



Marine Recreation and the Process of Rejuvenation of Small Ports and Harbours

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1.0 Introduction

The main objectives of this report are:

- To raise awareness of the opportunities afforded by marine recreational activities to assist in the regeneration/rejuvenation of small ports and harbours (SPHs);
- To explore the background and issues surrounding the use of marine leisure in securing the rejuvenation of SPHs; and
- To offer some guidance on the integration of marine recreational activities in the rejuvenation process.

The report is aimed primarily at potential local initiators and facilitators operating in coastal areas, particularly in areas where there are opportunities to assist the rejuvenation of SPHs through investment in marine leisure/recreation activities. However, the audience for the report will include: government departments; local authorities; port and harbour authorities; local community groups, tourism and leisure interests; harbour users generally; environmental interests as well as potential developers, and all those who are likely to be in a position to influence the process of integration of marine recreation in the rejuvenation of small ports and harbours.

This report is presented in five sections, setting out:

Section 2

The background to the rejuvenation of SPHs and the need for regeneration.

Section 3

The scope of marine recreation and the opportunities and constraints on its use in the rejuvenation process.

Section 4

The characteristics and assets of SPHs and how the rejuvenation process may be initiated.

Section 5

The financial considerations and incentives for development and investment.

Section 6

Conclusions about the growing awareness of development potential; the positive benefits; and support for the integration of marine recreation projects in the rejuvenation of SPHs.

2.0 Background

2.1 Context

This report is aimed primarily at highlighting opportunities and pathways which exist to integrate marine leisure in the continuing development/rehabilitation of small ports and harbours. In this context, marine leisure should not be seen as an alternative use for small ports and harbours (SPHs), but as a potentially vital function of any port or harbour. While the focus of the report is on harbours or ports that are out of the mainstream of trade or fishing activity, there may well be parts of larger and more active ports or harbours that are under-utilised or redundant and these locations will also afford opportunities for the development of marine recreation.

A key objective of the study is to highlight the validity of marine leisure as an important economic development consideration in the rejuvenation process of SPHs. In addition, there is a focus on identifying opportunities where the integration of marine leisure would potentially benefit from synergy with other port/harbour uses and activities, and complement rather than compete with more traditional port and harbour functions for the use of space, finance and infrastructural capacity. The study also aims to support sustainable levels of activity having regard to both environmental and economic conditions prevailing in the locality of SPHs.

2.2 Changing Functions of Small Ports and Harbours

Most SPHs developed originally to serve the fishing industry, to facilitate local trade or as landing places and places of refuge for local seafarers. Leisure, amenity and recreational uses may have been added over time. However the business of SPHs is dynamic, fish stocks wax and wane, distribution networks evolve, trends in trade shifts geographically and politically, technical advances in the design of vessels and port handling facilities make certain port infrastructure redundant – there are any number of reasons why the functions of SPHs are subject to constant change.

The *need* for rejuvenation of SPHs goes hand in hand with the forces for change. In summary:

- SPHs are public assets. Their continued deterioration or under-utilisation is an obvious waste of public resources and is unacceptable. Commercial pressures are driving those responsible to seek to make optimum use of existing assets, whether they be land, water, plant or infrastructure.
- The effect of EU Fisheries Policy and quotas allied with technical changes in vessels and fishing technique can be the cause of major changes within and between the ports and harbours serving the industry. Often the need is to find alternative enterprises as replacement for fishing activity displaced in this way.

- Deteriorating or poorly maintained marine infrastructure could be seen as a hazard and as a danger to the public and users alike. Increasing levels of use (both formal and informal) and increasing catchment populations mean that more and more people are exposed to such danger and this is an unacceptable situation, not least from a public liability perspective.
- The globalisation of trade and intensification of marine industrial activity is a factor generating new demand for port and harbour facilities in even the most remote locations. In planning to meet this demand, the opportunity to introduce or intensify marine recreational use as part of a renewal programme may also be considered as part of the rejuvenation process.
- The need for rejuvenation may simply be opportunistic – somebody, either from within or outside the community or the authority concerned identifies an opportunity for development that changes the valuation placed on the SPH assets. Once feasibility is established the need for rejuvenation becomes apparent.
- Local communities and entrepreneurs are becoming increasingly aware of their image and of the quality of their environment so that the drive to seek rejuvenation of some SPH may well be motivated, initially at least, by pride in the locality and the desire to enhance the environment. SPHs may also include structures and items of archeological and/or heritage value and the need to protect these values may coincide with a wider rejuvenation programme.
- The expansion of tourism is affecting areas that hitherto would not have been considered as destinations for visitors. New markets generate a need for new outlets, locations and facilities, and place new value on existing locations and infrastructure. This search for viable new marine and marine-linked tourism products, recreational activities and venues can be a force for the rejuvenation of SPHs.

2.3 Key Players

The rejuvenation/regeneration process in SPHs is likely to require the participation and support of many different organisations, including not only those directly involved in the management of the SPH but also representatives of the wider community, the planning authority, existing users and land owners, government agencies and other specialist interests who may be affected by such development.

The rejuvenation/regeneration of SPHs takes place against the legislative background of the Harbour Acts. These include the Harbours Act of 1946 – 96 which provided for the establishment, by the Minister of the Marine, of companies in respect of certain harbours and defined the functions of these companies, which includes the management, control, operation, and development of the harbours as fully fledged State Companies. Port companies and functional harbours are listed in Appendix 1.

The Harbours Act 1996 requires the port companies to discharge the following functions:

- Management, control, operation and development of their harbours
- Provision of services, etc. for goods, ships and passengers
- The promotion of investment
- Utilisation and management of available resources; and
- Promotion of leisure activities as appropriate

Because regeneration and development within a SPH straddles the marine and terrestrial divide, both the local planning authority and the harbour authority are likely to be key leading organisations in any such proposals within their jurisdictions.

2.4 Spatial Planning

A common starting point in a rejuvenation process will be the inclusion of appropriate supporting and enabling policies and objectives in the relevant county and local development plans which, in turn, need to be consistent with national and regional policy. A local authority wishing to secure the rejuvenation of SPHs within its jurisdiction will ensure that this objective is enshrined in the County Development Plan both as a policy statement and as a specific objective relating to the SPHs in question. In some cases it may be desirable to have as an objective the making of a Local Area Plan (Action plan) for the SPH in question. The spatial planning role of the local authority, who are also responsible for the maintenance of piers, breakwaters, roads, public water supplies and sewage systems, is especially important in this context.

Recognition through appropriate plans and policies will help to enhance the status of marine recreational use/activity and ensure its consideration in planning on all appropriate levels. It is equally important to ensure that policies for the development of marine recreational activity are included in the relevant sectoral plans and in the plans and strategies of specialist agencies such as those dealing with the Gaeltacht, with island communities and tourism. However the baseline document is the County Development Plan and the involvement and commitment of the local authority is usually essential.

The strategic value of having the rejuvenation plan and the inclusion of marine recreational activity enshrined in the current development plan hierarchy cannot be over stated since this gives any soundly based initiative a legitimacy that is of assistance in securing funding (from whatever source). The strategic plan will give assurance to potential investors that proposals for re-development and rejuvenation will be taken seriously; will have support at all levels; and can be dealt with expeditiously.

Diagram No. 1 describes in outline the framework necessary to facilitate the integration of marine recreational activity in the rejuvenation of SPHs. This is an 'ideal' path in that the legitimacy of any marine leisure initiative could be traced all the way through the hierarchy from local to national policy.

