



Supporting
Implementation of
Maritime Spatial
Planning in the
Celtic Seas

Component 1.2.1

Spatial Demands and
Scenarios for Maritime
Sectors and Marine
Conservation

Deliverable 2

Sectoral briefing notes

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Aquaculture
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Ports and Shipping



Maritime Sector Briefing Note

This briefing note summarises the current status of the ports and shipping sector in the Celtic Seas project area. It considers the future development of these sectors and analyses the implications for expansion of ports and shipping activities in relation to Maritime Spatial Planning.



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About SIMCelt: SIMCelt is a cross-border project involving partners from the UK Ireland and France. It aims to support cooperation between Member States on the implementation of the Maritime Spatial Planning Directive in the Celtic Seas. The SIMCelt project is aimed specifically at the OSPAR Region III Celtic Seas area in accordance with a proposed extension of this region.

<http://www.simcelt.eu/about/celtic-seas-area/>

Disclaimer: The contents and conclusions of this report, including the maps and figures, were developed by the participating partners with the best available knowledge at the time. They do not necessarily reflect the national governments' positions and are therefore not binding. This report reflects only the SIMCelt project partners' view and the European Commission or Executive Agency for Small and Medium-sized Enterprises is not responsible for any use that may be made of the information it contains.

KEY POINTS

Within this briefing note, the ports and shipping sector is defined as including ports that are primarily for the import and export of goods or passenger transport (ferry and cruise). Shipping includes containers, liquid and dry bulk, Ro-Ro units and other general cargo. Fishing ports, yachting and other leisure craft and marinas are not considered as part of this note.

- Shipping (encompassing the sub-functions of deep sea, short sea shipping and ferry transport) is considered to be a mature sector of Europe's maritime economy, contributing high levels of Gross Value Added (GVA) and employment in Member States (Ecorys, 2011). However, whilst the volume of freight moved by ship across Europe has shown a general trend of growth, there has been a more mixed picture for ports within the SIMCelt project area.
- Ferry passenger transport in the EU has experienced a period of decline from 2010 to 2015. This is mirrored in the UK, Ireland and France, where passenger numbers have fallen by 5% or more.
- Cruise tourism is considered to be a developing industry, with the number of cruise passengers in Europe more than doubling between 2004 and 2014. Further growth in this sector is predicted for the future.
- Governance of ports varies within and across countries, with both public and private ownership models existing within the SIMCelt project area. Major national objectives for all ports revolve around competitiveness of the sector, integration of ports with land-based transport modes and ensuring sufficient port capacity for the expansion of activity where this is anticipated.
- At EU level, developing key trade routes through the Motorways of the Sea initiative, encouraging modal switch from road to sea and the development of a single transport space without barriers (simplifying administrative and customs procedures) are key mechanisms for increasing shipping.
- The 'greening' of shipping through better ship design, reducing emissions and the implementation of Emissions Control Areas also helping to make shipping more efficient and competitive.
- The increasing density of activities at sea, including increased shipping traffic and new offshore infrastructure such as wind farms are increasing competition for space. Stakeholder engagement across sectors and across borders can help to increase knowledge of where competition may occur and ensure that this is taken into account in future maritime spatial plans.

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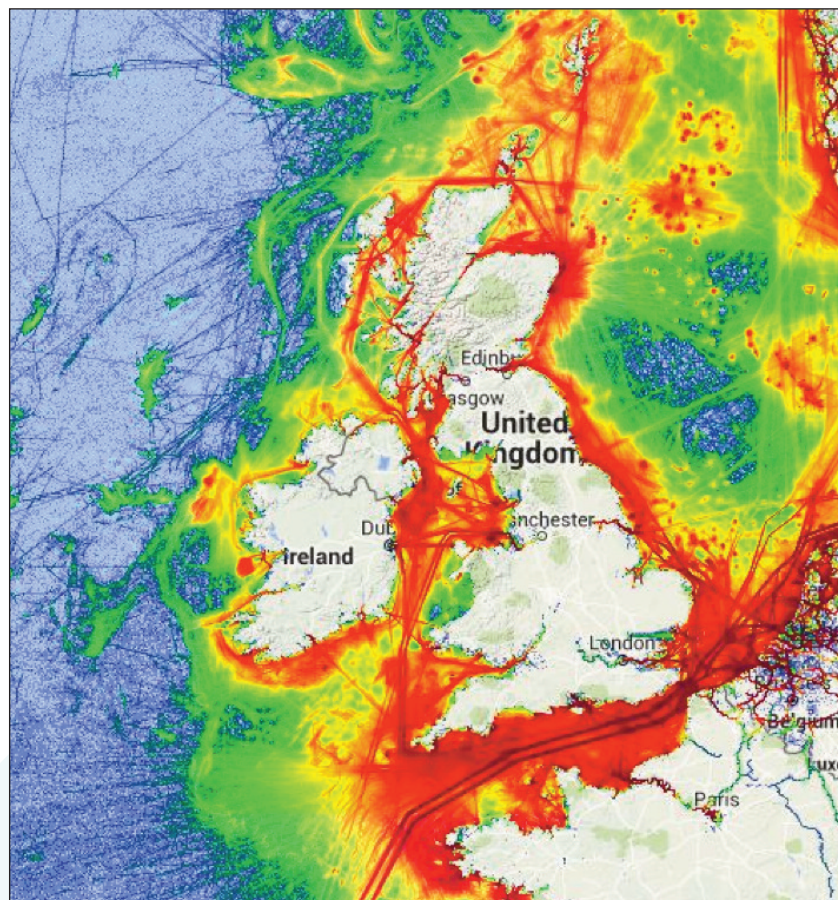
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DISTRIBUTION OF ACTIVITY

Figure 1 (below) shows the main shipping lanes in the Celtic Seas. The densest shipping traffic can be found in the southern area of the Celtic Seas, where ships enter and exit the English Channel. There is also a high volume of traffic travelling through St George's Channel, to the ports along the Severn Estuary and further north into the Irish Sea where Dublin, Liverpool, Belfast and Glasgow are the main ports. Shipping traffic continues along this north-south route along the west coast of Scotland and around into the waters of the North Sea. To the south and west of Ireland, there are key merchant shipping routes associated with the port of Cork and Shannon Estuary.

Figure 1: Shipping activity in the Celtic Seas



Source: GeoGarage (2014)

Freight Transport

Trends in freight transport in the Celtic Seas countries show a relatively mixed picture compared to the European average for 2010-2015 (growth of 4.6%, see Table 1 below). In Ireland, there has been a steady increase in the volume of freight (all types of goods), with a growth of 12.4% in the period 2010-2015. This is in contrast to France, which has seen a decline in freight traffic of -5.8% in 2010-2015 and the UK, which has seen an even bigger average decline of -3.0% in the same period.

