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## OUR OCEAN WEALTH CONSULTATION

This document represents the National Maritime College of Ireland (NMCI) response to the national consultation on the development of an Integrated Marine Plan for Ireland. NMCI, a partnership between the Cork Institute of Technology, the Irish Naval Service and Focus Education, is an example of what can be achieved through integrated marine planning. NMCI is the maritime operations education and training institution for Ireland providing degree, short course and commercial professional training to civilian seafarers, Irish Naval Service personnel and those from diverse disciplines whose work requires them to be involved in maritime operations and in the delivery of maritime services. NMCI endeavours to be proactive in educating maritime and allied students, fosters and develops research, development and innovation in its graduates and responds to the needs of the maritime and related industries in its deliverables. NMCI has recently embarked on a significant capacity building exercise in maritime research as part of the Irish Maritime and Energy Resource Cluster (IMERC) initiative. NMCI is a critical national asset in enabling Ireland to access the global maritime services market. With an estimated value of €786 billion annually<sup>1</sup> the maritime services market encompassing shipping, maritime transport and related activities, remains the most valuable marine market sector worldwide.

The contributions expressed below reflect the views of all partners in the NMCI. As a partner in the IMERC cluster, NMCI also aligns itself with the response provided by IMERC to the national consultation on the development of an Integrated Marine Plan for Ireland.

### RESPONSES TO THE QUESTIONS

1. In 2007, Ireland generated €3.4billion in turnover, €2.4billion direct and indirect GVA (1.2% 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?
  - With an estimated value of €786 billion annually, the maritime services market sector which includes shipping, transport and related maritime services remains the most valuable ocean related activity globally. It is more than twice as valuable as the next most significant sector

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<sup>1</sup> “ Our Ocean Wealth” information booklet

(resources at €337 billion). This fact must be a key consideration in deciding and prioritising the objectives of the Integrated Marine Plan. Not to do so will severely impede the plan's ability to meet any ocean economy targets set.

- The opportunities for economic growth in internationally traded maritime training, education and services must be fully explored and assessed in formulating targets.
- Market trends in Shipping, Logistics and Transport, as well as priority areas for further indigenous development including ship finance, ship owning, ship crewing and management, and project logistics should be given sufficient consideration in the setting of targets for 2020 and beyond.
- The Ocean Wealth Process must take a longer term perspective on the evolution of established sectors such as the shipping and maritime transport sector, as well as the maturing of emerging sectors, such as marine renewable energy. Ocean Energy alone could yield 17,000-52,000 jobs for Ireland by 2030 (SQW, 2010).
- Setting an ambitious yet realistic target for 2020 is important for focusing the national effort in the short-term on the development of the ocean economy of Ireland and such a target should be set by taking a systematic macro-economic expert-led process.
- Given the severe public finance difficulties likely to prevail for the rest of this decade, it may be necessary to set additional targets for 2025 and 2030.
- While it is useful to pose this question to stimulate consideration of the issues at hand, "guesstimates" provided as part of this consultation process need to be regarded with extreme caution.

## **2. What contributions can:**

### **a. The private sector make to achieving growth potential in this area?**

- The private sector is the critical enabler to achieving growth potential in the maritime area.
- The role of this sector is not given sufficient attention in the Ocean Wealth documentation.
- The role of the private sector must be considered in the development of the Ocean Wealth vision in a more integrated way.
- The growth in offshore oil and gas and Marine Renewable Energy will present significant opportunities for maritime support services and employment. These sectors should be an integral part of the integrated marine planning process.
- Many further potential growth sectors exist for Ireland in the maritime space including ship owning, commercial operations, ship technical management, shipping finance & banking, ship brokerage, legal services, classification & surveying, Insurance & underwriting, Corporate Management and Registry management. The potential in these sectors has not been fully appreciated to date and should be considered in depth in an integrated marine plan.
- Attention needs to be applied to a process of identifying niche markets where Ireland can position itself to accrue long term benefits. Consulting centres such as NMCI who are constantly in direct contact with industry must be a key element in this process; Maritime training, education and services represent good examples of niche markets that have significant further exploitation potential if fully leveraged.

