

OUR OCEAN WEALTH

Towards an Integrated
Marine Plan for Ireland

*Seeking Your Views on
New Ways;
New Approaches;
New Thinking*



“I believe a new age for Ireland lies ahead. The potential of this new age is there to be grasped. The people who grasp it freely will stand out from the crowd, whether that be based on the traditional strengths of Ireland or the realisation of what we can achieve in data analytics, cloud computing, the nano world and so on. It is the marriage of the old and the new that will differentiate the average from the brilliant, the stellar from the mundane.”

An Taoiseach

Enda Kenny

Global Irish Economic Forum

7th October 2011

Our Ocean Wealth

Foreword



Ireland needs New Ways; New Approaches; New Thinking. These words are especially applicable to our maritime resources, which for too long have been a blind spot in our national focus. Let me introduce you to the real map of Ireland, with its vast dimensions, its huge environmental significance and its exciting opportunities in both established and emerging sectors of activity.

The Government is serious about changing the way we in Ireland think about the sea. So the Marine Co-ordination Group, led by Minister Coveney, is preparing the first Integrated Marine Plan for Ireland.

We are a maritime nation. Whether we are from urban, rural or coastal communities, we all have a real interest in the social, cultural and economic impact of our coasts and seas. As Taoiseach, I want to see us reconnect to the sea in a way that harnesses the ideas, innovation and knowledge of all our people, at home and abroad. I want to see us setting out to secure for ourselves and our children the social, cultural and economic benefits that our marine assets can deliver.

Please take this opportunity to get involved. Share your ideas on how we as a nation can move from generating only 1.2% of our GDP from this vast and diverse national resource up to levels that we can be proud of and that will generate jobs for our people.

This is the start of a new era in Ireland's relationship with our ocean wealth.

An Taoiseach
Enda Kenny

Introduction



Taking our seabed area into account, Ireland is one of the largest EU states; with sovereign or exclusive rights over one of the largest sea to land ratios (10:1) of any EU State. The State of Ireland consists of 90,000 km² of a land resource, and 900,000 km² of a marine resource. Our coastline of 7,500km is longer than that of most European countries.

Our ocean is a national asset - supporting a diverse marine economy with vast potential to tap into a €1,200bn global marine market for seafood, tourism, oil and gas, renewable ocean energy and new applications for health, medicine and technology. In parallel, our marine resource gives us many non-commercial benefits for example, amenity, biodiversity and our mild climate.

Responsibility for marine matters is spread across a number of government departments and agencies. In recognition of the broad scope of the sector and the need for better co-ordination, the Government is implementing cross-government mechanisms to achieve greater co-ordination and integration.

During 2011, the Government initiated the first steps in developing an Integrated Marine Plan for Ireland. The next step—in keeping with the commitment in the Programme for Government to introduce new ways, new approaches and new thinking—is to promote a public debate on how best to harness Our Ocean Wealth.

A number of questions have been prepared to stimulate public debate and to give everyone the opportunity to present their views on Integrated Marine Policy and Planning for Ireland (see page 18 & 19). In addition, background briefing documents are available (see page 3).

We need an Integrated Marine Plan to harness our Ocean Wealth, get the environment right for investment and use the potential of our marine economy to create jobs in a sustainable manner.

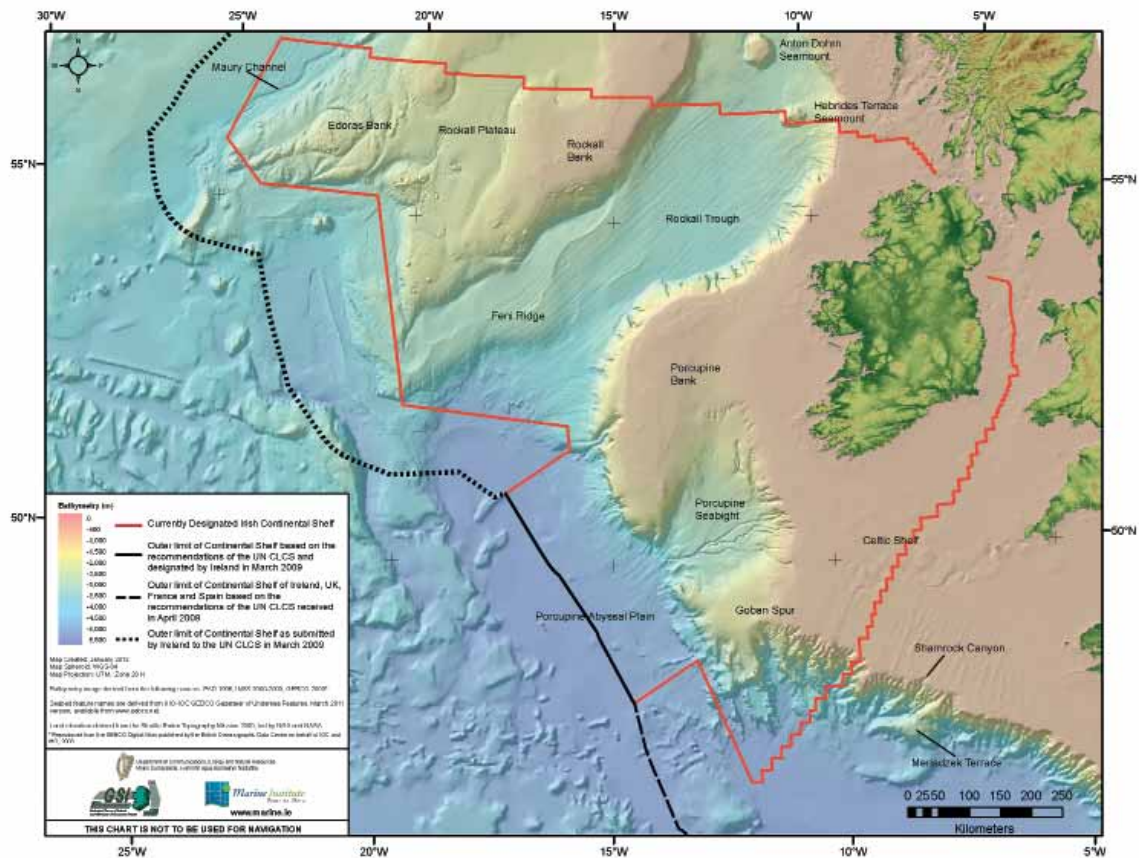
I strongly believe that we need a public debate on the marine resource in Ireland. The time is now to look at the marine as we never did before. I want to raise public awareness about this vast resource and promote a public discussion on Our Ocean Wealth.

