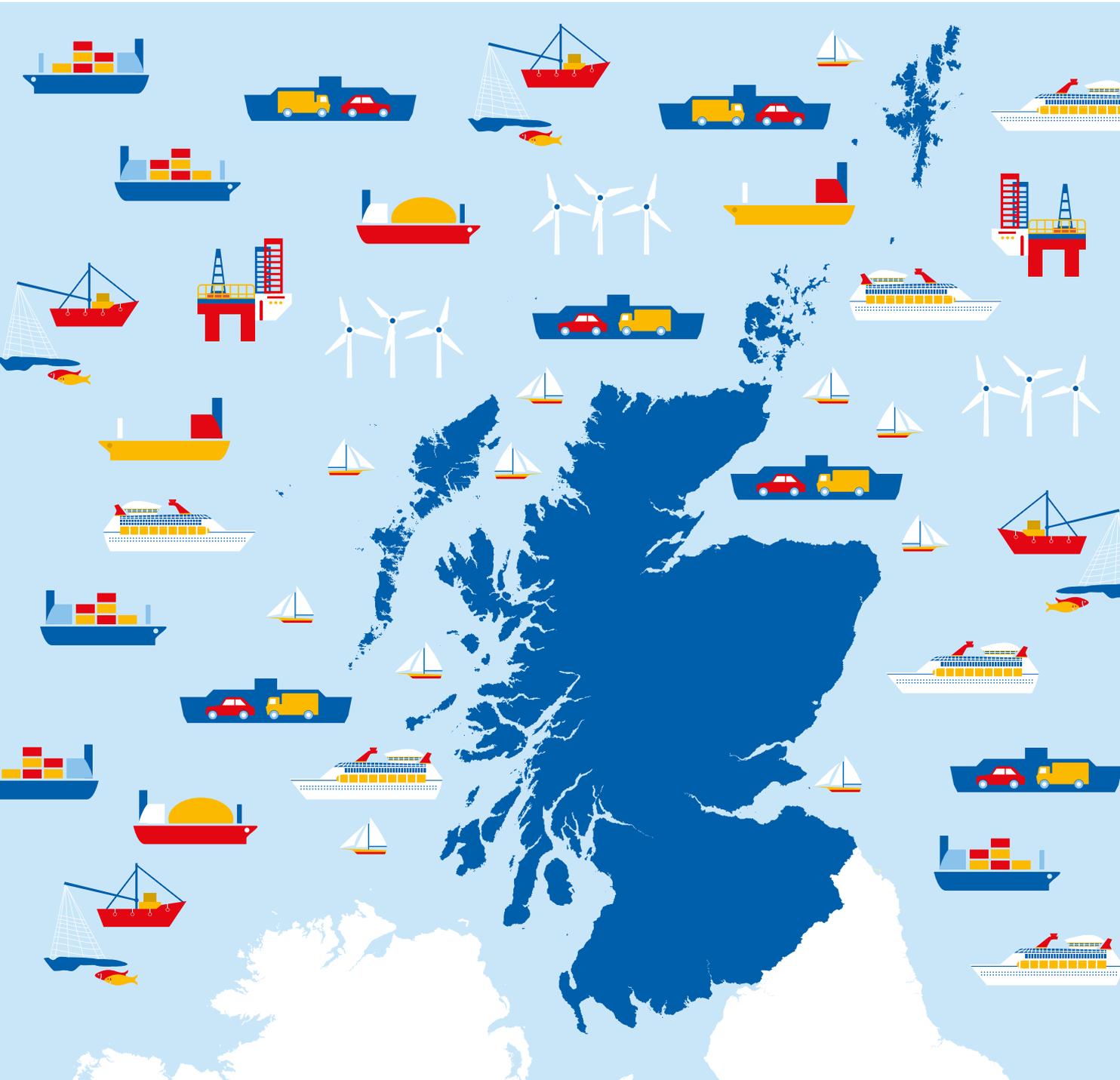




Scottish Ports: Gateways for Growth



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Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean



Highlands and Islands Enterprise and Scottish Enterprise have supported the production of this document. The views expressed are those of the British Ports Association and Scottish Ports Group.

Gateways for Growth

Scottish ports are fundamental to the Scottish and UK economies. They play a unique role, not only providing a base for trade and employment, but in connecting communities. They also provide the landside gateways for vital industries such as offshore energy, fishing and cruise sectors.

Scotland has a rich coastal heritage and ports provide important bases for maximising the opportunities presented from a number of economic activities. With the right conditions there could be real benefits from offshore decommissioning, renewable energy, further increases in cruise activities and new fisheries management arrangements.

Scotland's ports industry is diverse, successful, and market driven. The industry is financially and strategically independent of government. Investment decisions are based on market need and changes in demand, as with the current growth in demand from the offshore renewables industry.

Ports in Scotland make a significant contribution each year to national and local economies through tax contributions, high-quality and productive employment. They support and enable the wider "marine economy" to thrive, from ship building to aquaculture.

Scottish Ports Group

The Scottish Ports Group is the only industry-led forum representing the views of this important and dynamic sector, which is a major contributor to the success of the Scottish economy. Coordinated by the British Ports Association, it holds regular meetings with the Scottish Government and other key decision makers.

The Scottish Ports Group works closely with the Scottish Government and other key decision makers such as the Highlands and Islands Enterprise and Scottish Enterprise who have supported elements of this document.

Highlands and Islands Enterprise

As the Scottish Government's economic and community development agency for north and west Scotland, HIE's purpose is to generate sustainable economic growth across the Highlands and Islands. Their vision is for the Highlands and Islands to be a highly successful and competitive region in which increasing numbers of people choose to live, work, study and invest.

Scottish Enterprise

Scottish Enterprise is Scotland's main economic development agency and a non-departmental public body of the Scottish Government. They work with partners in the public and private sectors to identify and exploit the best opportunities to deliver a significant, lasting effect on the Scottish economy.

The content within this brochure represents the position of the Scottish Ports Group and is not necessarily representative of the views of Highlands and Islands Enterprise or Scottish Enterprise.

Keeping Scotland Supplied

95%

of trade comes through seaports

67m tonnes

of freight was handled by Scottish ports, 14% of the UK's total. This is equivalent to

13 tonnes

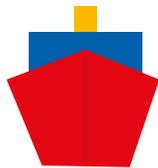
of freight per person, double that of England¹

30,000+

commercial vessels called in Scottish ports in 2015, including 21,000 cargo vessels²

25%

of Scotland's total annual freight tonnage is transported by water



Keeping Scotland Connected

As well as providing the foundation for Scotland's trade with the world, the ports industry plays an important role in connecting communities. Ferries are a vital part of the transport network and each year ports in Scotland handle **10.5 million domestic ferry passengers³** travelling both within Scotland and to and from Northern Ireland.

These routes also provide important links for national and regional business carrying more than 3 million HGVs, commercial and private vehicles. This has been increasing in recent years with ferries carrying more vehicles now than they have done within the past decade.

Ports are important not just in their traditional cargo handling roles. They have a long experience in supporting offshore energy, fishing, cruise and leisure markets. They provide vital locations for the development of offshore energy which are a key part of Scotland's energy, growth and decarbonisation agendas.

Brexit and Scottish Ports

Ports are quite literally at the frontier of the UK's future trading arrangements as we prepare to leave the EU.

The British Ports Association has spoken with a number of Scottish Ministers and officials as well as with their counterparts from a wide range of Westminster departments since the UK's EU referendum. Priorities for the ports industry include tackling potential challenges on the possible re-introduction of frontier and customs controls on European port routes, environmental policy changes, new trade opportunities, transport infrastructure investment and stimulus, and the impacts and outcomes across the fishing sector.

There will of course be opportunities for Government to look at the UK's regulatory framework, post-Brexit. A number of technical rules stemming from Brussels have had varying impacts on ports but of particular recent concern for industry is the forthcoming EU Port Services Regulation. This creates new rules for service provision in ports and was designed with the port governance models that exist in other member states in mind. It will cover 43 port locations in the UK and is something the ports industry would like to see overturned once the UK leaves the EU.

Providing Quality Jobs

14,800 people
in Scotland are directly
employed in the ports
industry⁴

£1.9bn
estimated GVA* contributed
to Scotland's GDP each
year by the Scottish
ports industry. In addition
to handling millions of
passengers and tonnes of
cargo, the ports industry
offers a wide range of other
services

£630m
contributed by the wider
maritime services sector in
Scotland through corporation,
labour and indirect taxes

Scotland's ports are vital
enablers of the wider maritime
sector, which is worth
£4.2bn
in GVA, and employs
48,100 people
in Scotland and generates
£88,300
GVA per worker⁵

* GVA (Gross Value Added) is the measure of the economic value generated by an industry and is defined as the difference between output and the cost of production.

The Economic Contribution Of The UK Ports Industry, The Centre for Economics and Business Research (CEBR), commissioned by the BPA and Maritime UK www.britishports.org.uk/news/new-cebr-ports-report-released

Port Connectivity

The Ports industry plays its part in investing in infrastructure to keep trade moving – in 2018 there was over £1.7bn of capital infrastructure projects in the pipeline in the UK⁶. The industry relies on Government to ensure that road and rail connections from the port gate are fit for purpose.

The Ports industry would like to see terrestrial and marine planning systems and consenting processes that are far more supportive of sustainable development.

In Scotland, the British Ports Association participates in Transport Scotland’s high level Scottish Freight and Logistics Group (ScotFLAG) with other key stakeholders looking at issues facing the wider freight and logistics industries. We also chair the sub-group on Last Mile Connections.

The British Ports Association also represents the Scottish Ports Group on a range of Scottish Government initiatives such as the Strategic Transport Projects Review and recently as one of the stakeholder members of the advisory groups as part of the review of the National Transport Strategy.