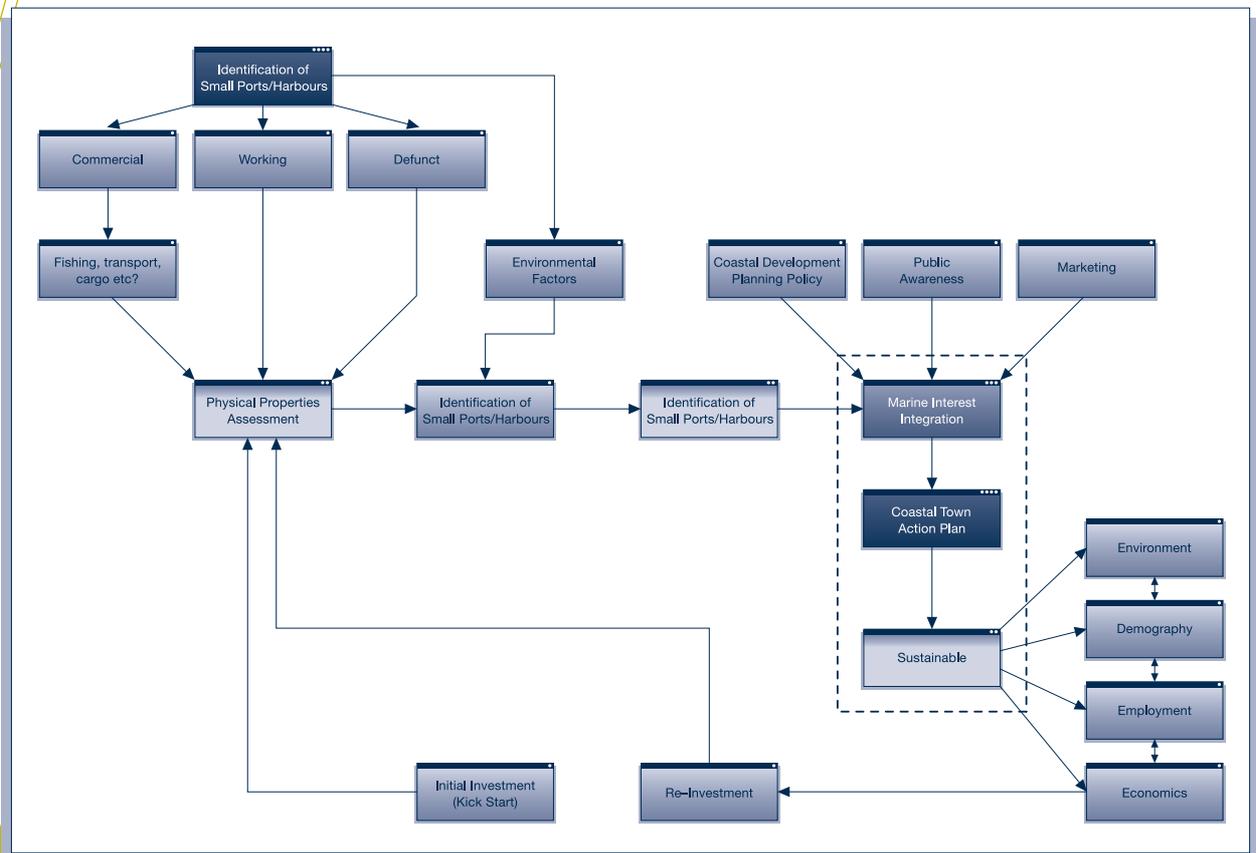


Diagram No. 1: Integration of marine recreational activities in the rejuvenation of small harbours and ports

2.5 Current Policy Initiatives as Instruments for Development

National Tourism Policy

The National Development Plan 2000–2006 provides a key aspect of the framework within which economic and tourism policy in Ireland operates. The Plan, which runs concurrently with EU spending programmes, is the basis on which decisions regarding EU Structural Funds for Ireland are made. The Plan was prepared against the background of needing to address the infrastructural deficit which threatens to inhibit the achievement of Ireland's economic and employment potential. One fundamental objective of the Plan is to achieve more balanced regional development.

National tourism policy and investment in tourism is manifested primarily through the Tourism Product Development Scheme which is administered and implemented by Fáilte Ireland, and is the main investment channel for the tourism sector. The Tourism Product Development Scheme is part of the Local Enterprise Development Priority of the Regional Operational Programmes for the South and East (S&E) and Border, Midlands and West (BMW) Regions, which is funded under the National Development Plan 2000–2006. There are five specific sub-measures to aid tourism investment under this Scheme.

- **Sub-Measure 1**
Development of major visitor attractions, capable of attracting over 100,000 visitors a year and upgrading of clusters of existing attractions.
- **Sub-Measure 2**
Development of special interest pursuits including cycling, walking, horse-riding, great gardens, outdoor activities, water-based activities and health tourism.
- **Sub-Measure 3**
Promotion of the better management of the relationship between tourism and the environment.
- **Sub-Measure 4**
Development of the tourism and recreational angling sector.
- **Sub-Measure 5**
Development of the marine tourism sector.

Water-based Tourism

Under the above NDP Programme, support is available, through Sub-Measure 2, for the development of specialised water-sports centres in both coastal and inland areas, and for the development of diving centres, sail training and other related water-based tourism facilities. Sub-Measure 5 provides support for coastal/estuarine access infrastructure.

The publication of Bord Failte's Tourism Development Strategy 2000–2006 endorsed support for marine tourism as a recognised sub-sector of the tourism industry. The strategy identified priorities for tourism investment in the context of ten main themes, three of which have a distinct water-based tourism component:

1. Inland Waterways and water-based activities.
2. Marine Tourism.
3. Special Interest Activities (including adventure sport).

Bord Failte's Operational Guidelines for the Tourism Product Development Scheme highlight that prioritised investment in special interest projects, which include specialist outdoor activities and water-based tourism, will be targeted in Special Interest Activity Areas. These are defined as areas where tourism business is relatively limited and which need support to expand their strength in catering for such niche markets, where realistic market potential is identified.

Marine Policy

The Department of Communications, Marine and Natural Resources is responsible for developing Irish marine policy. Its mission, as defined in the Department's Strategy Statement for 2001–03, is the following:

"To promote the sustainable development, management and regulation of the communications, energy, marine and natural resources sectors in support of national economic and social policy objectives."

The mission statement encompasses a wide range of roles and functions, sectoral policies and objectives, which the Department is mandated to pursue either directly or through associated agencies and companies. Underpinning this mandate are a number of core policy goals covering several marine-related areas:

- **Marine tourism, leisure and research** – to help secure the sustainable development of the marine tourism and leisure sector in the context of overall tourism development.
- **Marine safety** – to establish, promote and enforce safety and security standards, and by doing so, prevent, as far as possible, the loss of life at sea and on inland waters and other areas, and to provide effective emergency response services.
- **Maritime transport (Harbour Authorities)** – as provided in the Harbours Act 1996, to oversee the transfer to alternative uses under local control, of those remaining regional ports and harbours which do not form part of the national maritime transport system for trade and travel while maintaining, in transition, an appropriate corporate governance regime.

- **Engineering** – to facilitate and develop harbours and coastal infrastructure, to support coastal protection works, and the sustainable development of State foreshore.
- **Marine environment** – to safeguard the quality of the marine environment.
- **Marine coastal zone management** – to support and manage the sustainable use and development of Ireland’s marine territory.
- **Seafood sector** – to maximise the long-term contribution of the seafood sector to the economies of coastal regions.
- **Inland fisheries** – to conserve the inland fisheries resource in its own right and its viability and economic and social contribution at national and local community level.

The influence of each of these core policy goals on developing marine recreation activities and rejuvenating SPHs varies. The most important influence is **marine tourism and leisure** policy. While the Department of Arts, Sport and Tourism has overall responsibility for tourism policy and development, the Department of Communications, Marine and Natural Resources has played an important supporting role through targeted support for the development of access infrastructure and facilities. The Department also has a key regulatory function in relation to the marine tourism and leisure sector.

The Department’s core policy goal for Harbour Authorities has a strong bearing on the rejuvenation of SPHs in its strategic objective to implement a development framework for State regional ports and harbours through transfer of ownership to port companies or local authorities. The Department’s programme of development will be based on the findings of the recently published *Port Estate Task Force Report*. This report highlighted that a number of ports are no longer involved in trade, thereby releasing potentially valuable resources for alternative development (functions). The potential exists for these ports to unlock the inherent value of their assets by leveraging their property portfolios to develop new revenue streams. *This is particularly important in instances where the port estate/property is in a prime waterfront position and plays an important role in defining the character of the area.* Additionally, it is recognised that the amenity potential of port property should be considered in the development options for these SPHs. In support of this policy, the Department provides access to development funds for seaports under the Seaports Measure in the Regional Operational Programmes of the NDP. Within the overall package of €142m, there is provision to assist smaller ports and harbours with unsustainable commercial operations to find alternative uses. Types of actions that are eligible for *disengagement assistance* include the preparation of area action/integrated development plans, feasibility studies and cost-benefit analyses, and funding for the design, planning and construction of appropriate waterfront development initiatives.