I look forward to the debate and hearing your views.

Simon Coveney T.D.
Minister for Agriculture, Food and the Marine

Our Ocean Wealth

The 'Real' Map of Ireland with over 220 million acres under the Sea



Our Vision for 2020?

Our ocean wealth will be a key element of our sustainable economic growth. It will be managed in an integrated manner and supported by coherent policy, planning and regulation, generating economic, social and environmental benefits for our citizens.

Looking to the Sea

Ireland has a strong and long maritime culture and tradition. The sea has the power to capture a sense of imagination, adventure and achievement.

Our waters

- are the western gateway for shipping to Europe's busiest sea ports;
- contain some of the largest and most valuable sea fisheries resources in Europe;
- are an ideal location for aquaculture production;
- are among the richest and most accessible renewable energy (wave, tidal and wind) resources in the world;
- provide opportunities to develop new biomedical and pharmaceutical products and services;
- facilitate the development of innovative technologies, decision support and management tools; and
- offer us and our visitors an aquatic playground in which to enjoy water sports and activities.

Our sea basins

have significant potential for oil and gas reserves.

Our coastline

offers spectacular tourism and leisure opportunities and a rich maritime culture and heritage.

Our ocean wealth

supports a diverse marine economy and rich marine ecosystem.



We have traditionally seen the land as the primary provider of our food and fuel, and overlooked our ocean wealth. We are now looking at the sea in a different way; a way that can bring prosperity, health and enjoyment for our citizens.

Why an integrated marine plan?

An integrated marine plan will provide a new momentum for growth in the maritime area. It will build on the spirit of the Programme for Government; ensuring government departments work together more efficiently and effectively on the diverse issues related to the marine in order to generate an environment conducive to sustainable growth and jobs.

What will the plan cover?

An integrated plan addressing all the relevant sectors and related activities will:

- set out high-level goals to put in place the appropriate policy, governance and business climate to enable our marine potential to be realised; and
- prompt economic growth, investment and the creation of jobs in our ocean economy.



Seeking your views

Why seek your views?

This consultation – involving the public in the work of government – is an important step in developing an integrated marine plan for Ireland. It will enable the State to tap into the widest possible source of ideas, views and opinions, helping to better inform marine policy-making and improving the quality of decisions reached and services provided. Your views are important.

How can I get informed?

This document:

- describes our ocean economy and its opportunities;
- outlines our rich marine and coastal ecosystems;
- indicates some of the key challenges facing us and our oceans;
- summarises what the Government can do to get the conditions right for sustainable growth; and
- asks what the private sector, communities, State bodies and the higher education sector will do to make growth happen.

In addition, **three background briefing documents** are available on www.ouroceanwealth.ie:

- **Context: Our Ocean Wealth** – Provides an economic and environmental profile;
- **Sectoral Briefing Document** – Profiles our marine sectors and current Government plans and policies (seafood, seaweed, shipping and maritime transport, renewable and non-renewable energy, marine ICT and biotechnology); and
- **Getting the Conditions Right** – Describes the 'enablers' that are needed to improve the conditions for growth and investment.

Links to useful reference materials are on page 20 of this document.

How can I get involved?

1. Complete our survey:

Questions designed to capture your views are presented on page 18 & 19 of this document.

Your responses can be submitted via the **online survey** form available on www.ouroceanwealth.ie.

Alternatively, you can download a form to fill in and return by email to ouroceanwealth@marine.ie or post to Our Ocean Wealth, Marine Institute, Rinville, Oranmore, Co. Galway.

2. Additional ideas / suggestions:

Additional ideas and suggestions are also welcome. Email them to ouroceanwealth@marine.ie or alternatively send them by post to Our Ocean Wealth, Marine Institute, Rinville, Oranmore, Co. Galway.

Feedback is welcome in English or as Gaeilge.

3. Join the debate:

A discussion forum has also been set up to facilitate the debate at www.ouroceanwealth.ie



A summary of comments as well as details of responses received will be available during the process. Please note that any information submitted is subject to the Freedom of Information Acts 1997 and 2003.

The consultation will be open until 31 March 2012.

As many people are aware, recent policy development and planning consultations have been undertaken on a number of areas and the views generated have been taken into account - for example there have been public consultations on a national ports policy, on marine renewable energy. Details of these

consultations /current policies and plans are provided on page 20 of this document. We are not seeking to revisit these public consultations/plans; however, their content / outcomes will be incorporated into the integrated marine plan.

What will happen next?

After the consultation period, an Integrated Marine Plan for Ireland, taking into account all the inputs received, will be developed by the Government.



Towards an Integrated Marine Plan for Ireland

The Process

Programme for Government

New Ways; New Approaches; New Thinking
Get the environment right for investment
Use our economic potential to create jobs

Our Ocean Wealth

A €1.2 trillion global ocean market
Let's get more out of it
Stimulate a public debate
What would you do to make this happen?

