actions related to other Structural Funds Programmes

The joint actions related to other Structural Funds Programmes take a geographical starting point in the area covered by these programmes, be it transnational, cross-border, interregional, regional or urban territories. The content of these actions can be integrated and thematic analyses or they can be experimental and innovative of nature (as described above). A main prerequisite is that they are justified by supporting Structural Funds Programme implementation.

The objectives are:

¹ Types of territories codified for the territorial dimension, include urban, rural-mountains, rural-islands, rural-area (sparsely and very sparsely populated), rural-other, former external border, area dependant on fisheries, outermost regions, transnational cooperation areas, cross-border cooperation areas and interregional cooperation areas (as listed in the ESPON 2013 Programme, p. 9).

- a) To provide information and analyses on the European position of these areas, their comparability with other similar areas, and their potentials and challenges, useful for Structural Funds Programmes (regional, cross-border, transnational, interregional and urban);
- b) To provide methodological support for strategic processes, including visions and scenarios for spatial development and planning.

Independent of the type of action, each project should have a European perspective (i.e. supporting the understanding of the wider European context), a clear transferable character and a concrete implementation part, focusing on specific territories.

The analytical approach can provide integrated, cross-thematic analyses, study individual themes or sectors, or focus on a specific type of territories. At any rate, ESPON findings shall be integrated and supplemented with more detailed information and practical know-how, either from a territorial part of Europe or from a sector authority. Analysis can include/be based on case studies. The geographical coverage will normally have a more limited territorial coverage than the entire European territory.

This project belongs to the first type of action. By using, inter alia, existing ESPON results, the project will analyse European islands, their challenges and development potentials in order to foster their sustainable development in the framework of the single market.

(iii) Scope and rationale of the targeted analysis

Most European islands, island complexes and archipelagos are considered as disadvantageous regions which face specific problems. These are related to factors such as:

- Peripheral location and relative isolation of the islands in relation to other territories and regions at the continental mainland. This situation induces substantial accessibility problems, high transport costs, both for people and goods, which affect the trade potential; dependency on air and maritime public transport; additional obstacles in accessing the EU market, leading to lesser internationalisation of their economy in general;
- High dependency on external inputs (energy, food, other goods, services, etc.), therefore high sensitivity to increases of transport and energy costs, as seen in the current rise of oil prices;
- Traditional structure of the local economy, which means dependency on a few activities (often very seasonal, e.g. tourism) mainly based on exploitation of natural resources, low competitiveness, as well as high socio-economic impacts in cases of economic downturns and structural changes, due to limited reaction capacity;
- Small size of the domestic market, which doesn't favour economies of scale;
- Low administrative autonomy and/or weak administrative capacity (e.g. difficulties in representation in higher administrative levels, small size of administrative territorial units, lack of local expertise, etc.), which diminish

the power of the islanders to promote policies adapted to their situation and to take full advantage of existing measures;

- High dependency on national and European funds;
- Dynamics of the local population (ageing, emigration towards other regions or states at the continental mainland, temporary overpopulation during the high tourist season);
- Insufficient public infrastructures and services, such as transport, energy, health care and education;
- Scarcity of natural resources (e.g. water, fertile land);
- Land use pressures;
- Vulnerability of the environment with high sensitivity to natural hazards (e.g. deforestation, fires, draughts, rise of sea level, etc.) and ecosystems with a high level of endemic species and a very sensitive equilibrium;
- Intraregional inequalities (“double insularity”).

These factors – combined all together – comprise some of the primary and secondary consequences of “insularity” which is a permanent phenomenon with altered intensity, creating structural problems. Therefore there is a need for continuous intervention.

Island States share the factors common to all islands. At the same time, however, they have specific characteristics due to their role as autonomous states with no mainland territory, thus constituting a distinct category of islands. Island States’ vulnerabilities are particular as they concern the whole territory of the country, whereby there is no mainland territory to turn to as a main source to make up and support the island’s deficiencies. This calls for a comprehensive review of Island States’ vulnerabilities which are at a national level.

The aim of the EUROISLANDS targeted analysis is to deliver an appropriate reference work and a set of policy recommendations and strategic guidance to foster the sustainable development of the European islands within the framework of the Single Market, ensuring equal terms and opportunities with the other non-handicapped regions.