Table 1: Gross Weight of Goods Handled in All Ports by Country (million tonnes)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change 2014-2015	% Change 2010-2015
EU28	3,965,599	3,945,711	3,466,788	3,670,995	3,768,032	3,737,229	3,718,618	3,789,235	3,840,510	1.4%	4.6%
Ireland	54,139	51,081	41,829	45,071	45,078	47,649	46,722	47,483	50,666	6.7%	12.4%
France	346,825	351,976	315,562	316,137	322,254	303,269	303,031	298,203	297,880	-0.1%	-5.8%
United Kingdom	581,504	562,166	500,863	511,875	519,495	500,860	503,324	503,171	496,708	-1.3%	-3.0%

Data source: Eurostat (2017) [mar_mg_aa_cwh]

This variation in growth is mirrored across the ports of the SIMCelt project area as shown in Table 2 below, with Ireland's major ports showing a high level of growth between 2010 and 2015 (>19%), whilst UK and French ports show a mixture of decline in some ports (Clydeport, Bristol, Milford Haven, Brest) and extremely high growth in others (Belfast and Holyhead in particular have benefited from increased flows of trade between the island of Ireland and mainland Britain in recent years).

Table 2: Gross Weight of Goods Handled in Selected Celtic Sea Ports (Million tonnes)

	2007	2008	2009	2010	2011	2012	2013	2014	2015	% Change 2014-2015	% Change 2010-2015
Cork (IE)	10,098	9,633	7,968	8,466	8,434	8,708	8,983	8,714	9,709	11.4%	21.8%
Dublin (IE)	21,801	21,127	18,606	19,548	19,467	19,898	19,865	21,078	22,205	5.3%	19.3%
Belfast (UK)	13,416	13,040	12,050	12,827	13,561	15,186	16,783	16,793	16,700	-0.6%	38.6%
Bristol (UK)	11,178	11,527	8,999	7,272	8,202	10,762	10,633	11,421	8,877	-22.3%	-1.4%
Clydeport (UK)	12,063	14,338	12,552	12,283	13,431	15,421	14,783	16,201	12,484	-22.9%	-0.5%
Holyhead (UK)	3,468	3,419	2,852	2,658	3,148	3,087	3,212	3,663	4,455	21.6%	56.2%
Liverpool (UK)	32,258	32,204	29,936	30,020	32,660	32,924	31,149	30,996	31,256	0.8%	4.4%
Milford Haven (UK)	35,496	35,875	39,293	42,788	48,699	39,832	41,105	34,309	37,684	9.8%	-4.1%
Brest (FR)	2,726	2,733	2,776	2,895	4,765	2,937	3,992	2,807	2,357	-16.0%	-15.1%
St Malo (FR)	1,652	1,580	1,307	1,663	3,219	1,092	1,647	2,891	1,420	-50.9%	8.6%

Data Source: Eurostat (2017) [mar_go_aa] and Central Statistics Office Ireland

Ferry Transport

Passenger transport by ferry across Europe as a whole has shown an overall decrease of 7.2% in the period from 2010 to 2015 (Table 3, below). Within the Celtic Seas countries, this decrease is also reflected in passenger numbers. In Ireland, there has been a more dramatic decline of passenger numbers by 10.7%, however this decline is slowing. In the UK, passenger numbers have declined by 5% in the same period and France 5.8%.

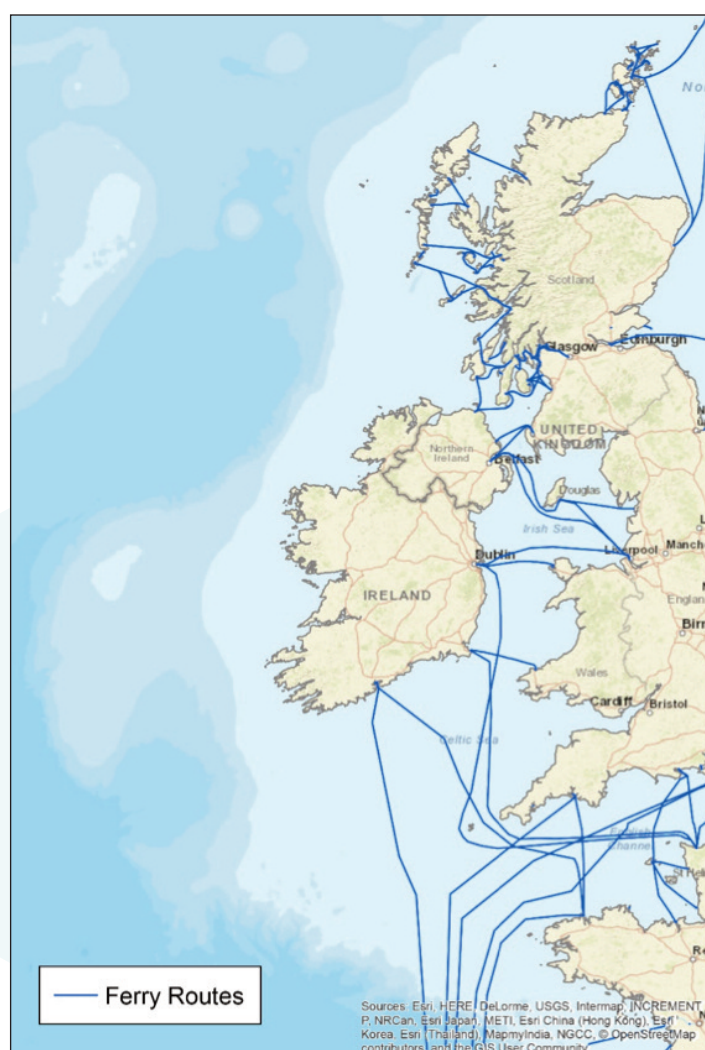
**Table 3: Thousand Passengers Embarked and Disembarked
at All Ports, Excluding Cruise Passengers**

	2009	2010	2011	2012	2013	2014	2015	2016	% Change 2014-2015	% Change 2010-2015
EU28	419,238	413,201	400,766	384,429	386,679	381,726	383,322	n/a	0.4%	-7.2%
Ireland	2,875	3,079	2,901	2,757	2,745	2,753	2,750	2,712	-0.1%	-10.7%
France	24,735	26,744	25,074	24,013	24,851	25,750	25,203	23,775	-2.1%	-5.8%
UK	26,879	27,212	26,327	24,640	25,566	26,359	25,854	24,843	-1.9%	-5.0%

Source: Eurostat (2017) [mar_pa_aa]

The main ferry routes in the Celtic Seas are shown in Figure 2 below.