- The Irish shipping community should work together to ensure that seagoing cadets have opportunities for high-quality training afloat.
- Industry associations and professional groups such as the Irish Chamber of Shipping, the Irish Harbour Masters Association, the Irish Institute of Master Mariners, the Irish Offshore Operators Association and the Marine Renewables Industry Association also have important roles to play. The role and potential of these industry associations should be considered in the formulation of the Integrated Marine Plan for Ireland.

**What contributions can:**

**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?**

- NMCI, a partnership between the Cork Institute of Technology, the Irish Naval Service and Focus Education (a private partner) is an example of what can be achieved through integrated planning in Ireland and represents what can happen with the public sector takes a integrated, teamwork focussed approach to meeting opportunities and challenges identified. The Naval Service was a partner in NMCI principally to provide training to its own personnel but the relationship has developed and become more integrated across the range of Colleges activities including the pooling and sharing of training expertise and across the spectrum of maritime research activities. The Service is also an important source of maritime operations professionals to both the public and private sectors.
- The education, training and international services opportunities that exist globally for Ireland can only be fully leveraged if Ireland's offerings are internationally competitive. To be competitive in these areas, the regulatory regime (e.g. Department of Transport, Marine Survey Office etc) should not be more onerous than our main OECD competitors.
- The growth in offshore oil and gas and Marine Renewable Energy will present significant opportunities for maritime support services and employment but the development of these new services must be supported by avoiding over-regulation and excessive bureaucracy.
- The education, training and international services sector, if it is to be internationalised in a significant way, needs an efficient and responsive (i.e. timely) VISA system for non-EU clients who wish to avail of Irish-based services.
- Seagoing cadets from Ireland should be able to avail of high quality seagoing placements. What is offered to incentivise placing Irish cadets should match what is offered by OECD competitors so the question of incentives does not act as a restriction in obtaining such placements.
- The IMDO is working tirelessly to attract businesses to Ireland and should receive all the support they ask for.
- By coming together in the IMERC partnership, the Cork Institute of Technology, the Irish Naval Service (two key partners in NMCI) and University College Cork are delivering a value added service within and across the respective partner organisations that aims to deliver up to 70 new jobs by 2014, the construction of the world's largest marine renewable energy research centre, commercialisation of research, and the creation of a magnet for FDI. CIT and UCC are focused on the commercialisation of research leading to job creation; while the Irish Naval Service is targeting the economic deficit as an enemy of the state. As a result, the Naval Service is uniquely positioned to support SMEs, collaborate with researchers, and

target FDI clients. The IMERC approach to shared services on the campus in Ringaskiddy, (e.g. library, workshops, laboratories and car parking) also yields direct savings to the tax payer. This is a shining example of what the public sector can do in a “bottom up” approach. Not everything in the public sector needs to be driven from the top down to achieve results that benefit the state.

- As well as direct investment for critical infrastructure, innovative approaches to economic incentivisation must be developed to order to tip the balance of trade to allow the home-base to grow. Ireland’s tonnage tax regime, combined with the low corporate tax rate, continues to enable new enterprise as well as attracting inward investment from international shipping companies . This model shows how the public sector can fundamentally contribute to job creation and growth, by creating the right conditions for the development of private industry. Surely, similar models can be pursued for high potential marine sectors including ocean energy and financial services for shipping?
- NMCI is aware that a Green and then White paper review process on Defence is planned in the near future. It is the Colleges view that an adequately resourced Naval Service retaining the capability to deliver value for money defence , security, Government and other services, in and from the maritime domain, is an essential element of Irelands maritime future and any Integrated Marine Plan for Ireland.
- The strong political support for the Ocean Wealth Consultation process is welcomed by NMCI. The lead taken by An Taoiseach’s office is to be commended. This type of leadership is essential to ensure an integrated approach to the development of maritime affairs can prevail.
- Public sector transformation provides an opportunity to publically engage with the public sector to re-organise and re-structure the workforce, as well as identifying the potential contribution of the public sector to the creation of an environment that provides the conditions needed for economic growth, investment and job creation in the ocean economy.