For the stakeholders behind this project the targeted analysis is seen as an opportunity:

- (a) To raise awareness at European level about “insularity” as an issue that needs particular consideration and consensus building, taking into account the structural problems and the unequal opportunities within the European integration process.
- (b) To elaborate policy options, which are coherent to the EU policies and encourage the endogenous development of the European Islands.
- (c) To use the study results in order to disseminate the policy options, to raise public awareness and to set the basis for discussion in the on-going process of the Territorial Agenda (First Action Programme, Line of Action 2) and the future Structural Funds.

Main characteristics of the territory to be addressed

The European insular space is not homogenous and the targeted analysis needs to take into consideration its differentiations. The European Union includes 2 small Island-States, 18 insular regional authorities and an important number of coastal islands², whose population exceeds 11 million inhabitants living on more than 300 islands³.

In the following tables some indicative classifications are presented based on previous studies on European islands.

Table 1: European Islands' classification according to their surface

Category	Surface	Number	Examples
Very big	More than 5.000 km ²	5	Corse, Cyprus, Kriti, Sardegna, Sicilia
Big	from 1.000 to 5.000 km ²	6	Mallorca, Lesvos, Gotland, Saarema, Lewis and Harris, Rodos
Intermediate	from 100 to 1.000 km ²	46	Hiiumaa, Bornholm, Limnos, Kephallonia, Elba, Wight, Ibiza, Menorca, Malta
Small	from 25 to 100 km ²	72	Borkum, Formentera, Serifos, Mykonos, Iskha, Ameland, Bressay, Korpo
Very small	Less than 25 km ²	173	Juist, Anholt, Kumlinge, Saint Barthelemy, Donousa, Aranmore, Lampedusa, Halso, Iona

Table 2: European Islands' classification according to their population

Category	Population	Number	Examples
Very big	More than 500.000 habitants	5	Cyprus, Mallorca, Kriti, Sardegna, Sicilia
Big	from 100.000 to 500.000 habitants	4	Corse, Malta, Kerkyra, Wight, Ibiza
Intermediate	from 10.000 to 100.000 habitants	33	Bornholm, Saint Martin, Samos, Naxos, Lipari, Fasta Aland, Menorca
Small	from 2.000 to 10.000 habitants	51	Nordernay, Formentera, Ikaria, Lampedusa, Mull
Very small	Less than 2.000 habitants	212	Juist, Endelave, Lappo, Batz, Amorgos, Anafi, Clare, Stromboli, Ven, Tresco

In addition to the classification mentioned above, some additional factors such as economic typology, governance structure and population density, should be considered by this project.

² Ultra-Peripheral Regions such as Canary Islands, Azores, Madeira, Réunion, Guadeloupe and Martinique are not included

³ Source: "Analyse des régions insulaires et des régions ultrapériphériques de l'Union européenne, 2003".

The European islands are characterised by common features, but also by important differences. The most important common features that differentiate them from other regions and states at the continental mainland are the following:

- Small size concerning the surface and the population that implies impossibility for economies of scale, limited resources and limited carrying capacity;
- Isolation and remoteness (peripheral location) that imply extra operational costs for the state, the enterprises and the households in order to obtain the same output (goods and services) as the mainland;
- Rich and unique but fragile cultural and natural environment.

European islands are characterised by a lot of disparities concerning their location, their population and their size. Important inequalities are also observed in the socio-economic performance among the islands. Island states share these territorial features but the challenges facing their territory seem to be more particular than for other types of European islands due to the fact that they concern the whole territory of a country and therefore, these territorial challenges have to be considered already at national level.

Territorial features have to be examined all together in order to approach “insularity” in an integrated way.

Thematic scope for the targeted analysis

In recent years great consideration has been given to geographical particularities within the EU (mainly arising from a peripheral location or vulnerability) which seem to be significantly responsible for the persistence of regional and intraregional inequalities, affecting the development of some regions. The identification of the above observations contributed to the incorporation of dimension of territorial cohesion in the Lisbon Treaty as one of the three cornerstones of the European Cohesion Policy. The territorial dimension has been included in the recent cohesion reports, lending a particular dynamic in the search of more specialised and integrated policies. A ratification of the Lisbon Treaty leads, inter alia, to the implementation of its modified Article 158 for “Economic, Social and Territorial Cohesion”, which acknowledges the need to pay particular attention to regions with severe and permanent natural or demographic handicaps, such as islands.