Port Connectivity: Industry Asks

	Desired Works
ABERDEEN	<ul style="list-style-type: none"> Freight priority lanes in roads.
CAIRNRYAN / LOCH RYAN	<ul style="list-style-type: none"> Dual carriageway extension on the A75 and A77 all the way to the ports.
FORTH PORTS	<p>Port of Grangemouth</p> <ul style="list-style-type: none"> Upgrade of the A801 Avon Gorge to provide an improved HGV connection between the M8 and M9 motorways. Flood defences to be installed at appropriate parts on the upper Forth and Grangemouth, including the Grange Burn and River Carron. Flood defence options for the Grangemouth area are currently being developed by Falkirk Council in conjunction with a number of partners. <p>Port of Leith</p> <ul style="list-style-type: none"> Improved road connections from the East to the Port.
FRASERBURGH	<ul style="list-style-type: none"> A project to dual the carriageway between Aberdeen and Ellon and to provide a bypass around Aberdeen is underway. The dual carriageway should be extended north of Ellon to Fraserburgh to remove congestion and delays on this stretch and alleviate accident blackspots. Formation of a fifth spur at roundabout at south entrance to Fraserburgh.
INVERNESS	<ul style="list-style-type: none"> New grade separated junction at the Longman Roundabout. This is the main access and egress from the A9 for port traffic. The proposals are linked into the dualling programme of the main A9.
LERWICK	<ul style="list-style-type: none"> Replacement of the linkspan with a wider linkspan to suit the next generation of ro-ro vessels. Also a modern linkspan requires one operator (compared to two with the current infrastructure) therefore saving operational costs.
MONTROSE	<ul style="list-style-type: none"> Improved road links to the port to and from the A90 Aberdeen / Dundee and the A92 Montrose / Dundee.

	Desired Works
OBAN	<ul style="list-style-type: none"> • Improvements to road system in the town and replacement bridge. Also replace the railway tracks with more accessible tramline tracks which maintain the train line but would allow road vehicles to drive over the tracks when the line is not in use. This would create more queueing space at the port terminal reliving pressure in the town centre.
PERTH	<ul style="list-style-type: none"> • Improved road links to and from the harbour, Edinburgh Road and Junction 10 of the M90 (steep hill and sharp bend). New access road required from harbour to Edinburgh Road / M90. Currently there is no access from the Southbound M90 or access to the Northbound M90 at Junction 10 requiring harbour traffic to go through the congested City Centre.
PETERHEAD	<ul style="list-style-type: none"> • A project to dual the carriageway between Aberdeen and Ellon and to provide a bypass around Aberdeen is underway. The dual carriageway should be extended north of Ellon to Peterhead to remove congestion and delays on this stretch. • The junction at Kirk St / Charlotte St in Peterhead should be realigned to facilitate larger vehicles making the turn.
SCRABSTER	<ul style="list-style-type: none"> • Removal of hairpin bend and improve road alignment. These works would improve journey times and road safety by removing the need for vehicles to slow down or stop to negotiate the bend.
STORNOWAY	<ul style="list-style-type: none"> • Replacement linkspan.
ULLAPOOL	<ul style="list-style-type: none"> • Widening of the A835.
All North West Coast Ports OBAN, MALLAIG, FORT WILLIAM, TOBERMORY, CRAIGNURE, UIG, PORTREE and on to INVERNESS and others	<ul style="list-style-type: none"> • Improve all sections of the A82 below modern twin track trunk road standards before 2020. • Passenger and Freight numbers and volume from these ports could collectively even justify EU TEN-T funding for the A82.

Port Ownership and Governance

Just as the markets they serve vary, so do ports themselves. The ports sector in the UK has changed substantially over the last twenty years. A process of deregulation has created a ports sector which is the second-biggest and unique within Europe.

For the most part, ports in the UK fall into one of three ownership categories. All three models are open to market forces, and are run independently of central government as stand-alone, self-financing enterprises, free from systematic Government support or subsidy.

Trust Ports

A trust port is an independent statutory body governed by its own unique legislation and controlled by a local independent board. Any profits trust ports make are re-invested into the port.

Trust ports operate in a commercial environment usually with no direct public funding and compete in the market with private and local authority ports as well as other trust ports. There are no shareholders or owners and profits are reinvested in the port. Trust ports have a high degree of accountability to port users and their communities.

A number of Scotland's ports are trusts including Aberdeen, Cromarty Firth, Eyemouth, Fraserburgh, Inverness, Lerwick, Mallaig, Montrose, Peterhead, Scrabster, St Margaret's Hope, Stornoway, Tarbert (Loch Fyne), Ullapool and Wick.



Privatised Ports

Private ports are privately owned companies, often by equity groups or private owners. Private ports can attract significant, privately financed investment and the largest ports are often owned by ports groups, for example most of the ports and terminals on the Forth estuary are collectively owned by Forth Ports who also own the Port of Dundee, while on the West Coast, Clydeport is owned by Peel Ports, Kishorn is owned by Ferguson Transport & Shipping and Leiths Ltd, the quarry port of Glensanda is operated by Aggregate Industries Group, the ferry ports of Cairnryan (P&O) and Loch Ryan (Stena Line Ports) while Ayr and Troon are both owned by Associated British Ports. Other smaller privately owned ports and piers include Westway Dock, Gills Bay and Lossiemouth.

Local Authority Ports

Local authority owned ports are the most diverse and plentiful group of ports. The ports are managed in varying ways but are accountable through a board of one or more elected local councillors. There are local authority owned ports located in Aberdeenshire Council, Angus Council, Argyll and Bute Council, Dumfries & Galloway Council, Highland Council, Moray Council, North Ayrshire Council, Orkney Islands Council, Perth & Kinross Council, Renfrewshire Council, Shetland Islands Council, West Dunbartonshire Council and Western Isles Council.

Other Ports

There are other types of port in Scotland and all are equal members of the Scottish Ports Group. The network of ferry ports owned by Caledonian Maritime Assets Ltd, and some of these harbours are managed by Caledonian MacBrayne Clyde & Hebridean (Calmac) Ferries and separately Tobermory Harbour is run as a community port.



Port Activities

Harbour Authorities each have different powers and responsibilities, set out in their enabling legislation or Harbour Orders. Regardless of the type of business the port is engaged in, most share some common activities that protect users of the harbour on land and on the water.

Conservancy and Navigation

Harbour authorities have a legal duty to conserve the harbour so that it is fit for use as a port. This conservancy duty includes responsibility to:

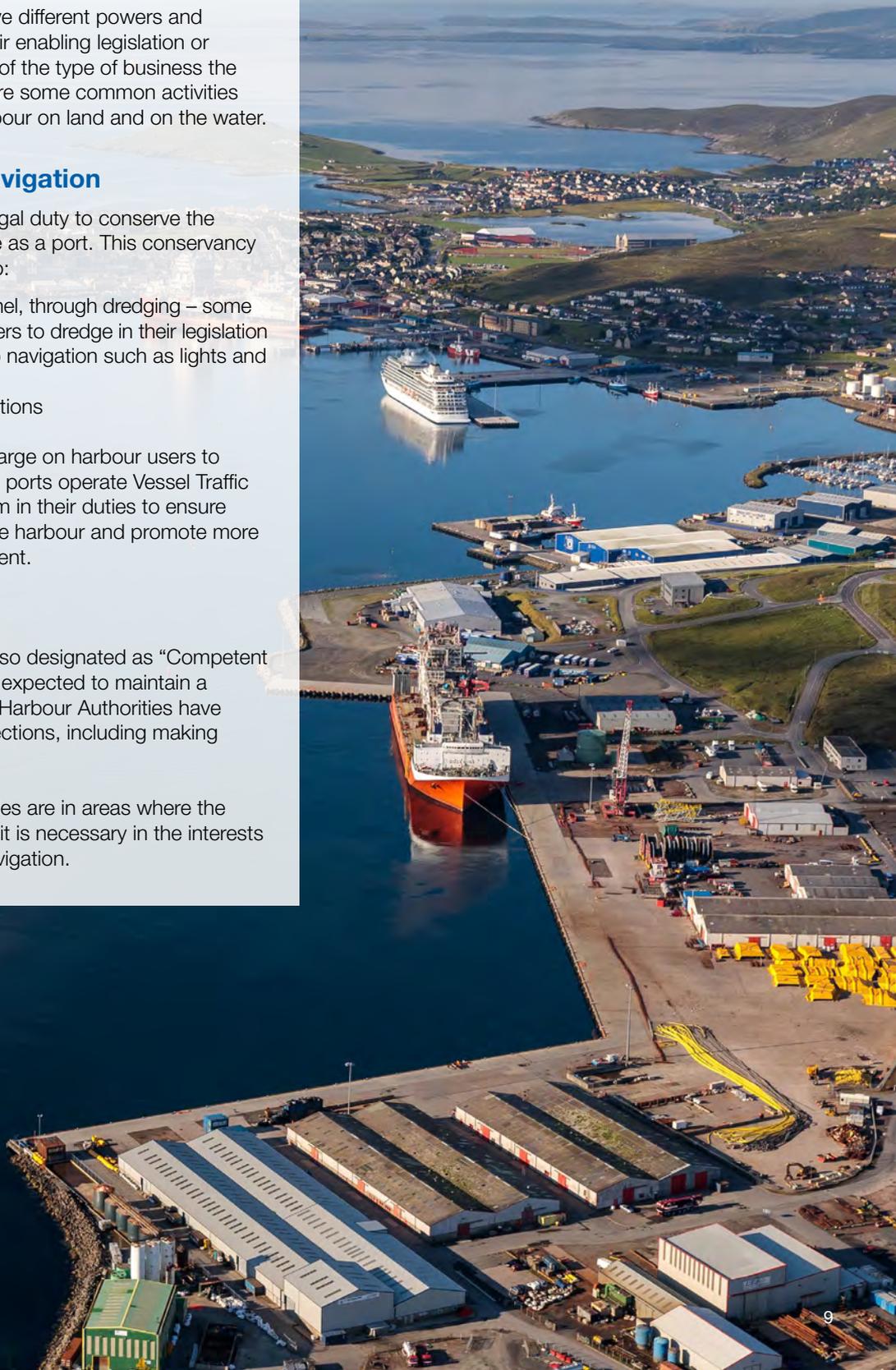
- maintain a navigable channel, through dredging – some ports have automatic powers to dredge in their legislation
- place and maintain aids to navigation such as lights and buoys
- remove wrecks or obstructions

Harbour authorities levy a charge on harbour users to pay for these activities. Many ports operate Vessel Traffic Services to help support them in their duties to ensure safe navigation and use of the harbour and promote more efficient vessel traffic movement.

