

Log of comments received from stakeholders

Interim Country paper Spain

(DG MARE Blue Growth sea basin study Atlantic)

18/10/2013

Comments from Consejo Economico y Social / Ms Arantza Lopez de Munain Zulueta

(uploaded on 12/09/2013)

	Comments	Suggested response
1	It would be worthwhile to make an effort to get more updated and precise information on regional maritime clusters and organisations	This is part of the methodology to analyse the selected clusters (in-depth analysis) alongside the indicators: Unemployment rate at cluster level (NUTS III or II level), Ongoing research: main research institutes / companies associated to the clusters, Number of students in higher education, Number of students in higher education following courses for employment in blue economy
2	Distorted visions of the magnitudes or importance of the different activities or clusters will be provided	Please specify your comments with regards to "distorted visions of the magnitudes or importance...". Annex I serves as a juxtaposition of the different sources (Eurostat, Official National Statistical Sources, Alternative) and to provide transparency. If you have additional sources please let us know.
3	Table 3 is based "on the basis of other parameters" since "hardly any data can be found in regionalized statistics". Whereas it should be possible to find these data of employment and GVA contacting regional maritime clusters and regions. In several regions there are statistical agencies that provide these data and maritime sector organizations do also have this information.	It is certainly possible to find some regionalised data on GVA and employment. However, and to comply with the unified methodology for assessing the size of the maritime economic activities (and as agreed with DG MARE), this data would need to fit in the NACE codes applied. Often, and to our experience, regionalised data (NUTS 2 or 3, as opposed to national data NUTS 0 or 1) is less available, the more disaggregated it gets (in regional terms).
4	Data quoted in table 3, e.g. the allocations between regions of the shares in ocean energy and offshore wind	Please see map from the Ministry of Agriculture on the suitable areas for marine offshore wind activities.
5	The clusters report is based on partial characterization of maritime activities, very much focused on fishing and related activities but excluding other important areas of the maritime activity like commercial shipping, most part of shipbuilding,	The methodology for selecting clusters has been approved by DG MARE

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	and ocean energies and offshore wind.	
	The tourist sector is taken as a whole without regard to whether its linked to coastal tourism or not.	Comment has been taken into account and the paragraph has been rephrased with an emphasis on coastal tourism.
6	More refined criteria to characterize the clusters would lead to a more representative selection of “maritime clusters” for the more thorough analysis to be done.	More clusters will be added to the longlist of clusters, as described in the methodology Annex. Please let us know, which ones you wish us to include for Spain.
7	The report on the ocean energy and offshore wind of the Spanish draft hardly reports on the existing projects and activities, not even an accurate description of the only two projects that it mentions, Ibermar and BIMEP, the former being a floating platform prototype and the second a testing infrastructure (like EMEC) for wave energy and floating offshore wind to be inaugurated next year already.	Please see changes in order to provide an accurate description and information on new projects (Plan de energías renovables 2010-2020-IDAE).pp198-199
8	The description (<i>on ocean energy</i>) does not mention a wave energy plant already in operation and connected to the grid for already two years in the Bay of Biscay and several other initiatives that show a very different picture of the sector.	Information regarding the Wave energy plant - MUTRIKU Plant, has been included: http://www.dw.de/spain-pumps-wave-power-onto-european-grid/a-16714308
9	It would be useful if the floating offshore wind and fixed offshore wind deep waters/ shallow waters duality is more clearly stated in the reports, at least in some of them.	Please see change in the OFFSHORE WIND Paragraph.
10	The depth of the coastal waters in most of France and Spain and Portugal explains why there are no offshore wind parks yet until the floating technology achieves sufficient maturity.	Inserted. Please see change in the OFFSHORE wind Paragraph.
11	Regarding contacts to get regional employment and GVA data and information of the different maritime activities going on, as said earlier, I will be very happy to provide you or the consultants	We will be very happy to get these contacts and ask them for the required information. Please let us know at martin.wegele@be.ecorys.com

Comments received from InnovaMAR (uploaded on 16/09/2013)

12	Innovamar completed for marine sub structure both supply and demand structure and integrated these subsectors in the National Accounts through the national input-output tables . Official data and surveys, time and resources do not seem to be part of the study (final report presented in December).	An input/output analysis will be compiled for ES and attached as separate Annex to the draft final report. We are happy to link up with you on that.
13	For the alternative sources and to Spain and work identifies and Innovamar CEET and Innovamar would have liked to get involved as "national expert" of Spain .	Please clarify with DG MARE
14	The role of experts in this work will be quite important. Not only will they review the data that will be offered in GVA and employment but also other features that are to be studied for each activity as their innovation , sustainability and future development prospects . There is enough work qualitative / quantitative to be made by national experts.	As agreed with DG MARE, EU Member States and related institutions will have 1 month time to comment on the draft final country fiches (one-round-of-comments), from 18 th Oct. to 15 th Nov. 2013. After that, comments will be addressed (where appropriate) by the research team and draft final country fiches produced.
15	this is a job that will try to unify sources and connections for "indicators" to monitor maritime activity and strength for future growth . There is thus an exercise in "structural" identification and quantification of sea sectors in each country 's GDP . It is rather an exercise of delimitation of economic indicators in order to make a foresight of future development and follow in time.	Please specify what you mean

