

THE STATES OF DELIBERATION
of the
ISLAND OF GUERNSEY

16th June, 2021

Proposition No. P.2021/45

States' Trading Supervisory Board

Future Harbour Development

AMENDMENT

Proposed by: Deputy S Kazantseva-Miller

Seconded by: Deputy S Haskins

After Proposition 2, insert the following:

"2A. To direct the Policy & Resources Committee, through its seafront regeneration sub-committee, in consultation with the Committee *for* Economic Development, the Committee *for the* Environment & Infrastructure, the marine industry and other relevant stakeholders, to undertake a detailed analysis of economic opportunities from developing an enhanced Blue Economy offering across the Guernsey Seafront Enhancement Area, including but not limited to leisure marinas, super yachts, over-wintering, marine service industry, marine tourism and other commercial opportunities and use the findings to develop proposals for such an enhanced Blue Economy offering to be submitted in the form of a Policy Letter and suitable Propositions for the States for approval by the end of December 2022."

Rule 4(3) Information

The costs of this work will be developed by the Policy & Resources Committee but are expected to be included within the £4 million envelope referenced in section 11.14 of the Policy Letter.

Explanatory note

It is recognised that the States Trading Supervisory Board has focussed primarily on scoping commercial requirements for future harbours with the corresponding spatial options reflecting such approach, which can be seen as restrictive to the future development of the Blue Economy in general and the leisure sector in specific.

It is considered that a more specific instruction to the Policy & Resources Committee to consider the economic opportunities presented by developing Guernsey Harbours and the Seafront Enhancement Area in consultation with industry and relevant committees is important at this early stage.

In 2019, the States directed the STSB to “carry out a detailed analysis of the future harbour requirements”. A study by Jacobs was undertaken looking into the demand forecast for different types of commercial and leisure uses.

Table 2: Jacobs demand forecast and additional spatial requirements.

	Historic trend/ current demand		2050 demand forecast		Additional facilities required ¹²
	2008-19	2019	Low	High	
LoLo/RoRo cargo ¹³ (tonnes)	↓ 0.8%	200,000	193,100	303,000	+3,000m ² landside LoLo +1,600m ² landside RoRo
Bulk fuels (tonnes)	↓ 2.5%	75,000	42,000	69,300	New terminal & storage facility location or convert to unitised cargo
Bulk solid cargo ¹⁴ (tonnes)	↓ 6.2%	41,000	0	135,000	No further requirements
International passenger traffic	↓ 0.6%	288,000	236,000	528,000	+300m ² passenger terminal, +1,000m ² parking, 15m berth extension
Private & small commercial vehicles	↓ 0.5%	95,000	84,000	157,000	+1,650m ² landside
Car import and export ¹⁵	↓ 7.5%	3,570	1740	5,020	No further requirements
Inter-island passengers	↑ 1.1%	137,000	100,000	183,000	No further requirements
Inter-island freight (tonnes)	↑ 0.5%	9,800	7,170	19,950	No further requirements
Visiting yachts	↓ 2.3%	8,800	6,500	14,300	2 x shower/toilet blocks
Local yachts ¹⁶	↑ 0.7%	1,767	646	2,110	+32,000m ² +343 berths
Super yachts	↑ 33%	29	6	70	90m berth, 4.5m deep; 90m ² fuelling area
Fishing & charter vessels	↓ 2.6%	120	46	149	+1,650m ² marine area for +29 berths
Cruise ¹⁷	↑ 0.4%	116,000	95,000	286,000	50m tender berth extension

The highest projected demand for local yachts is estimated to increase by 19% between 2019 and 2050, equating to an additional spatial requirement of 32,000 m² or 343 new berths. The

Jacobs study did not take into account any additional economic opportunities from servicing new markets such as over-wintering.

The current indicators from the marine industry via feedback from industry associations, show a significantly higher level of demand than can be met by the current capacities of our harbours, including a lack berths for bigger boats.

It is estimated that the maximum number of additional berths that could be provided by options 5.1, 5.2 or 5.3 and a Pool Marina concept in St Peter Port is 500 berths, representing a total capacity increase of 30%. In comparison, the development of the QE2 marina increased the harbours' capacity by 766 berths, representing an 83% increase.

Address future requirements for leisure facilities	5.1	New St Peter Port Harbour breakwater and marina with extended St Sampson's marina
	5.2	New breakwater, fish quay and marinas in St Peter Port harbour
	5.3	New breakwaters and marinas in St Peter Port Harbour with repurposed commercial berths

An extract from Table 3, p 20.

From an economic enablement opportunity, a 30% increase in the harbours' capacity may not be deemed sufficient to future-proof Guernsey and to significantly enhance its Blue Economy offering.

Recent marina developments in neighbouring Brittany outstrip the numbers considered as the basis for Future Harbour development.

- *St Cast, Brittany – 825 berths marina built in 2009*
- *Roscoff, Brittany – 625 berths marina built in 2016*

Following feedback from representatives of the marine trade in Guernsey, it is understood that the extent of consultation undertaken with the marine leisure industry so far has been limited in scope and cut short by the onset of the Covid pandemic in 2020. The amendment highlights the need to engage with the industry in developing and enhancing proposals to build the business case for Future Harbours development, including addressing concerns with the low estimates of demand forecasts for yachting from local and international customers as well as lack of consideration for additional Blue Economy business opportunities.

Without detailed economic considerations, this policy letter risks limiting the development of marine leisure and the wider future Blue Economy offering in Guernsey as the options developed within the policy paper have a constraint on the increase of the overall capacity of harbours of 30%.