Other relevant marine sectoral objectives that will impact on developing marine recreation in SPHs include:

- Marine research (through the Marine Institute), which has been instrumental in generating awareness of the potential of marine recreation and the availability of better data and statistics on the value of the sector. This has resulted in the formulation of an *Investment Programme 2000–2006 for the Water-based Tourism and Leisure Sector in Ireland and a Development Strategy for Marine Leisure Infrastructure*, which identifies indicative areas with potential for development/ improvement of leisure boating facilities. The Institute's supporting document, *Guidelines for Planning a Marina Development*, illustrates the planning process and highlights the appropriate steps to be taken in preparing an application for planning permission and a Foreshore Lease for a coastal marina development.
- Marine safety, including the ongoing development of better safety regulations for marine leisure activities.
- Marine environment and coastal zone management, which has, via the local authorities, a strong role to play in preserving the core resource that marine recreation needs.
- Seafood sector, which is providing some assistance for fishermen to diversify into more sustainable activities and practices.

This brief review of Irish tourism and marine policy shows that there are a number of elements within national policy that will play a role in shaping the rejuvenation of SPHs, particularly where marine recreation is involved. The challenge for the sector is to ensure that each of these elements work in tandem, so that there is an integrated policy approach to developing marine recreation at SPHs. This means in practice that marine tourism and leisure policy (and its implementation) should be fully integrated with maritime transport policy, environmental and coastal zone management policy, safety policy etc. If policy is clearly integrated, the prospects for bringing forward good rejuvenation projects will increase.

Case Study: Carrickfergus

The waterfront development in Carrickfergus is an example of how a local authority initiated a spatial plan for the rejuvenation of the harbour area, which resulted in the development of mixed-use infrastructure and a range of leisure and amenity facilities. The local population have ultimately benefited from an estimated £25m stg investment from the private sector and the creation of 335 jobs for the area.



Carrickfergus Marina

Carrickfergus is situated in the north-east, on the shores of Belfast Lough. The town has a population of just under 23,000 (1991 Census) and serves largely as a dormitory town for Belfast. It is easily accessible from Scotland and the Isle of Man, providing a useful stopover for boats cruising to and from Britain. There is now virtually no industrial activity in the harbour other than the provision of services for the leisure market which includes a 300-berth marina run by Carrickfergus Borough Council (CBC) as part of the town's harbour area.

The Council, in partnership with the private sector and central government, is in the process of providing a major commercial/retail and amenity area for the benefit of the local population, as part of the overall regeneration of the town. The harbour area was previously a run-down commercial area, used by coal and oil importers and for general port storage. Alternative sites were considered for regeneration and the value of linking the harbour and marina areas to take advantage of the attractions of the waterside setting was amongst the factors recognised in making the final selection. The visual appeal and general attractions of the marina have been capitalised on in the selection of a site adjacent to the town's harbour for significant redevelopment.

The regeneration represents a strategic effort by the Council, in partnership with central government, to attract consumer spending into the town and to tackle general environmental decay. The Maritime Area Partnership, set up by the CBC with the Department of the Environment for Northern Ireland, is responsible for implementing the strategy.

The development comprises mixed uses including a large shopping centre with the Northern Ireland Co-operative as anchor store; a McDonalds fast-food outlet; a pub/restaurant; 96-bed hotel, cinema and leisure facilities; apartments and offices. Net public funding of £4 million sterling stimulated private sector investment of £25 million sterling (£21 million at 1993 prices), and over 335 jobs were created. (Total public investment of £6m stg against which the Department received £2m stg from the private sector for the sale of the land.) To date, most of the planned development has taken place, with the exception of the provision of a hotel. Marina administration offices are now housed in the newly built office space and the waterfront also has its own tourism sub-office.

This regeneration of the waterfront and harbour of Carrickfergus provides an example of how a local authority can capitalise on the positive qualities associated with a marina, harbour and waterfront area to the advantage of the local population. The provision of public services in Northern Ireland is vested in central government to a much greater extent than in the Republic of Ireland. Leisure management and the provision of public amenity are amongst the areas within the remit of local government, which may help account for the concerted approach by CBC to maximise the “public good” to be gained from the regeneration of a harbour area.

Marine recreation activities currently associated with the harbour area include:

- Carrickfergus Sailing Club with 400 members and the Ulster Cruising School
- On site fuel, boat repair and maintenance service
- Sail making business
- Synchrolift and under-cover storage for up to 20 boats
- Two chandlers
- A yacht brokerage
- A number of events are organised centred on the Lough and the River Lagan
- Sea angling and pleasure boat trips

Benefits resulting from the regeneration include:

- Public sector investment was matched by private funding at a ratio of 5:1
- The marina has new administration offices and a tourism sub-office
- General environmental/visual improvement to the area and surroundings
Carrickfergus Marina has successfully achieved the Blue Flag award since 2001
- An increase of over 148,000 people per annum participating in water-based leisure activities
- An estimated ten-fold increase in visitor numbers to the area
- The number of visitor boats to the marina has doubled
- High year-round occupancy of resident berths at the marina
- The creation of a significant event venue- the waterfront now hosts 'Carrickfergus Celebrates' an annual two-day event
- Rates income from the commercial/recreation services adds value to the scheme
- The scheme has resulted in a significant increase in land values
- Positive support from residents for the new development.
In addition approximately 300 new residents now live in the area



Kilrush

3.0 Marine Recreation, Opportunities Constraints

3.1 The Scope of Marine Recreation

Marine recreation concerns leisure activities in and on the sea, inshore and offshore and on/along the seashore, within the visual influence of the sea. Many marine activities (swimming, sail boarding, etc.) require little more than personal equipment and a beach or slipway to facilitate access to the water and much marine recreational activity is of this 'casual' sort, getting by with minimal infrastructure and informal organisation. On the other hand some marine activities require sophisticated infrastructure, protection from the elements and an extensive network of related services if they are to operate efficiently and safely. These include activities like leisure boating, sport fishing, pleasure trips, etc., activities that demand high levels of organisation, investment and servicing, and these are generally associated with the more robust infrastructures available in a harbour or port.

Marine recreational activity also includes activity generated by (international) cruise ships. Cruising is a growing market in the Irish tourism sector and generates significant revenues for the ports and harbours on the cruise itinerary and their catchments. From a baseline figure of 60 cruise ship calls in 1994 carrying approximately 55,000 passengers and crew, the cruise ship business in Ireland has grown to over 140 calls in 2002 carrying over 120,000 passengers and crew. An economic impact study undertaken by the Port of Cork in 1997 quantifies the economic contribution to the region as a result of cruise traffic business as £5.7m and 76 full time jobs, based on 18,000 passengers. Of course not every SPH can accommodate such activity but the potential to participate in a network of small ports offering related or supportive products (e.g. sailing routes, island visits, coastal cultural/heritage trails, maritime events, etc) ought not be overlooked.

Shore based activities and services related to or dependent upon marine products include the revival of sea weed and sea water treatment centres (e.g. at Enniscrone in Co. Sligo), the development of aquaria, maritime museums and displays, diving centres and marine sport training centres and clubs. All of these facilities benefit greatly by being located within a port or harbour where they can share facilities and infrastructure as well as custom.

An analysis of marine recreation activities, common harbour/port infrastructural elements and the respective infrastructural requirements of individual activities is set out in Appendix 2. Obviously activities involving the use of a ship, boat or other large scale plant place the greatest demand on infrastructure, however it is also evident that many other activities would benefit by having harbour/port facilities available or by being based in a harbour or port.

3.2 Marine Recreational Infrastructural Considerations

The marine recreational infrastructural requirements of an individual project are obviously project and site specific. However practical experience suggests that, in general, standards of infrastructural provision are rising, and marine recreational activities and users are more discerning and look for higher standards of facilities than in the past. There has been considerable investment in marina development in the past few years with a growth in the number of marinas rising from 6 in 1996 to 19 in 2003. Nevertheless, gaps still remain in certain areas in the “network” of marinas surrounding our coast. The requirement for non-tidal restricted access is now an important issue. Many of the small piers and harbours around our coast dry out at low tide, a factor which boating visitors generally do not consider acceptable. In recent years boating visitors have become accustomed to ‘marina’ style access which facilitates direct access to the sea. Direct access also extends the season and greatly assists day-to-day maintenance, and, given the increasing scale of personal investment in boating, these are not unreasonable requirements.

It is important to highlight the fact that marine recreational activity in this context is not only about ‘marinas’. Fully-fledged marinas represent the upper end of the facilities range and because of their technical requirements they are also amongst the most costly elements to install. Marine recreational activity can be serviced effectively at almost any level and even the construction of a simple slipway or a simple pontoon alongside an existing quay in a SPH could transform its usefulness in terms of marine recreation.