Figure 2: Ferry Routes in the Celtic Seas



Source: EuroGeographics (2017) and Scottish Government

Cruise Tourism

Although cruise passengers only make up a small proportion of maritime traffic, as an industry the cruise sector is steadily growing, with numbers embarking on cruises from European ports increasing from 2.8 million passengers in 2004 to 6.39 million passengers in 2014 (Cruise Lines International Association, 2015). Within the Celtic Seas countries, cruise ports have experienced varying levels of growth and change, as shown in Table 4 below. Whilst the number of cruise passengers has generally increased at bigger ports that offer turnaround facilities (i.e. act as 'home' ports for cruise line companies where passengers can start and end a cruise), such as Liverpool, Cork and Belfast, smaller ports that act as 'ports of call' on longer routes such as Brest have experienced a decline in numbers.

Table 4: Cruise Passenger Numbers, Main Celtic Seas Cruise Ports

	2011	2012	2013	2014	2015	2016	% Change 2011-2016
Brest	26,794	7,573	12,766	18,078	9,838	6,862	-74.4%
Belfast	40,677	52,705	77,320	81,392	83,028	102,533	152.1%
Cork	70,431	59,898	85,495	83,201	102,217	89,686	-2.1%
Greenock (Glasgow)	57,790	66,737	84,011	-	-	-	n/a
Dublin	93,336	86,771	103,633	97,316	101,400	109,884	17.7%
Liverpool	41,727	38,656	44,478	55,088	77,352	80,759	93.5%
Portree (Skye)	7,780	12,884	11,161	10,868	7,847	12,951	66.5%

Source: www.cruiseeurope.com and Central Statistics Office (IE)

POLICIES: INTERNATIONAL

The International Maritime Organization (IMO) is the United Nations agency responsible for many aspects of shipping regulation, including pollution control, safety, ship operation and security. Some of the key Conventions and instruments devised by the IMO that are most relevant for consideration in a transboundary setting are those related to the prevention and control of pollution, including:

- The International Convention for the Control and Management of Ships' Ballast Water and Sediments (adopted in 2004, coming into force in September 2017). This requires careful management of ballast water from ships that may transport non-native species, either by exchange of ballast water mid-ocean or installation of treatment systems on board ships. Ports and terminals with ballast tank cleaning or repair facilities should also have adequate facilities for the reception of sediments;
- The International Convention for the Prevention of Pollution from Ships (MARPOL), which deals with pollution from ships including oil, other chemicals, garbage, sewage and other harmful substances. In 1997 this was revised to include air pollution and emissions from ships. Further amendments to MARPOL, including the introduction of Emission Control Areas (ECAs) are driving progressive reductions in sulphur and nitrogen oxides and greenhouse gases. The North Sea ECA covers the English Channel and therefore the south eastern part of the Celtic Seas;
- Traffic Separation Schemes – under the International Convention for the Safety of Lives at Sea (SOLAS, 1974) the IMO has responsibility for the safe routing of ships to avoid grounding, collisions and protect environmentally sensitive areas. Traffic Separation Schemes separate opposing streams of marine traffic by appropriate means and establish traffic lanes. Whilst the IMO governs the majority of traffic separation schemes, governments or other organisations may have responsibility for specific lanes or routes. In the Celtic Seas a number of traffic separation or similar routing schemes are in place, as shown in Box 1 below.

Box 1: Traffic Separation Schemes in the Celtic Seas

Irish Sea	Other
Off Neist Point (Scotland)	Isles of Scilly (England)
North Channel (N. Ireland/Scotland)	Before the coast of Ouessant/Ushant (France)
Off Skerries (N. Ireland)	Fastnet Rock (Rep. of Ireland)
Dublin Approaches (Ireland) (governed by Irish Government)	Minches (Scotland)
Off Tuskar Rock (Ireland)	West of the Hebrides
Liverpool Bay (England)	
Holyhead Harbour (Wales) (governed by Stena Line)	
Off Smalls (Wales)	

POLICIES: EUROPEAN UNION

Integrated Maritime Policy and Blue Growth

The European Commission's **Integrated Maritime Policy (IMP)** was published in 2007. This sets an overall direction for sea-related policies in the European Union, recognising that economic growth and sustainability based on maritime activities need to develop in a joined up way. IMP aims to change the way that decisions are made, so that they take into account the interactions between different aspects of sea use, climate change, environmental degradation, globalisation, maritime safety and security, sustainability and energy security. In the IMP programme of work, a number of projects were identified to be delivered within a coherent policy framework. The most relevant for shipping include:

- a single European maritime transport space without barriers – container transport in the EU is expected to have tripled between 2000 and 2020, but shipping remains at a disadvantage compared to other means of transport due to complex procedures for transporting goods between countries. The Communication and Action Plan of 21 January with a view to establishing a European maritime transport space without barriers [COM (2009) 10 final] notes that simplifying administrative and customs formalities is necessary to increase the efficiency and competitiveness of shipping. Directive 2010/65/EU of the European Parliament and of the Council of 20 October on reporting formalities for ships arriving in and/or departing from ports of the Member States requires that Every EU country must ensure that the reporting formalities at their ports are requested in a harmonised and coordinated manner;
- a European network for maritime surveillance – ensuring maritime safety by improving surveillance and interoperability of systems to support navigation, pollution control, law enforcement and overall security. The Common Information Sharing Environment for the EU maritime domain (CISE) will integrate existing surveillance systems and networks, enabling greater exchange of information and data;
- reduction of CO₂ emissions and pollution by shipping – by supporting international obligations for the reduction of air pollution and greenhouse gas emissions from ships, or proposing EU-wide actions in the absence of progress;
- a review of EU labour law exemptions for the fishing and shipping sectors – supporting the integration of the International Labour Organization's Convention on maritime labour standards into Community law and improving working conditions and safety for fishermen.

In 2012 Member States reaffirmed their commitment to an integrated maritime policy and a sustainable blue economy through the **Limassol Declaration**. In particular, this called for:

- Continued work to enhance the competitiveness of the EU shipping sector and increase the share of short sea shipping in intra-EU trade, while developing the EU's port infrastructures and services;
- Innovation in shipbuilding to improve the environmental performance of ships, and
- Supporting integration of maritime surveillance through contributing to an operational Common Information Sharing Environment.