In this context, the Territorial Agenda (TA) of the EU, as well as its First Action Program (AP1) for the implementation of the TA, provide for the enhancement of the regional policy with measures which will focus on economic, social and territorial cohesion. The ultimate aim of the TA is to integrate the territorial priorities in the European Policies and Programmes in an operational way. Based on the common acknowledgment of the particular problems that islands face but also on their opportunities for development, a specific Action⁴ concerning the European Islands has been included in the AP1. Its objective is to contribute to the pursuit of the framework of policies and the corresponding regulatory adjustments, which will facilitate the balanced and equivalent sustainable development of the islands.

⁴ Act 2.3c: “Analyse key-dossiers, policies and legislation from the point of view of the Regions with specific territorial constraints – European islands”

The EUROISLANDS targeted analysis should be in line with the requirements and objectives of the AP1 and it is expected to contribute to the definition of the future steps of the Action (Act 2.3c).

Objective of the targeted analysis

In order to outline the actual situation of the islands, and to achieve representative and applicable results from the study, the analysis shall include information and viewpoints not only from the regional, national and European levels of administration, but also from the lower level, especially the one represented by the local governance and the local community⁵.

Thus the targeted analysis will have to deal with territories at a NUTS level lower than NUTS II and make an effort to go even further to smaller territorial entities such as LAU1 and LAU2, thus taking the ESPON studies beyond their usual scope and level of analysis adding a more regional/local dimension. This level of analysis is necessary as the stakeholders underline that the importance of inter-islands disparities and differences within archipelago island regions have to be made known, as well as (b) the situation of small coastal islands. On NUTS II level the statistical information is available only for the large island regions such as Corsica, Kriti etc. For all the other cases it is necessary to have information at the island unit level.

The aim of the present study is the pursuit of a suitable EU policy in order for the islands to reach the economic, social and territorial cohesion and reduce regional disparities. The challenge is to achieve clear conclusions on the diverse situation of the islands. The evidence must rely on an input of quantitative and qualitative statistical data, measuring methods and indicators that will lead to a clear mapping of the situation and the potentials of all the European islands. A minimum number of charts and tables (not raw data) should be indicated that can give the reader full information, alongside with the particular case studies. The possibility to update the conceptual framework and the existing typology must also be considered. The analysis shall address relevant issues from the European perspective using ESPON results of spatial and sectoral studies in order to provide input to the analysis on the territorial context of islands within Europe.

The study conclusions have to be derived by using both a bottom-up and top-down approach. From the one side (bottom-up), the local and regional stakeholders will be invited to express their points of view on the islands' situation by providing information and sharing their knowledge and vision for their territories. From the other side (top-down), the national bodies and ESPON CU could provide information on national and European policies. In this way the study can be used as a tool for policy development in different administrative levels.

The active involvement of the stakeholders in this procedure will contribute to a sound knowledge of islands' development perspectives through a new understanding

⁵ Ultra-Peripheral Regions such as Canary Islands, Azores, Madeira, Reunion, Guadeloupe and Martinique, are not included in the targeted analysis.

of their future development potentials and challenges. The interaction between the European dimension and the national/regional/local one is expected to deliver added value to the stakeholders involved as well as to the European Authorities.

Through this targeted analysis, the issue of insularity can be better understood and promoted with a composed and systematic way, with the aim to contribute to the achievement of the territorial cohesion policy goals⁶ while maintaining the diversity of the European insular areas. More specifically, the objective of the study is to draw analytical conclusions that could lead to the formulation of an appropriate framework of policies and measures, to ensure the sustainable development of the European island regions.

The stakeholders' ambition is to effectively enable the European Islands full and equitable integration within the single market, and position them as equal players on a regional and global level. In order for the stakeholders to propose feasible recommendations for the better integration of the territorial cohesion of insular regions in the EU Cohesion Policy, the particular factors that demand a distinctive policy approach to islands should be examined.

