Feedback on Ecorys Draft Final Country Paper (18th Oct 2013 version)[[1]](#footnote-1)   
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The latest version of the report is an improvement on the previous version, however, the report still requires editing and investigation to ensure it is accurate reflection of Ireland’s blue economy. In particular the sections 3 and 4 of the report require further investigation.

The fact that the consultants were unable to access specific information at NACE code level from Ireland’s National Statistics Office ([www.cso.ie](http://www.cso.ie) ) has resulted in gaps in data[[2]](#footnote-2). As you are aware SEMRU, NUI Galway, are in the process of completing a report on Ireland’s ocean economy (base year 2010). The SEMRU researchers spent significant time and effort working as officers of statistics with national statistical data and also supplemented this with company surveys. Once the report is published (in the next month) a more accurate and up-to-date overview of the economic activities will be available.

The following specific comments / clarifications are suggested:

| **Section** | **Comment** |
| --- | --- |
| 1. General Overview  * Coastal regions: Pg 3 first line. | First line reads inaccurately due to grammatical error. Change to: *Ireland, being a coastal country, has only a single region which cannot be considered a coastal region (Midlands region)* |
| General Overview   * Coastal regions | 2nd para starting *Ireland is a truly maritime nation.*  See Pg 7 of Ocean Wealth Consultation Document: <http://www.ouroceanwealth.ie/SiteCollectionDocuments/FINAL%20CONSULTATION%20DOCUMENT%20Our%20Ocean%20Wealth.pdf>  *Ireland is the third largest EU state in the North Atlantic when our sea area is taken into account, with jurisdiction over a*  *seabed territory of* ***898,442km2****.... coastline of* ***7,500km*** |
| General Overview   * Coastal regions   Map pg 3 | Reference required for map as well as text |
| Pg 4: 2nd paragraph last line | Text related to main ports: suggest you note that these are both shipping ports and fishery harbours. See pg 12 of: <http://www.ouroceanwealth.ie/Briefing%20Documents/Our%20Ocean%20Wealth%20Briefing%20Documents%20for%20Consultation%20Part%20II%20Sectoral%20Briefs.pdf> .  Also last line *This also reflects the main employment locations in ocean energy.* Do you mean ocean economy as opposed to ocean energy?  Suggest Map is referenced |
| 1. Marine and Maritime Economic Activities | Title: formatting issue  First bullet: ref to use of national statistics and last paragraph starting *There are several data gaps.*  Suggest the report explains that there are national statistics available however the consultants were not able to extract the information from the Central Statistics Office (CSO) and reason for. |
| Table 1: Pg 7 | Due to the fact that Ecorys were unable to access specific data for a number of NACE codes from the CSO, it does not allow for the most up-to-date economic information to be presented. See comments previously submitted. Also many of the figures are based on 2007 statistics assessed by SEMRU. Updated stats are available however not available to Ecorys. See comment above |
| 2.5: Agriculture on saline soils | *No activity in Ireland, sector data negligible* – or is it that the statistics weren’t available? |
| 4.1 & 4.2 Coastal tourism & Yachting & marinas | The title Coastal tourism may be misleading as the figures are for marine & coastal tourism & leisure activities (including sailing/yachting) – See previous comments provided suggesting possible double counting |
| 6. Maritime monitoring & surveillance | See comments provided previously. 2007 data for high-tech services & products available in SEMRU report on Ireland’s Ocean Economy – based on SEMRU company survey. See page 32 of: <http://www.nuigalway.ie/semru/documents/final_report_small.pdf> |
| Maritime Transport Pg 11 | Line starting: *1. Shipping employed 1,149 individuals ...* suggest this line is moved at the end of the first paragraph as it doesn’t related to the international shipping services sector. Number 1 should start with *Marine Commerce....* |
| Passenger Ferry Pg 12 | Recent announcement by Irish Ferries is to increase its capacity and frequency on the Dublin to Holyhead route is positive news. |
| Marine aquatic products Pg 15 | 2nd sentence starting *Besides, it extends to the Arctic Char..* sentence not clear |
