

Hellenic Republic  
Region of Peloponnese

**EXTRA-SMEs**  
Interreg Europe

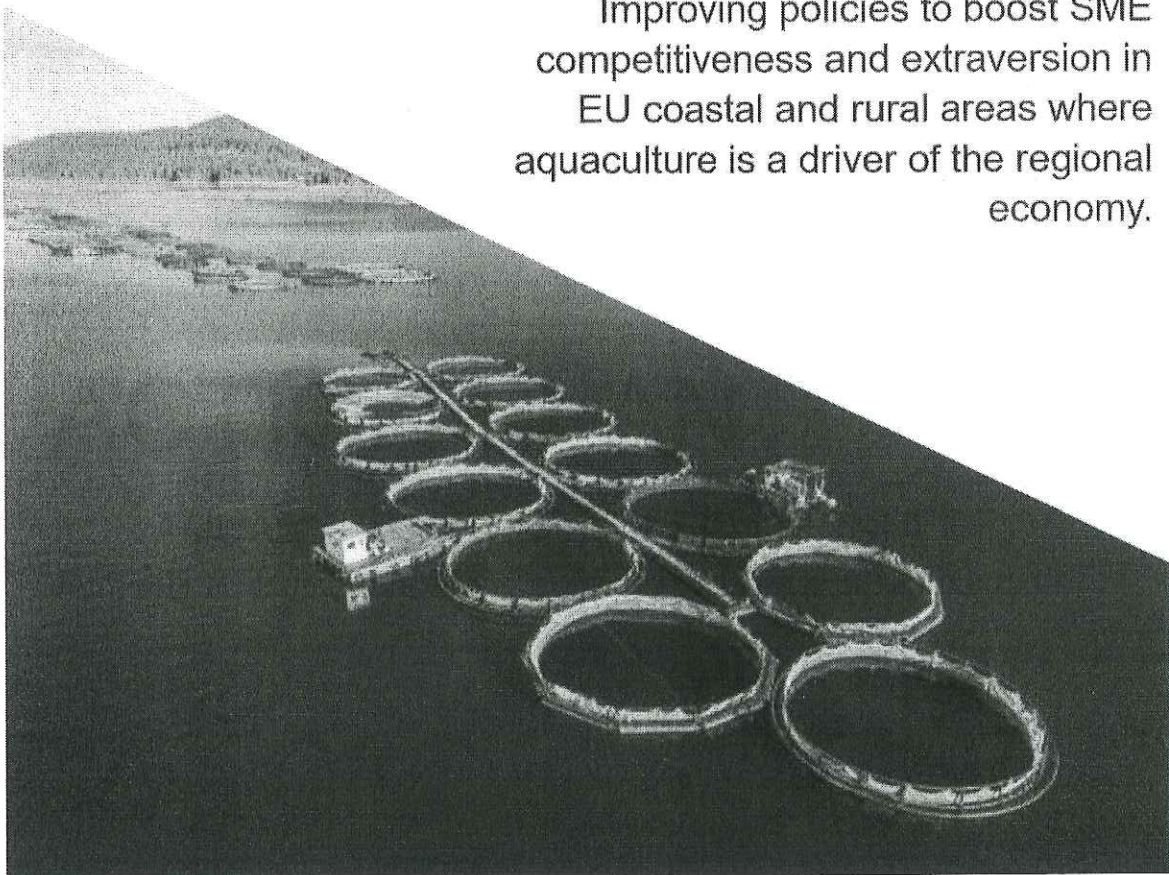


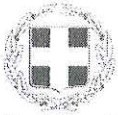
OCTOBER 2021

# ACTION PLAN

FOR AQUACULTURE SMEs IN PELOPONNESE,  
IN THE FRAMEWORK OF “EXTRA-SMEs” PROJECT

Improving policies to boost SME  
competitiveness and extraversion in  
EU coastal and rural areas where  
aquaculture is a driver of the regional  
economy.





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## Abbreviations

PO: Policy Objective

OP: Operational Programme

ROP: Regional Operational Programme

ICT: Information and Communications Technology

NSRF: National Strategic Reference Framework (ESPA)

## Introduction

Aquaculture has been the fastest-growing fishery sub-sector in Greece and is viewed as one of the major activities with hope for recovery of national economy. Farmed fish production exceeded wild catch since the beginning of the new millenium.

