



SCOTTISH PORTS GROUP



**Priorities for the next
Scottish Government**





Introduction

Scottish ports are essential to trade, food supply, manufacturing, offshore energy, tourism, fishing, and are at the heart of Scotland’s coastal communities. They are critical national infrastructure and will play a central role in helping deliver Scotland’s environmental and industrial ambitions.

This briefing sets out a small number of clear, deliverable policy actions for the next Scottish Government to consider that will help Scottish ports reach their full potential.

About the Scottish Ports Group

The Scottish Ports Group is the only industry-led forum representing Scotland’s ports and harbours. It brings together trust ports, privately-owned ports, and local authority-run facilities across Scotland. The Group is coordinated through the British Ports Association, which represents more than 400 ports, harbours, and marine facilities across the UK, including all the UK’s main energy and maritime hubs.

Scottish Ports in Context

Scottish ports are a diverse and regionally significant sector, supporting a wide range of economic activities across the country.

Unlike the rest of the UK, Scotland is a net exporter of goods. Scottish products such as whisky, fish, forestry products, and dry and liquid bulks are exported through Scottish ports. Hubs such as Greenock and Grangemouth facilitate unitised cargo, whereas Ayr, Campbeltown, Inverness, Glensanda, and Troon handle a mix of other bulk cargoes.

Ports such as Aberdeen, Cromarty Firth, Dundee, Lerwick, Montrose, Peterhead, Scapa Flow, Scrabster, and Sullom Voe play a central role in supporting North Sea energy. Others including Ardersier, Hunterston, and Kishorn are positioned for floating offshore wind and Scotland's wider energy transition. Cromarty Firth, Leith, and Nigg are important facilitators of offshore wind construction and deployment, and Eyemouth, Montrose, and Wick act as operation and maintenance support bases. The Scottish Ports Group works closely with the Scottish Offshore Wind Port Alliance (SOWPA), whose members are all BPA members, to promote the collective offer of Scottish ports to the offshore wind sector and support collaboration between industry and government.

In the South West, port facilities at Loch Ryan and Cairnryan provide a trade and passenger link across the Irish Sea. Across island communities, Brodick, Stornoway, Lerwick, and a number of ports on islands such as Harris, Islay, Orkney, Shetland, Mull, and the Small Isles support ferry and lifeline services, acting as vital links for people, goods, and supplies. Mainland harbours such as Troon, Weymss, Kennacraig, Tarbert (Loch Fyne), Mallaig, Oban, Kirkcudbright, Scrabster, Uig, and Ullapool also play essential roles in connecting island communities.



Scotland is also home to several of the UK's largest fishing ports, including Fraserburgh, Lochinver, Peterhead, Scrabster, Scalloway, and Lerwick, which together support a vital national industry and local jobs. Alongside landings, a number of ports provide ancillary fishing services to ports and wider ship repair facilities such as at Buckie, Macduff and Fraserburgh.

Lastly, in terms of marine leisure and tourism, a number of Scottish ports host sizeable levels of cruise activities including Aberdeen, Greenock, Invergordon, Kirkwall, Leith, Lerwick, Portree, Stornoway, and Ullapool. Scotland also has many moorings and marina activities for yachting and private vessels at Arbroath, Eyemouth, Nairn, Stonehaven, St Andrews, Cockenzie, Dunbar, Tarbert (Loch Fyne), Fairlie, Largs, Mallaig, Clyde, Stranraer, and Tobermory. These hubs provide important gateways for economic activity in often poorly connected coastal areas.

**While their roles differ,
Scottish ports share common
challenges, outlined in our
six policy priorities.**



Policy priority 1: Improve Planning and Marine Consenting to Unlock Port Investment

Scottish ports are competing with ports elsewhere in the UK and internationally for major clean energy projects and industrial investment. The growth of offshore wind represents one of Scotland's most significant economic opportunities for the coming decades, with the potential to drive large-scale industrial activity, supply chain development, and regional employment.

Ports are ready to invest and support these opportunities, but doing so requires confidence in delivery timelines and a reliable planning regime. At present, consenting processes across marine and landside regimes can make it difficult to progress projects at pace.

Applications require significant time and resources from both ports and the Scottish Government’s Marine Directorate and typically require input from a range of stakeholders and consultees.

We recognise the importance of thorough and robust decision-making, as well as the increased demand placed on the Marine Directorate in recent years. The scale, complexity, and volume of applications has grown significantly as ports invest in new infrastructure to support offshore wind, energy transition, and cruise activity, including deeper berths, heavy-lift capacity, and expanded quays.