#### **What contributions can:**

##### **c. Our communities make to the achievement of our growth potential**

- Ireland has a maritime tradition, a healthy maritime community, and a state of the art educational facility, NMCI. The maritime community should focus on informing young adults of the long-term potential of a maritime profession both afloat and ashore.
- Careful consideration must be given to community engagement to enable communities to make a positive contribution, not just to achieving our growth potential, but to achieving our sustainable development potential. Our Ocean Wealth needs to value the tacit knowledge of coastal communities in this regard.

#### **What contributions can:**

##### **d. The higher education sector make to the achievement of our growth potential?**

- Education, training and international services presents a unique opportunity. The Higher Education Institutes (HEIs) including NMCI have an important contribution to make to the achievement of our growth potential. NMCI, as the most relevant Higher Education Institute in the context of maritime education, training and services is uniquely positioned, ready and able to be the key HEI in making the most of this opportunity. NMCI was recently described by a major international shipping figure as “a critical element of Ireland’s maritime strategy

and responsible for developing Ireland's other great maritime resource, its maritime manpower"<sup>2</sup>. NMCI's capabilities, facilities and experience must be leveraged to the fullest extent possible in the integrated marine plan to give credibility to courses, qualifications, personnel and international services originating in Ireland for the global marketplace.

- Any growth in marine activity in Ireland will mean a corresponding growth in the need for those employed in the marine sector to have appropriate education and training. NMCI as the institution in which the vast majority of Irish maritime operations expertise resides must be appropriately consulted and be involved in the planning for the upsurge in maritime operations training and education that will occur.
- A number of HEIs have well-established, long-term track records in conducting marine research, others such as NMCI have started to build marine and maritime research capacity and this capacity building activity must be supported in any integrated marine plan for Ireland.
- As stated in the consultation documents, the shipping sector has no or very low levels of functioning R&D capacity, which, given its role in supporting export led growth would appear to be a fundamental weakness in the sector's ability to plan for and add long term strategic value to the domestic economy. The value of leveraging expertise in maritime operations education and training to address, augment and multiply the activity of R&D in this space will be pioneered by the NMCI and supported by the integrated marine plan for Ireland.
- The commercialisation of research in the marine space in Ireland has traditionally been relatively weak. Addressing this issue must become one of the primary objectives of HEIs in the current economic context. In order to achieve this, the HEIs need to deliver greater coherency between disparate elements of innovation, including knowledge transfer, commercialisation, entrepreneurship, education and consultancy. NMCI is committed to these goals.
- The Forfas Report (2012) describes how the future challenge will be to align publically funded research more closely with industry and societal needs, achieve critical mass in a small number of areas and facilitate the transfer of knowledge between academia and industry, while maintaining commitment to excellent research. NMCI is well positioned to deliver on this challenge, not least because of the college's central involvement in the IMERC Technical Working Group (TWG) process, which helped to define industry-led research priorities in the maritime space.
- The Forfas Report (2012) identifies 13 national research priority areas, one of which is Marine Renewable Energy (MRE). It recognises the need to position Ireland as a research, development and innovation hub for the deployment of marine renewable energy technologies and services. NMCI is targeting an important role relating to both Ocean Information Engineering research and maritime operations in this evolving area.
- The facilities within HEIs, including NMCI can provide additional services to the entire marine community. By opening existing facilities so they can be leveraged by the broader maritime community e.g. leisure, fishing etc. to meet their specific needs, additional synergies are possible to the benefit of all.