Seeking Your Views

Public consultation
Capture your views, ideas, comments, thoughts
February to March 2012

Crafting an Integrated Marine Plan for Ireland

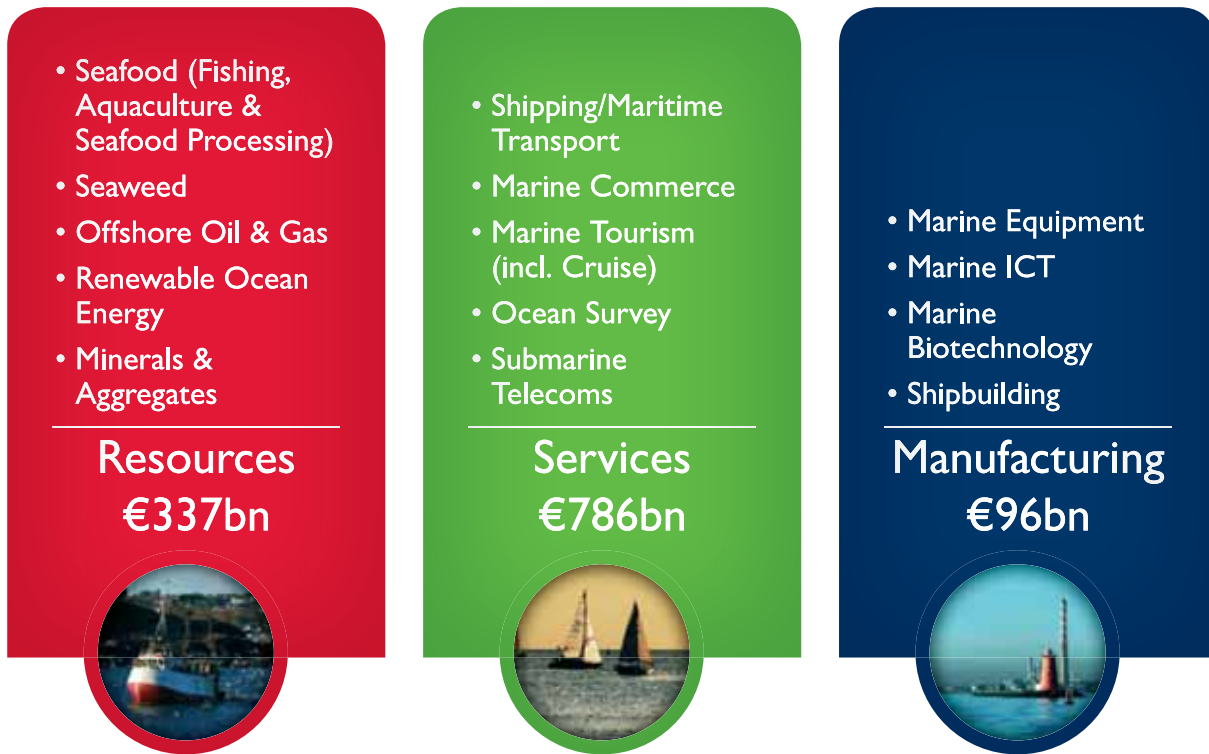
High-level strategy
Set direction – build momentum
Change attitudes
Greater co-ordination and integration across
government on matters related to our ocean wealth
April to July 2012

Integrated Marine Plan for Ireland

Drives implementation of public sector tasks
Generates private sector investment
Job creation

The Opportunity

The €1.2 Trillion Global Market



What is Ireland's ocean economy worth and how do we compare to others?

In 2007, Ireland generated €3.4 billion in turnover and €2.4 billion in direct and indirect GVA (1.2% of GDP) from its ocean resources. There is a widely held belief that we can achieve substantially more.

Value

- The global ocean market is estimated to be valued at approximately €1,200 billion per annum. Global marine economic activity is estimated to contribute 2% of the world's Gross Domestic Product (GDP).
- The European Commission estimates that between 3% and 5% of Europe's GDP was generated from sea-related industries and services in 2007.
- The UK derives 4.2% of GDP from its ocean economy. Norway and Iceland derive 1.2% and 8%, respectively, from their seafood sectors alone.
- In 2007, Ireland's ocean economy contributed 1.2% of our total GDP.

- There is an important challenge to identify to what extent Ireland can sustainably grow our ocean economy.

Employment

- Ireland's ocean economy provides employment for over 17,000 people – about 1% of the total workforce.
- The equivalent figures in neighbouring countries are UK 2.2%, Norway 6%, Netherlands 2.2% and Portugal 3.3%.
- While these countries currently outperform Ireland, the potential of the Irish ocean economy means there is a substantial growth opportunity available to us.

Our Ocean Wealth

Size
0.9m km²
(90% of Ireland)

Value
€2.4bn
(direct and indirect
Gross Value Added)

1%
of GDP



Global Ocean Wealth

Size
361m km²
(70% of the
earth's surface)

Value
€1,200bn

2%
of GDP

Our Ocean Wealth –Some Facts & Figures

1. 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.
5. Marine leisure (sailing, walking, swimming, visits to beach etc.) is a lifestyle pursuit of increasing importance contributing to the local economy and to our human and physical health.

Tourism & Leisure

2. With a spectacular coastline of over 7,500 km and a wealth of maritime assets – the Irish marine tourism and leisure sector is significantly underutilised.
3. Marine tourism and leisure is estimated to represent 7% of our overall tourism and leisure sector and contributed €453 million to the Irish economy in 2007.
4. Marine events such as the Volvo Ocean Race (2009 and again in 2012) alone can generate in excess of €50 million in revenue for the economy.
6. Dedicated angling tourism accounted for 173,000 visitors in 2010 and spending of €58 million.
7. Ireland has become one of Europe's top destinations for whale watching, birdwatching and outdoor activity enthusiasts. Ireland has a growing reputation as one of the world's best cold water surfing locations.
8. Cruise ship tourism continued to grow with a 12% increase in 2010; with over 200 cruise liners carrying over 305,000 passengers.



Shipping, Ports & Services

9. Ireland is critically dependent on maritime shipping and ports and the services they provide. Sea-based transport accounted for 99% of the total volume (45 million tonnes) and 95% of the total value (€128 billion) of the goods traded (imports/ exports) through Irish ports in 2010.
10. After two consecutive years of large declines, exports began to recover with the total volume of goods handled by Irish ports up 7.7% in 2010 compared to 2009.
11. Export volumes of food & drink, pharmaceuticals and chemicals increased by 5% to our key overseas markets in the US, UK and Asia.
12. There was a 40% increase in the numbers of firms operating in the international shipping services sector between 2006 -2010 and this growth rate is expected to continue over the next three to four years. In 2010, employment in this niche services sector in Ireland grew by 10%.
13. Marine commerce and the provision of marine financial services is a growing sector - marine commerce had a turnover of €99.5 million in 2007 and generated €47 million in gross added value to the Irish economy.
14. Ferry passenger volumes on and off the island grew by 4% to 4.8m passengers.