More specifically the study shall include:

- a) **An insight on islands' territorial structures and dynamics, in particular on development constraints and potentials based on 4-6 representative case studies, which should ensure a reasonable geographical coverage of the ESPON space and the results should be transferred to a general European context.** This will rely on appropriate information and data collected from the lower level of governance, the local community and the private sector through their stakeholders. The analysis and mapping of the existing situation in the different types of European islands, i.e. their problems (accessibility, lack of resources), their needs and possibilities, can constitute the base for approaching a new strategic framework for an efficient policy. Special emphasis must be given on the comprehension of the importance of "Insularity" (to include double insularity) and its impact on island sustainable development.

The study must reveal a knowledge basis of the islands' realities and disclose **the extent to which the instruments of Cohesion Policy can be effectively applied** to different territories given their particular circumstances. This could lead to the discussion of the appropriate policy recommendations that will create the necessary conditions for the sustainable development of the islands, especially of the very small and remote ones, as well as to the creation of an islands' evolution monitoring system.

Reference should also be made to the main challenge of territorial governance, i.e. the process of making and implementing policy in an integrated and coherent way amongst the different interests and actors and between different territorial scales.

⁶ "A series of overarching goals that define the current vision of Europe's desirable territorial state can be identified: prosperous, competitive and diversified economies, innovative knowledge society, sustainable transport, balanced distribution of population, wealth, cities....." (ESPON Project 3.2, p.55)

At the this stage of the project, it is necessary to proceed with an in depth analysis of the islands' situation (economic, social and environmental) in order to assess their divergence from the European average, taken into account the general sustainable development perspectives and the more specific European territorial objectives stemming from different European documents (ESDP, Lisbon Strategy, Gothenburg Strategy, Lisbon Treaty, Territorial Agenda of the European Union, etc).

A limited number (4-6) of representative case studies have to be examined in parallel with the compilation of targeted information about all the European islands. The conclusions of the case studies should be transferable in the European context. For the classification of the islands into categories and the selection of the mentioned case studies a set of criteria has to be elaborated.

These criteria should take into consideration parameters such as:

- Different types of islands such as:
 - Island States (Cyprus, Malta), Island regions (NUTS II – Sicily, Sardegna, Corsica, Kriti), Archipelago island regions (North & South Aegean Islands, Ionian Islands, Balearic Islands, Åland Islands), Coastal Islands belonging to different Member States as Germany, Holland, France, Italy, Greece, Sweden, Denmark, Estonia, Ireland, Gr. Britain.
- Geographical location: Different geographical areas of the European Union, such as the Baltic Sea, the Mediterranean Sea, the Atlantic Ocean and North Sea - Insular regions at the border of European Union.
- Different size of islands (surface and population).
- Administrative framework (such as small states, autonomous regions, administrative regions, part of a coastal administrative zone).
- Status of the islands according to EU structural funds (convergence regions, competitiveness and employment regions).
- Economic structure (such as cases of mono-activity and lack of economic diversification, seasonality of activities, low penetration of innovation in enterprises).
- Gaps in relation to development levels of various territories (EU, country, region - intraregional disparities within the insular space).

The use of information and considerations from previous ESPON and other European, national and local studies is necessary. The Transnational Project Group (TPG) will also be supported by the stakeholders, in terms of providing them with the available data and information.

- b) **An assessment of the intensity of the constraints based on an islands typology.** The mountainous, rural and dispersed populated character of the islands, as well as their peripheral distance from the European core market, should be taken into account, since they intensify the disadvantages, create cumulative results, increase islands' vulnerability and affect their attractiveness. In this context, data, indicators and qualitative information will be used to point out the issues of insularity and illustrate the weaknesses and the potentials of these types of territories but at the same time to identify (unexploited) territorial potentials.

At this stage of the project, the study should identify the causes and the driving forces for the results found by the first stage of the analysis. The causes should be distinguished in those that derive from insularity (low accessibility, limitation of natural resources, fragile environment, island market size, high operational cost for enterprises and services of public interest, high cost of living), and in those that derive from the dominant development model of islands (mono-activity, seasonal employment, unskilled human resources, low penetration of innovation and technological change, shortage of natural resources, pressures on land uses, lack of infrastructures).