Short Sea Shipping

Short Sea Shipping is envisaged to have a major strategic role in reducing greenhouse gas emissions from transport and as part of a shift from road to other modes of freight. There are, however, barriers to the growth of short sea shipping and the Commission is seeking to enhance development of the sector by:

- Administrative simplification
- Support industry in picking up new technologies for complying with new and stricter environmental legislation
- Integration of short sea shipping in full logistics chains

The Commission has supported the establishment of Shortsea Promotion Centres in maritime states to assist in the promotion of short sea shipping. In Ireland the Irish Maritime Development Office (IMDO) takes on this role, whilst in France the Bureau de Promotion du Shortsea Shipping (BP2S) leads. The UK has not established its own centre. National Shortsea Promotion Centres form part of a wider European Shortsea Network that brings expertise from different countries together.

Motorways of the Sea

In an effort to reduce road transport and promote efficient, inter-modal transport across the European Union, the Motorways of the Sea concept was introduced by the [2001 Transport White Paper - European transport policy for 2010: time to decide](#). Motorways of the Sea are part of the [Trans European Network for transport \(TEN-T\)](#). In terms of maritime transport, the TEN-T is made up of a core network of ports (providing the backbone of the network), facilitating the development of a comprehensive network that ensures the accessibility and connectivity of all European regions. TEN-T guidelines note that Motorways of the Sea shall contribute towards the achievement of a European maritime space without barriers.

One of the major Motorways of the Sea is that for western Europe – this leads from Portugal and Spain via the Atlantic Arc to the English Channel, North Sea and the Irish Sea (see Figure 2 below).

Figure 3: Motorways of the Sea



Source: European Commission, Innovation and Networks Executive Agency (n.d.)

Within the Celtic Seas, several UK and Ireland ports are part of the Core TEN-T network. In addition, some French ports form part of the comprehensive network. These are shown in Figure 4 and summarised in Table 5 below.

Figure 4: Ports in the TEN-T network

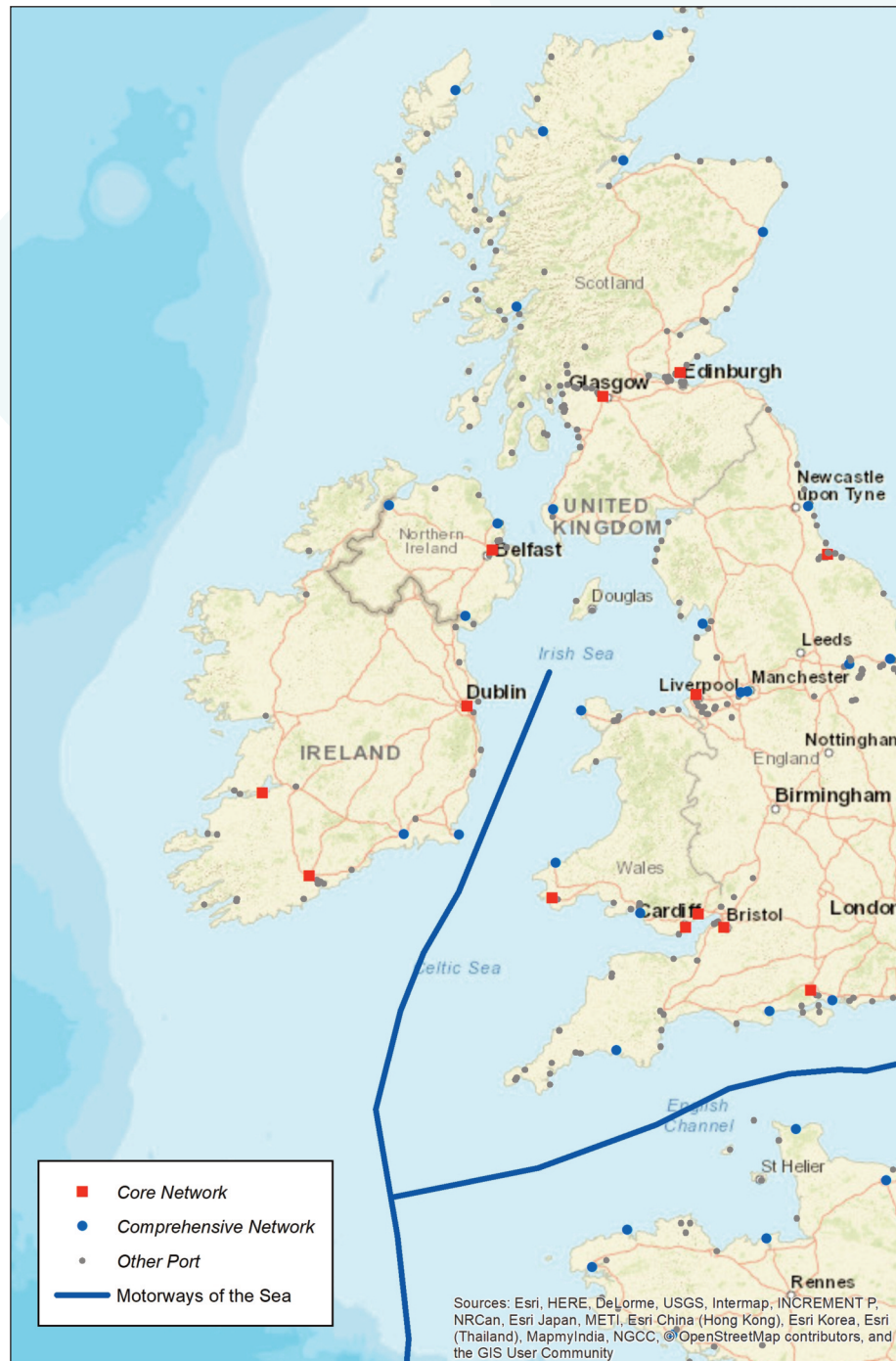


Table 5: Ports in the TEN-T Network

	Core Network	Comprehensive Network
UK - Scotland	Glasgow	Stornoway, Ullapool, Oban, Stranraer (Cairnryan)
UK - NI	Belfast	Larne, Foyle, Warrenpoint
UK - England	Liverpool, Bristol	Fleetwood, Plymouth
UK - Wales	Milford Haven, Cardiff, Newport	Holyhead, Fishguard, Swansea
Ireland	Dublin, Cork, Shannon Foynes	Rosslare, Waterford
France		Roscoff, Brest, St Malo

Atlantic Strategy and Action Plan

The EC's [Atlantic Strategy](#) refers to three specific issues around ports and shipping. First, with regards to the need to reduce emissions, both from shipping itself and by encouraging a modal shift from road to sea utilising the “Motorways of the Sea” network and new short sea routes. Secondly, the need for new marina facilities to encourage recreational boating is observed. Finally, the relatively slow growth of cruise tourism in the Atlantic (relative to other European seas) is recognised as an area for further investment that can bring jobs and growth.