Pilotage

Certain port authorities are also designated as “Competent Harbour Authorities” and are expected to maintain a pilotage service. Competent Harbour Authorities have powers to make pilotage directions, including making pilotage compulsory.

Competent Harbour Authorities are in areas where the Secretary of State considers it is necessary in the interests of efficiency and safety of navigation.



Safety

Port Marine Safety Code

The industry takes the safety of its employees and harbour extremely seriously. The Port Marine Safety Code is a national standard for port safety and it is managed by the Maritime Coastguard Agency. Port authorities and organisations operating in the marine environment, including berths, terminals and marinas, are expected by Government to comply with this Code through the adoption of a marine safety management system. It is reviewed periodically by a steering committee of industry and Government representatives and is designed with an approach that allows everyone, from major ports to smaller marine terminals and harbours, to proportionately apply the principles upon which it is based.

Port Skills and Safety

The BPA has strong links with Port Skills and Safety (PSS), a national organisation which provides advice on safety issues and promotes best practice throughout the UK. PSS is the standards setting body for the ports sector and work with employers and other key stakeholders to maintain a suite of National Occupational Standards for Port Operatives, Harbour Masters, Marine Pilots and VTS. It has developed port qualifications and apprenticeship frameworks based around SVQs in Scotland and are also responsible for the development and introduction of a national certificate for Harbour Masters with the UK Harbour Masters' Association. This is the only Harbour Master qualification that is endorsed by the Maritime and Coastguard Agency.

PSS work closely with the ports industry, the HSE and trade unions in promoting safety in the workplace and improving the safety culture throughout the industry. One way they work towards achieving this goal is collectively developing the "Safety in Ports" suite of guidance. The guidance currently covers General Cargo, Container handling, Mooring, Dry Bulk handling, Bulk Liquid transfer, to name a few.



Sustainable Development

95% of freight to and from the UK is carried by sea

As well as being cheaper, shipping has a much lower impact when it comes to CO₂ emissions than road, rail or air (see table below). Encouraging more freight movement by sea and water is a crucial tool for lowering freight emissions – although this must be backed up with investment in connectivity to ensure bottlenecks do not form around the port gate.

Mode of Transport	Grams of CO ₂ /tonne-km
Shipping 	
Large bulk carrier (200,000+ dwt)	2.5
Large crude oil tanker (200,000+ dwt)	5.7
Large container vessel (8000+ TEU)	12.5
Rail 	
Intermodal (container) train	35
Diesel locomotive	49
Road 	
Truck (40 tonnes+)	80
Air 	
Boeing 747	435
Ilyushin IL 76T	1,100

Marine Planning

The Marine (Scotland) Act 2010 introduced national and regional marine planning to Scotland. The British Ports Association believes that marine plans should form the foundation of the marine planning system and not be an additional extra or “filling in the gaps”.

The Marine Plan is designed to inform the consenting process. This helps developers and planners see where conflicts might arise and how they might be mitigated or removed. The National Marine Plan was reviewed in 2018 and the ports industry hopes that this and new regional planning partnerships will lead to improvements in the sustainable development process.

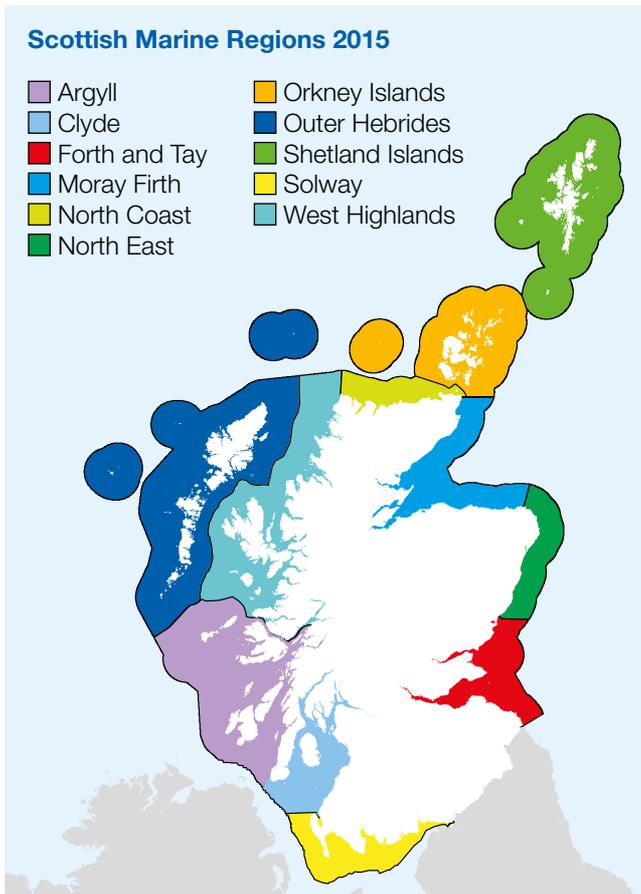
Scotland's National Marine Plan was published in 2015 with 11 sector chapters. The *Shipping, Ports, Harbours and Ferries* chapter set out five objectives:

1. Safeguarded access to ports and harbours and navigational safety.
2. Sustainable growth and development of ports and harbours as a competitive sector, maximising their potential to facilitate cargo movement, passenger movement and support other sectors.
3. Safeguarded essential maritime transport links to island and remote mainland communities.
4. Linking of ferry services with public transport routes and active travel routes to help encourage sustainable travel where possible.
5. Best available technology to mitigate and adapt to climate change, where possible, supporting efficiencies in fleet management and ensuring port infrastructure and shipping services are able to adapt to the consequences of climate change. Consideration of the provision of facilities for shoreside power in new developments to allow for this to be provided when markets require it, if it becomes cost effective to do so.

Source: IMO Second GHG Study www.imo.org/en/OurWork/Environment/PollutionPrevention/AirPollution/Documents/SecondIMOGHGStudy2009.pdf

Sustainable Development

In 2015 the Scottish Government established 11 “marine regions”, where marine planning will be undertaken by Marine Planning Partnerships made up of stakeholders in the area. These partnerships have delegated planning powers (although not over licensing or consents). Regional marine planning is new in Scotland and members of the Scottish Ports Group have supported the new regional Partnerships where they have been created.



Marine Protected Areas

Ports and harbours take their environmental responsibilities very seriously. There are a web of different types of domestic and international environmental protections that can be designated in Scotland. As of 2017 these included 60 designated or proposed *Special Protection Areas* for birds, 22 inshore *Special Areas of Conservation* for certain types of habitats, and well as 17 inshore *Marine Protection Areas*.

Ports and harbours are, in many cases, well-established industrial areas that support vital economic activity and thousands of direct and indirect jobs. The industry supports sustainable development and Scottish ports take huge steps to protect and enhance the environment in which they operate. Over the years, however, many port authorities have found marine protections and their associated licensing conditions increasingly hard to work with. It is important that Scottish ports operate in a commercial environment that does not regularly involve unnecessary delays or stop sustainable development.

In order to compete on a level playing field with European ports, the Scottish Ports Group and British Ports Association call on Government to support the sector and provide:

- A terrestrial and marine planning consents system that supports fast-track planning around ports, which are centres of industry
- Proportionate licensing conditions
- Longer term licenses where appropriate
- Reasonable exemptions and fast-track applications for low impact and existing activities
- Properly resourced licensing and consenting bodies and regulators
- Credible, up to date evidence in support of marine designations and licensing
- A closer link between marine plans and the actual licensing and consenting system



EcoPorts

EcoPorts is the main environmental initiative of the European port sector. The overarching principle of EcoPorts is to raise awareness on environmental protection, creating a level playing field through cooperation and the sharing of knowledge between ports to improve environmental management. EcoPorts celebrated its 20-year anniversary in 2017 and is refreshing its initiatives including the two main self-assessment tools that the network uses to address the environmental challenges they face. Over 100 ports across Europe are EcoPorts, including Peterhead, a long supporter of the programme, having been certified continuously since 2008.

Brexit

The UK's exit from the European Union impacts ports in a number of areas, from trade and cargo to fishing. The British Ports Association is particularly keen to explore opportunities to improve post-Brexit planning and consenting regimes, however.

The British Ports Association has called for new "Port Development and Enterprise Zones" to be created. This would involve designating UK port areas as special zones with supportive business, tax and planning conditions to encourage regional and coastal development. The industry is building a case to show how this would boost trade and economic growth at minimal cost to the Exchequer.

The BPA's Port Development and Enterprise Zones would cover ports, tenants and industrial clusters. While respecting the three pillars of sustainability – environmental, economic and social – the British Ports Association believes a review of the implementation of the Birds and Habitats Directives is critical to the functioning of an effective port zoning policy. Ports are industrial areas and Brexit offers a fresh opportunity to examine how Government can deliver the right regulatory conditions for industry to function and grow and support jobs and the economy.

We support the inclusion of the maritime sector in the Scottish Government's economic, industrial and transport strategies.



Crown Estate Scotland

Following the recommendations made by the Smith Commission in relation to the future of the Crown Estate, the Scottish ports industry has been closely monitoring the process to transfer the management of the marine assets to Scotland.

Depending upon the final model this could represent a major change from the current situation whereby many ports have lease agreements with the Crown Estate. This has added to the operational costs of the ports industry in Scotland, not to mention the time taken to negotiate lease agreements for every new project. Indeed some in the sector view such leases as a mechanism to tax ports.

Crown Estate Scotland assets are relatively modest, standing at a total of around £3m annually.

The Scottish Ports Group has been keen to explore the possibility of Statutory Harbour Authorities being given the option to take on the management of Crown Estate Scotland assets within their harbour areas.



About the Industry

Cargo



Scottish ports handle a wide range of cargo, with an array of dry bulk goods such as coal, timber, aggregates, paper, agricultural products, fertilizers, peat, salt and scrap metal entering and leaving the country through ports every day. The ports industry also handles people and supplies for the offshore energy industry and could potentially receive large amounts of decommissioned oil and gas installations in years to come.

