

Interim Country paper Ireland

Log of comments received from stakeholders (version 18/10/2013)

This logfile includes the comments from DG MARE (27/08/2013), the NUI Galway (SEMURU) (10/09/2013) and the Marine Institute (14/10/2013)

Comments received from DG MARE (27/08/2013)

	Comments	Action taken
1	Statements and figures should be referenced with footnotes.	Revised accordingly and footnotes added
2	For growth rates, we would like to see 10-year growth as well as 3-year where this is possible.	This is work in progress. It will be addressed in the next round of comments (as far as data is available)
3	The innovation chapter should examine output indicators as well as input ones. We have sent you some formulae for doing it. In parallel we will ask Eurostat for the microdata in case you have difficulty obtaining them.	This is work in progress. Indicators specific on micro-data will be added at a later stage to the country paper (if available).
4	<ul style="list-style-type: none"> a) Annex 4 can be combined with annex 1 and made more readable. b) A tabular format is not necessarily the best approach. c) It would be interesting to compare some indicators with other countries. Employment per marine berth for example 	<ul style="list-style-type: none"> a) Will be part of general methodological Annex, as agreed with DG MARE b) We will see how we can fix this, ensuring that all the sources are juxtaposed c) We suggest to put that on hold for now, and discuss once we have final country papers
5	<p>You can use these figures for coastal population (based on landscan data). They might need to be renormalized.</p> <p>You say that the sector "is dominated by tourism. You should qualify this as being an output of the 2007 study.</p>	<p>Done.</p> <p>A footnote has been added</p>
6	This section basically sets the scene by summarising earlier work. You should say that this new paper updates the previous figures and provides an independent check on them.	A footnote has been added
7	<p>OVERVIEW OF MARITIME ECONOMIC ACTIVITIES</p> <p>In a number of cases you note that there are no Eurostat data. Is the situation worse than for the other countries? It should be mentioned.</p>	Inserted footnote to table 1, commenting on the more limited data availability of national statistical sources
8	<p>SHIPBUILDING (EXCL. LEISURE BOATS) AND SHIP REPAIR IN YOUR COUNTRY</p> <ul style="list-style-type: none"> a) The "in your country" should be removed from the title of this and other sections. b) The paragraph on the fishing fleet does not belong here c) Leisure boats should be included 	<ul style="list-style-type: none"> a) Has been deleted b) Has been moved to the part on fishing c) Have included a paragraph on leisure boats as well as commercial boat construction

	Comments	Action taken
9	<p>CONSTRUCTION OF WATER PROJECTS IN YOUR COUNTRY</p> <p>a) The "in your country" should be removed from the title of this and other sections.</p> <p>b) What do the companies do</p> <p>c) 16 one-man companies for water projects (dredging etc) sounds very unlikely.</p>	<p>a) Has been deleted</p> <p>b) A brief statement has been added</p> <p>c) The number of companies has been changed as has the number of permanently employed personnel, nevertheless more precise information was not discovered</p>
1	MARITIME TRANSPORT	
0	<p>Shipping firms, service providers and government agencies serve mainly the local market.</p> <p>a) We have no idea what this means.</p> <p>b) What is the difference between the local market and international services?</p> <p>c) Nevertheless Ireland's share of deep sea shipping is rather limited and accounts for only 16% of all the weight of goods transported (7.1m tonnes in 2011).We think you mean "The share of Ireland's trade that is carried by deep seashipping is (...)"</p> <p>d) the capacity of the ships calling at Irish ports has increased by 300%. What does this mean? The average capacity of all ships landing at Irish ports? Including fishing boats?</p>	<p>a) The sentence has been deleted as it was not adding value added and caused confusion</p> <p>b) See point a)</p> <p>c) The sentence changed in line as correctly pointed out in the comment</p> <p>d) Clarification text added</p>
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1	CATCHING FISH FOR HUMAN CONSUMPTION IN YOUR COUNTRY	
2	This value chain should include processing and retailing but there is no text about this	Added a paragraph on seafood processing (similar comment received from Marine Institute) and seafood retailing
1	OFFSHORE OIL AND GAS	
3	This section is a bit piecemeal. It could do with a map or a table summarising the information.	Restructured the text, added a map on offshore oil and gas discoveries
1	OFFSHORE WIND	
4	Environmental constraints for further growth of the sector are more numerous for offshore than for onshore wind energy. We are not sure what this means. Does it mean that it is harder to build offshore or that there is more environmental impact. This should be explained.	Rephrased the meaning of the sentence.
1	LISTING AND RANKING THE LARGEST MARINE AND MARITIME ECONOMIC ACTIVITIES	
5	Please indicate how you calculate the score.	The calculation has been performed according to the general methodology Annex, attached to the country papers as a whole