In the [Atlantic Action Plan](#), these issues are tackled under Priority 3 (Improve accessibility and connectivity) and 4 (Create a socially inclusive and sustainable model of regional development) through:

- [Promoting cooperation between ports;](#)
- [Facilitating upgrades of infrastructure to improve connectivity with ports' hinterlands;](#)
- [Analysing and promoting port networks and short sea shipping routes;](#)
- [Developing niche markets by investing in marine sports, marinas and nautical leisure activities and cruise port facilities.](#)

NATIONAL ACTIVITIES

UK

In the UK the Department for Transport is responsible for overseeing shipping activity and the regulation of vessels in UK waters. The Department for Transport is supported by the [Maritime and Coastguard Agency](#), an executive agency responsible for the safety of people and vessels at sea, pollution prevention and control, seafarer training and certification and emergency response.

Ports policy in the UK is partially devolved – Scotland and Northern Ireland are responsible for their own policies. English and Welsh ports policy (except in the case of some small ports) is reserved to the UK Government.

Port ownership in the UK is divided into three categories:

- Privately owned ports, controlled by national or international commercial groups, e.g. Clydeport and Liverpool, owned by the Peel Ports Group, and Ayr and Fleetwood, owned by Associated British Ports;
- Municipal ports, which are governed by local authorities and subject to local government regulations, e.g. Bristol City docks and Lower Fishguard Harbour;
- Trust ports, independent statutory corporations managed by a board of trustees. They operate on a quasi-commercial basis, but they do not pay dividends as they have no shareholders. Belfast Harbour Commissioners and Milford Haven Port Authority are examples of this type.

The *Maritime Growth Study: Keeping the UK Competitive in a Global Market* (Department for Transport, 2015) underlines the importance of the maritime sector for the UK, including not just ports and shipping but associated industries such as manufacturing, insurance and training. The findings of the Study have helped to form a vision for the UK as *the world's foremost maritime centre* and a maritime nation that, amongst other things:

- exploits the full range and depth of its maritime cluster to promote the UK's position as the world's leading maritime centre;
- attracts inward investment in ports and other maritime business, contributing to both the national and regional economies;
- draws the world's shipowners to the UK, with more shipping operations being managed from here, creating UK jobs and with owners paying UK Tonnage Tax (p102).

To support this Vision, the Study outlines a set of recommendations in relation to:

- Leadership by government and industry;
- Effective marketing of the UK's maritime sector;
- Developing skills related to the maritime sector.

Scotland

The [Scottish Ferry Service Ferries Plan \(2013-2022\)](#) was published in 2012 by Transport Scotland. This sets out strategic guidance for the provision of ferry services in Scotland. Whilst the Plan places great emphasis on the importance of ferry services to serve remote rural and island communities, it also recognises the growing renewable energy sector and the need to provide transport links that can support opportunities for social and economic growth. The Plan therefore sets out a number of proposed improvements to services and new routes that will be introduced in the short and medium term. Methods of financing these routes, and investment in port infrastructure, are also outlined in the Plan.

As part of Scotland's [National Renewables Infrastructure Plan \(N-RIP\)](#) developed by Scottish Enterprise and Highlands and Islands Enterprise in 2010, several port sites are identified to support the initial growth of wave, tidal and offshore wind energy industries. Within the spatial framework of renewables infrastructure, ports identified for manufacturing, operation and maintenance (alongside areas being leased by The Crown Estate, now The Crown Estate Scotland) are seen as being crucial to the development of a successful renewables supply chain. On the west coast of Scotland, port sites include:

- Arnish, Kishorn and Hunterston for manufacturing, and
- Machrihanish and Campbeltown for operations and maintenance

Following on from this, the ports identified in the N-RIP spatial framework have been incorporated into the [Third National Planning Framework for Scotland](#), published in 2014. As ports invest in expanding their facilities and infrastructure, planning is expected 'to enable development in all of these locations'. Whilst renewables are seen as a major driver of growth in some port areas, the NPF also notes the importance of smaller ports and harbours in supporting existing strengths of some key sectors including tourism and fishing that should be maintained.

Scotland's [National Transport Strategy](#) (2016) represents a 'refresh' of the original Strategy published in 2006. In the interim period, it is noted that there has been a 7% decline in passengers using ferry services within Scotland (p14) and a decline in tonnage of freight moved by sea of approximately 14.5 thousand million tonne-kilometres to 9 thousand million tonne-kilometres between 2006 and 2012 (p17). Integration of ferry services with other transport modes (e.g. through smart ticketing), and with maritime freight considerations where lifeline services are provided, are key to ensuring accessibility and enhancing competitiveness of Scotland's economy.

Policies in Scotland's National Marine Plan that support the development of the ports and shipping sector include:

- [Protection of navigational safety and safeguarding lifeline ferry routes from developments that interfere with their operation;](#)
- [Restriction of development that may limit access to ports and harbours, or expansion/development of new ports identified through the National Planning Framework and National Renewables Infrastructure Plan;](#)
- [Maintenance, repair and sustainable development of harbour and port facilities in support of other sectors;](#)
- [Coordination with terrestrial planning to integrate transport solutions.](#)

NATIONAL POLICY STATEMENT (NPPS) FOR PORTS (2012)

This NPPS was produced by the Department for Transport and applies to England and Wales. It sets out the framework for decisions on proposals for new port development. The NPPS recognises that although there have been significant changes in both passenger travel patterns and the way in which freight is handled, ports are still crucial to the UK as an island economy. The NPPS therefore seeks to encourage sustainable port development to cater for long-term forecast growth in volumes of imports and exports by sea with a competitive and efficient port industry¹. The NPPS also recognises the importance of the offshore wind energy sector and the need for additional port capacity to support the manufacture and operation of wind turbines as the industry grows.

Whilst the NPPS is clear about the need to develop capacity in ports, it does not specify the locations where additional capacity should be developed. This is partly due to the unpredictability of changes in the market, but also due to the need for all ports to be responsive to changing demand. Competition between ports is also encouraged, to drive industry and competitiveness within the sector. Factors such as seasonal variations in shipping activity, port facilities and capacity, transport connections and labour markets are all crucial to ensuring that ports remain competitive and resilient in the face of changing markets.

The NPPS for ports will no longer apply when the ports related provision under the Wales Act 2017 come into force, scheduled for April 2018. The Welsh Government is currently developing a National Development Framework for Wales which will set out where nationally important growth and infrastructure is needed and how the planning system can deliver it. The Welsh Government will work with the ports sector to ensure that it is appropriately integrated within the framework.