Land-based facilities such as clubhouses, toilet and shower facilities, hard standing, repair and maintenance areas and facilities for storage and parking are equally in demand. SPHs have unused warehouse and/or industrial buildings that might be converted for such uses, potentially serving fishing, diving, surfing, swimming and many other marine activity interests. Passive activities such as walking, photography, picnic, music making, art and so forth can often be accommodated at relatively little cost within the existing structure of the harbour or port. In short a marine recreational rejuvenation project should seek to meet the needs of as wide a range of activities and users as possible.

3.3 Technical Feasibility of the Marine Recreation Option in the Rejuvenation Process

The development of marine leisure facilities is also taking place in the context of major changes in terrestrial planning administration (Planning and Development Act 2000, a new planning hierarchy, requirement for strategic planning, etc.) and in the management of both the marine and terrestrial environment. In some instances this is adding to the complexity of steering a development initiative through the system. The acquisition of Planning Approval, Foreshore Licences, EPA Waste Licences, Dumping at Sea Licences, and the preparation of an Environmental Impact Study (EIS), etc, all or some of which may be required as part of a rejuvenation initiative, can take a great deal of time which, together with the expense involved, can be a significant disincentive to development and investment. These procedures must be planned for from the outset in order to avoid delay and discouragement.

The technical aspects of developing new leisure facilities will be dependent on a variety of issues, the most important of which include:

- Planning/licensing context and conditions
- Nature of existing infrastructure and its condition
- The scale of marine leisure facilities planned, both on and off the water
- Navigational constraints imposed by the Harbour Authority
- Environmental and physical constraints and the mitigation measures required to deal with them

Key steps in assessing technical feasibility include:

- Scope environmental, planning and licensing constraints and conditions
- Acquire adequate site and geotechnical survey information
- Carry out preliminary design to facilitate initial costing studies

Detailed guidance in respect of the planning and design process are already available in the Marine Institute's *Guidelines for Planning a Marina Development* which describes a procedure that is common to all types of marine recreational development.



Dunmore East

In assessing the needs of a given SPH, factors such as the need for dredging, and/or breakwater protection are important considerations. These items are often costly in comparison to the provision of, say, a few pontoon berths or a slipway, but might be justified for bigger schemes provided the market is there for the end product. Water depth and shelter are perhaps the two most fundamental requirements/constraints. In some circumstances, it may be acceptable for shelter to be directionally limited (protection from particular direction) for visiting boats, but for permanent berths, shelter and sufficient water depth must be available for all wind and tidal ranges. In large-scale developments, it is commonly regarded that pontoons will pay for themselves, but infrastructure such as breakwaters, dredging, etc will almost certainly require grant aid. Certain ground and environmental conditions can result in extremely expensive infrastructure. The need, for example, to dredge significant volumes of rock can prove absolutely prohibitive.

If the facility is limited to a simple slipway access for sub-aqua, jet ski or other tailored boating activity, tidal restrictions may not be as important.

3.4 Opportunities for Marine Recreation in the Process of Rejuvenation

Opportunities afforded by and for integration of marine recreational activity in SPHs include:

- There is undoubted potential 'locked up' in under-used or derelict infrastructure. Many SPHs have considerable areas of sheltered water, derelict quayside, buildings and/or land that are not in regular use. In some cases at least these 'forgotten' assets could be put to beneficial, revenue generating, marine recreational use at minimum cost. An SPH embarking on a rejuvenation initiative ought to begin by conducting an audit of its resources. (e.g. Donegal County Council recently carried out an audit of SPH infrastructure and resources as a basis for drawing up a strategy for the development and rejuvenation of these assets).
- There is a high level of interdependence between and amongst all marine activities which tend to share shore-based and water-based infrastructure and services. Marine recreational activities require the same basic infrastructure as many traditional port uses and can frequently be accommodated in existing SPHs with only minor modification of existing facilities or simple designation of areas according to need, safety and priority. This facilitates clustering, gives rise to opportunities for the establishment of partnerships (public and private) and encourages synergistic developments that take advantage of economies of scale.
- Growth in marine recreational activity coincides with a period in which there is also much change taking place in the more traditional marine activities such as commercial fishing and trade. This, in turn is bringing about change in the use of SPHs around the coast and while some of these venues are experiencing a downturn in their fortunes, for others, opportunities are opening up for the development of new uses and activities and, in particular for the development of marine recreation.
- Owing to the high cost of providing marine infrastructure or of adapting existing infrastructure for marine recreational use, it has been recognised that the clustering of activity can yield essential synergies and economies of scale. On a regional basis the key infrastructural requirement to encourage 'clustering' of marine recreational activities is a network of safe, sheltered, non-tidally restricted harbours in close proximity (say within 4 hrs sailing time) to one another.
- Tourism and domestic visitor recreation markets are expanding. There is an opportunity for communities to use resources associated with SPHs to identify niche markets based on marine recreation and to reach out to and participate in the wider tourism market.

- A coastal community, seeking ways of enhancing their local environment, will be aware of the amenity and aesthetic value of any SPH in their locality. They will also be aware of the increasing interest in active recreational pursuits by tourists, visitors and local people and will realise the potential afforded by the SPH to act as a focus of both commercial and recreational activity. It is also obvious that the introduction of new uses can help reduce dereliction and provide a justification for maintenance that would not otherwise take place. Thus rejuvenation of SPHs using marine leisure as a catalyst can enhance the quality of life in a locality.
- The tourism product in many remote areas depends upon the scenery and upon an often slender portfolio of 'attractions' to hold the visitor's interest. Many forms of marine recreational activity are well suited to development in such remote and isolated areas and again the existence of a SPH, however small or derelict, can provide a base for such activity. In this way the rejuvenation of a SPH can lead to a deepening and strengthening of the tourism product that can, because it facilitates networking with other SPHs and allied products, be of benefit to an entire region. In planning a rejuvenation programme attention needs to be paid to the context of the SPH and to the potential for the creation of commercial activity networks based on marine recreational activity in the region.
- Such developments obviously help to create additional employment both directly and indirectly. By introducing new custom and demand into an area it can also help to secure existing employment, especially in SPHs that are experiencing a downturn in traditional activity. As can be seen from the Phennick Cove Case Study (see below) rejuvenation assisted by the introduction of marine recreational activities can induce demand for downstream services and products such as accommodation, restaurants, training and retail services, thus enhancing the links between the ports/harbour and its respective town or village.

3.5 Obstacles and Constraints

The principal 'obstacle' to integration of marine leisure activity in SPHs is probably a widespread lack of awareness amongst key players of the opportunities that exist for synergistic development or alternative development options for existing coastal infrastructure. Therefore, to develop marine recreation in these harbours, it is crucial that harbour authorities and local authorities be aware of the potential value of the infrastructure and property assets existing in SPHs and their potential for different uses. A starting point is for the relevant authorities to carry out detailed local audits of harbour resources and assets and to evaluate the potential different uses of the assets. (See Section 4 – Asset Management and Asset Managers). Concern over conflict of interest and competition for space may inhibit the process but most of these types of concerns can be overcome by awareness building and other management techniques. Given sufficient funding most physical obstacles to development associated with SPHs are capable of technical solution. In general obstacles to integration of any sector tend to be created by financial, management and planning issues.

Potential constraints to developing marine leisure activity in SPHs:

- Traditional harbour users tend to be conservative and there may (initially at least) be local opposition to change or the introduction of new uses or users, especially amongst existing users of the resource. Restricted capacity, competition for space and other physical/technical constraints may have an important bearing on this matter and the resolution of such conflicts is essential if a rejuvenation project is to succeed.
- Many projects founder or are delayed because of ownership disputes/uncertainties. There is a need to clarify all matters relating to property and to bring local property owners on board the project. The spatial patterns of public and private ownership are also a matter for consideration affecting the approach to the initiation of projects and the types of partnership/co-operation agreements that can be entered into as part of the programme of rejuvenation.
- A lack of space on-shore for support development can be a serious constraint. Consideration needs to be given early in the process to the adequacy of the proposed site in terms of space – including space for related activities such as parking, storage, maintenance, access, etc.