	Comments	Action taken
1 6	RANKING ORDER OF THE 7 MOST PROMISING MARINE AND MARITIME ECONOMIC Annex 4 should be incorporated in this chapter	Will now be part of the general methodology Annex, attached to the country papers as a whole, as opposed to including it in each country paper
1 7	IDENTIFICATION OF THE MOST INNOVATIVE COMPONENTS OF BLUE GROWTH We need to discuss this but meanwhile only print the rows for which you have a value	Will be part of the sea-basin report, the innovation indicators will be added to the country papers at a later stage, still amended the table for now
1 8	ANNEX 1 a) A table might not be the best way of presenting this. b) We need discussion of where there are discrepancies between different figures. c) We need to know exactly what proportion of NACE codes were used. d) Maybe separate tables of MEA against NACE for GVA and employment although you would have to make sure it is readable. e) Possibly separate ones for shipping, fishing tourism and mining/oil and gas. Combine with annex 4	a) The information may be too detailed to display in a table format. The data is now part of the methodology Annex and the data file (in .xls format) b) Still outstanding, to date c) For Eurostat figures and official national statistical sources, this is part of the agreed methodology Annex. For the NACE-based alternative sources, this can not be derived from the references. d) Now anyhow part of the datafile (provided in .xls format) and no longer attached to the country paper e) Now part of methodology Annex and data file (provided in .xls format)
1 9	ANNEX 2 We need 10-year growth figures as well as three years	Will address in final round of comments

	Comments	Action taken
1	<p>the report's rankings of importance of maritime economic activities in table 6. Oil and Gas is given the top rank in terms of being the largest marine economic activity but the value used is wrong. They say it's worth €137,117 million euro in the table which means it gets a score way above the other sectors. This should be €137 million euro instead which would drop it down the rankings considerably</p>	<p>Thanks for the comment. Has been amended accordingly in table 1 and ranking of 7 largest maritime economic activities (ch. 2.1.)</p>
2	<p>P4. - Unemployment has continued to decline since the peak at the start of 2012 (15%) a trend that is to continue, while employment has started to also increase in the second half of 2012 and is expected to continue to show signs of recovery in 2013 (growth of 0.2%)</p> <p>- Confusing comment, unemployment decline to continue, while employment increasing?</p>	<p>A footnote has been added explaining that the employment and unemployment figures do not change at the same time. The difference is well defined in Labour Economics as these two indicators calculate slightly different things and should be considered complementary, but separate.</p>
3	<p>P6. – Cruise tourism GVA figure €40.9m in table section 4.</p> <p>- Not sure if you can consider this as GVA. It is total expenditure of cruise passengers. Also, the use of these figures has since been revised by SEMRU as they are not comparable with the survey undertaken by Fáilte Ireland in 2010 and seem very much inflated.</p>	<p>Figures updated to the latest report that has been suggested.</p>
4	<p>P8. - Construction of water projects in your country</p> <p>- In 2010 there were only 16 companies in Ireland active in this field with a total employment of mere 17 fully employed people.18 The data available point towards a steady decline of the field until a very specialised and small field has been left to this day.</p> <p>- SEMRU has collected data from the CSO (BCI 2010) on this which differs from Eurostat – we have a query in with the CSO at the moment as to why CSO and Eurostat figures would differ. We have employment at 39FTE for 2010 in water construction.</p>	<p>A footnote has been added to explain that the difference is under investigation.</p>
5	<p>P24. – Table 6 – Offshore oil & gas – GVA 137,117 (million Euro)</p> <p>- This figure should be 137.1, which would change the order of the rankings of maritime economic activities. Oil and Gas is given the top rank in terms of being the largest marine economic activity but I think you have the value wrong. You say it's worth €137,117 million euro in the table which means it gets a score way above the other sectors. This</p>	<p>Modified in the description on Offshore Oil & Gas</p>

