



EUROPEAN COMMISSION
DIRECTORATE-GENERAL FOR MARITIME AFFAIRS AND FISHERIES
ATLANTIC, OUTERMOST REGIONS AND ARCTIC
MARITIME POLICY ATLANTIC, OUTERMOST REGIONS AND ARCTIC

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**STUDY ON DEEPENING UNDERSTANDING OF POTENTIAL BLUE GROWTH IN THE EU
MEMBER STATES ON EUROPE'S ATLANTIC ARC**

Subject **Comments on second draft of country paper for France**

Thank you for the second draft of these papers. Some of these comments are particular to France and others are general points that are also valid in the other country papers. In general we need more information as to the assumptions made in the estimates. It is acceptable if two sources give different answers but you need to explain why. Annex 1 should be merged with section 1. It doesn't add much to the length and would give a better overall view of the maritime economy.

1. 0 GENERAL OVERVIEW

Be cautious about the coastline length. We do not yet have a consolidated number. State the limitations. What scale was used?

What percentage of EEZ is metropolitan France?

We also need to know the population that is living near the coast. The numbers you give are not for coastal areas but for coastal regions. Give figures for 10km from coast.

2. 1.1. OVERVIEW OF RELEVANT MARITIME ECONOMIC ACTIVITIES IN A MEMBER STATE

Change title from "Member State" to France.

You have indicated that *outremer* countries are not included in this study. Are you sure that the figures you quote here do not include them? Give an estimate of their contribution. We would need a section on this.

3. TABLE 1 –OVERVIEW OF RELEVANT MARITIME ECONOMIC ACTIVITIES – FRANCE

This table is ugly. It needs to be squeezed up. You can do this partly by using a smaller typeface and partly by including the sources as notes or footnotes.

We need to be careful about this table. It will be the one that everybody quotes. Clearly some figures (such as marine tourism) are completely wrong. Possibly two rows – one for accommodation only, one including restaurants, maybe subdivide between rural and urban (we are checking with Eurostat on that).

4. COMMERCIAL AND NAVAL SHIPBUILDING

“This latter sector has less of an open global market character than commercial shipbuilding”.

This sentence should be put more simply. Is the French navy the only customer? Are there exports?

Unlike Asian shipyards, French shipyards have developed specific expertise in the construction of more complex unit (...) frigates, support ships, submarines.

Are you sure? The Chinese People’s Liberation Army and the Japanese Maritime Self-Defence Force between them have 78 frigates and the same number of submarines. Each has more than the French Navy. Who built them?

5. CONSTRUCTION OF LEISURE BOATS

Can you breakdown the leisure boats by size or type?

6. SHORT SEA SHIPPING

Similar to the EU as a whole the share of SSS is close to two thirds of seaborne goods transport.

Don’t use acronyms unless they are commonly used

Can we indicate how much is ro-ro?

7. PASSENGER FERRY

Passenger ferry transport services in France have always had a distinct position

What does this mean?

The demise of the ferry transport

I think you mean “decline” and we don’t need the definite article

8. CATCHING FISH FOR HUMAN CONSUMPTION

The fishery sector consists of fishing, fish processing, as well as wholesale and retail. Overall some 56,000 people are employed in fishery

Give a breakdown into the four categories

Are all the processing and retail people selling fish caught by the French fleet?

In total 443,000 tonnes of fish was being caught in France in 2010 (Eurostat).

I think you mean “by the French fleet”. Not all of this was caught in France

According to France Agrimer, the small-scale coastal fisheries³¹ employ 45% of the available workforce,

What is the “available workforce”. Presumably this is the catching sector – not processing

9. BLUE BIOTECHNOLOGY

In food processing, the French company Roquette launched an ambitious 5 years programme (ALGOHUB41) of more than 28 million to study the potential of microalgae for the production of new dietary supplements. The study started in 2009 and should come to an end in 2014.

28 million what? What is the outcome of the programme? We should have some results. It has been going for nearly four years.

10. OFFSHORE WIND

The challenge for France is twofold.

These are not challenges. They are opportunities

11. MARINE MINERALS MINING

This should include the outcome of the Ifremer-BRGM study that was done some time ago”*l’étude prospective sur les ressources minérales marines profondes (REMIMA)”*

12. COASTAL TOURISM

If, as you say, the French tourist industry employed 332,420 people employed and this is 5% of the coastal region’s workforce, then the total workforce in coastal

regions comes to about 67 million which is more than the total population of metropolitan and *outremer* France including children and all pensioners.

Nevertheless, you do have some interesting numbers here. You have the ratio of foreign to French tourists and the relative proportion of spending on hotel to restaurant. Is it really true that people spent 3 times more on food than accommodation? Well I suppose that the tourist in France expects more than fish and chips or takeaway pizza. However, the numbers you get for only the accommodation 69,808 are only slightly less than the total shown in table 1 (77,154) which includes more than just accommodation. Some checking is needed.

Read carefully Eurostat's manual on tourism:

http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-RA-11-021/EN/KS-RA-11-021-EN.PDF

13. COASTAL PROTECTION

By 2012, the Observatory provided the protection of 152,000 hectares, representing more than 12% of French coastline

What does this mean? Did the Observatory just observe? Or manage? Or protect?

14. MARITIME MONITORING AND SURVEILLANCE

Probably the French Navy has a role as well.

MRI is not a well-known acronym

15. TABLE 3 - OVERVIEW OF EMPLOYMENT AND GVA PER MARITIME ECONOMIC ACTIVITY PER REGION (%) SEA-BASIN ATLANTIC ARC

I would delete empty rows

16. TABLE 5 - RANKING ORDER OF THE 7 FASTEST GROWING MARITIME ECONOMIC ACTIVITIES IN A MS AT NUTS-0 LEVEL

Glad to see that you have 10 year figures as well as 3

Rather than "*MS at NUTS-0 level*" how about writing "*France*"

17. INNOVATION INDICATORS THE MARITIME ECONOMIC ACTIVITIES / SECTORS

This looks promising

18. ANNEX I – DETAILED DESCRIPTION OF THE SOURCES AND THE METHODOLOGY ON MARITIME ECONOMIC ACTIVITIES

A table is not the most appropriate way to present this information. It is not enough to say "*The judgement is based on the country expert with feedback from the core team*". We need explanations of why certain figures are more believable than others. It is better to merge this with section 1.

19. ANNEX II - COMPOUND ANNUAL GROWTH RATES (CAGR) OF THE MARITIME ECONOMIC ACTIVITIES

This table is better than previous version in that it shows 10 year as well as 3 year trends.



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