- c) A detailed **analysis of the conditions for promoting and exploiting territorial potentials from a European, transnational, national and regional/local perspective**. In particular, initiatives and perceptions from policy makers and other local stakeholders involved in developing the area/region should be considered.

At this stage of the project, the policies implemented in critical domains for the islands will be analysed (internal market, services of public interest, agriculture and rural development, fishery, environment, culture, tourism, etc.) and in particular those that have a territorial dimension – diversification. Also, the degree to which the existing national and European policies for cohesion, sustainable development, etc. have influenced these regions, based on existing ESPON studies and other information (statistical data, other studies, etc) as well as on interviews with the corresponding stakeholders will be determined and analysed. In this context, the strengths and weaknesses of the existing national and European policies and tools will be assessed with specific reference to the guidelines regarding Structural Funds and State Aids.

All the above analysis has to be summarised in a functional way (e.g. strengths and weaknesses of the different types of islands, threats and opportunities coming from the external environment as are the global issues – climate changes, rising of energy prices, population ageing, illegal migration flows, globalisation, technological achievement, innovations, change of development pattern, changes of population preferences etc. - and the European and national policies) in order to make as clear as possible policy priorities.

- d) **Conclusions in the form of non-binding recommendations so that the European, national and local policies could be appropriately adapted to the islands' realities** in order to enable islands to play a more active role in the EU both economically and socially. It will suggest, for the consideration of stakeholders, optional changes or adaptations in the regional development policies that could be adopted, so that the island particularities may be taken into consideration at the corresponding regulatory level, and contribute to a more effective and efficient cohesion policy in these territories.

Following the above, at the final stage of analysis, possible alternative measures for policy adaptation will be described, so that they can satisfy more effectively the particular requirements of the islands, taking into consideration the diversity of insular characteristics. The possibility of differentiating the intensity of the policy measures should be examined according to the islands' classification and

characteristics (e.g. population and surface, degree of isolation, legal status). The policies could have institutional character differentiating sectoral European policies and/or reinforce financial tools.

Topics that should be treated in priority are:

- Enforcement of (innovative) entrepreneurial initiatives,
- Management and valorisation of natural and cultural resources
- Enhancement of human resources
- Amelioration of Services of Public Interest (including social, economic and technical infrastructure)

An ex-ante evaluation of the policy options would be useful and welcomed by the stakeholders.

Finally, the conclusions of the study shall be connected to coherent policy guidelines taking into account different geographical levels (European, national, regional and local), with reference to the territorial governance. The TPG will also make proposals for the further deepening of the analysis in the future and give directions for future research.

(iv) Implementation method and project governance

Partnership in the project implementation is vital in order to achieve useful results. This applies to both, the partnership between the ESPON Programme and stakeholders, as well as between the team of researchers (TPG) and the stakeholder representatives.

Stakeholders' involvement is essential throughout the project's life-cycle and has started off with the definition and development of the specific theme for the targeted analysis. During the implementation phase of the targeted analysis, stakeholders play an active role by providing and giving access to information relevant for the project, as well as by steering and guiding the work of the TPG together with the ESPON Coordination Unit.

The Lead Stakeholder will be the Ministry of Economy & Finance, General Secretariat for Investments & Development, Special Service for Strategy, Planning & Evaluation of Development Programmes, Greece. It will be represented by the Director of the Special Service for Strategy, Planning & Evaluation, Mr Yiannis Firbas.

Other partners in the stakeholder partnership are:

- 1) Malta Environment and Planning Authority (MEPA), Malta
- 2) National Rural Development Agency (GBV), Sweden
- 3) Municipality of Gotland (GK), Sweden
- 4) Government of the Balearic Islands (CAIB), Spain
- 5) Department of Town Planning and Housing (DTPH), Cyprus
- 6) Regional Municipality of Bornholm, Department of Regional Development (RU BRK), Denmark

- 7) Ministry of Economic Development, Department for Development and Cohesion Policies (DPS), Italy
- 8) Autonomous Region of Sardinia, Department of EU and International Affairs (RAS), Italy
- 9) Saaremaa County Government, Department of Development and Planning (SCG), Estonia
- 10) The Government of Åland, Department for Administrative Affairs (AL), Finland

The project will be governed through a **Steering Committee** consisting of:

- Representatives of the Lead Stakeholder and the 10 partners of the stakeholder consortium;
- A Representative of the ESPON Coordination Unit that, on behalf of the ESPON Monitoring Committee, bears the contractual responsibility for the EUROISLANDS targeted analysis;
- A representative of the TPG.