Comments	Action taken
<p>should be €137 million euro instead which would drop it down the rankings considerably. If it was worth as much as you say it's worth, the Irish Oil and Gas industry would be very pleased indeed!</p>	
<p>P27. – Table 8 – Future potential of economic activities - I'm not sure how it was determined if there was a positive or negative impact – subjective data I assume?</p>	<p>Retained in the country paper, since part of agreed methodology with DG MARE. Indeed, the scoring on the future potential of maritime economic activities is based on the <u>country</u> editor's judgment. Due to the qualitative nature of the scoring, it is open to interpretation much more than the quantitative scorings (largest and fastest growing). However, and as far as the maritime economic activities: shipbuilding, ocean energy, fisheries, aquaculture, short-sea shipping, yachting and marinas are concerned, they will be analysed in more depths in the sector edits.</p>
<p>6 P28. – Table 9 - Ranking order of the 7 most promising maritime economic activities in Ireland (NUTS 0) - This is based on the above table so same comment as above</p>	<p>See comment above</p>
<p>7 P30. – Table 10 – Scoring of the maritime economic activities on innovation criteria - This table is very incomplete, perhaps too incomplete to include at this stage</p>	<p>Quantifiable indicators for innovation scoring have been developed and presented to DG MARE. Currently, we are extracting the data and compiling the indicators. Deleted from this round of submissions. Will be added at a later stage to the country papers.</p>
<p>8 Finally while other universities are mentioned no mention is made of the National University of Ireland Galway's Ryan Institute and the relevant research taking place there for certain sectors. I suggested that they should give the Ryan Institute aquaculture facility at Carna a sentence (this is after all where the rearing work for EIRCOD is carried out), and Deniz Tasdemir a sentence under Blue Biotech (as the state's only Professor of Natural Product Chemistry and Marine Biodiscovery). a) The Ryan Institute is the National University of Ireland, Galway's hub for Marine research activities. It is home to over 250 researchers and houses three centres of excellence: the Centre for Health from Environment, The Centre for Climate and Air Pollution Studies and the Energy Research Centre as well as Ireland's only</p>	<p>Done and amended accordingly under ch. 1 - review of the maritime economic activities a) Added to cluster section on Ireland (Galway) b) Inserted under review of blue biotechnology c) Added to blue biotechnology chapter (taken into account comments received from Marine Institute to mention EIRcod under blue biotechnology (and not under aquaculture)</p>

Comments	Action taken
<p>unit dedicated to research in the area of marine socio-economics; the Socio-Economic Marine Research Unit (SEMURU).</p> <p>b) The Ryan Institute's Prof. Tasdemir is Ireland's only Professor of Natural Product Chemistry and Marine Biodiscovery and is the leader of the Beaufort Marine Biodiscovery project. The overall aim of this project is to assess Irish marine biological diversity to identify and develop novel natural products and other biomaterials for application in areas such as drug discovery, marine biotechnology and biomedical research.</p> <p>c) The Ryan Institute aquaculture facility at Carna is where the cod rearing work for EIRCOD is carried out.</p>	

Comments received from the Marine Institute Ireland (Jenny O'Leary) (14/10/2013)

