15/11/2013

**SPANISH COMMENTS – PART II – SUMMARY AND INTRODUCTION**

**ECORYS STUDY – BLUE GROWTH MEDITERRANEAN SEA AND ATLANTIC OCEAN**

*(THIS COMMENTS ARE ADDITIONAL TO THE FIRST SET OF COMMENTS SENT PREVIOUSLY)*

* **GENERAL REMARKS**

There are two general remarks (and worries): we have found some methodological problems and there are important parts of information missing.

This study is analyzing the Atlantic Ocean and the Mediterranean Sea at the same time and the activities are therefore analyzed in a general context, not each basin separately. The conclusions for Spain are therefore not correct. (As an example, Andalusia is analyzed only as a Mediterranean region. The conclusions for the Golf of Biscay about the importance of the ocean energies are directly (and wrongly) used for the rest of Spain, and marine renewable energy is therefore considered as one of the most promising activities in Spain, including the Med. This doesn’t make too much sense.)

Actually, the presentation done by EUNETMAR (group IMP – MED) seems to be based on the ECORYS study for Spain, and therefore the same comments apply.

Another example, in the Golf of Biscay only the Basque is included, but not Asturias and Cantabria. If ECORYS has only been able to get information of some regions or in connection with some activities, it can be quiet wrong to draw conclusions for Spain as a whole.

It’s true that the maritime economy is difficult to analyze, and that only in a step by step approach the maritime and marine economy is going to have the necessary economic analysis. But the solution is not to ignore that there are difficulties to get data and just draw conclusions based only on limited information.

* **DETAILED COMMENTS:**
* The Cluster Marítimo de Canarias should also be mentioned in the following parts of the study:

4.- Identification and analysis of maritime clusters

4.1.- Maritime clusters in Spain

Table 12 –Maritime clusters in Spain

Table 13 - List and strengths and weaknesses of clusters

Table 14 – In-depth analysis of clusters

Table 15 – Regional or national cluster strategy

(Document in English on the Canary Island maritime Cluster is attached)

* Añadir en el apartado “Assessment” del Spanish Maritime Cluster el  siguiente texto en rojo (4º línea del Assesment):

***Its actions are coordinated with the maritime industry sector, the Spanish maritime organisations and strengthened by the Odyssea European model for sustainable Maritime, Coastline Tourism and Yachting in order to****: etc….*

* In Table 2. Breakdown of maritime economic activities at regional level. It must be coordinated with the divisions of geographical areas defined in the Atlantic arc with NUT geographic concepts.
* In Table 3. Percentages Overview of employment and GVA per maritime economic activity per region in Spain. In Section 0.1 states "Shipbuilding (excl. leisure ships) and ship repair [1], we believe that it is a mistake because previous texts include them; however if it´s not included, it must be explained.
* Overall, the data provided seem a bit outdated and we would like if it is possible that they are verified, in some cases we have modified them according to the data that we know.
* Table 5, in section 6: mixing two economic activities that are not related and are given an identical score: how are the scoring methods established in this table?
* Table 6: we modified the assessments regarding the potential future of shipbuilding, as we believe current policies clearly have great potential, based on the emerging markets and Blue Growth policy. And therefore, it should be considered as a potential future activity and included in Table 7.
* The analysis set out in Table 13: we removed the weakness where expressly indicated, as it is not right that shipbuilding is a sector with a strong dependence on National and European financial aid.
* There is no information about the Maritime Cluster of Murcia (AEI Naval y del Mar de la Region de Murcia). This is the link to the web page: <http://www.navalydelmar.com/inicio/index.aspx>
* **There are also comments included directly in the text of the draft. (Annex 1,2,3,4,5 and 6 with sets of comments.)**