- The process of rejuvenation can take anything from one to ten years to yield results. During this time it is often difficult to maintain local, and/or voluntary interest in a development initiative. Timing also affects cash flow and interest charges on loans, etc. and bureaucratic and other delays in progressing a project can be a major cause of financial difficulty. A business plan is an essential tool, its preparation at the same time as the feasibility studies, etc. is a critical element in any rejuvenation initiative whether it involves marine recreation or not.
- Road and other access constraints (incl. navigation) are critical constraint considerations. There is no point in providing an expensive infrastructure if the supporting access network is not available. This includes consideration of the ease of access both from the land and from the sea.
- Lack of land-based infrastructure (water, sewerage, etc), facilities and organisation can also be a constraint on initiating development at an SPH.
- For developments initiated by a community or special interest group, financial constraints can arise during the planning and development phases in particular. In the planning phase, difficulty in sourcing sufficient capital to undertake essential feasibility and design work can occur. During the development phase the difficulty of raising local community/special interest contribution, which may be necessary as match funding for specific support measures, may also be a constraint to development. In addition, as a result of the current downturn in the national economic situation, the suspension of national funding support schemes targeted at development of marine leisure is also a potential issue. (These matters are dealt with in greater detail in Section 5).
- Any rejuvenation programme involving the introduction or intensification of marine leisure will need to take into account the existence or otherwise of environmental designations in the area and the constraints these impose on potential development.
- SPHs are likely to include items of heritage, archeological, marine archeological or cultural value within and adjacent to their location. Such items can, in themselves, represent potential attractions but they may also impose restrictions on the way in which development is handled.
- Market constraints – particularly in regard to catchment size and make-up, demand levels and competition with existing or other planned facilities (These matters are discussed in Section 5).

Case Study: Phennick Cove

The following case study illustrates how a local community based development group in Northern Ireland, working closely with the relevant government agency, availed of the opportunity afforded by the Fishing Villages Programme and the funding it provided to secure the development/rejuvenation of Phennick Cove.

Against the background of the Rural Development Programme (N.I.), the Fishing Villages Programme (FVP) was set up in Northern Ireland in 1995. The objective of the FVP programme, which had £4m stg funding initially, was to support regeneration projects within Northern Ireland's fishing-dependent villages. Assistance was targeted on the most disadvantaged areas where private investment was lacking.

Initiation and management

As a result of the launch of the FVP, a community-based development group formed a company (Phennick Cove Developments Ltd.) in order to deliver a suitable regeneration project in Phennick Cove, Ardglass, Co. Down.

The regeneration plans included the development of a 55-berth marina, with offices, changing rooms, etc., on waste/reclaimed land within Ardglass Harbour. The company engaged with consultants to develop the idea into a realistic proposition. Feasibility studies were undertaken and the issues of sustainability, additionality and displacement were addressed. At the same time the company engaged with the port owners (the NI Fisheries Harbour Authority) and gave reassurances to existing commercial port users. They were successful in addressing all concerns and the project was awarded £1.4m stg in 1995 for the development of the marina. The company then appointed consultants to oversee the project development (which included the preparation of plans, tender documents, bill of reductions, and award of contract) and its implementation.

Current status

The development programme has been successful and the marina now has 78 berths and is proving to be a profitable enterprise. It has acted as a catalyst to development in the area which has since attracted investment in a new hotel, 2 guest houses, 2 restaurants and 2 retail outlets. At least 2 jobs were created directly and the environment was greatly improved. The project is now looking to expansion which would see the further enlargement of the marina and the addition of a complementary water-based activity centre. Additional restaurant and accommodation capacity is also planned.



The project has been an undoubted success, restoring local confidence and attracting new activities to the village. These include, in association with East Coast Adventure (a private group), the introduction of a water-based activity instructor's course and the launch of a Village Environmental Enhancement Scheme which is also facilitated by Phennick Cove Developments Ltd.

There were problems, of course; finding the £50k stg community contribution; grappling with Government/EU procedures; dealing with the effects of inflation due to delays and, perhaps the most difficult issue for the company, coping with cash-flow/VAT monthly payments. Key lessons from the project include the need for realistic cash flow projections from the start (to help secure bridging finance) and a realistic appreciation of the time required to progress the work, acquire consents, etc. and to maintain the interest of those involved. Finally the need for good supervision of the contract is essential to deal with unforeseen problems such as bad weather, plant breakdowns, and so forth.

4.0 Marine Recreation and the Process of Rejuvenation

4.1 Asset Management and Asset Managers

Ireland's SPHs have a variety of different elements. These elements include both infrastructure and services. Each element is in turn a potential part of the marine recreation "asset", depending on its possible uses. Figure 4.1 lists some of the different types of infrastructure and services that can form part of the asset.

Infrastructure	Services
Pier/harbour	Port/harbour offices and administration
Quayside	Net drying/repair area
Slipway(s)	Ice house
Breakwater(s)	Chandlers
Hard standing	Boat repair
Fixed marina berths	Fuel depot/stage
Floating pontoons	RNLI
Floating moorings	Fishing industry
Crane/hoist	Yacht or boat clubs/clubhouse
Access roadways/ramps	Other tourist activity providers
Dry dock/repair dock	Amenity areas
Boathouse/warehousing/storage	Small industry
Sail loft	Car parking
Navigation/safety equipment	
Land	

Figure 4.1: Infrastructure and Services Available at Small Ports and Harbours

The Marine Institute has identified the lack of appropriate infrastructure for marine leisure – i.e. piers, slipways and moorings – as the single biggest obstacle to developing the water-based tourism and leisure sector. If this infrastructure is not in place, or if it is not useable, it is unlikely that marine recreation activities can be developed.

In most cases, such infrastructure is owned by the harbour authority. This authority is usually either a dedicated harbour board or a local authority (county or borough council). Therefore, to develop marine recreation in these harbours, it is crucial that harbour authorities be aware of the potential value of their assets and their potential for different uses.



It is not essential for all of the items mentioned in Figure 4.1 to be available, but they can crucially determine the nature of the development. For example, having on-site chandlers and boat repair facilities is useful if a port or harbour is developing a centre for yachting or boating. Fuel and repair facilities can also be useful for developing other marine recreation activities (e.g. angling, surfing, water skiing, canoeing). Furthermore, having some activities already in place will increase the potential for developing a marketable “cluster”.

There are several players that typically own or manage assets in SPHs. Marinas or pontoons/moorings are often owned by a local yacht club, for example. Chandlery, boat repair or other small enterprise activities are most likely run by private operators. In addition, land for development within the port/harbour area might also be outside the control of a harbour authority.

Rejuvenating SPHs will therefore involve a number of different players, each with different interests, and this has to be managed properly for the rejuvenation process to be effective. A starting point here is for harbour authorities to carry out detailed local audits of harbour resources and assets, which highlight potential different uses of the assets.

4.2 The Value and Utilisation of Assets

Any infrastructure or service will only be a marine recreation “asset” if it can demonstrate a socio-economic value. Furthermore, the size of this value will depend on a number of different factors. The main factors to consider are as follows:

- The market for the asset
- The number of alternative uses for the asset
- The level of use of the asset
- The lifetime of the asset
- The potential of the asset to contribute to developing clusters of critical mass

The market for the asset

An infrastructure or service is only a marine recreation asset if there is a market for using it. An SPH with a high quality pier infrastructure may be located in a poorly populated area that has little other in the way of infrastructure or services, that is isolated from local resident demand, and that is inaccessible or unattractive for domestic and overseas visitor markets. Such infrastructure may have less potential as an “asset” than a poor quality pier that is in need of repair, but which is situated in an area with high levels of demand for marine-based and other tourism and recreation activity.

It is crucial that the market for an asset is established in advance of any development. This should ensure that development will be market-led rather than supply-driven. The market for marine recreation and the assessment of its potential is discussed further in Section 5.

The number of alternative uses for the asset

An asset’s value will increase with the number of different possible uses that it has (assuming, of course, that there is a market for its use). A good, suitably sheltered pier and slipway can facilitate several different uses such as sailing, pleasure boating, water skiing, scuba diving, sea angling, kayaking and pleasure cruising. Each of these uses can in turn deliver socio-economic activity and benefits. However, a pier without adequate shelter (e.g. breakwater) can only facilitate some of these activities, and its potential value will therefore be less.

Not all marine recreation activities are homogeneous, and some pursuits do not necessarily go well with others. For example, active pursuits like water skiing might not necessarily fit well in the same location with passive pursuits such as nature tourism or marine mammal watching. Great care must therefore be taken to ensure that a port/harbour possesses an appropriate potential mix of activities to maximise its economic return.