Though particularly, given the scale of the offshore wind pipeline and the global competition for associated manufacturing and supply chain activity, it is essential that Scotland moves quickly, or it may simply miss out on this opportunity.

We are supportive of the Marine Directorate and its role, but additional resourcing, capacity, and internal expertise are needed to ensure the system can respond effectively to this increased demand. Without this, timelines are likely to remain extended and less predictable, increasing the risk that investment and projects are delayed, scaled back, or delivered in competing locations.

Permitted Development Rights (PDRs) are also an important part of a port’s toolkit in responding to moving opportunities. Ports are established authorities and will likely exist for many generations to come. We would therefore suggest that to support the growth of new markets, **the next Scottish Government should consider increasing the scope and thresholds of port PDRs and to help make landside planning processes more effective.**





Policy Priority 2: Fix Floating Offshore Wind (FLOW) Bottleneck

Floating offshore wind (FLOW) will play an increasingly important role in delivering Scotland's energy needs. Scottish ports are ready to support the industry to create good jobs and regional economic growth for years to come.

However, for over two years, there has been ambiguity around the licensing requirements for the inshore anchoring and mooring of FLOW components. While seemingly technical in nature, this issue now presents a real and immediate risk to port investment and project delivery in Scotland.

Concerns about this issue have been raised across the port sector, including through engagement with the Scottish Offshore Wind Port Alliance (SOWPA).

The anchoring, mooring, storage and routine management of floating structures within ports have not historically been treated as licensable

activities under the Marine (Scotland) Act 2010. Any departure from this approach would introduce new consenting requirements for routine operations.

Requiring project-specific marine licences would add cost, delay, and uncertainty to FLOW deployment, create totally avoidable bottlenecks and undermine Scottish port competitiveness.

There is also a risk of unintended consequences for other offshore industries. If the interpretation of licensing requirements is broadened to capture these activities, it could extend beyond floating wind to affect sectors such as oil and gas, as well as other marine infrastructure projects that rely on similar port-based operations.

The next Scottish Government should prioritise early resolution of this issue. This uncertainty has persisted for too long and is now affecting investment decisions. Ministerial clarity is required to confirm the regulatory position, remove ambiguity, and ensure projects can proceed with clarity.



Policy Priority 3: Protect the Competitiveness of Scottish Cruise Ports

Last year, the Scottish Government launched a consultation on a potential cruise ship levy, viewed as an extension of the local visitor levy. There is clear consensus among Scottish ports that such a levy would harm local communities, have little benefit to local authority finances, and undermine the millions of pounds that ports have invested to attract cruise calls.

Scottish ports are a key part of the cruise ecosystem and would be harmed by the market contraction we believe a passenger levy would cause. International evidence suggests that the introduction of cruise levies is commonly associated with a decline in cruise visits. In Dubrovnik, the introduction of a cruise levy in 2021 coincided with a 19% decline in cruise calls between 2019 and 2025. Similarly, Amsterdam has recorded a 44% fall in cruise passenger visits since implementing a levy in 2019. In these cases, such policies were introduced

specifically to discourage cruise traffic in response to concerns about over-tourism.

Scotland's circumstances are markedly different. Cruise tourism has been one of the fastest growing segments of the visitor economy, with cruise passenger capacity scheduled to visit Scotland in 2024 almost tripling over the past decade. Around 1.2 million cruise passenger visits were recorded in 2024, and in some island communities cruise visitors make up a very significant share of total tourism. This levy is primarily sought by local councils as a revenue-raising measure and does not aim to reduce tourist numbers and spend.

Against this backdrop, introducing a levy primarily for revenue-raising purposes risks undermining a sector that is currently experiencing strong growth. A contraction in cruise visits would have direct consequences for local economies, particularly for small and independent businesses that rely on



cruise passengers, including gift shops, tour guides, transport providers, and hospitality operators.

To raise any significant revenue, a levy would need to be set at a level that would deter cruise ships calling in Scotland. This risk is particularly acute for smaller or trust ports, which operate on tight margins and reinvest income into local infrastructure, community benefit, or maritime safety. For ports with only a handful of calls per season, the loss of one or two vessels due to the levy will make cruise tourism unviable. If smaller ports conclude that cruise activity has become unviable and withdraw from itineraries, this could have knock-on effects for larger ports as well, as cruise lines require a viable sequence of destinations when planning routes.

It would also be particularly damaging to ports such as Aberdeen, Lerwick, and Stornoway, which have recently invested hundreds of millions of pounds in new cruise infrastructure in anticipation of long-term growth.

While a cruise passenger levy may raise several million pounds across Scotland, this must be balanced against the potential loss of economic activity, reduced business rates, lower seasonal employment, and diminished visitor spend in local economies. The net result would be a loss to the Scottish economy with no real boost to council coffers.

