

SPANISH COMMENTS – PART II – SUMMARY AND INTRODUCTION

(new and final version)

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.

In Palma de Mallorca (2/3 May 2103) a Workshop on Blue Growth in the Mediterranean sea was organized by the Commission – DGMARE - and the Spanish Government. The information gathered in this Workshop should be also helpful. (Annex 8, the Executive Summary.)

In part 5 of the study, specific clusters are studied. ECORYS has chosen two clusters, this is an independent choice of ECORYS. As a footnote, the Study says “Other clusters, research institutions, foundations with relevance in the field of maritime activities have been identified at National level, thus having important direct and indirect impact to the regional clusters of Galicia and Basque Country” (page 52). It’s understandable that a limited study as ECORYS isn’t able to study all existing clusters, but ECORYS has to explain the general framework first.

ECORYS states now that all other clusters, research institutions, etc, have an “direct and indirect impact” on the Galicia and Basque cluster. This doesn’t make too much sense and it is confusing: The ECORYS study is about SPAIN, not about these two clusters. Therefore it’s important that in the introduction of part 5 of the Study, the situation is explained, something like:

In Spain there is a national Maritime Cluster(CME) created simultaneously with the publication of the Blue Book, following his recommendation to create the network of European clusters.

In the CME all maritime sectors participate: Shipbuilding; Maritime Transport; Fishing; Auxiliary Industry; Ports; Nautical Tourism; Navy; Sea Energy ; as well as related activities such as insurance; security; lawyers; financial institutions; unions...etc. .Taking into account all associations, institutions, enterprises, etc., the CME incorporates more than 75 members, representing more than 3.000 Enterprises.

Since 2006, the CME is member of the European Network of Maritime Clusters, which has 16 members.

The Regional Maritime Clusters existing in Spain are: Clúster Marítimo de las Illes Balears, Clúster Naval y del Mar de la Región de Murcia, Clúster Marítimo de Canarias, Asociación Clúster del Naval Gallego (ACLUNAGA), Foro Marítimo Vasco and currently under creation Foro Marítimo Catalán. All of them are members of the CME (FMV request temporary leave), although none covers all maritime sectors but the most representative of region in question.

After this introduction, ECORYS should justify that the choice of Clusters for its study for this and that reasons.

- DETAILED COMMENTS:

- Ceuta and Melilla coast is missing (in the text and map)
- Maritime regions: no criteria seem to be used concerning ports. For instance, Vigo is mentioned but A Coruña has higher traffic. (more data, annex 9)

- REVIEW AND MARITIME ECONOMIC ACTIVITIES IN SPAIN
 - Construction of water projects: we think that data to be used should be total port investment, not only infrastructure and port capacity. (attached investment information 2012- annex 10)
 - Deep sea and short sea shipping: they refer to 22 ports included or adjacent to RTE. It should say more than 40.
 - Cruise tourism: Data are wrong (total cruise passenger in 2012 is 7.596.784.).

- ECONOMIC IMPACT
 - The conclusions on the economic impact in terms of added value are not understandable. In table 3, "inland waterways transport " there is a high value (100%), but there is only 1 inland waterway in Spain (Guadalquivir).

- Methodology should be mentioned as well as sources used.

- 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)

- Page 17. Baleares and its port are not mentioned as ports in Spain.

- Page 17: Ferries: Baleares island are not mentioned in spite of its important role in ferry transport between the peninsula and the islands.

- Add in page 60, line 4 - “Assessment” del Spanish Maritime Cluster :
 - Its actions are coordinated with the maritime industry sector, the Spanish maritime organizations and strengthened by the Odyssey 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 1,2,3,4,5,6 and 7 with sets of comments.)**