Seafood & Seaweed

15. The Irish seafood sector has an annual sales value of €719 million supporting 11,000 jobs with a potential to increase revenue to €1 billion and employment of 14,000 full time equivalents (FTEs) by 2020.
16. Irish seafood exports increased by 14% in 2010 to €378 million compared with the previous year with a further increase of 13% to €420m in 2011.
17. Ireland is surrounded by some of the most productive fishing grounds in Europe with an estimated 900,000 tonnes of fish landed by all EU fishing fleets worth over €1 billion. There is potential to land and process more of these fish in Ireland. The 2011 fishing opportunities (i.e. Total Allowable Catches, TAC's) for the international fleets that operate in the waters around Ireland were 937,924 tonnes of fish, with an estimated landed value of €1.04 billion. This economic value is based on 2009 average prices and represents a conservative estimate of the quayside value and does not include the potential added value in processing. Ireland's share of these fishing opportunities represents 21% by tonnage and 17% by value.
18. Aquaculture is the fastest-growing food sector in the world. Ireland is ranked the 7th largest aquaculture producer in the EU (turnover of €115m in 2010) and although we have a very similar environment to that of Norway and Scotland, we lag significantly behind them in the volume of aquaculture production.
19. The EU market for seafood is already 65% dependent on imports.
20. Predications from the UN Food and Agriculture Organisation show that an additional 42 million tonnes of farmed seafood will be required by 2025.
21. There is significant scope for aquaculture expansion in Ireland, including in deep water sites. It is estimated that each new large-scale deep water salmon farming site could generate an extra €100m in exports per annum and create 350 direct jobs with a further 150 indirect jobs in service sector supplying fish feed, netting, transportation and other services. Work is underway to examine and prepare three suitable deep water sites.



22. Ireland's seaweed industry is worth approximately €18m per annum, processing 36,000 tonnes of seaweed (entirely from wild resources) and employing 185 people.
23. There is a significant global market for seaweed, with a total output reaching 15.8 million tonnes in 2008, valued at approximately €5.4 billion.

Energy

24. Ireland's offshore Atlantic margin is estimated to hold substantial 'potential, yet-to-find' hydrocarbon reserves of some 10 billion barrels of oil equivalent (including gas). However, extensive exploration drilling would be required to test this estimated potential.
25. Over the last 40 years 129 exploration wells have been drilled with only a 1 in 30 overall success ratio (discovery of commercial fields). However when discoveries not declared commercial are included, there is a 'technical' success rate of about 1 in 9. Importantly, only limited drilling activity has taken place over much of the offshore area and a number of discoveries are presently being re-evaluated by the industry, but considerable work remains to be done to advance the prospectivity of our offshore potential.
26. Total investment to-date by the private sector in exploration activity is estimated at approximately €3 billion, resulting in four commercial discoveries (three off Cork and one at Corrib off Mayo).
27. Ireland's offshore gas resources currently

supply about 5% of the economy's gas demand, which means there is a ready market for new gas discoveries. The current reliance on imported gas is set to be reduced when the Corrib Field comes on stream, currently expected in 2014.

28. The marine renewables sector is a relatively new category of economic activity which has seen an increase of activity from €18 million in 2003 to €101 million in 2007. In 2007, eight companies were actively involved in the design, development, testing and deployment of marine renewable energy devices.
29. Ireland's offshore wind, waves and tides have the potential in the future to offer a source of clean, green, renewable energy along with exciting new commercial opportunities (services), provided the technologies become commercially viable.

Information and Communications Technology (ICT) & Biotechnology

30. Ireland has a significant industrial base (foreign direct investment and indigenous), and research strengths, in the ICT and life sciences sectors, with growing interest in looking at new products and services directed at and derived from the ocean.
31. Fish, shellfish, seaweeds and other marine species are a recognised source of functional ingredients (i.e. health-promoting additives) that offer huge potential for Ireland's large food and ingredients companies to target the \$300bn global market for functional foods and ingredients.



- 32. The global market for compounds and materials derived from marine sources is expected to reach \$4.1bn in 2015. Marine-derived drugs, enzymes and bio-materials (e.g. glues and bone replacement) are the subject of significant research and commercial interest. Irish companies already target markets for animal health and horticultural products using compounds derived from native Irish seaweeds.
- 33. Ireland's ICT sector comprises over 1,000 companies, including nine of the top ten global software companies, with exports of approximately €50bn. Over 50 of these companies (SMEs and multinationals) are already involved in the Irish SmartOcean cluster, targeting the fast-growing global market (valued at €3.6bn in 2009) for marine ICT products and services [e.g. sensors and communications systems, digital design tools and e-navigation and data management systems] for the oil and gas, renewable ocean energy, transport and shipping, and marine tourism sectors and for environmental monitoring and maritime security and surveillance.



- 34. Several international interconnectivity points exist around the coast of Ireland for marine telecom cables. Ireland's unique location presents an ideal opportunity to become the digital bridge between Europe and the United States. Recent announcements of optic cable projects linking the US to Europe via Ireland supports Ireland's reputation as a global location for leaders in the fields of information technology, creativity and innovation and at the same time can provide an environment in which indigenous talent can develop and grow.

Marine Research & Innovation

- 35. The marine research capacity of Ireland has been transformed over the last decade, through a cumulative investment of over €250m in human and capital infrastructure, and research programmes.
- 36. The quality of Irish marine research both in the public and private sectors is shown by the levels of funding that Ireland wins from EU programmes. This currently stands at over €42m (2007-2011), representing circa 8% of such national earnings.
- 37. This research and innovation capacity is a vital foundation and critical success ingredient to achieving greater economic growth and job creation in our marine sector.

