

ANNEXE 5

Results of the questionnaire

**What themes would be suitable for
enhancing cross Channel cooperation?**

Initial results of the questionnaire



© 2005 KPMG S.A. cabinet français membre de KPMG International, une coopérative de droit suisse.
Tous droits réservés.

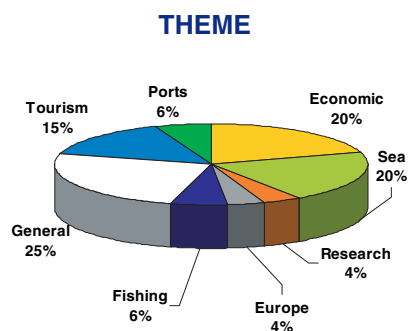
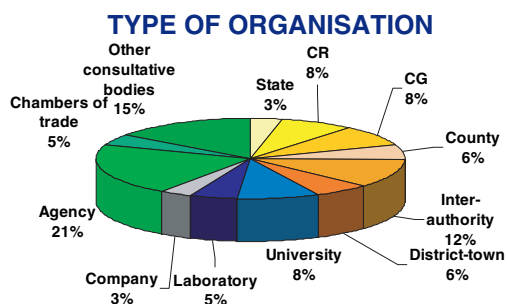
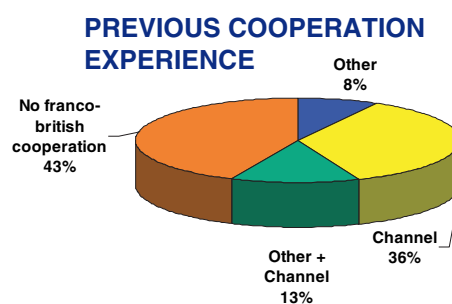
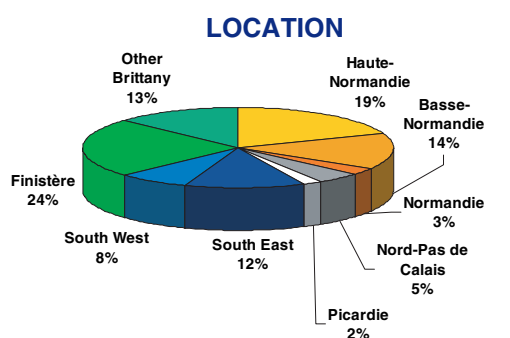


1. Survey and respondents

1.1. Survey

SURVEY METHOD	
Questionnaire	35 main questions divided into 194 sub-items
Type of responses	Scoring based on degree of interest
Distribution method	<ul style="list-style-type: none"> By the project partners/workshop coordinators Between 15th December and 20th January
A good degree of interest	<ul style="list-style-type: none"> 175 respondents Average response rate of 88%

1.2. Respondents



2. Overall view on strategic themes

2.1. Franco-British cooperation: current situation and obstacles

- 78 % said cooperation between the two sides of the Channel barely existed.
- The main problems:

Problem:	Degree of importance
Lack of awareness concerning interests of cross Channel partners	71%
Differences in standards/laws	58%
Difference in institutional structures	58%
<i>Specific English responses:</i>	
• <i>Language difficulties</i>	64%
• <i>Different priorities for organisations on each side of the Channel</i>	72%

2.2. Environment and economy : the two priority issues for the Channel region

Issues concerning the Channel region	Important
Preservation of the sea's natural resources	84%
Improved trade and economic exchanges	84%
Protection of the environment	83%
Maritime safety	82%
Development of tourism	79%
Make the region more attractive to visitors/workers	79%
<i>Specific English responses:</i>	
• <i>Social cohesion</i>	76%
• <i>Activity/Land use conflicts</i>	72%

Issues concerning the Channel region	Less important
Climatic change	58%
Development of cross Channel identity	53%
Social cohesion	49%

2.3. Joint projects an important and major priority for the cross Channel region:

Nearly 85% of respondents indicated that there would be «added value» in joint projects and more than the majority supported the idea of cooperation («high added value»).

Added value of cooperation	Important
Management and reduction of marine pollution	94%
Maritime safety (prevention and intervention)	90%
Fishing and marine resources	87%
Ports and maritime transport	86%
Tourism	86%
Research, innovation and further education	86%
Coastal management	85%

3. Maritime safety

3.1. Maritime safety: towards better integration

Key issues	Important
Harmonisation of traffic control and information systems (VTMS)	91%
Joint intervention plans	90%
Exchange of data and information	88%
Integration of monitoring and surveillance systems	87%
Exchange of experiences	82%
Sharing and coordination of technical resources	82%
Tightening up of navigation regulations in the Channel area	75%

Key issue	Less important
Information/ promotion of activities for the public	47%

4. Ports and transports

4.1. The ferry: priority Number one for ports and transports issues in the Channel region

Importance for ports/maritime sector	Important
Maintaining ferry routes	93%
Development of short sea shipping	76%
Energy issues	64%
Sea motorways	63%
Leisure sailing/yachting	61%
<i>Specific English responses: Competition from low cost airlines</i>	74%