The [Wales Spatial Plan \(2008 Update\)](#) notes the importance of ports as facilitators of inward investment and places of high quality employment (p103). To this end, particular locations are identified as significant drivers of growth for the Welsh economy. These are:

- [the Pembrokeshire ports, and in particular the Haven Waterway, as the route to major oil refineries and a large LNG terminal, are seen infrastructure critical to the wellbeing of the UK. As this area is surrounded by the Pembrokeshire Coast National Park and a large SAC it needs to be 'managed carefully for both local and national benefit and to safeguard the unique environment' \(p84\);](#)
- [Developing port facilities and connectivity with road transport to encourage modal shifts for freight at south eastern ports \(Cardiff, Barry, Newport\);](#)
- [Maximising opportunities for Holyhead Port in the north west of Wales as an international gateway, with particularly strong links to Ireland;](#)
- [The southern ferry ports of Pembroke and Fishguard, part of a Trans-European Network, provide a 'southern corridor' to Ireland that avoids the increasingly congested Dublin area.](#)

The **Draft Welsh National Marine Plan** (Welsh Government, 2017) highlights some of the main challenges and opportunities facing the ports and shipping sector. These include:

- The provision of sufficient port and shipping capacity is essential to supporting sustainable economic growth and remains strongly linked to the state of the Welsh economy. Ports proximate to proposed low carbon energy developments have been identified as having increasing significance in the growth of the renewables sector, including Mostyn and Holyhead in the north, Pembroke Dock, Port Talbot, Newport and Swansea;
- Integration of ports within inter-modal freight networks. Ro-Ro and container traffic is expected to continue growing in line with long term trends of 3-4% per year and the Welsh Government would like to see an increase in short sea shipping to support the sustainability of the freight network;
- Ports will need to invest in facilities to support cruise tourism in Wales, such as infrastructure investment to enable the handling of larger ships and the development of shore-based excursions. This is a future growth area which is seen as important to the UK cruise industry as a whole;
- There is a need to ensure that coastal and marine developments do not impact on navigational routes or potential for expansion of port and harbour facilities. Policies contained within the Draft Plan guide decision makers to avoid permitting developments that might restrict access to ports or impact upon existing port, harbour and marina activities.

Under the St David's Day Agreement of February 2015, ports in Wales are due to be devolved as part of the Wales Bill. The NPPS for ports will no longer apply when the ports related provision under the Wales Act 2017 come into force, scheduled for April 2018. The Welsh Government is currently developing a National Development Framework for Wales which will set out where nationally important growth and infrastructure is needed and how the planning system can deliver it. The Welsh Government will work with the ports sector to ensure that it is appropriately integrated within the framework.

Northern Ireland

Responsibility for shipping services, navigation and marine safety matters in Northern Ireland remain reserved functions for the UK Government's Department for Transport and the Maritime and Coastguard Agency. In Northern Ireland the Transport Policy Branch is responsible for supporting the **Department for Infrastructure** in the discharge of statutory and other duties in respect of sea ports and harbours.

Four out of five of Northern Ireland's commercial ports (Belfast, Foyle, Warrenpoint and Coleraine) are Trust Ports, i.e. established by statute for the purposes of providing, maintaining and developing harbour facilities. The Port of Larne is privately owned. Whilst not compulsory, it is considered good practice for ports to prepare Master Plans that set out their strategic plans for the medium to long term and to assist planning authorities in developing their own plans and strategies. So far, only Belfast Harbour Commissioners have produced a master plan for Belfast Port, this was published in 2016.

The Northern Ireland Executive's Programme for Government (PfG) (Northern Ireland Executive, 2016) set driving economic growth through a strong, competitive and regionally balanced economy and by connecting people and opportunities through infrastructure, as two of its priority outcomes. It will not be possible to realise the Executive's priorities for Northern Ireland without further strengthening the connectivity and capacity of the ports as sustainable regional drivers of economic growth.

The ports in Northern Ireland have an important yet sometimes unheralded role in the global logistic chain by providing successful gateways for trade and travel. They not only provide a gateway for travel of over 2 million passengers but also connect local economies to the international marketplace. Almost 24 million tonnes of freight were transported through the North's ports in 2015.

The PfG also emphasises that local businesses remain the key drivers of economic growth by increasing sales of goods and services to external markets. The Executive has committed to playing its part in helping to create the conditions which support a diverse export base, one which will help to deliver increased employment and wealth. The future success of the economy in Northern Ireland will depend on the ability to trade internationally, and therefore access to global markets is critical, particularly in the context of Brexit and an increasing global economy.

Isle of Man

On the Isle of Man, responsibilities for shipping are split between two government departments, Economic Development and Infrastructure. The Department of Economic Development oversees the operation of the [Isle of Man Ship Registry](#), which provides a registration service for a range of vessels from large merchant ships to fishing vessels and offers support to ship owners and ship management companies. The Register also performs inspections of ships to ensure maintenance and safety is of a high standard.

The Harbours section of the Ports Division, Department of Infrastructure has a unique set of functions within the British Isles, being responsible for the coastguard and management of the Isle of Man's territorial sea. The purpose of the Harbours section is to manage and develop appropriate marine related commercial and leisure opportunities, operation and maintenance of the Isle's eight statutory harbours, preparation of harbours legislation, marine oil pollution contingency planning and co-ordination of territorial sea management.

Ireland

In Ireland in 2012, the Inter-Departmental Marine Coordination Group (MCG), on behalf of the Government, published [Harnessing Our Ocean Wealth, Ireland's Integrated Marine Plan for Ireland](#) (HOOW). HOOW sets out the Government's Vision, High-Level Goals, and Key enabling Actions to put in place the appropriate policy, governance and business climate to enable Ireland's marine potential to be realised. The Group is chaired by the Minister for Agriculture, Food and the Marine and its members are drawn from Departments with marine related responsibilities.

A *thriving maritime economy* is a key goal of HOOW, which also noted that within the shipping and maritime commerce sector:

- Maritime shipping, ports and services employed 7,200 people directly in 2010;
- Sea-based transport accounted for 95% of the total value (€128bn) of goods traded in Ireland in 2010;
- There was a 40% increase in the number of firms operating in the shipping services sector between 2006-2010.

In seeking to expand Ireland's maritime economy, it is recognised that the growth of ports and maritime transport services is closely linked to the nation's wider economic performance and thus at the time of writing 'modest' growth over the next 3-5 years was forecast. In addition, the following enablers of growth in ports and shipping were identified:

- Governance – implementing a proposed Ports Policy;
- Maritime Safety and Surveillance – developing the Irish Maritime Administration to ensure its effectiveness and to use Ireland's positive status on international shipping benchmarks to further promote shipping related enterprise;
- Business Development, Marketing and Promotion – continued promotion of marine products and services through organisations such as the IMDO;
- Capacity, Education, Training and Awareness - planning for the appropriate human resources to be in place to meet future demands of the maritime sector;
- Infrastructure – carrying out new initiatives to tap into the potential of new and existing coastal infrastructure, e.g. researching best practice in the development and funding of marina and berthing facilities, opportunities to increase cruise tourism and supporting the implementation of port master plans to add capacity to ports.