Marine Environment & Sustainability

- 38. Much of Ireland's richest biodiversity is in the marine environment. As well as a great range of invertebrate communities, we have high numbers of whale and dolphin species, large seabird breeding colonies, cold water coral communities in the deep seas and many species at the northern or southern limit of their distributional range. In addition to biodiversity many important ecosystems exist which provide a variety of services to us for free which bring many benefits to society and the economy. Conserving and restoring biodiversity and ecosystems services in the marine environment has been identified as one of 6 key objectives in Actions for Biodiversity 2011 – 2016, the National Biodiversity Plan recently adopted by Government.

A Flavour of the Challenges We Face

- Difficult global and national economic climate
- Need for new investment
- Maintaining and growing profitability
- Low cost imports
- Getting the regulatory and licensing framework right
- Implementing environmental legislation
- Improving our environmental understanding
- Protecting marine biodiversity
- Adapting to climate change
- Sustainable exploitation of living resources
- Sustainable development of our marine opportunities
- Low public awareness of the potential of our ocean wealth

An Integrated Marine Plan needs to strike a balance between protecting our marine environment and its species and habitats and maximising the use of its resources as a source of economic growth.



A Rich and Diverse Marine Ecosystem

Ireland's marine ecosystems¹ (i.e. offshore, inshore and coastline) are home to a rich and diverse range of species and habitats. This is due to our unique geographical location, where warm southern waters mix with cold northern waters, resulting in high levels of productivity and a food rich environment. This is home to a diverse range of animals and plants including plankton, cold water corals, fish, seabirds, dolphins, and whales.

Our Coastline:

- Is home to over 24 species of resident and visiting seabirds (e.g. terns, puffins, guillemots, sea gulls and gannets)—many of which nest on islands, headlands and sand/shingle beaches—that feed on fish in the rich inshore and offshore waters. There are over 500,000 pairs of seabirds around the island of Ireland.
- Supports approximately 60 species of resident and migrating wildfowl (ducks, geese and swans) and waders (including plovers, sandpipers and curlews), attracted to the abundance of food and safe breeding sites and roosting areas in our wetland habitats (e.g. mudflats and sandflats, coastal lagoons, polders/sloblands and shallow bays).

- Has a network of protected sites, designated under European and national legislation for the species (mammals, birds and fish) and/or habitats (e.g. estuaries, saltmarshes, inlets and bays) that occur within them. There are 100 sites designated as Special Protection Areas and which have seabird or wading bird interests under the EU Birds Directive and 130 sites designated as Special Areas of Conservation under the EU Habitats Directive for marine or coastal habitats and species.
- Has some 80 coastal and near-shore Special Areas of Conservation (SACs).



¹ A marine ecosystem is a community of living and non living "things" that occur together in a specific area and that interact with each other (e.g. Irish Sea ecosystem). Marine ecosystems have a huge impact on our lives; for example they regulate our weather, provide food, absorb carbon dioxide and provide for leisure activities. Therefore, it is critical that we maintain our marine ecosystems in a healthy state.



Our Inshore and Offshore Waters:

- Support over 400 fish and cephalopod (e.g. octopuses, squid, and cuttlefish) species and contain some very important spawning and nursery areas for commercial fish species, e.g.
 - herring spawning grounds on gravel beds around the coast;
 - mackerel, horse mackerel and blue whiting spawning areas in deeper waters off the north-west, west and south-west coasts; and
 - cod, whiting and haddock spawning in the north-west Irish Sea and off the south coast.
- Provide feeding and breeding grounds for 24 species of resident and visiting whales (e.g. blue, fin, sperm, minke and killer) and dolphins (e.g. common, bottlenose, striped and white-sided) and host some regular large visitors (leatherback turtles and basking sharks).
- Contain a rich variety of physical habitats and associated species, ranging from shallow inshore reefs and sandbanks to canyons, seamounts, troughs and coldwater coral reefs in deeper waters, occurring between 400 and 1200m along the edge of the

Continental Shelf which cover an area the size of Co. Wexford, including 130 sites designated under the EU Habitats Directive as Special Areas of Conservation.

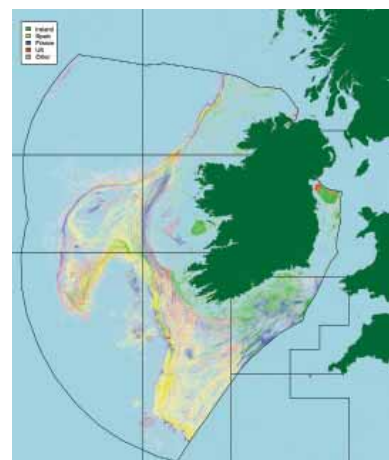
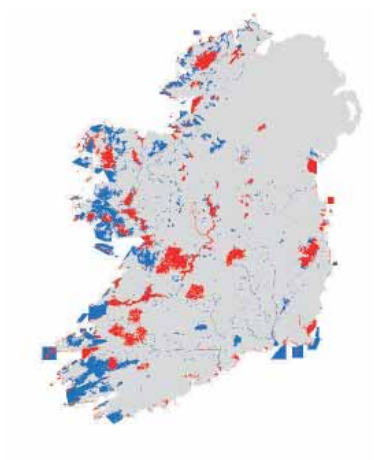
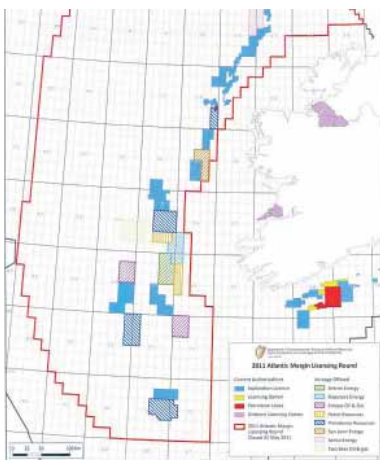
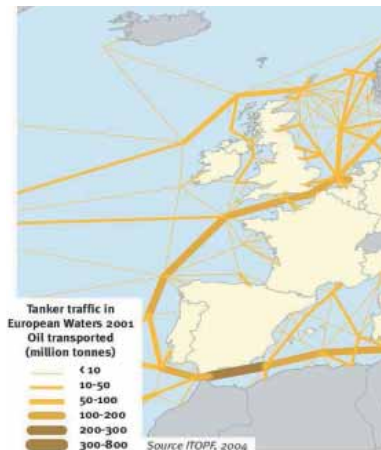
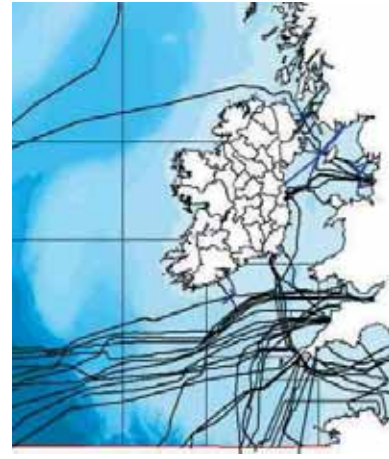
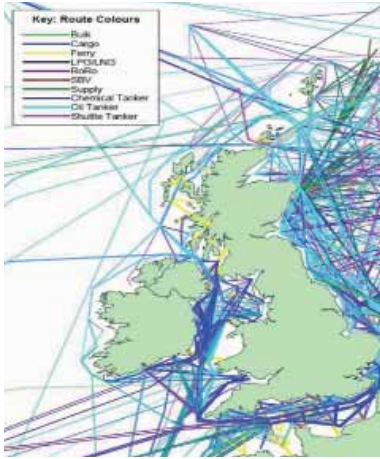
- Greatly influence our weather and climate patterns by storing and dissipating solar energy (heat). Ireland enjoys a mild climate in comparison to other locations at the same latitude (e.g. Newfoundland) because of the warming affect of the North Atlantic Current.
- Produce some of the world's vital oxygen supplies and absorb carbon dioxide produced by burning fossil fuel.