Almost 63% of seafood harvested in Greece comes from aquaculture with the remaining 37% from wild catches. The total seafood harvested from aquaculture amounted 149,975 tons, with an estimated first-sale value of 564.6 million euros (+2% in volume and +5% in value over the last year). The per capita seafood consumption is 19 kg/person and Greece ranks 2th in volume and in value among the EU-28 in fish farming (following the UK).

According to the latest annual report of the Federation of Greek Maricultures, published in 2020, the current aquaculture state in Greece is as follows:

- In 2019 total aquaculture production reached 149,975 tons with a value of 564.6 million euros, which is 2% more in terms of volume and 5% more in terms of value compared to the previous year.
- Finfish and mussels are the main groups of species produced. Fish farming (marine and fresh water) holds a dominant position of 85% in volume and 98% in value, followed by mussels with 15% and 2% respectively.
- Fish farming (marine and fresh water) reached 127,055 tons in 2019 with an estimated value at first sale of 553.4 million euro (1% more in volume but 14.5% more in value compared to the previous year).
- Shellfish production reached 22,020 in 2019 with an estimated value of 7.7 million euros (10% more in terms of volume and 1.5% more in terms of value).
- In 2019 the production of sea bream and sea bass reached 120,500 tons, 3% more compared to the previous year.
- In 2019 exports of bass and bream are estimated at 88,651 tons, of which 95% are marketed in the EU countries and 5% in third countries.

- In 2019 Greece supplied 59% of the sea bream and sea bass sold in the EU and 22.2% sold worldwide.
- In 2020 sea bream and sea bass production is expected to reach 117,000 tons, which is 2.9% less than the previous year.

The major milestones of the industry for 2019 were the progress achieved concerning the restructuring of the sector and the strong investment interest, the high extroversion rate, the development of the brand “Fish from Greece” and the increasing competition with third Countries. More specifically and regarding the restructuring progress of the sector, the process of merging and consolidating the largest companies in the industry went further as the remedies set by the competent European authorities were met. The last phase of the acquisition agreement will be completed in 2021. When it comes to the second milestone and the market conditions, the export volume increased by 4%, confirming the strategy of Greek companies to increase production and expand to new markets. In 2019 the Hellenic Aquaculture Producers Organization (ELOPY) developed a brand for aquaculture products originating from Greece, “Fish from Greece”.

In total there are 1007 aquaculture operators, where 84% of them are established in marine waters (822 fish and selfish farms), 9% are in fresh and brackish waters and 7% in lagoons. In the above analysis the hatcheries are not included. Marine fish farmers operate 302 farms and regarding the spatial distribution of their farms, 77% of them are located in three decentralized Administrations, accounting for 82% of the production. These are the Decentralized Administrations of:

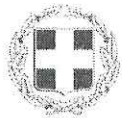
1. Peloponnese, Western Greece and the Ionian Islands,
2. Thessaly and Central Greece,
3. the Aegean

At regional level, out of the 13 regional units countrywide, the industry operates farms in 11 of them (Evia, Dodecanese, Etoloakarnania, Kefalonia, Fthiotida, Thesprotia, Attica, Argolis, Corinth, Chios and Preveza), with an average of less than 10 licensed farms per unit in the remaining coastal areas.

The Administration of Peloponnese – West Greece and Ionian Islands hosts 109 farms, that cover in total 2,791 acres of marine area and represent the 33% of approved production tonnage of the country.

In terms of employment in aquaculture, Greece has one of the highest shares in the E.U. The industry employs directly almost 4,000 people and indirectly about 12,000 workers and scientific, technical and managerial personnel. Most importantly, these jobs are created in remoted coastal areas contributing significantly to the economic and social development of local communities. Marine aquaculture (fish and mussels) accounts for 83% of the employment in the sector, brackish water 10% and inland aquaculture 7%. With regard to marine fish farming, the industry creates significant number of jobs in ten out of the thirteen Regions of Greece.

Greek aquaculture sector is committed to provide high nutritional value marine protein through responsible and sustainable operations. Sustainability means creating value for the employees,



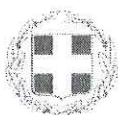
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for the environment and for the society, without compromising the ability of future generations to meet their needs.