Stakeholder organisations at European level i.e. the CPMR, INSULEUR and ESIF, can eventually be invited on their own expense to participate in the steering of the project should the stakeholder(s) so wish.

The EUROISLANDS Steering Committee will guide the targeted analysis and closely follow up the work carried out by the group of experts (TPG), aiming at the sound elaboration of the study and giving particular emphasis on the practical usefulness of the study outputs. To this end, several meetings of the Steering Committee will be organised throughout the project's life-cycle in order to give guidance and feedback to the TPG:

1. By the start of the project a Kick-off meeting will be held in order to clarify the requirements for the implementation of the first phase (inception phase) and specifically define the respective expected outputs.
2. A second meeting of the Steering Committee will be organised right after the submission of the inception report, in order to review the deliverable and set the detailed requirements for the rest of the project and specifically for the next phase (intermediate phase).
3. The Steering Committee will meet again after the submission of the interim report, in order to review the outputs of the targeted analysis and set the directions for the final phase.
4. The next meeting will be held after the submission of the draft final report, in order to review the policy recommendations and the final outputs of the study.
5. Finally, the Steering Committee will meet for the closure of the project right after the submission of the final report.

At these meetings, the TPG will be invited to present the results of its work so far. After consultation during the meeting, the TPG will receive guidance and feedback on key issues related to the development and the outputs of the project (such as the selection of the representative cases to be examined), which will then be considered in the revisions of the submitted reports, as well as in the forthcoming reports of the project.

The Steering Committee may hold extra meetings (if necessary), in case of unforeseen situations that could possibly affect the normal implementation of the project.

Among other decisions, the EUROISLANDS Steering Committee will agree on:

- Communication and reporting mechanisms with the TPG and between stakeholders;
- Dates and agenda for meetings;
- Dissemination/communication strategy;
- Content of the press releases and other dissemination documents.

Decisions will be taken in accordance with the principle of majority amongst the represented partners.

The EUROISLANDS Steering Committee will also work with the ESPON Coordination Unit on the assessment of the project proposals.

Besides their participation in the steering of the project, the stakeholders will be actively involved in carrying through the targeted analysis by providing the TPG in charge with:

- Their practical knowledge and input on their needs;
- Detailed data, information and qualitative inputs covering the fields of interest and the methodology of the survey;
- They will also make efforts (when necessary) to facilitate data/information acquisition not readily available e.g. from national and regional authorities (secondary data, surveys, reports, studies, applied policies in different islands (i.e. structural measures, legislation, data related to projects implemented in insular areas within the framework of Structural Funds and State aids), best practices); from local authorities (primary data, qualitative information, best practices); from stakeholder organisations at European level (reports, sectoral studies, secondary data).

The TPG may collect more quantitative and qualitative information from the stakeholders through questionnaires and interviews with key practitioners and policy makers.

The Ministry of Economy & Finance, General Secretariat for Investments & Development, Special Service for Strategy, Planning & Evaluation of Development Programmes, as the Lead Stakeholder, will be the main contact for both, the ESPON Coordination Unit and the TPG.

The stakeholders will form a group of policy makers and practitioners that will continuously support and give guidance to the TPG and will provide specific information to the targeted analysis, under the coordination of the Lead Stakeholder.

A particular emphasis will be given to the communication mechanism between all parties involved. The stakeholders will be regularly updated on EUROISLANDS' status and its gradual results. Their respective feedback to several issues will be asked explicitly. The interaction between the stakeholders will be conducted in form of stakeholder meetings, teleconferences and e-mail exchanges.

It may be necessary that the TPG should take part in a few stakeholder communication events, in order to provide its experience and sound knowledge on specific issues.