An Integrated Marine Plan needs to strike a balance between protecting our marine environment and its species and habitats and maximising the use of its resources as a source of economic growth.

Use of Our Oceans

The following maps show just a small portion of the many uses we have for our oceans. By integrating thinking we can manage all this to optimise our ocean wealth.

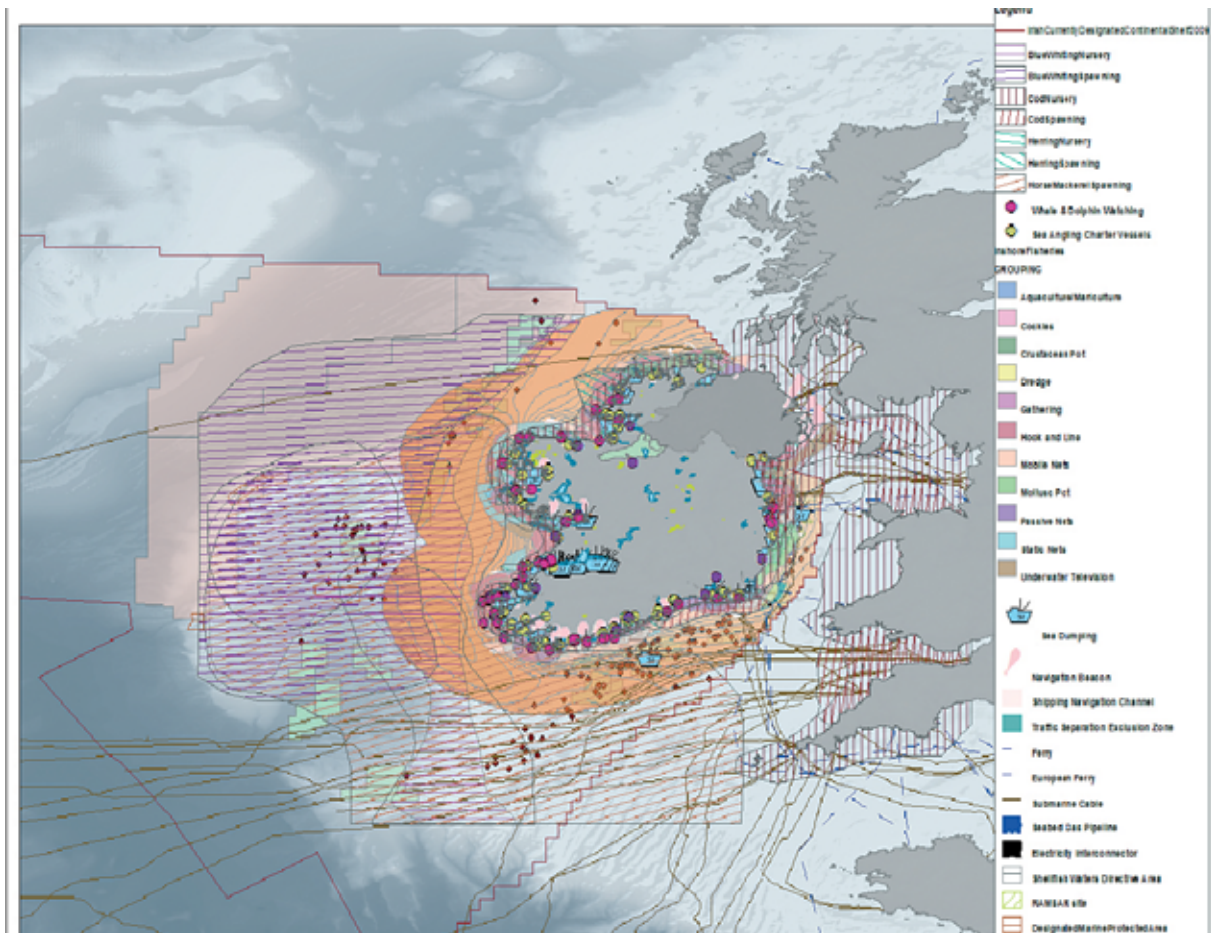


(Top L-R): Shipping Routes (Source: OSPAR, 2009); Aquaculture Sites (Source: BIM); Submarine Cables and Pipelines (Source: MEFEBO NWW Atlas).
 (Middle L-R): Bathing Water Quality 2010 (Source EPA); Oil Tanker Traffic (Source: EU Green Paper on Maritime Policy); Fishing Ports and Commercial Ports (Source: MEFEBO NWW Atlas).
 (Bottom L-R): Irish Atlantic Margin 2011 Licensing Round – (Offshore Oil & Gas Exploration, Development and Production– Acreage Offered (Source: DCENR); Natura 2000 sites (Source: NPWS/DAHG); International Fishing Activity in the Irish Exclusive Economic Zone (Source: Marine Institute).