Importance for ports/maritime sector	Less important
Cruise liner shipping	54%
Competition from low cost airlines	51%
Increase the Channel Tunnel traffic	49%
<i>Specific English responses: Sea motorways</i>	58%

4.2. Ports and maritime transport in the Channel region: a priority for infrastructures and relevant services

Proposed improvements/actions	Important
Improvements to port infrastructure	83%
Development of intermodal traffic activities and services	77%
Improvements to rail networks	76%
Development of intelligent transport systems	75%
Standardisation of rules, regulations and tariffs	73%
Improvements to management of sea traffic	72,5%
<i>Specifically English replies: port infrastructure improvement</i>	62 %

Proposed improvements/actions	Less important
Improvement to waterways infrastructure	49%
<i>Specific English responses : traffic management</i>	48%

Main niches of activity +75%: heritage tourism, transport of goods and people.

5. Tourism

5.1. Tourism: heritage a strenght for client groups

For more than 85% of respondents the main assets for the Channel region are:

- Cultural heritage (gardens, galleries, etc)
- Similar heritage and attractions (maritime heritage, history and environment).

Diversity of leisure activities offered is also a distinct asset for the Channel region as shown by 75% of replies

85% of replies indicated that the majority of clients are European or British

5.2. Key issues for the tourism «offer» in the Channel region: quality and sustainability

Importance of the issue	Important
Ensure a high quality of service for the region	93% !
Improvements to the transport systems	88%
Develop an all year round tourism offer	85%
Development of relevant competences (languages, management etc)	80%
Develop sustainable tourism through the development of an integrated public transport system	68%
<i>Specific English responses: Sustainable tourism and improvements to the transport system: better connections between air/road/rail/sea.</i>	89%

5.3. The tourism «offer»: improve cooperation as well as promotion

Importance of the proposed action	Important
To jointly develop tourism products	86%
To exchange experience about quality	84%
Improved mobility of the workforce	72%
To share information about clients and markets	71%

Importance of the proposed action	Less important
<i>Specific English responses:</i>	
<i>Improved mobility of the workforce</i>	44%
<i>Create databases about the tourism product</i>	45%
<i>Joint projects to train the Franco-British workforce</i>	59%

6. Economy, training, research and development

6.1. Economic cooperation, training and research and development can bring added value in all areas

Areas of cooperation	Value added important
Research	86%
Innovation	86%
Further education	85%
Technology transfer	81%
R&D (private sector)	72%
<i>Less so for the English</i>	
<i>Research</i>	<i>74%</i>
<i>R&D (private sector)</i>	<i>63%</i>

6.2. Economy, education, research and innovation: more exchanges, more networking and more public-private sector cooperation

Education, research and innovation	Important
Improved understanding of the R&D potential	86%
Facilitation of cross Channel meetings between Universities and researchers.	80%
Create cross border technology transfer centres	75%
Sharing of equipment and resources	74%
Economic cooperation and innovation	VA important
Joint centres of excellence =>European visibility	82%
Development of a limited number of large joint research projects	79%
Improve visibility of Channel region at a European and International level to attract investment	77%
<i>+ More linkages between the Public and private sector</i>	<i>86%</i>
Economic cooperation and innovation	Less important
<i>+ Develop several large research projects</i>	<i>52%</i>

7. Coastal management

7.1. Joint projects for coastal management: communication between partners and communication with the general public

Improving knowledge of key issues concerning coastal management	Important
Sharing of mapping data	84%
Development of a shared GIS	82%
Development of common reference systems	81%
Improved use and dissemination of scientific information	79%
Development of common management methodologies	67%

Managing user conflicts	Important
Establishment of franco-british consultation bodies	79%
Communication with the public	77%
Long term management contracts	74%
Establishment of franco-british management and arbitration structure	72%
+ : <i>coordinated land development strategy</i>	76%

8. Fishing and maritime resources

8.1. Resources: no new risks but a general lack of experience and knowledge

Risk	Important
Overfishing	89%
Maritime pollution	88%
Lack of cooperation	78%
<i>Inadequate rules and regulations</i>	73%
Risk	Less important
Development of other activities (gravel extraction, wind energy)	57%

Importance of proposed activity	Important
Improve knowledge of fishing stock	89%
Development of joint pilot projects (artificial reefs, targeted fishing)	85%
Best practice exchange programmes	84%
Establishment of franco-british consultation organisations	80%
Importance of proposed activity	Less important
Encourage fish farm development	58%

8.2. Fishing: improving the quality of the product and the organisation of the sector

Maintaining a dynamic fishing industry	Important
Promotion of the quality of the products	93%
Establish management of franco-british resources	93%
Communication with the EU	87%
Training (ongoing)	81%
Better structuring of the sector	80%
Maintaining grants/subsidies	62%
Interest	Less important
Reserve fishing for the french and the british	55%

Improving the image of the fishing industry	Important
Promotion to the young/potential workforce	83%
Improving security on board	81%
Large marketing campaigns	72%

9. Future trends

9.1. Other themes for EMDI?

Potential Areas of cooperation	Degree of support
Culture	75%
Educational exchanges	74%
Security (ex: terrorism)	54%
+ <i>Security</i>	65%
<i>Social cohesion issues</i>	57%