Additionally, it should be noted that an external group of stakeholders will be activated to provide support to the EUROISLANDS stakeholders and the TPG (where needed). This external group has already expressed its strong interest and has been actively participating in the development of the project idea. A not exhaustive indication of this external group of stakeholders follows:

- Conference of Peripheral Maritime Regions – CPMR / Islands Commission (represents the island regional authorities);
- Network of the Insular Chambers of Commerce and Industry of the European Union – INSULEUR (represents the Islands’ Chambers of Commerce and Industry);
- European Small Islands Federation – ESIF (represents the small islands);
- Other associated Member-States and/or their Regional/local administrations and Stakeholder organisations at European level

Their involvement will be coordinated by the Lead Stakeholder.

Finally, in the framework of their involvement in the project, the stakeholders will undertake the wide dissemination of their experience from the targeted analysis, its results and its use throughout the study elaboration and particularly after finalisation of the project. It is envisaged that the stakeholders will carry out at least the following dissemination activities:

- Open fora will be organised by the stakeholders during and after the end of the project, in order to raise awareness about the aims and results of the project. It is estimated that at least 4 fora will be organised (as much as possible in the framework of future ESPON Seminars).
- Transnational workshops will be also organised, where stakeholders from different island regions at different governmental levels will be invited to participate, in order to exchange experiences and transfer the targeted analysis’ results. For an increased effectiveness of the workshops, the supporting stakeholder organisations at European level mentioned above will be utilised since they can provide wider audiences. It is estimated that at least 2 workshops will be organised.
- Key messages from the study results will be translated in the stakeholders’ languages under their responsibility and disseminated accordingly to all interested parties
- A web site will be developed where updated information regarding the project’s progress, the results of the targeted analysis, project events, interesting articles and links, etc. will be regularly uploaded.

The TPG will be invited to participate in 4 of the above dissemination events.

(v) Envisaged results of the Targeted Analysis

The stakeholders expect to receive the following analytical results:

- **In depth knowledge of islands' situation** and an updated classification of European islands. The islands' situation will be presented in thematic maps.
- **Field analysis** of 4-6 case studies of different types of European islands that can be used as representative cases.
- **Evaluation of the level of divergence of islands** from the European average. The reasons of divergence (i.e. intensity of natural constraints) will be analysed and explained.
- **A general evaluation of the existing policy measures** for the islands which will lead to the discussion on the adequacy of relevant policies and the possibility for alternative measures.
- **An analysis of the islands' future potential from a European perspective within the coming years.** This will include the presentation of islands' strengths and opportunities for development within the international and European context.
- **An analysis on the policy options that can be adopted** (mainly in the most important fields) in order to face their weaknesses and to exploit strengths and opportunities. Proposals for adaptation of EU legislation.
- **An integrated system for monitoring islands' evolution** (in order to be able to undertake regular updates on the data included in this study)
- **A main reference work** for technical, methodological and analytical support to territorial planning processes at local level, spatial programming and strategic planning, which could be used as a basis for possible follow up studies.

(vi) Operational use of the targeted analysis

Stakeholders will make use of the expected analytical results in the following ways:

- To create a complete picture of the European islands' realities giving insight in their position in a European territorial context that will provide valuable knowledge to the continuation of discussion and implementation of the TA and its AP1. The results of the study will form a major input for the further implementation of the Territorial Agenda and its First Action Programme and the implementation of local development programmes.
- To gather information on the European islands that could be utilised for the preparation of the future Cohesion Reports, feedback on policy papers (such as the communication to follow the forthcoming Green Paper) and other relative documents.
- To contribute to the policy discussions on the future cohesion and regional development policy on a European level, including territorial cohesion.
- To encourage ongoing consultations among stakeholders as to how they can best encounter their problems and develop appropriate policies and local strategies

- To disseminate the findings of the interim and the final report by presentations during annual meetings of the stakeholder organisations as CPMR Islands' Commission, INSULEUR and ESIF.
- To form an integrated system of sources & data that can be used as a tool for the observation of European Islands.

A number of dissemination events after the end of the project will be carried out by the stakeholders, in order to better utilise the study's outputs.