| Marine aquatic products Pg 17 | 2nd last paragraph. The Eircod project is being carried out at NUIG Ryan Institute Carna facility. Currently reads it is being carried out by UCC – suggest the paragraph is re-written.  Last paragraph starting *The Marine Research Sub-Programme...* this is historic data. Suggest it is replaced by reference to Food Harvest National Strategy and BIM’s recent strategy which aims to deliver targets of 1200 jobs and €1 billion seafood sales by building scale and enhancing competitiveness in the Irish seafood sector: <http://www.bim.ie/media/bim/content/publications/BIM%20Strategy%202013-2017.pdf> |
| Blue Biotechnology Pgs 17 & 18 | There is a need for more accurate, up-to-date and comprehensive reflection of marine biotechnology activity in Irish institutions and that which also includes a number of SMEs; removal of reference to individual researchers; any marine biotech cluster based on the Atlantic Arc would be incomplete without the involvement of UCC and UL; Prof Alan Dobson (UCC) is the leader of the Beaufort Marine Biodiscovery project.  Having checked with Letterkenny IT, the CAMBIo initiative ceased to function from around 2009/2010. The building however remains as does the name of the building. A project involving Errigal Seafood and funded by FP7 is located in the Cambio Building.  This has implications for later sections in the report related to Clusters. There will be a need for stronger justification in the report to support the SWOT presented.  Updated information (profile, opportunities and SWOT) is available at: <http://www.ouroceanwealth.ie/Briefing%20Documents/Our%20Ocean%20Wealth%20Briefing%20Documents%20for%20Consultation%20Part%20II%20Sectoral%20Briefs.pdf> starting pg 42. Further information is also available in SEMRU report: An Overview of the Irish Biotechnology Sector and its Position within the Atlantic Area: <http://www.nuigalway.ie/semru/documents/semru_needs_report_series_3.pdf> |
| Offshore wind Pgs 20 & 21 | Pg 20 Sentence: *Ireland currently has one single offshore wind farm, with seven wind farms .....* suggest sentence is reviewed.  Pg 21 para starting *The effects of offshore wind installations....* Suggest this sentence is also reviewed. Later in paragraph the sentence also requires re-editing.  The recent publishing of the *General Scheme of the Maritime Area and Foreshore (Amendment) Bill* by the Department of Environment, Community and Local Government on a New Bill is seen as a positive development for the sector. It aims to provide a coherent mechanism to facilitate and manage development activity in Ireland’s EEZ beyond the territorial waters/foreshore and on the continental shelf, including in relation to strategic infrastructure projects, such as oil and gas, ports and offshore renewable energy. It also intends to provide for a more streamlined development consent process for both the onshore and offshore elements of strategic infrastructure projects. Details are available on: <http://www.environ.ie/en/Foreshore/News/MainBody,34325,en.htm> .  Also the Offshore Renewable Energy Development Plan is due to be published shortly. The again will be a positive policy development. |
| Ocean renewable Energy Pg 22 | Similar to the Biotechnology section, this section would also benefit from more up-to-date and comprehensive information. Information can be found on: <http://www.ouroceanwealth.ie/Briefing%20Documents/Our%20Ocean%20Wealth%20Briefing%20Documents%20for%20Consultation%20Part%20II%20Sectoral%20Briefs.pdf> see pgs 19 & 20. Ireland has also recent seen significant investment in research & innovation: details are available on pgs 16 & 15 of: <http://www.ouroceanwealth.ie/SiteCollectionDocuments/MCG%202013%20Q%202%20Status%20Report%20of%20Implementing%20HOOW%20Early%20%20and%20Ongoing%20Actions%20_June_13.pdf>  (See update provided under Action 25 of Harnessing Our Ocean Wealth) |
| CCS Pg 22 | 2nd para: reference to NER 300 project is related to ocean energy |
| Coastal Protection Pg 26 | Comments from Ireland’s Office of Public Works (OPW) will be provided separately |
| Maritime monitoring and surveillance Pgs 26 & 27 | Again section would benefit from a more comprehensive overview of the enterprises and research & education activity taking place. E.g IMERC – The Irish Maritime and Energy Resource Cluster should be profiled. Details are available on: [www.imerc.ie](http://www.imerc.ie) or from IMERC directly.  Information on SmartOcean Cluster could also be further developed. Information available on [www.smartocean.org](http://www.smartocean.org) |