The Central Belt is the focus of much of Scotland's container shipping industry as well as the main point of entry for significantly high levels of coal imports, much of which is transported onto England. The west coast of Scotland exports more than seven million tonnes of aggregate each year to various destinations all over the world.

In the 30 years since it started operating in 1986, over 150,000,000 million tonnes of aggregate have been shipped out of Glensanda. Today, the port loads almost one ship a day on average.

210,000

**Grangemouth:
TEU container
annual throughput**

100,000

**Greenock:
TEU container
annual throughput,
with plans to handle
200,000 by 2021**



Customs Arrangements and Trade

In terms of trade, EU membership enables UK-European cargo to move across borders and therefore through ports without needing customs and other checks, essentially with minimal disruption. This benefits a wide range of cargo traffic, particularly those of animal and plant origin. The British Ports Association has welcomed the Prime Minister's aspiration of "frictionless" trade but the impact of customs requirements could be that port traffic faces disruption from Government border checks and potential inspections. Such checks and delays represent costs for shippers and the freight sector, and these costs will be passed on to importers, manufacturers and consumers.

The impact of any future tariffs on intra-EU traffic however is less clear to our members. Tariffs are usually collected away from ports and administered by shipping agents so their introduction is less concerning. Unlike customs clearances, the payment of tariffs for example is not conditional on freight being allowed to leave a port. The macro impact of tariffs on the economy and consequently on ports trade is less understood however and we would hope that the UK Government is considering this fully.

Other factors post-Brexit such as the wider economic impacts on the domestic economy and investment could be equally or even more important. Confidence in the economy and the currency are essential for stable volumes of trade.



As new shipping routes begin to open up in the Arctic, Scottish ports will be well-placed to handle deep draught cargo and cruise traffic to and from the Far East.

About the Industry

Offshore Energy – Oil and Gas



The Scottish oil and gas industry is of immense economic significance to Scotland and the UK. Due to their proximity to North Sea oil and gas fields, Scottish ports provide an essential role supporting the sector.

Each year Scottish ports handle over 32 million tonnes of oil and gas products, with 47% of Scotland's total energy use coming from petroleum products largely extracted from North Sea fields.

Sullom Voe on Shetland and Flotta on the Orkney Islands play a major role in transferring North Sea crude oil and gas from their pipelines onto tankers. Ports such as Cromarty Firth and Dundee have a vital role to play in servicing drillings rigs, while Aberdeen and Peterhead are major hubs for logistics, supply and all types of vessels.

It is estimated that the UK oil and gas industry currently supports more than 302,000 jobs, 38 per cent of which are in Scotland. As a hub for North Sea oil and gas, the city of Aberdeen and Aberdeenshire supports a majority share. Aberdeen Harbour alone supported 12,000 full-time jobs in 2016, many of which are in the oil and gas sector.

Whilst the North Sea is a mature producing basin, new reserves are still being found and further developments are in the pipeline. 40 billion barrels of oil equivalent (boe) have been extracted from the UK Continental Shelf (UKCS) since the 1970s. There are still up to 20 billion boe to recover and in June 2017, the biggest project in a decade – the Kraken field – began production with an estimated lifetime of 25 years. Future opportunities are anticipated for West of Shetland oil and gas fields, with significant exploration already underway.

As remaining reserves have become harder to extract, and alongside global businesses continuing to invest in the basin, the UKCS is attracting a range of companies specialising in optimising production from mature fields and extracting hydrocarbons from more challenging and deeper waters.



Scapa Flow, Orkney

Consequently, since the 2014 downturn a number of these companies have achieved remarkable gains in productivity levels within the UKCS, allowing sustained operating costs to be reduced while simultaneously increasing net production. Throughout the global oil and gas downturn, ports and harbours in Scotland have remained extremely resilient in adapting their offering to cover the growing demand for inspection, repair and maintenance of offshore assets.

The North Sea must compete for investment with a range of other oil producing regions around the world. Scotland's financial and political stability and well-developed port support services compare very favourably against international counterparts.

The Scottish Government's 2017 Energy Strategy recognises that the success of Scotland's existing energy industries provides the "engineering and technical bedrock" that the offshore renewables industry will be built on. It's widely recognised that demand for North Sea oil and gas will remain for the foreseeable future, whilst Scotland's renewable energy market continues to develop and compete more readily with traditional energy sources.

>32m tonnes of oil and gas products handled by Scottish ports each year

60% The amount Scotland has of total EU oil reserves (estimated)



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd's nan Eilean

 **Scottish Enterprise**

About the Industry

Offshore Wind and Marine Renewables



Scotland is ideally placed to lead the world in offshore renewables, with 25% of Europe's offshore wind resource, as well as an existing network of ports and harbours with expertise to support the manufacture, assembly and supply requirements of North Sea wind farms.

Scotland's energy ports have a wide range of capabilities and infrastructure in place to support offshore renewables. From laydown areas and heavy lifting capacity, to manufacturing and assembly plants, as well as bases for supply vessels and crew transfer, ports are an important enabler of the offshore sector.

Recent success in the offshore wind sector can be seen in the development of the 588MW SSE-led Beatrice Offshore Windfarm Ltd (BOWL) and Statoil's Hywind floating offshore wind project. Several Scottish port and harbour sites have been successful in these renewable projects, including Peterhead, Port of Cromarty Firth, Nigg Energy Park and Wick Harbour, indicating the confidence which key industry players have in Scotland's infrastructure.

September 2017 brought with it the latest UK Government CfD auction results, with EDP Renewables (EDPR) achieving a highly competitive strike price of £57.50MW/h for their 950MW Moray East offshore wind project. This result is indicative of the advances made by the UK offshore wind sector in recent years and the dramatic cost reduction in providing reliable, cost effective and low carbon electricity.

Scotland has:

 **25%** of Europe's offshore wind resource

 **25%** of Europe's tidal energy resource

 **10%** of Europe's wave energy resource

Source: Scottish Government⁷



Credit: Beatrice Offshore Windfarm Ltd

The ever-growing competitiveness of offshore wind with mature and traditional energy sectors highlights the major opportunities which Scotland's ports and harbours will prosper from.

With unique natural resources and complementary supply chain expertise, the marine energy industry remains a fantastic opportunity for Scotland. Global installed capacity of wave and tidal stream energy devices peaked at 25MW in 2017, with deployments in Scotland contributing significantly. In the Pentland Firth, Atlantis Resources' 6MW MeyGen Phase 1A remains the world's first utility scale grid-connected tidal array energy farm. The world-leading support stemming from the European Marine Energy Centre (EMEC) in Orkney and its supporting local infrastructure, continues to advance the developments in wave and tidal stream energy and is helping to commercialise these emerging sectors.

In the development of a globally competitive renewable energy sector in Scotland, port and harbour sites throughout the country will be vital to ensure the industry is effectively constructed and serviced.

About the Industry

Decommissioning



The Oil and Gas industry estimates that £17bn will be spent on decommissioning oil and gas installations on the UKCS between 2017 and 2025. In the UKCS alone, 302 oil and gas installations, 373 subsea installations, 16,000km of pipelines and more than 5,000 wells will all eventually need to be decommissioned.

With a strong track record developing around decommissioning projects, Gross Value Add (GVA) direct and indirect impacts for Scotland could reach £11.3 billion by 2025, supporting a peak of up to 22,775 jobs.

Scottish ports are vital in supporting decommissioning work and are investing in infrastructure to be able to compete with ultra-deep water Norwegian ports. In 2017, Dales Voe was selected by the decommissioning partnership of Veolia and Peterson for the dismantling and recycling of the BuchanAlpha Floating Production Unit, highlighting this premier facility which has been established in Shetland.

It is important that support for Scottish industry and the Governments' decommissioning strategy continue to enable large scale investment and transformation in the long term.

Ship-to-ship oil and LNG transfer operations

Ship-to-ship oil transfer operations help reduce the number of overall tanker movements. Regulations requiring a license to ensure such operations are properly monitored and conducted in a safe manner came into force in 2012.

There were 132 Ship-to-ship oil and LNG transfer operations between 2010 and 2015, an average of 26 a year with 9,471,977 tonnes of oil in total transferred safely.⁸



The Decommissioning Challenge Fund

The Decommissioning Challenge Fund was announced by the Scottish Government in 2017. It is a £5 million fund, for 2017-2018, providing opportunities for ports and the supply chains in Scotland to benefit from the decommissioning of North Sea infrastructure.

There are forecasted to be 214 fields with decommissioning activity in the UKCS by 2025, which means:

98 platforms are to be removed

5,514 kilometres of pipelines are to be decommissioned

840,359 total tonnage to be brought onshore

Source: Oil and Gas UK⁹



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd's nan Eilean



Scottish Enterprise

Scottish Energy Ports Initiative



In recent years Scotland has seen success in a range of offshore energy projects, with Scottish ports and harbours playing a crucial role in their delivery. With decades of experience in oil and gas and abundant renewable energy resources, ports across Scotland provide the vital infrastructure needed for offshore developers and providers.