(vii) Outputs and timetable

The EUROISLANDS Targeted Analysis will result in the following deliverables:

- **Inception Report:** This first report, which will be submitted 12 weeks following the Kick-off meeting, will present a detailed overview of the methodology and the analytical approach to be applied, plus the data sources to be used. It will set out the steps of the study and define the criteria for the selection of the representative case studies. Finally, it will define the representative cases to be examined and the data needed for the analysis.
- **Interim Report:** This report, to be delivered 32 weeks after the submission of the Inception Report, will present the analysis of the islands' situation (measurements, data, thematic maps, best practices, etc.) and the main outcomes of the representative case studies. It will then give first comments on the national and European Policies and transfer the results of the study to the European level.
- **Draft Final Report:** The draft final report which will be submitted 20 weeks after the Interim report will include the final detailed results from the analysis of the representative cases, the final proposals and policy options.
- **Final Report:** A revised version of the draft final report (including an executive summary) will be submitted 6 weeks after the final draft report on the basis of the comments received from the EUROISLANDS Steering Committee, the MC and the CU.

The timetable for EUROISLANDS looks as follows:

Deliverables	Duration	Content
Project start	January 2009	
Inception report	March 2009	Elaboration of the methodology
		Definition of the priority fields
		Data needed for the analysis
		Selection of the representative cases to be studied
Interim report	November 2009	Analysis of the islands' situation including maps
		Study of the representative cases
		Evaluation of national and European policies
		Model for transferring the results to a European level
Draft Final report	April 2010	Draft final outcomes of the targeted analysis
		Policy options
Final Report	June 2010	Finalization of Policy options and conclusions
		Executive Summary

viii) Budget for the targeted analysis

The maximum budget foreseen amounts to € 250.000, including VAT if applicable. Proposals exceeding this value will not be considered. This amount will include all the TPGs' costs for completing the study including travel expenses and attendance at Steering Committee.

ESPON projects are generally conducted in a partnership of several bodies from at least three EU Member and Partner States (from three different countries taking part in the ESPON 2013 Programme). However this requirement does not apply to projects with a budget up to €200.000 (incl.).

(ix) Existing access points

The access points listed below serve the purpose of providing the TPG with useful information for preparing a proposal. It is by no means meant to be exhaustive, but should be considered as information that can be helpful as background information.

ESPON Documents:

- 1.1.4 Demographic trends
- 1.2.1 Transport trends
- 1.4.5 Tourism
- 2.1.1 Transport
- 2.1.4 Energy
- 2.2.1 Structural funds
- 2.3.2 Governance of urban and territorial policies from EU to local level

- 2.4.2 Integrated analysis of transnational and national territories
- 3.1 Integrated tools for European spatial development
- 3.2 Scenarios on the territorial future of Europe
- 3.3 Lisbon strategy
- 3.4.2 Economy

All available at www.espon.eu.

Documents provided by stakeholders:

- National Strategic Reference Frameworks and the Competitiveness Programmes 2007-2013.
- Local Development Studies
- Studies by stakeholder associations or organisations (e.g. CPMR, INSULEUR, ESIF, etc.), relevant websites
- Reports of cooperation projects between islands
- « Au large de l'Europe », made by Eurisles in the context of the initiative from the CRPM, *Commission des îles*, 2002
- Resolution from the European Parliament from 15 March 2007 on "Islands and Natural and Economic Constraints in the context of the regional policy"
- Websites (www.crpm.org, www.insuleur.net, www.smallislands.eu, etc.)

European Policy Documents:

- The Lisbon Treaty
- Lisbon / Gothenburg Strategy
- European Spatial Development Perspective
- The Territorial Agenda for European Cohesion
- Analyse des régions insulaires et des régions ultrapériphériques de l'Union européenne, 2003
- The Fourth Report on the Cohesion Policy
- The Fifth Progress Report on the Cohesion Policy
- The upcoming Green Paper on Territorial Cohesion (previewed for October 2008)
- EESC Opinion on "A better integration in the internal market as a key factor for cohesion and growth for islands", 10/07/08.

Other relevant studies:

- Studies on particular domains of the islands (energy, transport, tourism, natural resources management, SMEs, etc)