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<sup>2</sup> Anthony Gurnee, CEO, Ardmore Shipping at the IMERC Conference, NMCI, March 2012

### **3. What actions should be taken to strengthen our marine awareness/identity**

- There is a need to put maritime Ireland more firmly on the map. A key message to communicate immediately is that Ireland is open for business in the maritime space – both nationally and internationally. Political representatives, journalists, civil servants, industry representatives, educators and scientists all have a role to play to feed this message across the thousands of international networks that are used almost daily.
- Since its opening in 2004, NMCI has become a national focal point for maritime gatherings such as conferences and seminars and meetings between individuals. NMCI plays a critically important role in outreach to the entire Irish maritime community and is a hub for information and knowledge exchange among the diverse Irish maritime community and between the Irish community and the international maritime community. NMCI should be considered a central pillar in any plans to further strengthen the nation's marine awareness/identity.
- Irish young adults should have easy access to full information on long-term prospects both at sea and ashore as well in the marine and maritime sectors.
- Naval Service ships have “flown the flag” in international waters and foreign ports in the operational sphere but also in a representative role in conjunction with State agencies including DFA, IDA, EI, Bord Bia etc. The response from agencies is invariably that such visits and promotions represent value for money in terms of access, profile and good-will. This effective strategy should be continued, strengthened and further leveraged.
- The IMDO Follow the Fleet Program has had a positive impact on growing maritime awareness in young people. Primary level and secondary level school programs like Follow the Fleet that can increase awareness among Ireland's young people are important and must be part of any actions to strengthen our marine awareness/identity.
- Being a component of the Defence Forces the Naval Service has restrictions on establishing a distinct image in the public eye as it must often communicate through several reporting/approval layers. The means to allow the establishment of a distinct and clear image in the maritime operational domain should be encouraged to enhance maritime awareness.

### **4. Is the draft of 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”*

- The objective should not be solely on economic development, as suggested by the statement above. The emphasis on economic growth needs to be balanced.

### **5. How can we maximise the benefits of our ocean wealth and protect the marine ecosystems/environment?**

- We need to develop an integrated policy formulation process that deals with major issues of restructuring, transformation, prioritisation, investment, accountability *and* sustainable development. Policy formulation will have to reconcile the need to exploit the economic

opportunity with protecting the asset upon which our ocean wealth is based. We have not had a good track record to date and the sustainability crisis is deepening.

- It is imperative that Ireland moves towards a more *proactive* approach to protecting the marine environment.
- The SmartOcean approach to networked observation systems, promoting test-bed infrastructure and technology convergence should continue to be supported at the national level, as an important initiative for making data more readily available for science and management. New opportunities for data collection should also be sought, for example via the deployment of automated marine monitoring equipment on commercial ships or passenger vessels. The willingness of the Naval Service to support data collection at sea can also be further promoted.
- Technology can be a force multiplier and the Naval Service is active in enhancing maritime surveillance and Maritime Domain Awareness via development of its own Recognised Maritime Picture (RMP), and contributing to such as EDA PT MARSUR, PERSEUS, Darius and NETMAR projects. But timely knowledge about a problem may not be enough, and protection of ecosystems /environment will often require an enforcement option. The capability to carry out enforcement/compliance actions at sea is a basic requirement for any meaningful sovereignty. A national presence at sea facilitates both timely response and deterrence.

**6. How can the interest 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?**

- Traditional approaches to policy making need to be replaced with a more open, inclusive processes at all levels. The new policy framework needs to consider the best organisational structures for engaging with stakeholders on an on-going basis at the appropriate scale.

**7. To what extent could the development of a Maritime Spatial Plan assist in this balancing process?**

- NMCI welcomes and will support the development of an MSP initiative in Ireland, however it should be noted that MSP is not a panacea for delivering Our Ocean Wealth. MSP is a tool for decision making. It is not the complete solution for conflict resolution.

**8. Are the opportunities and constraints identified the right ones? Are the enablers the right ones to be focusing on in order to unlock the potential of our oceans?**

- Industrial Development is an essential enabler that is not included. This is an essential pre-requisite to unlocking the potential of our oceans. Existing capacity exists among the development agencies such as the IDA and Enterprise Ireland. The Irish Maritime Development Office (IMDO) has an extremely important role to play in this space, as does NMCI because of its direct, extensive and long-standing relationships with the international maritime industry
- The Enablers identified are all extremely relevant. NMCI would highlight in particular; Education and training; Marine research and innovation; Maritime safety, security and surveillance.