The level of use of the asset

Asset value also depends on its level of use, i.e. the amount of use that is made of it throughout the day, week, month or year. This is particularly important for recreational assets, which (as with tourism and leisure generally) experience seasonal peaks and troughs in demand. For example a port or harbour that depends solely on sailing is likely to have a relatively short season (maybe April–September at its longest). However a port or harbour that can accommodate other activities (e.g. angling, diving), will experience better demand throughout the year. The mix of alternative uses thus directly impacts on the overall use of an asset, and it therefore impacts on its ultimate value.

The lifetime of the asset

An asset's value is further increased by its useful life, and by the degree to which it depreciates over time or needs maintenance and repair. Some assets can have long lifetimes, and might need little ongoing maintenance and repair over 20–30 years. This gives the asset greater scope to deliver better economic returns than an asset with a useful life of five years. This is an important consideration for ports and harbours, since much of the “asset” has a potentially long useful life that can deliver long-term returns.

Clusters and critical mass

An asset's value can be enhanced by the tourism and leisure infrastructure surrounding it, and by the extent to which it forms part of a tourism and leisure “cluster”. Clusters include a number of mutually supportive individual products and services. They provide opportunities for synergy and economies of scale by enhancing the overall attractiveness of a product, while also facilitating cost savings through shared infrastructure, knowledge, experience or marketing. An asset's potential value therefore increases if it can also draw on other tourism and leisure activities (marine-based or otherwise) as well as on an accommodation base, pubs, restaurants or entertainments. In these cases, the asset includes a wider tourism and leisure “package” that enhances its attractiveness for potential users.

4.3 Potential of Under-Utilised Assets

There are several examples of how under-utilised assets at SPHs can be used to generate economic activity using marine recreation. The most common examples involve the upgrading or enhancement of key port or harbour infrastructure, i.e. the piers, the slipways, the quaysides. For example:

- There are numerous examples of marine recreation developments that were stimulated by major infrastructural improvements along the Irish coast. Kilmore Quay in Co. Wexford is a busy fishing port, but its potential as a centre for marine recreation activities was under-utilised for many years. Following severe storm damage caused to its harbour in 1989, Kilmore Quay underwent a major infrastructural re-development in the mid-1990s. This has in turn proved the catalyst for the development of a successful 55-berth marina in the harbour, followed by the development of angling, diving and island cruise activities.
- Development does not depend solely on enhancing key port infrastructure. The port/harbour quayside and surrounding area can also be developed for amenity purposes by simply making it more attractive for activities like walking, picnics etc. Such development may not directly generate spend for a port/harbour, but it can generate additional activity for surrounding businesses by either bringing people into the area or by prolonging their “dwell time” there. The longer people stay in the area, the more likely they are to spend money there.
- Many SPHs have disused buildings or warehousing. These structures can be turned into useable assets for marine recreation purposes, e.g. as centres for sailing clubs, other watersport activities, chandlers, boat repairs, cafés and restaurants.
- The availability of land is a valuable asset that SPHs can draw on. In particular, it can be used to fund marine recreation development (whether through outright sale of land to raise finance or through the use of land in a mixed-use development, e.g. for apartments). In such cases, however, it is important to ensure that marine recreation development is enshrined in the overall Development Plans for the area.
- Various users of a port/harbour may be able to develop marine recreation activities to supplement their activities. Fishermen, for example, might diversify into providing angling trips or pleasure cruises.

4.4 Who Might Initiate the Process of Integration of Marine Leisure?

Anyone can promote a marine leisure initiative, however, because of the wide range of activities and interests represented in the industry, it is likely that the initiative to draw up a strategy for integration in a given port or harbour will come from the harbour or local authority themselves. Certainly, the preparation of such a strategy will require an authority of that status to carry it forward, to ensure continuity and to persuade potential participants of its seriousness.

On the other hand the initiative might come from a local tourist organisation or from a specialist sports association. Local communities and ad hoc groups might also initiate a project or the effort may come from an individual investor/enthusiast. All of these parties, whether through the statutory system or by means of other local planning mechanisms, will need to persuade the harbour or local authority of the value of their proposals. In short, whatever the origin of the initiative, the involvement and commitment of the local authority and/or the harbour/port authority is essential.

In any given situation the rejuvenation process will require forward planning in order to define the limits of development and the nature of the development envisaged. This initial phase is essential in order to promote the proposed development and to bring all of the key players 'on board' the project. By definition, planning for integration of marine leisure as part of the rejuvenation process requires that all relevant interests are properly consulted and that their plans, needs and concerns are taken into account in the preparation of the regeneration plan. This makes practical sense in any case since any progress toward the introduction or the intensification of marine recreational activities will depend upon a high level of consensus amongst all those affected. In this regard it is perhaps obvious that the support of existing users, owners and the local community is absolutely vital. For example, Donegal County Council, in partnership with other statutory agencies, has appointed a co-ordinator to lead the strategic development of marine leisure and tourism based on consultation with all interest groups in the county. The recently launched County Strategy for Donegal also proposes the establishment of an integrated marine section within the County Council to oversee development of marine infrastructure.

The cultivation of consensus amongst key actors is central to the integrative process. In seeking consensus it is important to understand the motivations and expectations (in terms of benefits) of each of the key players.

4.5 Motivation

At both local and regional level the motivation is more focused, and opportunities for commercial gain, the potential for local job creation, the use of redundant or underused infrastructure, as well as enhanced capacity for tourism will be important. At local level too the potential to improve the 'quality of life' will be significant.

Local harbour commissioners/boards will appreciate the revenue generating potential of marine leisure. They are likely to be concerned with the use and maintenance of presently redundant infrastructure, and will also see the development and integration of marine recreational activity as an opportunity to resolve existing conflicts of interest, etc. The harbour authority may well have a responsibility to initiate the integrative process.

At a national level, government agencies will recognise the potential to generate wealth, secure improvements in the 'quality of life' of citizens and expand the potential to create jobs (particularly in the more remote regions). They will also support initiatives that seek diversification of activity and creation of new opportunities for the application of technology, innovation, etc.

The benefits to interest groups and their motivation for involvement may differ depending on the nature of the organisation or individual interest. For example marine leisure enthusiasts (sub-aqua, sailing and boating, fishing, etc.) may see an opportunity to diversify or enhance opportunities for exercising their sport/recreation in a hitherto under-developed area. Marine leisure bodies such as the ISA, Yacht/boat clubs and others may wish to have the range of infrastructure and venues expanded so as to enable them to compete internationally and to bid for international events. This, in turn raises the profile of the sport/activity, raises standards, and is beneficial to the sport and venue alike.

The wider marine leisure industry, equipment manufacturers, chandlers, etc. will have a purely commercial motivation for participation since such organisations are likely to gain from increased and more widespread use of their equipment and by increased demand for their products.

The tourism industry (both national and local) would see potential in being able to promote improved product offers and introduce a greater variety and depth of products. They would also see merit in developing new venues capable of participating in or contributing to international events.

4.6 Strengths and Weaknesses of the Key Sectors Involved in Initiating a Marine Leisure Rejuvenation Project

There are an infinite number of combinations of organisations and individuals (public and private) who might initiate, participate in, manage or implement a marine recreation-led initiative in a SPH. The most likely combination of interests will involve representatives of both the public and the private sector, the latter being represented either as interested individuals or as commercial companies/associations. A third possible participant/initiator could come from the voluntary sector, representing either the community at large or particular interests (business, environment, social, etc.) within the community. The following analysis attempts to highlight the principal strengths and weaknesses of these three main groups in relation to the conduct of a marine recreation initiative.



Howth

The Public Sector

Because such projects are likely to involve the use of public assets, it is absolutely essential that there be at least some public sector involvement in the initiative. Again, in this context, whilst a government department might be involved either directly or indirectly, it is more than likely that the sector would be represented by the relevant local authority and/or the harbour authority.

The support of the local authority/harbour authority is a vital issue.

The key strengths and weaknesses of public sector involvement include:

Strengths

Ownership/control of key assets relating to the site of the initiative.

Knowledge base: The relevant public authorities are likely to have advanced knowledge of the technical and administrative characteristics of the site.

Contextual knowledge: The authorities will be aware of related projects elsewhere in their own and neighbouring jurisdictions and will therefore be in a good position to assess need, demand and likely competition for the facilities/services contemplated.