The [Irish Maritime Administration](#), of the Department of Transport, Tourism and Sport was established in 2013 and works to deliver all the maritime functions of the Department under one single office. It comprises of the Maritime Safety Policy Division, the Marine Survey Office, the Irish Coast Guard, the Maritime Transport Division and the Maritime Services Division. Its role is to facilitate efficient, safe and sustainable maritime transport and the delivery of emergency management services through a National Ports Policy and the implementation and assurance of safety, environmental, technical, labour and enforcement standards and procedures that provide assurance for all who are reliant on the sea.

The [Irish Maritime Development Office \(IMDO\)](#) is a national office that is dedicated to the development and promotion of Ireland's shipping and shipping services sector. Its functions include promoting and assisting the development of the Irish shipping, shipping services and seafarer training, advising the Minister for Transport on policy for the shipping sector, shipping services and ports and carry out policy as specified by the Minister. The IMDO also acts as Ireland's Shortsea Shipping Promotion Agency and provides independent advice and guidance on EU funding.

Unlike in the UK, ports in Ireland are owned and controlled by the State and managed through Port Companies established by statute (the [Harbours Act 1996](#)). These Port Companies act independently to achieve their own commercial goals. However, the shift to larger vessels and emerging economies of scale has led to a decline in some smaller Irish ports such as Drogheda and New Ross. Competition between Irish Ports, and with neighbouring European ports, has driven the development of an Irish [National Ports Policy](#) which was published in 2013. This Policy:

- [Differentiates between Ports of National Significance \(Tiers 1 and 2\) and Regional Significance, based on volume of freight handled. Box 2 highlights the overall hierarchy of ports and the policy implications for each Tier;](#)
- [Reinforces the important economic, social and environmental functions of ports and the need to maintain and improve economic viability;](#)
- [Recognises the importance of Trans-European Networks and the need to develop hinterland connections.](#)

Box 2: Summary of tiered ports policy for Ireland

Tier	Capacity	Key Policy Priorities
Tier 1: Ports of National Significance Dublin, Cork, Shannon Foynes	15-20% of all tonnage through Irish ports	Continued commercial development Provide for future national port capacity requirements
Tier 2: Ports of National Significance Waterford, Rosslare	Over 2.5% of all tonnage through Irish ports	Achieving potential to handle higher volumes of traffic Continue to offer alternative routes to Dublin and Cork for high value unitised sectors (LoLo and RoRo)
Tier 3: Ports of Regional Significance Drogheda, Dun Laoghaire, Galway, New Ross, Wicklow and other smaller ports		May be limited as centres of commercial shipping but have an important strategic role, e.g. serving particular communities or supporting specialised trades and tourism Control to be transferred to local authorities to enable development that is most appropriate for local circumstances

France

In France the [Secrétariat Général de la Mer](#) (SGMer, General Secretary of the Sea) coordinates matters of maritime policy, including issues of safety and security, development of the marine economy, environmental protection and guiding the work of the maritime prefects. SGMer also ensures that decisions taken by the [Inter-ministerial Committee on the Sea \(CIMER\)](#) are executed. CIMER meets periodically and sets the direction of policy relating to sustainable use of maritime resources, spatial planning and environmental protection.

The “[Blue Book](#)” or *Livre Bleu*, published by SGMer in 2009, outlines key issues and priorities for France’s maritime policy¹. This includes the need for a transformation of maritime transport in the context of globalisation. To achieve this, strengthening of the French fleet (both in terms of cargo and cruise ships), encouraging modal shift to reduce greenhouse gas emissions, developing motorways of the sea, simplification of maritime commercial law and making the maritime industries more attractive in terms of employment are key ambitions. Becoming Europe’s interface with the Atlantic Ocean and developing cruise tourism (both turnaround and ports of call) are also identified as opportunities to improve the competitiveness of French ports relative to other European ports.

French port policy in the last ten years has mainly focused on changes in the governance regime of its biggest ports in order to support more integration with their hinterlands and to reverse the trend of decline in the volume of goods handled relative to other European ports.

In 2008 a law on port reform (*Loi n° 2008-660 du 4 Juillet 2008 portant réformé portuaire*) entered into force. This aimed to reform the operations and governance of major ports and to stem the decline experienced between 1990 and 2008, when French ports lost approximately 42% of their market share (goods handled) in Europe². Under this law, the autonomous seaports of metropolitan areas - Marseilles, Le Havre, Dunkerque, Bordeaux, La Rochelle, Nantes and Rouen - were renamed “grands ports maritimes” (GPM, major seaports).

Under the reforms major seaports transferred their port handling operations to private companies, allowing the ports themselves, remaining in public ownership, to focus on key activities of safety, security and policing and management of the port. Other reforms and actions instigated under the port reform law include³:

- Establishment of new governance structures – a supervisory board for each port to oversee strategic projects, directorate for overall management, development council involving local actors connected to the port, and where there are ports on the same façade or river, a coordination council;
- Additional finance for infrastructure projects in the period from 2009-2013, including inland waterways and railways connected to the major seaports;
- The ability to develop strategic projects in conjunction with the state and local authorities on matters including development of land for rail services, other infrastructure, environmental protection and land management;
- Reinforcement of the role of the state in dredging and maintenance of navigable waterways.

¹ Summary version available at http://www.ladocumentationfrancaise.fr/rapports-publics/104000028/#book_sommaire

² <http://www.lenouveleconomiste.fr/lesdossiers/reforme-portuaire-la-nouvelle-donne-16874/>

³ <http://www.vie-publique.fr/politiques-publiques/reforme-port-autonome/loi-reforme-ports/>

Following the law on port reform, a national strategy for the recovery of ports (*la stratégie nationale de relance portuaire*) was launched in May 2013 by the Ministry of Environment, Sustainable Development and Energy. This strategy builds on the port reforms of 2008, recognising that although there is now growth in the French shipping sector, ports have a crucial role in the development of the French economy. The recovery strategy therefore focuses its ambitions in three key areas:

- **Logistics** – ports must become ‘architects’ of logistics solutions which make French ports more competitive and attractive, by developing integrated and sustainable supply chains. This may require cooperation between ports, sharing information and even creating new partnerships. Modernisation of ports, developing connections with other modes (e.g. rail and inland waterways), simplified administrative procedures and new IT services accessible to port actors will assist this change;
- **Industrial development** – recognising ports and their hinterlands as important sites for a variety of economic activities, ports should identify sites and provide land for other sectors that can generate maritime traffic, such as renewable energy. In tandem with this the state will look at reducing time taken to process planning applications for new development;
- **Management** – port plans should take a long term, forward looking approach in their management plans, considering different medium to long term scenarios. Plans should also deal with the way in which the port interfaces with the city and how sensitive or natural spaces are to be managed.