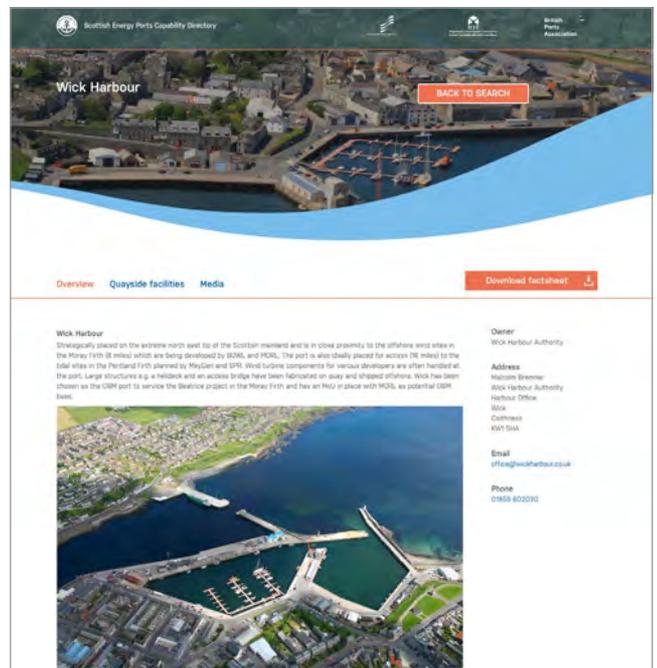
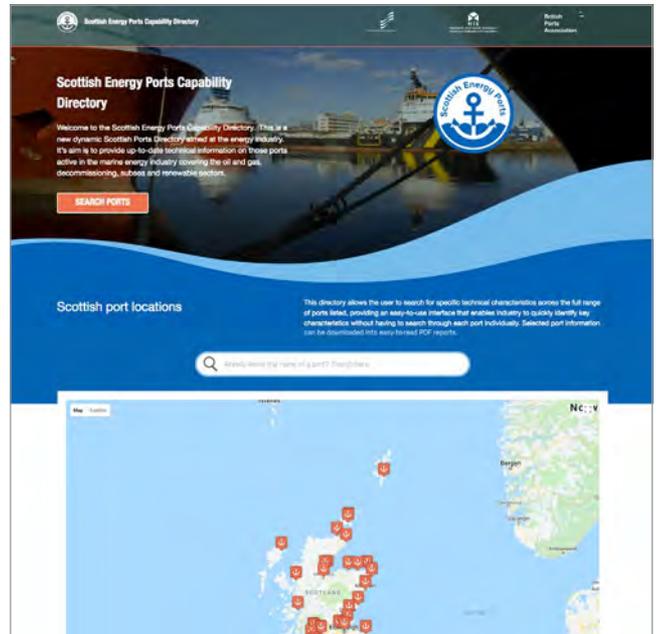
Recently the BPA's Scottish Ports Group, in partnership of Highlands and Islands Enterprise (HIE) and Scottish Enterprise (SE) built a dynamic new **Scottish Ports Directory** aimed at the energy industry. To build on their achievements and generate increased business opportunities, the directory provides up to date technical information on active marine energy industry ports covering the oil and gas, decommissioning, subsea and renewable sectors. The ports industry has worked closely with HIE and SE to develop a tool to showcase and promote the fantastic facilities the Scottish ports have though the new capability directory.

The Scottish Energy Ports Capability Directory provides businesses investing in Scotland with a searchable database allowing the users to examine and compare ports using a range of attributes. It also provides a range of in-depth information for individual ports.

This new portal aims to provide a one-stop-shop of Scotland's port and harbour strengths and capabilities to help maximise growth opportunities and encourage new investment and jobs in Scotland.

The capability directory features a number of sites across Scotland with interests spanning the entire offshore energy sector, from marine renewables and offshore wind, to oil and gas and decommissioning. The portal provides accurate and updated port information and it is hosted and managed by the British Ports Association. This portal will be invaluable for potential energy developers enabling them to analyse different ports, be kept up-to-date with development plans and source industry news, all in one location.

Participation in this directory is free, open to all Scottish ports, and can be accessed at energy.scottishports.org.uk



Highlands and Islands Enterprise
Iomairt na Gàidhealtachd 's nan Eilean



Scottish Enterprise

About the Industry



The fishing industry in Scotland is by far the largest in the UK. Landings at three ports alone (Peterhead, Lerwick, and Fraserburgh) account for just over 50% of all landings by UK vessels and 37% of the total value of the UK catch. There are also many smaller ports supporting fishing communities all around the coast.

Fishing is the most common activity in Scottish ports, which is unsurprising given Scotland's location amongst some of the most productive fishing grounds in the world.

Over the past decade the number of fishing vessels in the Scottish fleet has declined, although the number of larger boats has increased. Both the number of vessels and people employed have remained stable in more recent years, whilst the value and tonnage of landings has increased.



2,038 Number of Scottish registered fishing vessels in 2016

4,823 Overall number of fishermen employed on Scottish fishing vessels in 2016

A New Fisheries Policy

Many fishing ports are at the centre of their communities, providing an economic hub as well as supporting jobs in the catching, processing and logistics sectors. Fishing ports are clear that following the UK's exit from the European Union, the UK must retain full sovereignty of its waters and control access and management of our fisheries.

The Government will then be in a better position to increase domestic fish landings and facilitate more processing at British ports to the benefit of coastal communities.

British fishing ports would like to see positive fiscal and funding policies to facilitate the growth of the domestic market, through a reformed successor to the European Maritime and Fisheries Fund that would support the transition to more equitable and well-managed UK fisheries.

Approximately 80% of the fish landed at UK ports is exported and the overwhelming majority of this goes to Europe. Tariff free access to EU markets – and vice versa – is seen as essential and of utmost importance to many in the sector. Norway and Iceland manage their own fisheries, have healthy fish stocks and trade with the EU and we would like to see a similar arrangement for the UK.



About the Industry

Ferries



Ferries are a vital part of the transport network and ports in Scotland handled **over 10 million ferry passengers** in 2015-16, travelling both within Scotland and to and from Northern Ireland.

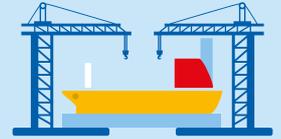
Three million vehicles and **8.3 million passengers** were carried on all ferry routes within Scotland in 2016, demonstrating the vital importance of their links for communities and for the economy.¹⁰

Smaller scale ferry services not only provide local communities with an essential trade and passenger link with the mainland, they are also a gateway for tourists to visit areas that might be otherwise inaccessible by car or train. Examples of this type of link are on services operated by Caledonian MacBrayne, Orkney Ferries Ltd, Northlink Ferries and Shetland Islands Council.

Ports play an integral part in linking island communities with the mainland. Ports and harbours are often a vital link for remote fragile economies (or communities). Ports such as Lerwick in the Shetland Isles, Kirkwall and Stromness in the Orkney Isles and Stornoway on the Isle of Lewis, provide a “lifeline” connection which is more than merely a ferry link to the mainland. Other mainland harbours such as Tarbert (Loch Fyne) and Ullapool act as an important intermediate link to island communities and have themselves grown around such connections.

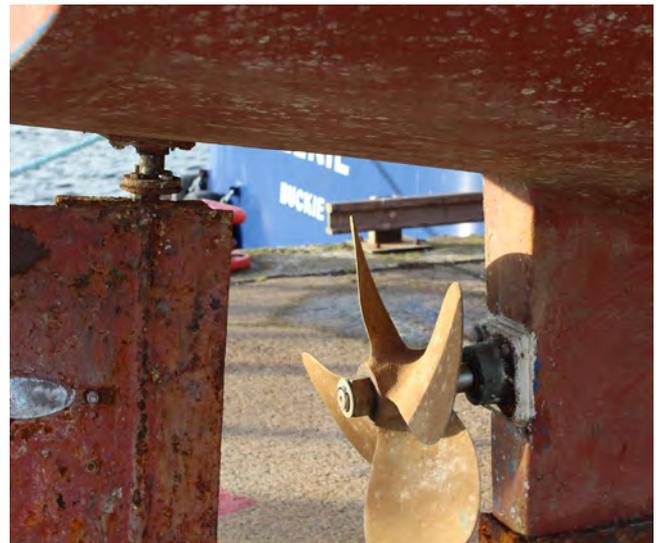


Shipbuilding and Repair



Scotland’s shipbuilding and maintenance industry employed 7,300 people in 2014 and was worth £0.5bn to the Scottish economy. Scottish shipbuilding represents nearly 30% of the UK’s shipbuilding and repair output. The industry is a major part of Scotland’s manufacturing sector.

Scotland’s shipbuilding sector is concentrated primarily on the manufacture and support of naval ships and specialist, more complex vessels for niche markets.



30% Represents the output in the UK by Scottish shipbuilding

£0.5bn Shipbuilding and repair worth to the Scottish economy

About the Industry

Cruise



Cruise calls in Scotland have more than doubled in the past decade and this looks set to continue, making major contributions to the national economy. Ports and their hinterlands around mainland Scotland and the islands shared a market with an estimated value to the Scottish economy of over £72 million in 2016.

2016 was the seventh successive record breaking cruise season for Scottish ports. There were 676 cruise ships that visited Scottish ports in 2016, up 35 per cent on 2015. Passenger numbers also increased, with over 484,000 passengers disembarking.

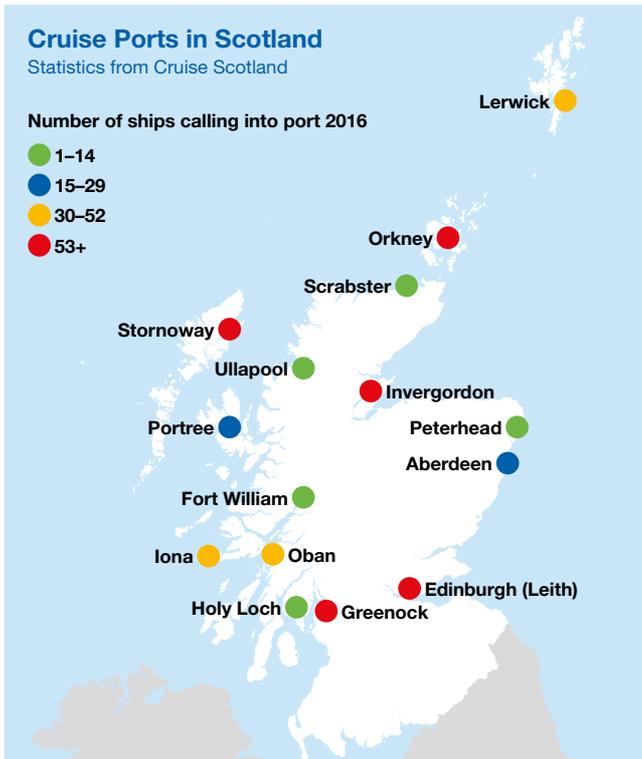
Scotland is an important UK and European cruise destination and conservative estimates suggest that the cruise industry supports more than 800 employees, generating £23m GVA to the Scottish economy each year. The cruise sector has good medium-term growth forecasts.