Ports are rooted in their communities and are sympathetic to the financial pressures facing local authorities. We believe the focus should be targeted solutions that address specific local concerns, without undermining a port sector that supports well-paid jobs, community enrichment, and connectivity across Scotland. The Scottish Government have previously acknowledged the real benefits that cruise tourism brings, and should be working with industry to promote further sustainable growth.



Policy Priority 4: Improve Road Connectivity and Transport Links

Scottish ports invest private capital in infrastructure, skills, and services each year. However, their ability to operate efficiently and remain competitive depends on reliable landside connections, particularly road and rail links, which are largely delivered through public investment.

In many parts of Scotland, connectivity to ports remains a constraint on growth. Congestion, limited capacity, and poor-quality road links can restrict the efficient movement of freight, increase costs for businesses, and reduce the attractiveness of ports for investment and new services.

Last mile connections are particularly important and these road links are usually managed by local authorities that have seen their budgets squeezed in the last two decades. **We would like to see more financial support given to councils to prioritise links to ports to ease and improve the flow goods, services and passengers around Scotland.**

Strategic improvements to key road corridors serving ports would unlock significant economic

benefits, support energy projects, freight movements, and regional development. There is also a need for better alignment between national transport planning and port developments. Ports are long-term infrastructure assets, but upgrades to supporting road and rail networks are not always delivered in a coordinated or timely way.

We believe the next Scottish Government should prioritise investment in road and rail links that support key port clusters in the central belt, Highlands, and Northeast, support modal shift where appropriate to make greater use of coastal shipping, and ensure continued investment in ferry ports and harbour infrastructure to support resilient lifeline services and regional connectivity.



Policy Priority 5: Maintain Support for Scottish Fishing Ports

Fishing remains a vital part of Scotland's coastal economy, supporting jobs and communities across the country. Ports provide the infrastructure and services that enable catching, landing, processing, and export activity to take place.

For the fishing industry to be strong and sustainable over the long term, more of the economic value generated from our seas must be realised in Scotland's coastal communities. In recent years, the Scottish Government has taken steps to strengthen the economic link through licence conditions, including requirements on landings. We have long advocated for this and continue to support this approach. Increasing the proportion of fish landed into Scottish ports is one of the most effective ways to support local jobs, processing activity and wider economic resilience. Evidence shows that where landings take place has a direct impact on the distribution of economic benefits across the supply chain, with significant multiplier effects in coastal communities.

At a time when there is potential for improved market access, including through a future UK–EU SPS agreement, it is even more important that Scotland is well-positioned to capture the value of its fisheries domestically. Rolling back or weakening landings requirements would risk undermining this opportunity and shifting value away from Scottish ports and communities.

The next Scottish Government should maintain and protect the economic link in fishing licences, including landings requirements, to ensure that more of the value from Scottish fisheries is realised in Scottish ports and coastal communities. At a time when there is potential for improved international market access, it will be important to resist calls to dilute or remove these requirements, which play a key role in supporting local jobs, processing activity and wider economic resilience.

Alongside this, there is a need to move towards a more stable and strategic approach to fisheries funding. **A multi-year funding programme would provide the long-term certainty needed for ports and associated businesses to plan and invest with confidence.** This should include a dedicated focus on port infrastructure, recognising the foundational role that ports play in supporting the fishing industry and the wider coastal economy.

Funding should also support projects that enhance the resilience and diversification of fishing ports, including investment in infrastructure, safety, and complementary economic activity that helps sustain local fisheries and the communities that depend on them.