The Need for Maritime Spatial Planning

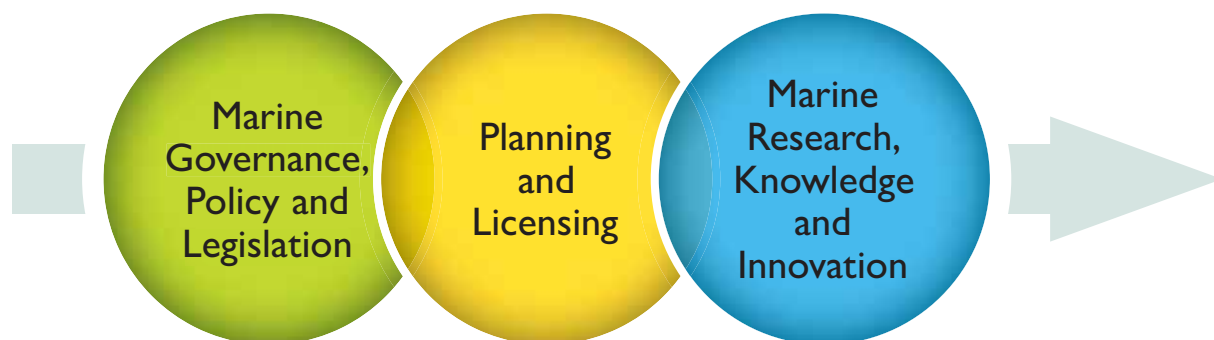
Maritime Spatial Planning (MSP) is a strategic tool for planning, regulating, and managing the use of marine goods, services and space in a holistic, rational, forward-looking manner. The majority of legislation and regulation in Ireland for marine-based activities and development is largely carried out on a sectoral, demand-driven basis. MSP would provide a clear expression of how competing/overlapping demands for our marine areas and resources are to be reconciled. MSP is an important example of how the State could work to achieve greater co-ordination and integration.

Maritime Spatial Planning can occur at national and international level. For example, the rules governing fishing activity, particularly outside the territorial waters are determined at EU level as part of the Common Fisheries Policy. Any development of maritime spatial planning at national level will have to take account of consenting and spatial planning activity at the international level.



A demonstration of the various activities / uses of our ocean space using GIS (Geographical Information system). Source: Marine Institute

Getting the Conditions Right for Growth What the State can Contribute



The private sector provides the drivers for economic growth. Within the context of the current severe constraints on our public finances, a key role for the State in facilitating economic growth in the marine sector will be to deliver a business-friendly yet robust governance, policy and planning environment. This will require the State to deliver more efficient and more effective public services, and remove impediments where appropriate, in order to generate the momentum to encourage private sector investment and growth. This will require integrated cross-government planning and delivery.

Marine Governance, Policy and Legislation

Good governance and co-ordinated cross-government action is essential to achieving our vision for 2020 (page 1). Responsibility for marine activities is spread across a number of government departments and agencies, depending on their functions. The Inter-Departmental Marine Co-ordination Group provides a forum to address greater integration. Integrated maritime policy and

plans can ensure better co-ordination. Strong legislation (e.g. maritime and food safety) can support sustainable development and creates a safe environment for businesses and consumers.

Planning and Licensing

Maritime spatial planning is a practical tool used for planning, regulating and managing the use of marine goods, services and space in a holistic manner. Currently, the majority of planning, licensing and regulation for marine-based activity is carried out on a sectoral and demand-driven basis. A fit-for-purpose planning and licensing framework, supported by a Maritime Spatial Plan, can provide a competitive advantage for our marine sectors, help realise the full benefit of our ocean wealth and assist with managing our resources effectively and sustainably.

Marine Research, Knowledge and Innovation

Research and development (R&D) supports economic growth and job creation in our marine sector by creating and exploiting

Getting the Conditions Right for Growth What the State can Contribute



knowledge that i) leads to the generation of new products and services and ii) can be used to inform policy, governance and regulation of the sector. Continued investment in R&D and other knowledge-generating programmes (e.g. seabed mapping) is vital for achieving Our Ocean Vision 2020 (see page 1).

Education and Training

A skilled and experienced workforce that adapts to changing requirements and new opportunities is essential for developing indigenous Irish industry, attracting foreign direct investment and providing efficient public services. To achieve our vision for 2020 (page 1) we need to continue to identify future skills needs and labour market supply and demand trends and adapt and develop education and training needs to meet them.

Marketing

Ireland's clean, green image can play a critical role in the promotion of marine products and services. For example, consumers and regulators are increasingly seeking assurances on the sustainability of and ethical standards relating to seafood products. Ecotourism is steadily becoming an important aspect of the

wider tourism market. The future sustainability and growth of our marine industries depends on protecting the credibility of our clean, green image. Equally, focusing on Ireland's reputation as an innovative, high-tech economy can help to generate interest and stimulate investment (foreign and indigenous) in marine-related high-tech industries.

Development of Policy at EU Level

European economic, regional and maritime policies guide how we manage our seas. Most importantly, the Integrated Maritime Policy for the European Union (2007) recognises that the marine and coastal environment is central to our well-being and prosperity. It proposes actions in all relevant policy areas related to the seas. Ireland must continue to play a role in shaping European policy e.g., in bringing forward the Action Plan called for in the EU's *Developing a Maritime Strategy for the Atlantic Ocean Area* published in November 2011. This will in turn support us in achieving our vision for 2020 (page 1).

Some Questions for You

- The backdrop is one of severe constraints in our public finances.
- The opportunity is to generate rapid growth in our ocean economy.
- The challenge is to get the conditions right to generate the momentum to promote this economic growth.

This is your chance to contribute to the process

Q1 In 2007, Ireland generated €3.4 billion in turnover, €2.4 billion direct and indirect GVA² (1.2% of GDP) from our ocean resources. It is generally believed this performance could be substantially improved.