The vision for the development of Greek aquaculture, originally drafted in 2012, along with the European Aquaculture Research and Innovation Platform (EATiP), was elaborated further in the “Multiannual National Strategic Plan for Aquaculture 2014-2020». Greece in particular, is expected to double its production by 2030 in order to meet the growing demand and maintain its market position globally. Harvest volume is expected to reach nearly 220,000 tons, worth 1 billion euros. The export rate will be further strengthened (85% - 90%) as exports are expected to exceed 170,000 tons annually. It is estimated that this will create up to 3,000 new jobs in direct employment and many more in related activities.

However, during the 2012–2016 period, due to the financial crisis in the country and the ongoing restructuring process of the largest companies, the growth strategy was revised, focusing on stabilizing the sector and improving profitability rather than increasing production. According to the mid-term evaluation of the Multiannual National Strategic Plan for the Development of Aquaculture 2014-2020, the average growth rate has been revised, based on the production trends. The industry is projected to grow further in 2021.



## General Information

### The EXTRA-SMEs Project

EXTRA-SMEs brings together 8 regions from 7 countries, to achieve expansion of rural and coastal SMEs in wider markets for the promotion of their products, through simpler and improved administrative processes, and innovative technologies. More than 90% of businesses in EXTRA-SMEs regions are inland and coastal SMEs operating across and around the aquaculture value chain, contributing to growth and creation of jobs. Along the chain, these economic operators are characterized by systematic weaknesses in reaching international markets and exporting their products. To this end, EXTRA-SMEs will support public authorities to join forces and exchange experiences in a) administrative simplification, b) expansion in new markets, c) innovative value-added product solutions, d) personnel up skilling, and e) resolution of stakeholders' conflicts of interests. The expected outcomes of the project are:

- ✓ Increased capacity of 200 staff of public administrations to effectively support SME competitiveness.
- ✓ 14 million euros unlocked to support projects on the modernisation of the wider network of aquaculture SMEs.
- ✓ Increased awareness and consensus building among the wider aquaculture sector, the workforce, and citizens, to support measures for SMEs internationalization operating locally (over 1000 individuals).

### Operational Programme of Peloponnese 2021-2027

#### EU cohesion policy priorities for 2021-2027

In 2021-2027 EU cohesion policy has set 5 policy objectives supporting growth for the period 2021-2027:

1. a more competitive and smarter Europe, through innovation, digitization, economic transformation and support for small and medium-sized enterprises
2. a greener, low-carbon transitioning towards a net zero carbon economy, implementing the Paris Agreement and investing in energy transition, renewable energy and the fight against climate change
3. a more connected Europe by enhancing mobility, with strategic transport networks and digital networks
4. a more social and inclusive Europe, which implements the European pillar of social rights and supports quality employment, education, skills, social inclusion and equal access to healthcare
5. Europe closer to citizens by fostering the sustainable and integrated development of all types of territories

## **Region of Peloponnese's priorities for 2021-2027**

At national level, the priorities set, based on the above policy objectives, are the following:

### PO1: "A smarter Europe through the promotion of innovative and smart economic transformation",

The main goal for the Greek economy is the systematic increase of productivity and extroversion (i.e., the relative participation of internationally traded goods and services in the national product) as well as the deeper connection of production with technology and innovation. The turn of the economy in this direction will take place in a way compatible with the social and environmental goals of the country.

### PO2: "A greener, low-carbon and resilient Europe through the promotion of clean and equitable energy transitions, green and blue investments, circular economy, adaptation to climate change and risk prevention & management"

Policy changes towards energy efficiency, the promotion of autonomy using RES for self-generation and storage systems, the use of RES for heating / cooling, the transition of islands to clean energy, the strengthening of cross-border interconnection projects, the upgrading of transmission and distribution networks, the development of energy control centers and "smart" energy systems and storage at the local level, the promotion of fishing practices for low carbon dioxide emissions.

### PO3: "A more connected Europe through enhanced mobility and regional ICT interconnections" infrastructure and transport systems".

Aiming at economic / digital transformation, connectivity with high-speed broadband access is enhanced and supports the development of accessible, high-quality, multimodal, climate-resistant, smart and sustainable infrastructure and transport systems.

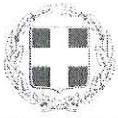
### PO4: "A more social Europe through the implementation of the European pillar of social rights".

Central focus of the interventions in PO4 is a more social Greece through investment in human resources and ensuring equal access to quality services and goods.