Direct role: In planning and capacity to endow local plans with official standing through the Development Plan process. Local authority involvement makes it somewhat easier to have such projects brought into the strategic plans for the area.

Technical expertise: Public authorities will have many of the specialist skills necessary to develop the project in-house. They will also have the administrative capacity and skill to carry the project forward.

Legal and procedural knowledge relating to the conduct of such initiatives.

Status: The involvement of a public authority lends weight and credibility to any project.

Access to funding: In some instances at least, a public authority will be in a better position to access funding than would the private sector.

Continuity: Many projects fail not because they are 'bad' projects but because the personnel driving the project 'move on' leaving the project in a vacuum. Again public authorities will continue in existence and will continue to have liability for a project and its maintenance into the future.

Weaknesses

Staff resources/Time constraints: Many local authority staffs are already over-stretched and are not in a position to take on additional responsibilities.

Lack of specialist knowledge and/or expertise in marine recreation planning or management.

Lack of financial resources.

The Private Sector

The private sector (either as individual investors or as consortia of business interests) will usually only initiate a project if it is found to be commercially and financially feasible. Marine recreational projects may grow out of existing enterprises or they may arise because of an opportunity afforded by the chance availability of a site/facility and/or of tax incentives or grant assistance.

The key strengths and weaknesses of private sector involvement include:

Strengths

Commercial experience and 'know-how' to implement such projects.

Personal commitment.

Specialist expertise in marine recreation or related industry or activity.

Flexibility in operation including the freedom to recruit or to enter into partnership with other private interests for the purposes of a particular project. Also, freedom to co-operate with public authorities for the same purpose.

Capacity and freedom to raise finance and to take (personal) commercial risks.

Weaknesses

Lack of knowledge relating to the operation and functioning of small harbours and ports, or of the procedures and the multiple licenses and permissions required to operate in that environment. Private enterprise may face a steep learning curve in this respect.

Absence of responsibility towards other port or harbour users, single-mindedness or lack of awareness of the needs and traditional rights of others can sometimes lead to conflict with other SPH interests.

'Walk Away' factor if an initiative proves to be unwieldy or unprofitable, private sector interests may abandon the project or simply lose interest leaving behind unfinished business and/or a costly maintenance bill. This might be called the 'Walk Away' factor.

Sometimes-unrealistic expectations in regard to the length of time allocated to project implementation and the time needed to process planning permission/foreshore lease applications and grant applications (where relevant).

The Voluntary Sector

This sector is difficult to define because it can take so many different forms ranging from groups of interested residents representing a local community, to specialist groupings with interests ranging from protection of the environment to local sporting clubs, to those interested in coastal protection. What such groups have in common is their voluntary status and the fact that they represent disparate interests in the community – which may be local or regional in its coverage.

The key strengths and weaknesses of voluntary sector involvement include:

Strengths

The enthusiasm (initially at least) of such groups and their dedication to a local 'cause'.

Involvement with low risk to the individual.

Flexibility in approach.

Variety of professional and commercial skills brought to the project.

Capacity to involve the local community in a practical way and to secure 'ownership' of a project for locals.

Weaknesses

Lack of finance and other resources – no guarantee of continuity.

Lack of standing, experience, legal status or commercial credibility.

Lack of knowledge of marine recreation or of the functioning of SPHs.

Sometimes unrealistic expectations for the project in terms of costs and timing.

Possibility of competing voluntary interests: Local 'infighting' getting in the way of the project.

Difficulty of maintaining interest (amongst participants) when the project falters or is delayed.

Is there an 'Ideal' combination of players?

Although it might be considered desirable to have all three of the above sectors mutually involved in such projects there is, in reality, no such thing as an 'ideal' combination of interests. As the various Case Studies outlined in this report illustrate, each project is a response to the circumstances prevailing at the time and in the area under consideration. In the case of Carrickfergus, rejuvenation commenced by the local authority acted as a catalyst for private sector investment. Development in Phennic Cove was led by a community group, working in close co-operation with a government agency. In Cahersiveen, the initiative to develop was led by a community group, with the objective of addressing local economic development, and tourism considerations. The marina centre in Dingle was incorporated during the overall harbour regeneration process.

What needs to be appreciated is the crucial role of the local authority, which in almost every case acts as 'facilitator' and 'mentor'. Also of importance is the sequential nature of the development of such projects. The organisation (combination of interests) that initiates the project will not necessarily be the same as the organisation that delivers the infrastructure or manages the end product. Projects evolve and have different skill and resource requirements corresponding to their successive stages of development. For example, the appointment of a full-time project manager in Cahersiveen, to oversee the key development stages including pre-planning, community consultation, tracking costs, negotiating contracts etc, was fundamental in the delivery of a successful project.

Another lesson from the Case Studies is that such projects do not happen overnight. Indeed a timeframe of from five to ten years would usually be required to allow for the promotion and development of project concept, technical and commercial feasibility assessment, the acquisition of all the necessary consents and, not least, to secure consensus amongst interested parties. Depending upon the nature and complexity of the project, its implementation may take even more time and throughout all this time interest on the part of the key participants must be maintained. Emergencies (e.g. plant failure, planning appeals, unforeseen technical difficulties, etc.) too must be dealt with and a realistic cash flow projected and maintained from the very start.

The examples illustrated in this report and the success of similar developments elsewhere around our coasts clearly illustrates the benefits, in terms of employment and activity, environmental improvement and quality of life, that can flow from such projects. This is in no small part due to the imagination, patience, skills and perseverance demonstrated by the public, private and voluntary interests involved.

4.7 Some Examples of How Projects May Evolve

Local business, yacht clubs and private developers often initiate projects such as the proposals for small to large marinas at Rosses Point, Skerries and Greystones. Local authorities will often assist, mentor or even take over projects initiated by private interests. The degree to which local government becomes involved will depend upon the nature of the project. If the project is a small marina with the potential of visitor berths it is quite possible that local government may assist in the project funding and take a part role in the management of the project/facility. However if the project has a more significant public benefit, for example, involving waterfront rejuvenation, local government may play a greater role (e.g. Waterford Marina). Alternatively if the project is commercially focused e.g., say, a private marina and apartment development, the developer may have the greater role and responsibility.

Whilst national policy in the rejuvenation of harbours has tended to be somewhat ad-hoc, in recent years various bodies have taken the initiative to carry out works, e.g. community-led initiatives on Tory Island, which was identified as needing more reliable sea communications, tourism, and access facilities in the form of a new pier. Various County Councils are promoting projects either directly or by mentoring/facilitating business proposals. A common theme amongst those actively involved in such initiatives (which was echoed by those participating in the study workshop held in Athlone on 1st November 2002) is the need for a national policy for assisting and grant-aiding the initiation (planning, licensing, feasibility studies, etc.) phase of projects. Assistance for this phase would undoubtedly help to stimulate private sector involvement in marine leisure and recreational-type projects.

Case Study: Cahersiveen Marina

This case study identifies some of the key issues encountered and resolved by a local community during the rejuvenation of a small harbour.

Background. In the mid 1980's the town of Cahersiveen, Co. Kerry was facing the serious threat of rural decline. Cahersiveen pier (managed by Kerry County Council) did provide for some local fishing activity, but was undeveloped in terms of marine tourism and leisure. Also, despite being on the circuit of 'The Ring of Kerry', one of the most popular tourist destinations in Ireland, the town was not reaping the economic potential that its geographical location provided.

Initiation. Against this backdrop ACARD Ltd, the Cahersiveen Community Development Company, was formed with the single objective of unifying the effort of the community into a positive force to make things happen in the area. Kerry County Council had identified the lack of visitor facilities in the west-end of the Iveragh peninsula as a major deficiency in the South Kerry tourism product, so ACARD's proposal for a marina and water activity centre fitted the profile of a suitable regeneration project – addressing local economic, development, and tourism considerations and amenity enhancement.



Cahersiveen Marina

Development. With a total cost of €3.23m (ex. VAT), development at Cahersiveen commenced in April 2000 and was completed August 2002. The marina was awarded €2.54m in exchequer funding, and these funds were matched by community funds of €687,000 raised through the lease of 10-year berths, bank borrowing and fund raising activity. ACARD employed a dedicated project manager to oversee the completion of Phase 1, and to guide and develop the project into its next phase. Key achievements of Phase 1 include:

- Marina infrastructure, pontoons and dredging.
- Private leisure craft berths available.
- Temporary on-shore structures for toilet/showers/training facilities.
- Sea angling vessels operating in the marina.
- Sailing training centre developed and Cahersiveen Sailing Club established.
- Improved access has resulted in attracting passenger-carrying pleasure craft.
- Increased sport and recreation activity in Cahersiveen.
- Enhanced amenity and waterfront regeneration achieved.
- 1 full time and 4 seasonal jobs at the marina. In addition, local business has benefited economically from the marina in terms of accommodation, restaurants, provisions etc.