17	Spain has the largest coastline of all EU countries, with a total of 7880 km of coastline (km and not km ³ !) bordering the Iberian peninsula and the Canary and Balearic Islands.	Modified accordingly
18	The correct name of the Spanish Institute of Oceanography is “Instituto Español de Oceanografía”. In the ECORYS draft the Institute appears with two different names.	The name has been modified accordingly.
19	In Spain, the sea workers, occupied in maritime fishing and transport, in loading and unloading, and other activities of the maritime fishing sector, are included in a Special Social Security Scheme, namely the Social Security Special Scheme for Maritime Workers.	Included as a footnote for fishing activities.
20	Coastal Tourism is not included in the study, and its importance present and future for the Spanish economy cannot be denied.	Please note comment in the paragraph dedicated to Coastal Tourism.
21	- The study about offshore wind energy should also be taken into account,	Please specify the source of the study you mentioned. We can then review it and include it in the qualitative review (if appropriate)
22	- “Catching fish for human consumption”, should have more than “0” for innovation (see information of PTEPA in http://ptepa.org/index.php/documentos/documentosptepa)	This comment has been taken into account. Please see change.
23	- The MAGRAMA – Ministerio de Agricultura, Alimentación y Medio Ambiente is the Ministry competent for environmental protection of the marine environment (División para la Protección del Mar – Division for the Protection of the Sea). The Law applicable is the Ley de Protección del Medio Marino. There is a national system for the protection of the sea – Sistema Nacional de Protección de la Ribera del Mar.	We will add that as a source to the review
24	Information about marine based Pharmaceutical production in Spain should be included. Instead of “Marine Army Forces”, the right translation for “Armada” into English is “Navy”.	Please feel free to hint us to relevant sources
25	Comments on the “country overview” and economic data - part 0 of the draft of the Study:	We addressed this in the draft final country papers. The following information does not seem to have a direct implication with the

<p>Paraphrased 1 The necessary fiscal adjustment policies to return to sustainable public finances and the bank system restructuring process to guarantee a sound and solvent economy will post a positive lending capacity sector, essential to regain market confidence. There is an extraordinary development of the external sector, with a strong performance of exports and current account surplus, thus external demand's contribution to growth to reach 2.3 p.p. of gdp in 2013; for the first time in 15 years the economy will post a positive lending capacity.</p>	<p>object of the study. Comments have been considered but will not be fully integrated in the report.</p>
<p>26 Paraphrased 2: The last data published by the ministry of employment show a change in the tendency although it is still the biggest problem of the Spanish economy , registering a reduction of unemployment during the last 5 months of 2013.the labour market reform is already bearing fruits and the unit labour cost reduction is improving competitiveness</p>	<p>Please feel free to hint us to data (if at hand).</p>
<p>27 Paraphrased 3: With respect to public finances, the adjustment of the deficit of the public sector in 2012 has been of 2 p.p. of gdp. The restructuring of the financial sector has brought is allowing a healthy reallocation of resources and more transparent banking sector. The strong performance of exports (Spain's level in international trade has fallen only by two tenths of a percentage point from 1,9% to 1,7%, the smallest reduction in the major EU economies and has recorded a current account surplus. With respect to the private sector the deleveraging via reduction of gross debt is being actively reduced and the Government is committed to pursue and reinforce the reform agenda initiated in 2012 despite a challenging outlook for 2013. The Spanish economy is highly diversified with a gdp structure characteristic of developed countries (agriculture, 2,63% gdp, industry and construction, 28, 14% gdp and services 69,03% gdp. Its agricultural sector is highly developed accounting for 7,77% of gdp and internationally acclaimed for its capacity, development, r+d+i and</p>	<p>Idem, Please see above. (see previous comment)</p>

quality with Spanish companies leading world positions in many sectors like olive oil, wine, fruits and vegetables, rice, pasta.. It has also the largest surface extension of greenhouses in the Mediterranean area and is world leader in technology in this area. But Spain's industrial sector has experienced a huge development during the last decades, in which Spanish companies have embarked on a very intense internationalization process and are among the world leaders in high added value and major growth potential sectors such as infrastructures, electricity sector, renewable energies, high speed railways, biotechnology, environmental technologies and water treatment, financial sector, automotive sector, social economy as well as world leaders in mature sectors like fashion and of course tourism.