### PO5: "A Europe closer to its citizens, through the promotion of sustainable and integrated development of urban, rural and coastal areas, as well as through the support of local initiatives".

Integrated spatial strategies using the tools of Integrated Territorial Investment (RUE) and Local Development at the Initiative of Local Communities (TAPTOK) will be applied in areas that will meet the criteria that will be determined by the national authorities and will be mentioned in the Programs.

The Operational Programme of Peloponnese 2021-2027 is expected to meet the focused needs and challenges of the Region in a wide range of policies of all EU Policy Objectives, with the assistance of the 7 Sectoral Programs of the NSRF (Competitiveness - Entrepreneurship - Innovation, Digital Transformation, Environment - Energy - Climate Change, Transport Infrastructure, Human Resources Development - Education and Lifelong Learning, Civil Protection, Fisheries and Maritime), the Territorial Cooperation and the Technical Assistance



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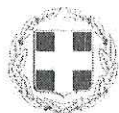


Programs of NSRF, and, finally, the Technical Assistance Development Transition Programme 2021-2027 (the Peloponnese Region is one of the five eligible Regions in the country).

The total resources allocated to OP Peloponnese 2021-2027 amount to € 388.17 million, a budget increased by 1.5 times compared to the current Regional Operational Program (ROP) of Peloponnese 2014-2020.

The planning of the OP Peloponnese 2021-2027 was under public consultation (until 07/06/2021) and all stakeholders and citizens were welcomed to express their views and suggestions. The results of the consultation will be taken into account in the formation of official positions of the Peloponnese Region that will be sent to the Ministry of Development.





## General Information/ Contact Details

<b>Project</b>	Improving policies to boost SME competitiveness and extraversion in EU coastal and rural areas where aquaculture is a driver of the regional economy – EXTRA-SMEs
<b>Partner organisation</b>	Region of Peloponnese
<b>Country</b>	Greece
<b>NUTS2 region</b>	Peloponnese
<b>Contact Person</b>	Lampropoulou Ioanna
<b>Email address</b>	<a href="mailto:ilampropoulou@mou.gr">ilampropoulou@mou.gr</a>
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## Policy Context

<b>The Action Plan aims to impact:</b>	The Investment for Growth and Jobs programme
<b>Name of the policy instrument addressed:</b>	Operational Programme of Peloponnese 2021-2027

## Details of the envisaged actions

### **ACTION 1: Sustainable Scheme for regional aquaculture SMEs**

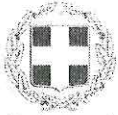
#### **Background**

In activity A1.1 “Comparative analysis of regulatory frameworks applicable to licensing and operations of EXTRA-SMEs economic operators”, all partners gathered territorial data on current practices / existing frameworks in licensing procedures and EXTRA-SME’s economic operation. Two of the recommendations that emerged from those data analysis were regarding:

- Entrepreneurship – how the establishment of a comprehensive and stable financial support framework is recommended to attract investors and open the way to economic growth and
- Internationalization - the best potential use of funding and the establishment of a comprehensive framework programme should be discussed.

Based on the A1.4 “Report on the factors hindering EXTRA-SMEs’ internationalization and extraversion” results, efforts should be directed towards product innovation and diversification. Aquaculture SMEs may benefit from allocating more resources to the production of higher-value goods. The regional authorities should focus in the development of support programs and procedures, aiming at assisting aquaculture SMEs in increasing their competitiveness and extraversion. Authorities need to develop communication strategies for their existing support activities in order to increase the visibility of programs and the accessibility to procedures which may be too complex for newcomers in the arena of international trading activities. Aquaculture businesses can further benefit from receiving market intelligence support to obtain an objective and data driven picture of the dynamics in target markets.

Combining those valuable lessons, the Region of Peloponnese will create a Sustainable Scheme, that will be incorporated in the Peloponnese OP 2021-2027 and will set a clear framework of actions that are eligible for funding, assisting the aquaculture SMEs to increase their capacity and competitiveness while pushing them to extravert.