What is a sufficiently ambitious yet realistic target for our ocean economy by 2020?

Q2 What contributions can:

- (a) the private sector make to achieving growth potential in this area?
- (b) the public sector make to create an environment that provides the conditions needed for economic growth, investment and job creation in the ocean economy?
- (c) our communities make to the achievement of our growth potential?
- (d) the higher education sector make to the achievement of our growth potential?

Q3 What actions should be taken to strengthen our maritime awareness/identity?

Q4 Is the draft vision for Our Ocean Wealth sufficiently ambitious and realistic or would you suggest an alternative?

“By 2020 our ocean wealth will be a key element of our sustainable economic growth. It will be managed in an integrated manner and supported by coherent policy, planning and regulation, generating economic, social and environmental benefits for our citizens.”



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- Q5** How can we maximise the benefits of our ocean wealth and protect the marine ecosystem/environment?
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- Q6** How can the interests of competing sectors be balanced when it comes to planning the use of our ocean space and what criteria should be used to balance them?
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- Q7** To what extent could the development of a Maritime Spatial Plan assist in this balancing process?
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- Q8** Are the opportunities and constraints identified the right ones? (See Page 11 and the sectoral briefing document which is available on www.ouroceanwealth.ie Are the 'Enablers' the right ones to be focussing on in order to unlock the potential of our oceans? (See Page 16 & 17 and the briefing document III: Getting the Conditions Right which is available on www.ouroceanwealth.ie)
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- Q9** How can we ensure appropriate governance in national maritime affairs for optimal results (at local, regional, national, European and international level)?
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- Q10** Suggest ways we can foster and / integrate marine policy and planning in Ireland? With less resources, how can we do it better?

Having read the background material do you have any specific suggestions / ideas/ comments on what we can do to realise the potential of our ocean wealth?

Further Information

This public consultation document provides you with an overview of our ocean wealth. There is much more information in our three background briefing documents. For further information go to our OCEAN WEALTH WEBSITE ADDRESS www.ouroceanwealth.ie

Further information on various national and international sectoral/marine initiatives is available in the following sources of information:

Ocean Economy	Overview of Ireland's ocean and coastal economy http://www.nuigalway.ie/semru/documents/final_report_small.pdf
Marine Environment/ Ecosystems	OSPAR Commission Quality Status Report for the North-East Atlantic and its sub-regions (2010) http://qsr2010.ospar.org/en/index.html Biodiversity: Ireland's National Biodiversity Plan - Actions for Biodiversity 2011-2016 http://www.npws.ie/legislationandconventions/nationalbiodiversityplan/ The Economic and Social Aspects of Biodiversity - Benefits and Costs of Biodiversity in Ireland http://www.npws.ie/publications/archive/Bullock_et_al_2008_Economic_&_Social_Benefits_of_Biodiversity.pdf
Seafood	Food Harvest 2020 - A vision for Irish agri-food and fisheries http://www.agriculture.gov.ie/agri-foodindustry/foodharvest2020/
Shipping, Ports and Services	Review of national ports policy – 2011 Consultation Document http://www.transport.ie/upload/general/12651-PORTS_POLICY_REVIEW_CONSULTATION_DOCUMENT-0.DOC
Marine Renewable Energy	Information on the draft Offshore Renewable Energy Development Plan and associated Public Consultation (including the Natura Impact Statement and Strategic Environmental Assessment) http://www.dcenr.gov.ie/Energy/Sustainable+and+Renewable+Energy+Division/Natura+Impact+Statement+and+Strategic+Environmental+Assessment+on+draft+Offshore+Renewable+Energy+De.htm
Offshore Oil & Gas and Other Seabed Resources	Petroleum Affairs Division of the Department of Communications, Energy & Natural Resources. Information includes Irish Offshore Strategic Environmental Assessments (x4) and 2011 Atlantic Margin Licensing Round - Results and Map http://www.dcenr.gov.ie/Natural/Petroleum+Affairs+Division/
Marine & Coastal Tourism & Leisure	Fáilte Ireland Tourism Product Development Strategy 2007-2013 http://www.failteireland.ie/strategyplans
Marine ICT (SmartOcean)	Information about SmartOcean Strategy & Innovation Cluster www.marine.ie/home/smartocean
Marine Biotechnology and Bioproducts	Information about National Marine Biotechnology Programme /Marine Biotechnology Ireland www.marine.ie/biotech
Research	Sea Change – A Marine Knowledge, Research & Innovation Strategy for Ireland 2007-2013 www.marine.ie/seachange
EU	Integrated Maritime Policy for the European Union http://ec.europa.eu/maritimeaffairs/ EU Strategy for the Atlantic http://ec.europa.eu/maritimeaffairs/policy/sea_basins/atlantic_ocean/index_en.htm Irish Government response to the EU Consultation on a EU Strategy for the Atlantic (2010) http://www.agriculture.gov.ie/media/migration/fisheries/seafoodpolicydevelopment/AnIntegratedStrategyfortheAtlantic060111.rtf
National	Ireland's response to the Green Paper on the Reform of the Common Fisheries Policy http://ec.europa.eu/fisheries/reform/docs/ireland_en.pdf

Marine Co-ordination Group

Cross-Government Action

The Marine Co-ordination Group, established in 2009, is chaired by the Minister for Agriculture Food and Marine and hosted by the Department of the Taoiseach . The Group meets monthly to bring together representatives of Departments with an involvement in maritime / marine issues so as to discuss/coordinate issues that require Inter-Departmental action.

Membership

The Group is at Assistant Secretary level with the following Departments represented:

Agriculture, Food and Marine	Taoiseach
Defence	Communications, Energy and Natural Resources
Arts, Heritage and the Gaeltacht	Environment, Community and Local Government
Jobs, Enterprise and Innovation	Public Expenditure and Reform
Transport, Tourism and Sport	Attorney General's Office

The Marine Institute also participates.

OUR OCEAN WEALTH

*Seeking Your Views on
New Ways;
New Approaches;
New Thinking*

*Further Information:
www.OurOceanWealth.ie*