

Study on deepening understanding of potential blue growth in the EU MS on Atlantic Arc

Draft final country paper - revised version

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## 1) General remarks

- Overall, there is a real effort to get a comprehensive picture of the whole maritime economy in France in terms of both industries and R&D clusters; there is also a real effort to compile much relevant qualitative information.
- The analysis of strategies including the “Grenelle de la mer” forum and the sea port reform (section 5) is relevant.
- The report relies on a range of quantitative data sources the quality of which has not been verified. (It must be acknowledged that it is difficult to find comprehensive and reliable sources.)
- As a result, the quantitative data set used to analyse maritime sectors remains fragmented and would require further harmonisation. Rankings presented p. 18-19 are therefore hypothetical.

## 2) Specific remarks

General overview

- “some 33% of the French gross added value was produced in these coastal regions”: there is no measure of local value added; this figure is very fragile. INSEE only provides estimates of regional (Nuts2) value added: these are conventional (and fragile) estimates.
- “When characterizing the different coastal regions...”: naval shipbuilding is also present on the Channel-NS coast (Cherbourg) and the Atlantic coast (Brest, Lorient); not only on the Mediterranean coast.

Chapter 1, table 1 “Overview...”

- Reference years should be related to figures, not to publication dates.
- Employment column seem to give numbers of jobs, including part time jobs. Further information would be desirable.
- 1. Maritime transport. GVA and employment figures seem to be overestimated as compared with INSEE data, especially for deep and short sea shipping. It would be cautious to double check.
- Line 2.1 “Catching fish...”: GVA and employment figures are unreliable and overestimated.

Overview of maritime economic activities at Nuts 0 level

Shipbuilding and ship repair (p.4)

- Approximate figures on direct employment are questionable. 2010 figures are as follows: 12,547 (resp 5,432) salaried employees as of 31 December and 11,015 FTEs (resp 4,908) for shipbuilding (resp ship repair); overall 17,979 and 15,923 respectively (source: national statistical institute INSEE).

Shipping (p.5)

- Little information is provided on deep sea shipping, except that it employed “almost 15,000 people in 2010”, which is overestimated: 14,151 salaried employees as of 31 Dec and 12,917 FTEs for shipping as a whole (short sea + deep sea) in 2010 (source: national statistical institute INSEE).

#### Offshore oil and gas (p.9)

- A short overview distinguishing between offshore oil and gas extraction on the one hand and services to offshore oil and gas exploration and extraction on the other hand would have been useful.

#### Coastal tourism (p.12-13)

- No geographical level has been “chosen” by the authorities for providing coastal data. Local data from INSEE give details at Lau2 level on employment and establishments but are also aggregated at higher levels (Nuts3 and 2). Coastal accommodation is often documented by the number of hotel rooms and number of nights per annum in coastal communes (Lau2 level).
- The employment data given page 13 are at Nuts2 level as noted by the authors: this is not really about coastal tourism, whatever geographical delimitation given to the activity.
- A reference to 2008 data “from Ifremer” is top of page 13. Actually, the note referred to has NOT been prepared by Ifremer, but posted on an Ifremer webpage like a range of other notes prepared for the initial economic assessment required by the Marine Strategy Framework Directive.

#### Maritime monitoring and surveillance (p. 14)

- It would have been possible and useful to be more specific on marine water monitoring without expanding too much, in terms the different types of monitoring systems developed in the framework of specific regulations, and with specific economic impacts. This is a major aspect of blue growth in connection with the Marine Strategy Framework Directive, concerning many of the member states.

#### Table 3 (p. 16-17)

- Splitting employment by regions and sea basins is one thing; splitting GVA is quite another. There is no simple link between the two.
- Employment and GVA split by sea basins for shipping, ferry and cruise has nothing to do with sea port traffic of freight and passengers.
- Coastal tourism GVA split by sea basins has nothing to do with the split of the number of nights by Nuts 2 or 3. The link between the latter and employment location remains to be proven.

#### Table 6 (p. 20)

- Several of the marks to maritime sectors would require explanation.