| Table 8: Pg 33 | 3. Energy and aquacultures – error in title. Suggest the text makes clear these are the views of the authors |
| 4. Identification and analysis of maritime clusters | Consider broadening the Galway cluster to West Coast. This would ensure inclusion of hotspots of activity in addition to those in Galway e.g ocean energy also in Mayo and Clare; aquaculture also in Clare and Mayo; and seafood also in Mayo and Donegal. Consider also including marine recreation and tourism under west coast activities in the cluster. Also consider location of Marine Institute in the analysis of the strengths related to the economic activities in SWOT presented later in the report |
| Cluster analysis Pg 38 | Is there data for indicators 4 & 5? Would be interested in seeing any available data collected (Table 14 incomplete) |
| Table 13 SWOT | It should be made clear these are the views of the authors. The information requires review – taking into account more comprehensive investigation of the status, geographical extent of enterprises, and in-depth knowledge of the strengths and weaknesses of the sectors (SWOTs for these economic activities are available at: <http://www.ouroceanwealth.ie/Briefing%20Documents/Our%20Ocean%20Wealth%20Briefing%20Documents%20for%20Consultation%20Part%20II%20Sectoral%20Briefs.pdf> . E.g. see previous comments related to CAMBio, also Nutramara and Beaufort awards also include other active research institutes across Ireland. Consider reference to Galway cluster of medical-devices companies.  Fish & processing: again geographical extent on the west coast would suggest possible broadening out of the cluster to the west coast. This would change then weaknesses mentioned related to ports – ie inclusion of Killybegs in the cluster.  Ocean Energy – by broadening out the geographical extent to include other west coast counties you include the Atlantic Marine Energy Test Site - the proposed full scale grid connected wave energy test site off Annagh Head near Belmullet, Co. Mayo and also the Westwave project off Co. Clare.  Aquaculture – Ireland weakness – limited domestic demand – please provide basis for this view. Would benefit from further investigation.  Consider including tourism and recreation and yachting & marinas – note Wild Atlantic Way tourism initiative along the west coast <http://www.failteireland.ie/wildatlanticway> and opportunities & associated weaknesses linked to developing yachting/marinas. Suggest the growing market for marine activity/adventure-based tourism/recreation along the west coast is referred to. |
| Cork Pg 42-44 | Tourism: Again the west coast of Cork is a highly popular and attractive tourist destination which also includes a large number of marine/coastal activity centres/enterprises. Suggest the weaknesses mentioned are referenced if they come from published sources.  Aquaculture: Strengths – reference to Galway and Donegal should be reviewed.  Blue Biotech – reference to large concentration of Multinational Pharma companies should be considered. Also reference to UCC’s involvement in Beaufort Biodiscovery should also be mentioned.  Note existing emerging cork cluster: IMERC. Consider including maritime surveillance and monitoring as an economic activity under the Cork cluster |
| Table 14 In-depth analysis | Please advise if data has been collected or plans to complete this data |
| Table 15 | Description of the SmartOcean cluster would benefit from more comprehensive information on the enterprises and research underway and links between the two. E.g. Over 50 ICT companies (SMEs and multinationals) are involved in the Irish SmartOcean cluster, targeting the fast-growing market for marine ICT products and services for the oil and gas, renewable ocean energy, and transport and shipping sectors and for environmental monitoring and maritime security and surveillance. This is an exciting and new niche opportunity for Ireland building on the strengths of a successful national ICT cluster.  Cork Cluster Strategy – suggest you change the name to *Irish Maritime and Energy Resource Cluster (IMERC)* |

1. Previous comments submitted 14th October 2013 [↑](#footnote-ref-1)
2. The CSO’s policy on access to Research Microdata Files can be found on: <http://www.cso.ie/en/aboutus/dissemination/accesstomicrodatarulespoliciesandprocedures/policyonaccesstoresearchmicrodatafiles/> [↑](#footnote-ref-2)