**9. How can we ensure appropriate governance in national maritime affairs for optimal results (at local, regional, national, European and international levels?)**

- The education, training and international services opportunity can only be fully leveraged if Ireland's offerings are internationally competitive. To be competitive in these areas, the regulatory regime (e.g. Department of Transport, Marine Survey Office etc) should not be more onerous than our main OECD competitors.
- The education, training and international services sector, if it is to be internationalised in a significant way, needs an efficient and responsive (i.e. timely) VISA system for non-EU clients who wish to avail of Irish-based services.
- The significant opportunities for maritime support services and employment must be supported by avoiding over-regulation and excessive bureaucracy.
- The plethora of state departments, agencies and organisations involved in the marine in Ireland results in a dispersed, unfocussed message to the public and practical challenges for those engaged in marine activities in Ireland.
- National rights over the subsea, seabed and water column also brings national responsibilities. The capability to effectively police that over which we have rights is a basic responsibility. Maritime Law Enforcement (MLE) or Maritime Security Operations (MSO) are most effectively carried out by naval ships who carry a unique status and privileges under international law.
- The EU is currently drafting a Maritime Security Strategy ( 3009<sup>th</sup> Foreign Affairs Council meeting, Luxembourg 26<sup>th</sup> April 2010). This will be within the framework of the EU Security Strategy (ESS), and work will take place in the context of the EU Common Foreign & Security Policy (CFSP) and EU Common Security & Defence Policy (CSDP). The Council conclusions stated inter alia " *The Union needs to actively contribute to a stable and secure global maritime domain by tackling the threats identified in the European Security Strategy, while ensuring coherence with EU internal policies, including the EU Integrated Maritime Policy (IMP).* " Ireland should actively engage in influencing this process to ensure it meets our national interests. The Maritime Security aspects of any governance regime in a future Integrated Marine Plan for Ireland should likewise ensure coherence with the EU Integrated Maritime Policy and the future EU Maritime Security Strategy.

**10. Suggest ways we can foster and / integrate marine policy and planning in Ireland? With less resources, how can we do better?**

- NMCI is an exemplar of how you can do more with the same resources. The successful partnership between the Cork Institute of Technology, the Naval Service and more recently University College Cork through the IMERC partnership, demonstrates what is possible.
- Doing more with less is a challenge but it is also an opportunity to streamline activities, to derive synergies from partnership approaches, and to deliver greater joined-up-thinking. A certain amount can be achieved within the current resource base. Activities such as communicating that *Maritime Ireland is Open for Business*, engaging with stakeholders, and reforming regulatory regimes, cost little, and should be prioritised in any case.
- If the Government are serious about transforming our ability to create new jobs from marine resources, then public investment will have to occur.

**11. 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?**

- The EU Integrated Maritime Policy aims to promote maritime clusters across Member States as a vehicle for job creation and maritime development. Maritime cluster development has become topical in Ireland in response to this driver. In recent times, the term cluster has been linked to network or centre based activities, which is inaccurate. Clusters have been defined as *“a group of economic actors and institutions that are located near each other and have reached sufficient scale to develop specialised expertise, services, resources, suppliers and skills”* (US Council on Competitiveness, 2007).
- Proximity between business and academia is an essential building block for cluster success, where opportunities for face-to-face interactions and sharing of innovative ideas are presented on a daily basis, such as in the IMERC campus in Ringaskiddy.
- The Ocean Wealth Consultation process provides an opportunity to provide greater clarity on the national approach to maritime clusters.
- A dedicated budget towards the integration of maritime and marine related disciplines at government level is required.
- Continued clear leadership at Ministerial level to underpin, drive and sustain the movement towards an integrated marine plan for Ireland.