Cruise Ports in Scotland

Statistics from Cruise Scotland

Number of ships calling into port 2016

- 1-14
- 15-29
- 30-52
- 53+



Leisure and Tourism



Leisure moorings remain an important business income for many Scottish ports and help to support many businesses situated around harbours and marinas.

Tourism is an important market for coastal areas and islands. The money tourism brings to these regions helps to support employment in the leisure and hospitality industries. Recently the harbour at Stornoway has modernised facilities to accommodate a greater number of visitors to the Isle of Lewis, many of whom arrive on the ferry service from Ullapool on the mainland. Some communities have been able to successfully capitalise on their fishing heritage and use it to promote their tourist industry.

Tourism is one of Scotland's largest business sectors, providing direct employment for over 200,000 people and generating visitor spending of more than £3.5bn a year.

Although there are a number of small inter-island flight routes, ports and harbours on many of Scotland's islands act as the main gateways for visitors. While some ferry routes remain unprofitable, their social and economic significance to Scotland's outlying communities mean that there is a case for targeted support for these vital ferry services by the Scottish Government.



Stranraer Harbour

Scottish Ports Group

The Voice of Industry

The Scottish Ports Group is the only national forum representing the interests of the port industry. The Group meets regularly with the Scottish and UK Government and is the voice of Scottish ports as well as providing a forum for the sharing of good practice.

The Group meets three times a year, alternating between two member ports and Edinburgh, where the Group hosts an annual reception at Holyrood.

The Group represents 38 port members in Scotland, including a number of trust and privately owned ports as well as 14 local authorities, many of which own and manage groups of ports and harbours themselves.

Together our members in Scotland manage over 250 ports, harbours, terminals and piers of all sizes.



Arbroath Harbour

Scottish Ports Group Priorities and Challenges for Government

- To maintain the strategic and financial independence of the sector, which has worked successfully for ports and port users.
- To ensure that its voice is heard when decisions on transport infrastructure spending are made.
- To play its part in protecting the environment within a framework of environmental designations that respect sustainability and the need for thriving coastal businesses.
- To use its marine plans to create an increasingly effective marine licensing and consents regime.

“The Scottish Ports Group is an important resource for formulating policy and representing industry. It underpins the remarkable port network – a great national asset.

Sharing our experience and expertise is a major objective for us and self-regulation remains important for ports. We are proud of our independence.”

The UK and Scotland's future outside of the European Union is a significant concern for the Scottish ports industry. The British Ports Association has always argued for the need for goods and passengers to be able to move as freely as possible at the border, whatever the controls or conditions placed upon them. As far as possible, the industry has called for any checks to be processed away from the port, which are natural bottlenecks.

Other areas of importance are hinterland transport connectivity and planning and environmental issues. Successful ports require good road and rail links and also an efficient planning system. We have good links with the Scottish Government and continue to raise these issues for members regularly.

As operators within the private sector, ports run the risk of marginalisation when public spending decisions on road and rail development are taken. The Scottish Ports Group values its constructive relationship with Government and Transport Scotland in particular. Industry believe that good communication between Government and industry – and other stakeholders – is important in ensuring that policy supports industry so that it can provide the jobs and services that are so important to the Scottish economy.

The principles of strategic and financial independence underpin our approach. We very much support the current port ownership and management mix in Scotland and the UK and believe that this has added to the strength and vigour of the sector and should not be compromised.

Although investment in transport does not in itself grow the economy, it is nevertheless clear that transport facilitates economic growth. As part of the mutual understanding of future capacity needs, there is a responsibility to identify economic trends in Scotland and areas of current and future transport demand. For example, inward investment initiatives, particularly in manufacturing would need to be linked with transport plans.

Where public money is being invested in public transport, care should be taken that public money does not distort the market and is not used to provide unnecessary subsidy. Lifeline services apart, waterborne and port transport developments should be viable in their own right. To this extent, we see Scottish policy reflecting policy elsewhere in the UK.

Directory for BPA Scottish Ports Group Members



Scottish Energy Ports Capability Directory

For more detailed information about those ports active in the marine energy industry please refer to the Scottish Energy Ports Capability Directory energy.scottishports.org.uk

Aberdeen Harbour Board

16 Regent Quay
Aberdeen
AB11 5SS

Telephone

01224 597000

Website

www.aberdeen-harbour.co.uk

Contact

- Michelle Handforth, Chief Executive
m.handforth@aberdeen-harbour.co.uk
- Captain Jeff Gaskin, Harbour Master
j-gaskin@aberdeen-harbour.co.uk
- John McGuigan, Operations Manager
j-mcguigan@aberdeen-harbour.co.uk

Types of traffic handled

Agricultural products, chemical products, construction material, containers, cruise liners, decommissioning/ NORM materials, dry bulks (multiple commodities), fabricated subsea cargoes, fabrication facilities, fish/ animal feeds, forest products, iron and steels, liquid cargos, lo-ro lifeline ferry operations, mineral products, offshore wind operations/components, oilfield equipment/ specialist products, oil & gas operational support (UKCS & International), petroleum products, project cargo, project/ company offices (property), project quaysides, ro-ro lifeline ferry operations timber products, warehousing

Aberdeenshire Council Harbours

Macduff Harbour
Shore Street
Macduff
AB44 1TX

Telephone

01261 832236 / 07747 020496

Website

www.aberdeenshire.gov.uk/roads-and-travel/harbours

Contact

- Corrie McCall, Principal Officer Harbours
corrie.mccall@aberdeenshire.gov.uk

Principal Harbours

Macduff, Banff Rosehearty, Johnshaven, Gourdon, Portsoy, and Stonehaven

Types of traffic handled

Vessels up to 60M LOA for repair and refit, cargo vessels, salt boats, fishing, leisure



Directory

ABP Ayr & Troon

Port Office
North Harbour Street
Ayr
KA8 8AH

Telephone

01292 281687

Website

www.abports.co.uk

Contact

- Stuart Cresswell, Port Manager
scresswell@abports.co.uk

Types of traffic handled

Ro-ro freight and passengers, cruise, forest products, fishing

Arbroath Harbour (Angus Council)

Harbour Office
Arbroath
Angus
DD11 1PD

Telephone

01242 872166

Website

www.angus.gov.uk/search/content?keys=arbroath+harbour&=Apply

Contact

- Bruce Fleming, Harbour Master
harbourmaster@angus.gov.uk

Types of traffic handled

Fishing, leisure



Argyll and Bute Council Harbours

Campbeltown Harbour
Harbour Master's Office
Old Quay Campbeltown
Argyll
PA28 6EF

Telephone

01586 552552

Website

www.argyll-bute.gov.uk/transport-and-streets/ports-and-harbours

Contact

- Stephen Scally, Campbeltown Harbour Master/Port Manager
Stephen.Scally@argyll-bute.gov.uk

Principal Harbours

Campbeltown Carradale, Craginure, Dunoon Oban, Port Askaig, Rothesay

Types of traffic handled

Vessels up to 160m LOA, dry bulks, steel, timber, renewables, fishing, ferries, leisure

Port of Cairnryan

The Port
Cairnryan
Scotland
DG9 8RF

Telephone

02828 872183

Website

www.portofcairnryan.co.uk

Contact

- Roger Armson, Head of Operations
Roger.Armson@POferries.com

Types of traffic handled

Ro-ro, general cargo



Directory

Caledonian Maritime Assets Ltd

Municipal Buildings
Fore Street
Port Glasgow
PA14 5EQ

Telephone

01475 749920

Website

www.cmassets.co.uk

Contact

- Lorna Spencer, Director of Harbours
lorna.spencer@cmassets.co.uk
- David McHardie, Harbour Master
david.mchardie@cmassets.co.uk

Types of traffic handled

Ferries, fishing, leisure

CalMac Ferries Ltd (Harbour Operations)

Harbour Operations Department
Gourock Ferry Terminal
Gourock
PA19 1QP

Telephone

01475 650100

Website

www.calmac.co.uk

Contact

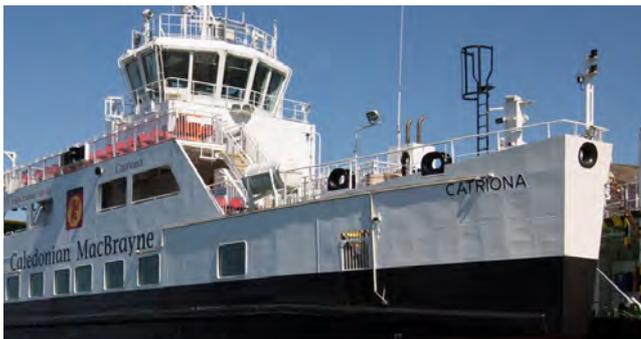
- Cameron MacPhail, Head of Ports & Harbours
Cameron.MacPhail@calmac.co.uk
- Scott Goodwill, Regional Harbour Manager (South)
Scott.goodwill@calmac.co.uk
- Ross MacDonald, Regional Harbour Manager (North)
Ross.macdonald1@calmac.co.uk

Principal Harbours

Armadale, Brodick, Castlebay, Colonsay, Coll, Gourock, Kennacraig, Largs, Lochranza, Lochboisdale, Port Ellen, Oban, Tarbert (Harris), Tiree, Tobermory

Types of traffic handled

Ferries, cruise, small commercial, fishing, leisure



Caledonian MacBrayne

Hebridean & Clyde Ferries

Dockyard Port of Clyde (Ministry of Defence)

Renown Building
HMNB Clyde
Faslane
Helensburgh
Argyll & Bute
G84 8HL

Telephone

01436 674321 x 6996

Website

www.gov.uk/government/groups/qhm-clyde

Contact

- David Lightfoot OBE MSM AFNI, Queens Harbour Master Clyde
david.lightfoot458@mod.gov.uk

Types of traffic handled

HM Naval Base Clyde is the Royal Navy's operating base in Scotland, home to submarines of the VANGUARD and ASTUTE Classes, as well as SANDOWN Class minehunters. Accommodation, Engineering and Logistic Support is provided by Service personnel and MoD Contractors. Also, home to 43 Commando Royal Marines and the RN Northern Diving Group (Bomb Disposal). One of the largest single site employers in Scotland. The Dockyard Port includes the Gareloch, Loch Long and Loch Goil