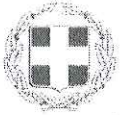


## Action

The Region of Peloponnese will create a Scheme to promote the sustainable growth of output, value, extraversion and employment in the aquaculture sector. The Scheme will focus mainly in scaling up of aquaculture enterprises to improve their competitiveness and efficiency, diversification into new species, more farming of underutilised species and promotion of organic aquaculture. Particular attention will also be given to the diversification of aquaculture towards methods with significant commercial output. The Scheme will be incorporated into the Regional Operation Programme 2021-2027, under which the Region of Peloponnese will proceed with open calls for funding aquaculture SMEs in order to promote marketing, quality and added value of fishery and aquaculture products, as well as processing of these products.

The Region of Peloponnese proposes the following actions which are relevant to this Scheme and may be progressed with support from this Scheme:

- **Enhancing the competitiveness and resilience of aquaculture.**
  - establishment of new or expansion and modernization of existing aquaculture units, fish hatcheries and shellfish and crustaceans' hatcheries
  - development and introduction of innovation in production, both in products as well as in procedures
  - introduction of new species
- **Promotion of sustainable aquaculture practices and actions for environmental protection.**
  - energy efficiency
  - reduction of plastics' use
  - promotion of circular economy production models
  - streamlining water usage
  - waste management efficiency
- **Improving the conditions for the promotion and marketing of fishery products and aquaculture**
  - enhancing the commerciality of fishery products and aquaculture products
  - promotion of quality and add value procedures (certification, packaging and presentation of products upgrading, adoption of quality labels, traceability and reduction of the environmental fingerprint as promotion tools).
- **Encourage investment in the processing of fishery products and aquaculture.**
  - new products
  - new management, organisation and production procedures
  - capitalization of sub-products
  - exploitation of consulting services to strengthen the productivity and competitiveness of aquaculture SMEs.
- **Strengthening the creation of business clusters of companies.**
  - create economies of scale
  - reduce business operating/processing/product promotion costs



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The actions described above are in total alliance with the targets set in the Operational Program for Fisheries, Aquaculture and Maritime 2021-2027 of the Hellenic Ministry of Agricultural Development and Food.

### **Players involved**

- ✓ Public bodies
- ✓ Aquaculture SMEs
- ✓ Collective bodies (associations, organisations, clusters, partnerships)
- ✓ Providers of consulting, education and training services
- ✓ Management Body of Fisheries, Aquaculture and Processing Fund
- ✓ Management of the Fisheries and Maritime Operational Program
- ✓ Hellenic Ministry of Agricultural Development and Food

### **Timeframe**

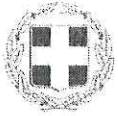
October 2021 – May 2022

### **Costs**

The total budgets per Regional and Sectoral Programmes of 2021-2027 are not distributed yet.

### **Funding sources**

- Fisheries, Aquaculture and Processing Fund (will be created under Operational Program for Fisheries, Aquaculture and Maritime 2021-2027)
- Regional Operation Program of Peloponnese Region 2021-2027 (and/or remaining funds of ROP 2014-2021)



## **ACTION 2: Innovative Platform for Fisheries, Aquaculture and Marine SMEs**

### **Background**

The results of the A1.2 *“Report on regional conditions and trends for new product development”* activity, indicated that measures on administrative procedures pertaining to aquaculture are a prerequisite for the boost of the sector’s growth and extraversion. It is essential that the policies on the promotion of competitiveness, innovation and internationalisation of aquaculture value chains, should include -besides funding- training, consultation and international networking. The relevant actors should focus on access to information regarding expansion opportunities and the development of synergies can facilitate access to new knowledge, skills, specialisation and resources.

The development of fully functioning knowledge networks through capacity building and awareness raising activities can have significant impacts on innovation efficiency and effectiveness, in reducing the transaction costs of knowledge diffusion and by encouraging green innovation in areas where market signals are not fully effective.

One of the identified good practices under the activity A1.3 *“Improving policies to boost SME competitiveness and extraversion in EU”* was the case of the Centre for Aquaculture Consultancy Services to assist fish farmers on legal and technical matters, in Romania. The Fish Culture Research and Development Station Nucet is a research institute that supports the Romanian aquaculture industry and fish farmers. The launch of a Centre for advice and consultancy for aquaculturists was based on the need to create a formal mechanism that would allow the transfer of technology to fish farmers and to assist them in ensuring that their projects conformed to all the relevant legislation both national and European. With the establishment of the Consultancy Centre the number of requests from fish farmers for advice reached 150 a year. Moreover, the types of advice increased; it is not only for water sampling, but also for advice on environmental legislation and authorisation procedures. Other results achieved by the Centre were the

- increased competitiveness of the aquaculture related SMEs,
- strengthened technological development,
- innovation and knowledge transfer and the
- promotion of sustainable aquaculture.