The 2015 Act on the new territorial organisation of France (**NOTRE Act**) has provided the possible transfer of departmental ports to local bodies; these transfers were due to take effect by the beginning of 2017. The 2016 Reform (**Blue economy Act**) has modified the governance scheme of major seaports.

INTERACTIONS WITH OTHER SECTORS AND THE ENVIRONMENT

The ports and shipping sectors play a vital role in the delivery of goods to people, ensuring accessibility and the economic success of nations on Europe's Atlantic seaboard. The development of these sectors in the future will have a range of impacts, both positive and negative, and through their direct or indirect interactions with other sectors and marine users provide additional benefits. These are considered below.

The environmental impacts of ports and shipping include:

- Potential for introduction or spread of non-native species from ballast water (although potential for risk should be minimised by adherence to the Ballast Water Convention);
- Accidental spillage of oils, anti-fouling paints and other pollutants, or discharges of microbial pathogens from ships;
- Air pollution emissions;
- Potential for pollution from marine litter from all types of shipping;
- According to the UK Initial Assessment for the MSFD (HM Government, 2012), it is unclear as to whether an increase in shipping has led to an increase in ambient underwater noise;
- Dredging may lead to habitat loss and smothering where dredged material is disposed of, or expose marine organisms to high concentrations of contaminated sediment. Areas where constant dredging of navigational channels takes place are described as having a 'permanently changing' benthic environment (OSPAR, 2017);
- Development of coastal infrastructure e.g. marina berths, harbour walls could alter hydrographical conditions and sensitive habitats;
- New regulations such as Sulphur Emission Control Areas may cause vessels to anchor in places that were previously not used for this purpose, causing damage to fishing gear. Similarly, there is the potential for fishing gear to become trapped in anchor holes left on the seabed by large tankers and oil or gas rigs, causing vessels to capsize.

In terms of interactions with other sectors, a range of issues must be taken into consideration in future maritime spatial planning activity. These include:

- Ports may support a wide range of established (or new) maritime activities and value chains, including shipbuilding and repair, cruise tourism, aggregate extraction, energy extraction and maintenance of energy infrastructure. Sectors such as fishing and aquaculture, other leisure and tourism activities and defence also benefit from access to port facilities;

- Existing ports may provide suitable locations for servicing the offshore wind sector, for example as bases for the construction of wind turbines (if there is sufficient space available to make this activity feasible), or supporting maintenance vessels during the operational phase of wind farm development;
- Dredging of navigational channels and disposal of materials may have some temporary effects on other sea users and interfere with some uses;
- Competition for space is a major issue for the ports and shipping sector. For ports, capacity to expand and support diversifying activities may be limited by location of the port in built up or intensively used coastal areas. Within the marine environment, Scotland's National Marine Plan (2014) notes that shipping and ferries may conflict with specific recreational uses. The growth of marine leisure and tourism may increase user conflicts within the area closest to the coast (within three nautical miles), however these tend to be temporal or spatial in nature and may be resolved through alignment of terrestrial and maritime spatial planning processes.

POTENTIAL DRIVERS OF CHANGE

Looking to the future of the ports and shipping sectors in the Celtic Seas, the following drivers of development have been identified:

Socio-Political

- Inclusion of Atlantic/Celtic Seas ports within the TEN-T network will enable them to apply for infrastructure funding through the Connecting Europe Facility. This may help them to attract more traffic;
- Emissions Control Areas requiring ships to use low sulphur content fuels;
- Opening up of Arctic sea routes due to receding polar ice such as the North East and North West Passages could generate more shipping traffic in the northern ports of the Celtic Seas.

Economic

- Need to remain competitive with European (North Sea, Mediterranean) and extra-EU ports in Asia;
- Increase in ship size to achieve economies of scale in transport costs – deep water ports and harbours that can accommodate larger ships will benefit from this most;
- Shipping is highly dependent upon the prevailing economic conditions – therefore increasing prosperity or an economic downturn could have implications for global trade;
- EU ‘Blue Belt’ initiative contributing to further reduction of customs formalities for shipping;
- The development of facilities to support the growing cruise tourism market will benefit some ports;
- Potential to draw on local supply chains in established port areas provides a competitive advantage over other port locations.

Technological

- Implementation of common information systems for vessel data may speed up administration for ships calling at certain ports;
- Increasing efficiency of ships through use of Liquefied Natural Gas (LNG) as a fuel, particularly for short sea shipping routes (Ecorys, 2012:54);
- More specialised types of shipbuilding and repair (for example research vessels, retrofitting ships to meet environmental standards and development of alternative fuel sources) could attract new business to shipyards with existing capacity and expertise;
- Development of E-navigation systems, leading to improved navigational safety;
- Port infrastructure needs to keep pace with increasing container ship sizes to maintain competitiveness (e.g. dredging deeper channels, load/unload facilities);
- Advances in marine renewable energy may require the development of test facilities within ports and harbours where there is room for this kind of diversification to take place.

KEY MSP AND CROSS-BORDER CONSIDERATIONS

- Competition between ports to attract the same business, e.g. Irish Sea ports and trans-Atlantic trade;
- Changes to international shipping routes as new ports or additional port capacity becomes available;
- Smaller vessels e.g. some recreational vessels and small fishing boats are not legally required to carry AIS, therefore local knowledge and consultations with local groups is important during the MSP process in order to capture these users as best as possible;
- Interaction between new offshore energy installations (e.g. floating wind turbines) and shipping lanes;
- Wind farms built in deeper waters may be closer to maritime borders and therefore will require a greater level of cross-border consultation. If these wind farms are not being built on banks like wind farms in shallower waters any natural deterrent to shipping crossing these areas is lost, so planning for more navigational safety is required;
- The importance of top-level governance structures and recommendations for dealing with particular issues. The EU must work through international organisations such as the IMO and ILO to achieve a level playing field in the maritime sector (Ecorys, 2011). For specific issues the MSP must also take into account worldwide governance, guidance and regulation, e.g. IMO recommendations for navigating offshore wind farms;
- Understanding by the ports and shipping sectors of the needs and requirements of other marine sectors such as aquaculture and offshore renewable energy – this requires greater stakeholder engagement across sectors;
- Data availability and harmonisation for the creation of plans is important when dealing with different jurisdictions, for example AIS data provided by different countries.

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