Comments	Action taken
<p>0 Maritime economic activities Boats & Chandlery – National Statistics are available</p>	<p>If boats means marine supplies, then it is included in this activity in 0.1 Shipbuilding (NACE 33.15). If chandlery means marine retail, it is included in the 1.1., 1.2., 1.3. as renting and leasing of water transport equipment (NACE rev. 2: 77.34) We checked national statistics: 2-digit NACE code 30 is available, but that code is defined very broadly in Official National Statistics (includes also e.g. manufacture of bicycles, manufacture of air and spacecraft, ...). 30.3 is shown individually and could therefore be subtracted. Please feel free to hint us to more specific national statistics (if available).</p>
<p>1 Table 1 – SHIPBUILDING a) Consider expanding the title to Shipbuilding and Maritime Construction 30.11 and 30.12 – national CSO stats available. b) Construction of water projects (Eurostat not up-to date – National Stats available.</p>	<p>a) Suggestion welcome. We will check with DG MARE; for consistency reasons, it would need to be modified for all country papers (not just Ireland) b) We checked at the National Statistical office and could access employment figures for shipbuilding (NACE rev. 1: 361) for both sexes. However, no further data was available. Any help/assistance would be welcome, as to find more recent / appropriate national statistics.</p>
<p>2 Table 1 – maritime transport a) Consider expanding title to Maritime Transport & International Shipping Services as it includes services such as ship leasing. b) Consider including Maritime Commerce / Insurance. Large sector – not collated through national stats/eurostat. Important sector – c) SEMRU have carried out a survey – see 2010 report</p>	<p>a) The suggestion is welcome. We will check with DG MARE; for consistency reasons, it would need to be modified for all country papers (not just Ireland) b) Footnote added to point out that figures on deep-sea shipping exclude maritime commerce / insurance sector. In any case, we suggest to rather add that to 0.1 Shipbuilding (if at all). c) Welcome comment. Please feel free to provide us with data specific to GVA and employment on maritime commerce and insurance sector (disaggregated).</p>
<p>3 Nace code 52.29 (previously called 63.40) not included. For completeness</p>	<p>We agree that NACE CODE 52.29 (other transportation support activities) is not included yet in the overall methodology (NACE-based figures). However, we could not</p>

	Comments	Action taken
	recommend you look at including a % of 52.29	find a straightforward allocation key to apply here, to disaggregate the maritime related support activities. We will have to address that for all countries.
4	63.22 (Other supporting water transport activities in deep sea shipping? Not sure it belongs there	We included the NACE codes that were also part of your study (SEMRU; Ireland's Ocean Economy 2010). .
5	1.3. passenger services 1.1, 1.2, 1.3 – Suggest source of information needs explanation in methodology e.g. overall fig and % applied / weighting for each sub-activity ?	This is explained in the general methodological Annex to the country papers.
6	Suggest "...and eco-system services" is dropped from the title. See comment under 2.5 below	Suggestion welcome. For consistency reasons, it would need to be modified for all country papers (not just Ireland)
7	2.1. Fishing for human versus animal – title needs consideration as the category also includes processing and sale of fish.	Suggestion welcome and implemented . We suggest a title like "Fish and fish processing for human consumption. We suggest this amendment (for consistency reasons) for all all country papers (not just Ireland).
8	NACE 10.2.	Indeed, NACE rev. 2: 10.2 is included in 2.2. Catching fish for animal feeding (as also explained in the general methodological Annex to the country papers). We added a footnote to the country paper, indicating that no data on Eurostat was available for that code (as well as the other NACE rev. 2 codes under this maritime economic activity, i.e. 03.11, 03.12.
8	2.3. More up-to-date national statistics available – See BIMs Status of Irish Aquaculture Report 2012.	We modified the figures in table 1 accordingly and aligned with qualitative description
9	a) Would it be possible change the title to aquaculture as it is difficult to understand this general title. b) If algae/seaweed is also included in these figs then there will be double counting with 2.4	a) Suggestion welcome. Title changed accordingly. b) Algae and seaweed are not included in 2.3. According to the methodology Annex, <i>"A specific NACE code is available for this sub-function: 03.21 Marine aquaculture, but no data are available in Eurostat SBS. However data on NACE sector 03.21 is available through JRCs Technical report, An Approach Towards European Aquaculture Performance Indicators. In the JRC report, GVA and persons employed are available for: freshwater, marine and shellfish farming. For the purpose of our analysis, marine and shellfish farming will be aggregated."</i>
10	2.5. Agriculture in saline soils Data is available on a NUTS 2 for agriculture however we would disagree with the inclusion of this activity .	Indeed, data is available at a NUTS 2 level for agriculture. However, JRC data (map) is available and does not indicate any activity for Ireland. See also: http://eusoiils.jrc.ec.europa.eu/library/themes/Salinization/Re