Clydeport Operations Ltd

Peel Ports
16 Robertson Street
Glasgow
G2 8DS

Telephone

01412 218733

Website

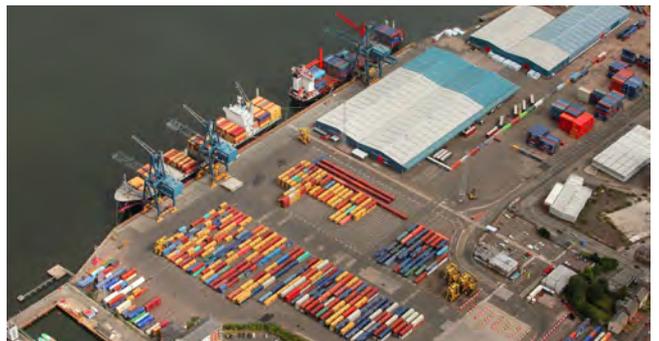
www.peelports.com/ports/clydeport

Contact

- Andrew Hemphill, Port Director
andrew.hemphill@peelports.com
- Brian Forrest, Senior Manager Operations Marine
brian.forrest@peelports.com
- Colin Bankier, Port of Glasgow Terminal Manager
colin.bankier@peelports.com
- Craig Collins, Port of Greenock Terminal Manager
craig.collins@peelports.com

Types of traffic handled

Containers, forest products, dry bulks., coal, onshore wind turbine components, project cargo, liquid cargo, iron and steel, agricultural products, construction materials, timber products, marine services, support base, fabrication facilities, renewables, ro-ro ferry, vessel layup, dry docking, ship repair and cruise



Directory

Comhairle nan Eilean Siar Harbour

Harbour Office
Balivanich
Isle of Benecula
Western Isles
HS7 5LA

Telephone
08456 007090

Website
www.cne-siar.gov.uk/harbourmaster

Contact
• Kenneth Morrison, Harbour Master
kenneth.m@cne-siar.gov.uk

Principal Harbours
Ardveinish, Callanish, Kallin, Leverburgh, Lochmaddy

Types of traffic handled
Ferries, bulk cargo, fishing, cruise, aquaculture, leisure



**Comhairle nan
Eilean Siar**

Port of Cromarty Firth

Port Office
Shore Road
Invergordon
IV18 0HD

Telephone
01349 852 308

Website
www.pocf.co.uk

Contact

- Bob Buskie, Chief Executive
bbuskie@cfpa.co.uk
- Calum Slater, General Manager
calum@cfpa.co.uk
- Richard Fea, Finance Manager
richard@cfpa.co.uk
- Joanne Allday, Marketing & PR Manager
joanne@cfpa.co.uk

Types of traffic handled
Heavy lift and servicing facilities for the offshore energy industry, European leaders in inspection, repair and maintenance of oil rigs, deep anchorages, subsea engineering, offshore decommissioning, bulk, project cargo, general cargo, busiest Scottish cruise port



Dumfries & Galloway Council

Planning & Environment Services
Militia House
English Street
Dumfries
DG1 2HR

Telephone
03033 333000

Website
www.dumgal.gov.uk/harbours

Contact
• Harbour Master
pe.harbours@dumgal.gov.uk

Principal Harbours
Kirkcudbright, Garlieston, Isle of Whithorn, Port William, Stranraer

Types of traffic handled
Shellfish boats, yachts/leisure craft

Port of Dundee (Forth Ports Ltd)

Stannergate Road
Dundee
DD1 3LU

Telephone
01382 224121

Website
www.forthports.co.uk

Contact
• Ryan Porteous, Harbour Master
ryan.porteous@forthports.co.uk
• Mark Gaffney, Port Operations Manager
mark.gaffney@forthports.co.uk

Types of traffic handled
Petroleum products, forest products, fertiliser, grains and cereals, minerals, manufacturing metals, decommissioning, oil and gas equipment and materials, dry powder cement, liquid fertiliser



Directory

Eyemouth Harbour

Harbour Office
Gungreen Basin
Eyemouth
Berwickshire
TD14 5SD

Telephone
01890 752494

Website
www.eyemouth-harbour.co.uk

Contact

- Richard Lawton, Harbour Master
harbourmaster@eyemouth-harbour.co.uk
- Christine Bell, Business Manager
businessmanager@eyemouth-harbour.co.uk

Types of traffic handled

Commercial fishing, offshore wind support vessels, serviced pontoon for sailing craft and passenger charter vessels, anchorage available for cruise liners

Forth Ports Ltd

Carron House
Central Dock Road
Grangemouth
FK3 8TY

Telephone
01324 668400

Website
www.forthports.co.uk

Contact

- Derek Knox, Port Manager (Grangemouth)
derek.knox@forthports.co.uk
- Craig Torrance, Operations Manager (Grangemouth)
craig.torrance@forthports.co.uk
- Fiona Doherty, Port Manager (Leith)
fiona.doherty@forthports.co.uk
- Kenny Williamson, Operations Manager (Burntisland)
kenny.williamson@forthports.co.uk
- Ryan Porteous, Harbour Master
ryan.porteous@forthports.co.uk
- Mark Gaffney, Operations Manager (Methil)
mark.gaffney@forthports.co.uk

Types of traffic handled

Petroleum products, chemical products, fish oil, containers, timber products, dry bulks, iron and steel commodities, onshore wind turbine components, project cargo, construction material, forest products, liquid cargo, marine services support base, fabrication facilities, agricultural products, subsea umbilical cargoes, cruise, renewable components, ro-ro ferry operations, dry powder cement, liquid fertiliser



Fraserburgh Harbour Commissioners

Harbour Office
Shore Street
Fraserburgh
AB43 9BR

Telephone

01346 515858

Website

www.fraserburgh-harbour.co.uk

Contact

- Thomas Boyle, Harbour Master
Harbourmaster@fraserburgh-harbour.co.uk
- John Murison, Harbour Superintendent
john@fraserburgh-harbour.co.uk
- Jill Smith, HSEQ
jill@fraserburgh-harbour.co.uk

Types of traffic handled

Fish vessels mainly

Port of Glensanda

Glensanda Quarry Operations
Rhugh Garbh Depot
Barcaldine
Oban
PA34 4LZ

Telephone

01631 568100

Website

www.aggregate.com

Contact

- Ian Henry, Harbour Master
ian.henry@aggregate.com
- Simon Turk, Logistics Director
simon.turk@aggregate.com
- Nick Lucas, Shipping Manager
nicholas.lucas@aggregate.com

Types of traffic handled

Aggregates in bulk, rock armour



Directory

The Highland Council Harbours

Culag Building
Lochinver
Sutherland
IV27 4LE

Telephone 01571 844800

Website www.highland.gov.uk/yourenvironment/roadsandtransport/harbours

Contact

- David Ross, Kinlochbervie Harbour Master
david.ross@highland.gov.uk
- Robert Thomson, Kyle Harbour Master
Robert.thomson@highland.gov.uk
- Joseph Mackay, Lochinver Harbour Master
Joseph.mackay@highland.gov.uk
- Ron Henderson, Portree Assistant Harbour Master
ron.henderson@highland.gov.uk
- Iain MacLeod, Uig Assistant Harbour Master
iain.macleod@highland.gov.uk
- Robert Barron, Nairn Harbour Master
nairn.harbourmaster@gmail.com
- Tony Usher, Harbours Manager
tony.usher@highland.gov.uk

Principal Harbours

Gairloch, Helmsdale Kinlochbervie, Kyle, Lochinver, Nairn Portree, Uig. We also manage many other small piers, harbours and jetties throughout the Highlands.

Types of traffic handled

Fishing industry, ferry operations and general cargo

Port of Inverness

Harbour Office
Longman Drive
Inverness
IV1 1SU

Telephone
01463 715715

Website
www.portofinverness.co.uk

Contact

- Sinclair Browne MRICS, Chief Executive
sinclair@portofinverness.co.uk
- Captain Ken MacLean, Harbour Master
hm@portofinverness.co.uk

Types of traffic handled

Fuel, timber, salt, wind turbines, sterling board, woodchips, wood pellets, carbon blocks, all types of grains/cereals, animal feeds, frozen fish and a diverse range of other goods including one off specific project cargoes



Kishorn Port and Dry Dock

Integrated Freight Facility
 Annat
 Corpach
 PH33 7NN

Telephone
 01397 773840

Website
www.kishornport.co.uk

Contact

- Alasdair Ferguson, Director
alasdair@kishornportltd.com
- Simon Russell, Director
simon@kishornportltd.com

Types of traffic handled
 Energy sector, decommissioning, extension of life, renewables, dry bulk, dry dock facilities

Lerwick Port Authority

Albert Building
 Lerwick
 Shetland
 ZE1 0LL

Telephone
 01595 692991

Website
www.lerwick-harbour.co.uk

Contact

- Sandra Laurenson, Chief Executive
slaurenson@lerwick-harbour.co.uk

Types of traffic handled
 Oil and gas, fishing, ferries, cargo, freight, decommissioning, cruise, yachts, sail training vessels



Directory

Loch Ryan Port – Stena Line Ports Ltd

Belfast Way
Cairnryan
Stranraer
DG9 8RG

Telephone

01581 622160

Website

www.lochryanport.co.uk

Contact

- Andy Kane, Port Services Manager
andrew.kane@stenaline.com

Types of traffic handled

Ro-ro freight

Mallaig Harbour Authority

Harbour Offices
Harbour Road
Mallaig, Inverness-Shire
PH41 4QB

Telephone

01687 462154

Website

www.mallaig-harbour.com

Contact

- Robert MacMillan, Chief Executive
- James McLean, Harbour Master
- Charles King, Chairman
info@mallaigharbourauthority.com

Types of traffic handled

Fishing, ferries, yachting, aquaculture, general cargo



Montrose Port Authority

Harbour Office
South Quay
Ferryden
Montrose
DD10 9SL

Telephone

01674 672302

Website

www.montroseport.co.uk

Contact

- Nicholas Scott-Gray, Chief Executive
nsg@montroseport.co.uk
- Jim Raeper, Technical Manager
jim@montroseport.co.uk
- Tom Hutchison, Harbour Master
Thomash@montroseport.co.uk