Throughout the A3.1 *“Workshop on adopting simplified administrative procedures”*, the needs for revisions in frameworks of governance in partnership countries, as it was reported in their Multiannual National Strategic Plan developed in 2014-2015, were identified. For Greece, some of the needed revisions that were identified were the following:

- Establishment of a National Council for Aquaculture.
- Releasing a handbook for the dissemination of permitting information (procedures, documents required etc.)
- Conducting training programs for the staff of the administration on the procedures.

Inspired by the Center, willing to establish measures on administrative procedures and to address the specific needs of the Greek territory, the Region of Peloponnese will create an Innovative Platform for Fisheries, Aquaculture and Marine SMEs. The Platform’s main objectives will be

similar of those of the Centre for Aquaculture Consultancy Services in Romania and will set the basis for a stronger, more competitive aquaculture sector, ready to meet the needs of the international markets.

### **Action**

The Region of Peloponnese had already accentuated the strengthening of establishment / modernization of SMEs in the Peloponnese Region with emphasis on innovation and the development of new products and services in the previous ROP 2014-2020.

By capitalizing this experience, the Region of Peloponnese, within the framework of the EXTRA-SMEs project, will create a digital innovation platform addressing to the aquaculture SMEs and relevant stakeholders.

The Innovative Platform for Fisheries, Aquaculture and Marine SMEs will cover a range of services such as:

- Giving access to the users to numerous studies & researches on innovative aquaculture schemes (like the good practices service of the PLP).
- Providing human resources training and development services to enhance the capacity of aquaculture SMEs to manage technology and innovation (the trainings/development services could be in the form of videos, phone/online meetings, platform events' organisation).
- Developing of business links, creation of synergies between aquaculture SMEs, promoting technological cooperation.
- Helping aquaculture SMEs with marketing related issues (e.g., production of promotional and promotional materials).
- Providing practical information and news related to market opportunities and national legislation.
- Encourage participation in research projects and facilitate access to funding through European and national programs.

Additionally, the Innovative Platform for Fisheries, Aquaculture and Marine SMEs will have a direct link with Action 1. Users can find all the new funding calls, with detailed information on their eligibility, criteria etc. and with the possibility to submit directly their applications through the platforms' system.

All the above services will create a new dynamic in the aquaculture sector, enhancing the competitiveness and resilience of the aquaculture SMEs regionally and, perhaps, nationally.

### **Players involved**

- ✓ Research Institutes and National Universities
- ✓ Public bodies
- ✓ Aquaculture SMEs
- ✓ Collective bodies (associations, organisations, clusters, partnerships)
- ✓ Providers of consulting, education and training services
- ✓ Management Body of Fisheries, Aquaculture and Processing Fund
- ✓ Management of the Fisheries and Maritime Operational Program
- ✓ Hellenic Ministry of Agricultural Development and Food



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European Union  
European Regional  
Development Fund



- ✓ General Secretariat for Research and Innovation (GSRI)
- ✓ HCMR - Hellenic Centre for Marine Research

### **Timeframe**

October 2021 – May 2022

### **Costs**

The total budgets per Regional and Sectoral Programmes of 2021-2027 are not distributed yet.

### **Funding sources**

- Operational Program for Fisheries, Aquaculture and Maritime 2021-2027
- Regional Operation Program of Peloponnese Region 2021-2027 (and/or remaining funds of ROP 2014-2021)

## Organisation Signatures

The organisations below agree to support and promote the implementation of the actions listed above. The signatory confirms that he has the authority required to do so and that the approval process required by the organization has been successfully completed.

<b>Organisation Name:</b>	Region of Peloponnese
<b>Name of legal representative:</b>	Ραυζακίτης Νίκος
<b>Position:</b>	Region of Peloponnese
<b>Date:</b>	13/12/2021
<b>Signature:</b>	

<b>Organisation Name:</b>	
<b>Name of legal representative:</b>	
<b>Position:</b>	
<b>Date:</b>	
<b>Signature:</b>	

<b>Organisation Name:</b>	
<b>Name of legal representative:</b>	
<b>Position:</b>	
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