Comments	Action taken
	sources/salinisation.pdf Comment in table 1 and Annex amended accordingly.
11 3. Energy and raw material Energy & Seabed Resources reflects better as a title	Suggestion welcome. We will check with DG MARE; for consistency reasons, it would need to be modified for all country papers (not just Ireland)
12 3.3. 3.2 and 3.3. Aggregate Ocean Energy information. Suggest you don't disaggregate.	Description in table 1 amended accordingly
13 4. Leisure, working and living. Should Tourism be in the title ?	Suggestion welcome and implemented . Modified into "Leisure and tourism". We will suggest this as amendment to all country papers.
14 4.1. Title : a) Can it be expanded to Coastal tourism & recreation as statistics reflect this Definition/methodology outlined in pg 38 b) Annex 2 not used for Irish profile. Irish profile is activity only and not accommodation therefore will not be comparable across countries	a) Suggestion welcome. We will check with DG MARE; for consistency reasons, it would need to be modified for all country papers (not just Ireland) b) Footnote added hinting to the fact that qualitative review for Ireland does not include accommodation.
15 4.2 Possible double counting ? Data also contained in 4.1 ?	Need to check ICOMIA statistics still to ensure no double-counting is taking place
16 4.3. GVA and employment cannot be used as data is not from NACE 50.1 and 77.34 and not comparable with other countries. Other indicators are available e.g. expenditure see comment below	
17 4.3. Failte Ireland's Cruise Tourism Research Report (2010) found : In 2010, there were 202 calls by cruise ships to Irish ports carrying 204,489 passengers. Direct spend from passengers and crew who disembarked at Irish ports, including port charges, was estimated at €20.3 million.	Thanks. This has been added to the qualitative sector description. Data deleted from table 1, since direct spend not corresponding to GVA .
18 6.3. Consider inclusion of	Thanks for the suggestion. Can you please provide us with the

	Comments	Action taken
	high-tech products & services category. SEMRU data available on size of the sector 2010 (SEMURU Survey).	data on the SEMRU survey. I was not able to search it via the internet.
19	Request to move paragraph starting “In 2012, the fleet numbered 2,188 registered vessels...”to Fishing for Human Consumption section	Moved to Fishing for human consumption
	On Maritime Transport qualitative review. This is the Maritime Commerce & Ship Leasing Sector. Consider expanding title to Maritime Transport & International Shipping Services as it includes services such as ship leasing. Stats in Table 1 cover the Ship Leasing only whereas the text below also cover the maritime commerce/insurance sector. SEMRU have recent economic and employment information reported through their survey.	Suggestion welcome. Happy to add economic and employment information, if provided. The survey was not accessible online to us.
20	Marine transport review: This paragraph doesn't belong here. Suggest it is moved after first line re volume	Done.
21	Suggest National Policy and Plan and associated targets is highlighted: Harnessing Our Ocean Wealth – An Integrated Marine Plan for Ireland www.ouroceanwealth.ie	Is now addressed under chapter 5 of the country paper (Analysis of measures, policies and strategies to stimulate growth and good practices in the sea-basin)
22	Request to move paragraph starting “In 2012, the fleet numbered 2,188 registered vessels...”to Fishing for Human Consumption section	
23	Marine Aquatic products in your country	Added information from the BIM – Status of Irish Aquaculture Report 2012 as an additional source to the description