Types of traffic handled

Offshore oil and gas supply, petroleum products, timber, salt, renewable energy cargoes, break bulk, agri-bulks, animal feed, fertiliser, steel, construction products and cruise ships

Moray Council Harbours

High Street
Elgin
IV30 1BX

Telephone

01343 563791

Website

www.moray.gov.uk

Contact

- Darren Bremner, Harbour Master
darren.bremner@moray.gov.uk
01542 831700
- Duncan Brown, Harbours Manager
duncan.brown@moray.gov.uk
01343 563791

Principal Harbours

Buckie, Burghead, Hopeman, Findochty, Portknockie, Cullen

Types of traffic handled

All ok



Directory

North Ayrshire Council (operates Saltcoats Harbour and Millport Harbour)

Perceton House
Irvine
Ayrshire
KA11 2AL

Telephone

07774 237936

Website

www.north-ayrshire.gov.uk

Contact

- Arthur Cowley
ArthurCowley@north-Ayrshire.gov.uk

Types of traffic handled

Leisure, commercial

Northern Lighthouse Board

Gallanach Road
Oban
Argyll
PA34 4LS

Telephone

01631 562146

Website

www.nlb.org.uk

Contact

- Ewen Mackerchar, Oban Marine Operations Manager
EwenM@nlb.org.uk

Types of traffic handled

Marine services and aids to navigation



North Ayrshire Council
Comhairle Siorrachd Àir a Tuath



Orkney Islands Council Marine Services

Harbour Authority Building
Scapa
Orkney
KW15 1SD

Telephone

01856 873636

Website

www.orkneyharbours.com

Contact

- Brian Archibald, Harbour Master and Head of Marine Services, Engineering & Transportation
brian.archibald@orkney.gov.uk
- David Sawkins, Deputy Harbour Master: Strategy & Support
david.sawkins@orkney.gov.uk
- Alistair Wylie, Deputy Harbour Master: Operations
alistair.wylie@orkney.gov.uk

Types of traffic handled

Ro-ro freight and passenger ferries, general cargo vessels, oil and gas supply vessels, crude oil tankers, ship to ship transfers (crude oil, LNG & LPG), product tankers, semi-submersible accommodation vessels and oil rigs, towage, cruise ships, coastguard vessels and renewable energy support vessels

Perth Harbour

Perth & Kinross Council
Perth Harbour Office
Friarton Road
Perth
PH2 8BB

Telephone

01738 624056

Website

www.perthharbour.co.uk

Contact

- Brian Meldrum, Harbour Master
bmmeldrum@pkc.gov.uk

Types of traffic handled

Open to shipping round the clock, Perth Harbour accepts coastal and dry bulk ships up to 90 metres in length, carrying up to 2,500 tonnes from Europe, the Baltic or Scandinavia. Because of its scale, vessels can be received on one high tide and depart on the next, ensuring maximum efficiency.



Directory

Peterhead Port Authority

Harbour Office
West Pier
Peterhead
Aberdeenshire
AB42 1DW

Telephone
01779 483620

Website
www.peterheadport.co.uk

Contact

- John Wallace, Chief Executive
John.Wallace@peterheadport.co.uk
- Stephen Paterson, Deputy Chief Executive & Chief Financial Officer
stephen.paterson@peterheadport.co.uk
- Captain John Forman, Harbour Master
John.Forman@peterheadport.co.uk

Types of traffic handled

Fish, offshore supply, bulks, ship build and repair, cruise, leisure

Renfrewshire Council (operates Renfrew Dock)

Renfrewshire House
Cotton Street
Paisley
PA1 1LL

Telephone
07774 237936

Website
www.renfrewshire.gov.uk

Contact

- Jamie McNeillis
Jamie.Mcneillis@renfrewshire.co.uk

Types of traffic handled

Commercial



**Renfrewshire
Council**

Scrabster Harbour Trust

Harbour Offices
Scrabster
Thurso
Caithness
KW14 7UJ

Telephone

01847 892779

Website

www.scrabster.co.uk

Contact

- Sandy Mackie, Trust Manager
sandy.mackie@scrabster.co.uk
- Jason Hamilton, Harbour Master
Jason.hamilton@scrabster.co.uk
- Ross Farquhar, Deputy Harbour Master
ross.farquhar@scrabster.co.uk

Types of traffic handled

Ro-ro ferry and cargoes, offshore oil and gas supply, petroleum products, bulk timber, palletised fresh and frozen fish cargoes, rock salt, fertilisers, cruise vessels, general cargoes, renewable energy cargoes, project specific operations and cargoes

St Margaret's Hope Pier

Pier Road
St Margaret's Hope
Orkney
KW17 2SW

Telephone

01856 831646

Website

www.orkneycommunities.co.uk/SMHPIERTRUST

Contact

- Victoria Moar, Clerk
clerk@smhharbour.co.uk
- Billy Norquay, Harbour Master
harbourmaster@smhharbour.co.uk

Types of traffic handled

Ro-ro passenger ferry, small fishing boats, leisure crafts, creel boats, dive boats



Directory

Stornoway Port Authority

Amity House
Esplanade Quay
Stornoway
Isle of Lewis
Outer Hebrides
HS1 2XS

Telephone

01851 702688

Website

www.stornowayportauthority.com

Contact

- Alex Macleod, Chief Executive
alex.macleod@stornowayport.com
sypa@stornowayport.com

Types of traffic handled

Ferry, freight, dry cargo, fishing, aquaculture, cruise, yachts/leisure craft, oil & gas including fabrication and decommissioning, renewables

Shetland Islands Council (including Sullom Voe Harbour Authority)

Port Administration Building
Sella Ness
Sullom Voe
Shetland
ZE2 9QR

Telephone

01595 744209

Website

www.shetland.gov.uk/ports/sullomvoe

Contact

- Greg Maitland, Harbour Master
greg.maitland@shetland.gov.uk
harbourmaster@shetland.gov.uk
- John Smith, Executive Manager – Ports & Harbours,
j.r.smith@shetland.gov.uk

Types of traffic handled

Crude oil import/export, limited general cargo



Tarbert (Loch Fyne) Harbour Authority

Harbour Office
Garval Road
Tarbert
Argyll
PA29 6TR

Telephone
01880 820344

Website
www.tarbertharbour.co.uk

Contact

- Donald McAllister, Port Manager/Harbour Master
donald@tarbertharbour.co.uk
info@tarbertharbour.co.uk

Types of traffic handled
Fishing vessels, work and fish farm boats, passenger ships, MoD vessels and yachts

Tobermory Harbour

Taigh Solais
Ledaig
Tobermory
PA75 6QA

Telephone
01688 302876

Website
www.tobermoryharbour.co.uk

Contact

- Rob MacDonald, Trainee Harbour Manager
rob.macdonald@tobermoryharbour.co.uk
- Robert Hemming, Harbour Master
hm@tobermoryharbour.co.uk
- Mary Macgregor, Finance Officer
mary.macgregor@tobermoryharbour.co.uk
- Brian Swinbanks, Chair
kft@btconnect.com

Types of traffic handled
The harbour has recently been empowered as Scotland's newest statutory harbour authority and it handles cruise liner day visits, all types of leisure craft short term overnight visits, can accommodate small commercial craft alongside pontoon overnight, visitor moorings for hire



Directory

Ullapool Harbour Trustees

Harbour Office
The Pier
Ullapool
Ross-shire
IV26 2UH

Telephone

01854 612091

Website

www.ullapool-harbour.co.uk

Contact

- Kevin Peach, Chief Executive/Harbour Master
kevin@ullapool-harbour.co.uk
- Edel Walsh, Business Manager
edel@ullapool-harbour.co.uk
- Kenneth Mackenzie, Deputy Harbour Master
kenny@ullapool-harbour.co.uk

Types of traffic handled

Fishing, commercial, ferry, freight, leisure, cruise

West Dunbartonshire Council (operates Bowling Harbour)

Council Offices
Garshake Road
Dunbarton
G82 3PU

Telephone

07774 237936

Website

www.west-dunbarton.gov.uk

Contact

- Raymond Walsh
Raymond.walsh@west-Dunbarton.gov.uk

Types of traffic handled

Commercial



Westway Dock

Westway Dock
Gatehouse Building
Porterfield Road
Renfrew
PA4 8DJ

Telephone
01418 866373

Website
www.westway-park.com

Contact

- Mark Napier
Mark.Napier@gva.co.uk

Types of traffic handled
Please contact Mark Napier for details

Wick Harbour

Harbour Office
Wick
KW1 5HA

Telephone
01955 602030

Website
www.wickharbour.co.uk

Contact

- Malcolm Bremner, Harbour Master
malcolm.bremner@wickharbour.co.uk
- Norma Simpson, Harbour Treasurer
norma.simpson@wickharbour.co.uk

Types of traffic handled
General cargo, timber, coal, fertilizer, gas and oil, wind turbines, road salt, steel pipes, tow heads, heavy lifts, fishing vessels, yachts, cargo vessels, tankers, tugs, survey vessels



British Ports Association

Created in 1992, the British Ports Association represents the interests of its 100 full members, and numerous associate members, to the UK and devolved Governments, the EU and national and international bodies. As our membership comprises many ports, terminal operators and port facilities, all of varying size, location and nature, the Association is able to draw upon a wide range of experience and knowledge to represent its members' interests.

The BPA's aims are to:

- Dedicate resources to representing a wide variety of UK port interests to government in the UK, Europe and internationally
- Provide a resource for its members on legislative and policy issues, as well as a forum for the exchange of knowledge and development of best practice
- Work towards achieving an equitable and transparent ports industry and a level playing field throughout Europe
- Promote the use of ports and shipping as an environmentally sustainable mode of transport



Macduff Harbour

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www.scottish-enterprise.com/knowledge-hub/articles/publication/oil-gas-decommissioning-action-plan
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Oil & Gas UK, Decommissioning Insight 2017.

Scottish Enterprise and Highlands and Islands Enterprise, Oil & Gas Decommissioning Action Plan 2017.

Oxford Economics, The Economic Impact of the Maritime Services Sector in Scotland, 2013.

**British
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British Ports Association

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