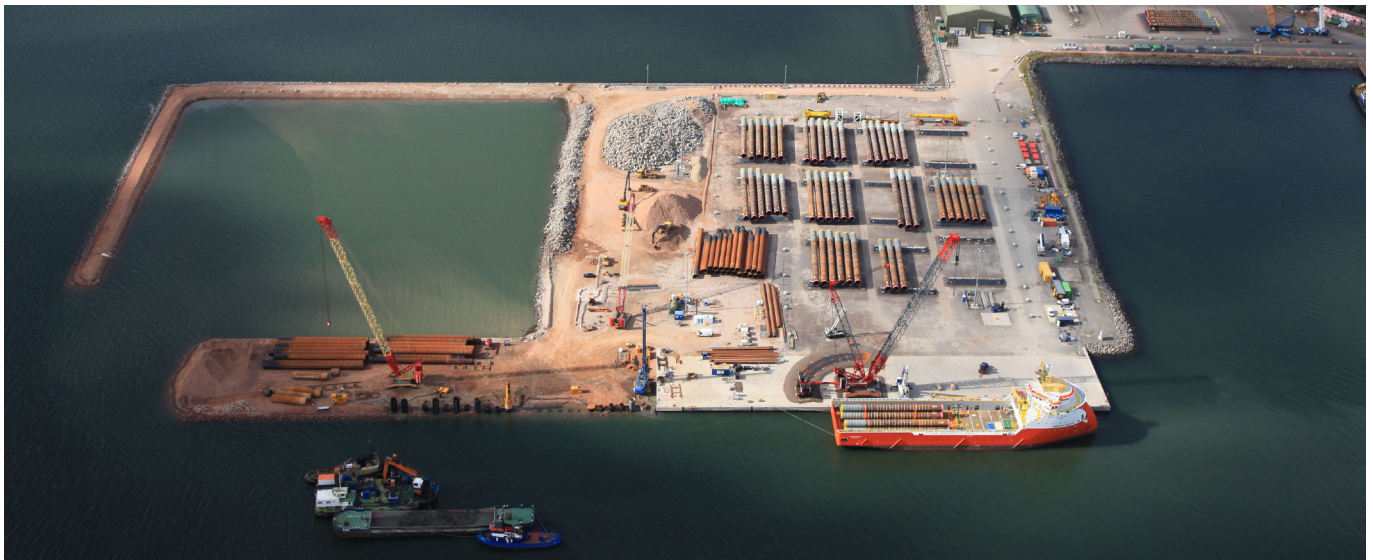
Policy Priority 6: Strive for a Balanced Approach to Energy

Energy is central to Scotland’s economy and to the role that ports play in supporting jobs, investment, and industrial activity across the country. Ports are critical hubs for offshore energy, including oil and gas, offshore wind, carbon capture and storage (CCUS), and emerging hydrogen markets. They provide the infrastructure, supply chain access and connectivity needed to support both existing industries, and the transition to lower-carbon energy.

For many Scottish ports, oil and gas remains a cornerstone of activity, supporting skilled employment, local economies and long-established supply chains. While the energy transition presents significant opportunities, it is important that this is managed in a way that builds on existing strengths rather than accelerating decline. **A sudden or unmanaged reduction in North Sea activity risks undermining the industrial capabilities, infrastructure and skills base needed to deliver future energy projects.** Supporting the retention and transition of this workforce will be critical to

ensuring Scotland can successfully deliver its wider energy ambitions. At the same time, Scotland is well placed to be a global leader in emerging energy sectors. Projects in CCUS and hydrogen, alongside continued growth in offshore wind, offer major opportunities for ports to support new investment, supply chain development, and regional economic growth. **Realising this potential will depend on timely decision-making, coordinated policy and a supportive investment environment that provides long-term certainty for developers and investors.**

A more coordinated, whole-system approach to energy planning will also be required. **Aligning generation, networks and infrastructure planning at a national and regional level** will help ensure that projects are delivered efficiently and that ports and coastal locations are able to play their full role as energy hubs. This should be supported by a stronger focus on capturing supply chain activity, manufacturing, and long-term economic value within Scotland, particularly in coastal and industrial regions.



Energy networks are also becoming an increasingly important constraint. Ports face rising costs, long connection timelines, and uncertainty around future capacity, which risk delaying both port investment and wider energy projects. Addressing these barriers will be essential if Scotland is to fully capitalise on its energy opportunities. This includes improving access to grid connections, reducing uncertainty, and ensuring that electricity pricing and network costs do not act as a barrier to investment, electrification, or industrial competitiveness.

We would also wish to see the next Scottish Government work alongside the UK Government to help drive down energy grid transfer costs, which are currently undermining the commercial potential for energy generation projects. This is particularly an issue for Northern regions of Scotland, which do not have the same energy demands of the rest of the UK, but face high transfer costs in moving energy further south.

The next Scottish Government should therefore take a balanced and integrated approach to energy policy, recognising the ongoing role of oil and gas alongside the development of new technologies, and ensuring that ports and their supply chains are supported through this transition.

This should include a supportive environment for North Sea activity, while working with the UK Government to ensure that regulatory and fiscal frameworks enable continued investment. It should also include accelerating the development of CCUS and hydrogen projects, including both production and end-use demand, and ensuring that planning and consenting processes allow projects to proceed at pace, helping to strengthen Scotland’s long-term energy security.

Taken together, a coherent and pragmatic approach to energy policy will help ensure that Scotland can retain its industrial strengths, support high-quality jobs, and position itself at the forefront of the energy transition, while maximising the economic value captured in Scottish ports and coastal communities.

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