Comments	Action taken
<p>Suggest you don't include the first two paragraphs and update with BIMs Status of Irish Aquaculture Report 2012 available on Also current national policy (Food Harvest 2020) contains specific growth and employment targets.</p>	
<p>24 In terms of research, the sector benefits from a community of offshore oil and gas researchers, totalling 22 researchers, located at the University College Cork, National University Ireland, Galway, University College Dublin. Suggest this is left out as it isn't covered in the other areas and also not up to date</p>	<p>Removed from the description of the sector..</p>
<p>25 Blue biotechnology Economic and employment statistics (2010) available from SEMRU Survey. Sector comprises large number of seaweed-based biotech companies.</p>	<p>Upon an internet search, these data were not available.</p>
<p>SEMURU provided a summary of the economic value of the sector in their 2010 report. They have recently updated the data with a survey collecting 2010 economic and employment data. Note also target set out in Harnessing Our Ocean Wealth (growth)</p>	<p>Suggestion welcome. Please feel free to provide the data of the survey.</p>
<p>26 Carbon capture & storage: Further information also available on pg 30 : http://www.ouroceanwealth.ie/Briefing%20Documents/Our%20Ocean%20Wealth%20Briefing%20Documents%20for%20Consultation%20Part%20II%20Sectoral%20Briefs.pdf</p>	<p>Added information and source to the maritime economic activity description</p>
<p>27 Aggregates mining:</p>	<p>Added information and source to the maritime economic</p>

Comments	Action taken
<p>See information available on pg 27 : http://www.ouroceanwealth.ie/Briefing%20Documents/Our%20Ocean%20Wealth%20Briefing%20Documents%20for%20Consultation%20Part%20II%20Sectoral%20Briefs.pdf</p>	<p>activity description</p>
<p>28 See updated statistics In Inland Fisheries Ireland Report : http://www.fisheriesireland.ie/Press-releases/new-study-angling-worth-075-billion-to-irish-economy-and-supporting-10000-jobs-in-rural-ireland.html The report states : Angling is worth €0.75 billion to Irish Economy and supports 10,000 jobs in rural Ireland</p>	<p>Added some information on that and reference in the country paper</p>
<p>29 Yachting and marinas Text is related to maritime events as opposed to yachting & Marinas</p>	<p>Yachting is included in the text. To date, no valid source has been found that is covering the sector adequately. Please feel free to forward material, if available.</p>
<p>30</p>	
<p>31 Failte Ireland's Cruise Tourism Research Report (2010) found in 2010 there were 202 calls by cruise ships to Irish ports carrying 204,489 passengers. Direct spend from passengers and crew who disembarked at Irish ports, including port charges, was estimated at €20.3 million.</p>	<p>Accepted as add-on. Added the exact reference.</p>
<p>32 Coastal protection - data out of date</p>	<p>Data from 2008 (pre-crisis period) has been deleted.</p>
<p>33 Regional breakdown: Cathing fish for human consumption Can you advise methodology ?</p>	<p>Yes,</p>
<p>34 Listing the 7 largest maritime economic activities a) Would it be more</p>	<p>a) For Eurostat, the last available year is 2010. Whereas Eurostat is our 1st data source, other data sources will be used, if Eurostat is not available (national statistics and alternative sources). Hence, and according to that agreed approach with DG MARE, the reference years</p>

Comments	Action taken
beneficial to use a standard year to carry out the analysis ? b) Maritime events?	may sometimes differ. b) No, the number we use for Yachting and marinas is based on ICOMIA; ICOMIA Statistics 2011 (2012) Statistics concerning July 2011 to June 2012 (proprietary data)
35 Cruise tourism Note Failte Ireland report	