Issues. The development of Cahersiveen Marina is a unique partnership of community, local authority and state commitment, all driven forward by a private company specialising in such cross-disciplinary projects. Key issues faced by ACARD included:

- Making the decision to engage a full time project manager to oversee Phase 1 of the marina. This investment ensured that commitment and momentum for the project was maintained, and that the project was handled professionally.
- The dedicated project manager also ensured smooth co-operation among the various partners involved in the project. This role was vital to co-ordinate, inform and involve at each stage of the development.
- The project manager's experience also played a key role in facilitating negotiations with the various stakeholders in the project. Continuous communication with the community brought them on-board and achieved local support of the project. The local authority was also extensively consulted from the preplanning stage, before any major decisions were taken.
- ACARD took a long-term approach towards development, working within funding confines to achieve milestones in 3 phases, rather than attempting to complete the development in one round of funding.

- To keep the project within budget, all tenders were negotiated as fixed cost contracts. This approach ensured that the project didn't suffer from budget overruns.
- ACARD were adaptable, and were willing to amend technical plans as a result of post tender discussion. Technical difficulties were addressed and an alternative design plan was implemented. The new marina plan was revised to incorporate rock-armour using locally sourced materials, together with a novel floating breakwater solution, which significantly reduced the capital cost of the project.

Current Status. Phase 2 of development plans provide for permanent on-shore facilities and a purpose-built Clubhouse. To achieve this, ACARD have applied for funding under the Lottery Fund Scheme to the Department of Arts, Sports & Tourism. Phase 3 of the development will aim to provide boat repair facilities, including a boat hoist and hard stand for over-wintering boats. According to ACARD, the 105 berth marina has the capability of generating over €2m per annum in the local economy.

5.0 Financial Considerations and Development and Investment Incentives

5.1 The Market Demand for Marine Recreation

Marine leisure pursuits are both active and passive, and different activities tend to serve different markets. In general, market demand for marine recreation has been increasing. The domestic market for water-based tourism and leisure is worth about €380m per annum, while overseas visitors engaging in water-based tourism and leisure activities spend a further €110m each year¹.

Active Water-based Pursuits	Passive Water-based Pursuits
Pleasure Boating	Beaches and Coastal Recreation
Sail Training	Visits to Islands
Wind/Board Surfing	Coastal Passenger Boats/Pleasure Cruises
Water Skiing	Inland Passenger Boats/Pleasure Cruises
Scuba Diving	Aquaria
Sea Angling	Maritime Museums/Interpretative Centres
Game Angling	Nature Tourism
Coarse Angling	Marine Mammal Watching
Sea Kayaking	Marine Archaeology
Canoeing	Coastal/Lake Touring Routes
Swimming	Cruise Ships

Figure 5.1: Marine Recreational Activities

Demand for marine recreation comes from four main markets. These markets are:

- The local resident market, i.e. those living in the surrounding area of the port/harbour.
- Domestic day-trip visitors, i.e. people who do not live locally but who might use facilities/activities at a port/harbour. More than likely these people would live within a maximum of 60–90 minutes drive time from the port/harbour.
- Domestic overnight visitors, i.e. Irish people who spend at least an overnight visit in the port/harbour area, probably for holiday purposes.
- Overseas visitors, i.e. mainly visitors from Britain and Continental Europe.

¹ 1996 estimates. The domestic figures are based on the Marine Institute's "National Survey of Water-based Leisure Activities", and include spend on visits to beaches/coastal recreation. The overseas figures are derived from Bord Fáilte estimates (these figures do not include spend by visiting sailors to Ireland, as they do not enter Ireland via the major access points where the Bord Fáilte Survey of Overseas Travellers is carried out).



In general, local residents or domestic day-trippers will spend less per visit to a port/harbour, but they will make the most trips. For the majority of ports or harbours, these two markets will make up the core demand. The value of overnight visitors, on the other hand, derives from their spend per head, as they are more likely to spend money locally on accommodation, food and drink, shopping or entertainment.

Factors to consider in assessing the likely demand for marine recreation include:

- Population levels and trends in an area
- Trends in income levels, in particular disposable incomes
- People's propensity to engage in marine recreational activities, and the types of activities they engage in
- The likely size of the overnight visitor market for marine recreational activities

5.2 Investment in “Public Good” Infrastructure

A key reason for State investment in infrastructure is to provide services that have “public good” characteristics. These are investments that are desirable, but which are not optimally provided for by the private sector.

Investment in the marine recreation sector can demonstrate public good characteristics. For example, investment in a breakwater or in carrying out dredging can be highly expensive but it is often necessary to allow sea access into a port/harbour and to facilitate the construction of marinas/pontoons. In most cases, these costs would deter a private investor from providing the infrastructure. However, if State backing is provided it can open up opportunities for marine recreation developments that will deliver genuine economic benefits for the surrounding area.

Investment in public good infrastructure is often justified by the “downstream” effects of the use of the asset, i.e. initial spend by marine recreation users of an asset creates additional spending elsewhere in the economy, which in turn stimulates more economic benefits. The overall spend is broken into four parts:

- Direct expenditure
- Indirect expenditure
- Induced expenditure
- Government recycling expenditure

If rejuvenation projects demonstrate a downstream economic effect that justifies the provision of public good infrastructure, then there should be a strong case for public investment. Even relatively small-scale developments will arouse State interest if the likely benefits are worth it. The marina in Kilmore Quay received about €420,000 in funding under the 1994–99 Operational Programme for Tourism but research carried out by the Marine Institute suggests that the marina generates spending of about €550,000 per annum for its local area.

More expensive investment does not necessarily mean uneconomic investment either. Even where expensive investment such as breakwaters is needed, funding may be justified by the benefits that the infrastructure helps to generate over its lifetime, e.g. the economic benefits generated over 20 years may justify heavy capital investment if ongoing maintenance or repair is not a major issue.

Investment in public good infrastructure can therefore open up opportunities to develop marine recreation as a viable economic activity. Development cannot take place, however, unless there is a willingness to spend money in this way. It is equally important that the major players at a port/harbour present the best possible case for why such investment should take place.

5.3 Benefits and Cost Considerations

Promoters need to fully consider the possible costs and benefits involved in rejuvenating a port or harbour. The justification for spending public funds on regenerating or rejuvenating SPHs therefore needs to be very clear, and there are a number of questions to consider:

- What will the development cost? What scale of development is proposed? Does it require major infrastructural improvements (e.g. breakwaters, dredging)? Are there substantial planning costs involved (e.g. feasibility studies, environmental impact assessments, planning and foreshore licence)? Will the development complement other suitable infrastructures and activities/services that are already available (water-based or otherwise)?
- What are the development's likely direct, indirect and induced effects on the economy? Does it have the right product/location to attract the right markets? Is it filling a development "gap" in its area? Will it compete with/take business from other similar developments in the area or will it generate new business?
- What impact will the development have on other activities in the port/harbour (e.g. commercial fishing)? Will this impact be positive (e.g. by improving the infrastructure available) or negative (e.g. by creating competition for space and by impinging on commercial operations)?

Formal economic appraisal or cost-benefit analysis is needed to fully appreciate the costs and benefits of regenerating or rejuvenating SPHs². A summary of the economic appraisal/cost-benefit analysis steps and what they each involve is provided in Appendix 3.

Economic appraisal and cost-benefit analysis is a decision support tool. It should therefore be carried out early in the project planning process. Whether it is done all at once or all by the same actor (e.g. the port/harbour authority) may depend on the circumstances of a particular port/harbour. It may in practice need the inputs of a number of possible stakeholders (e.g. port/harbour authority, local authority, potential private investors or operators) as well as a wide consultation process with all those affected by the proposed development.

² For a more detailed description of using cost-benefit analysis to gauge the socio-economic impact of marine leisure facilities see K. Hannigan, "The Socio-economic Impact of Marine Leisure Facilities", Irish Management Institute, 1999.

5.4 Investment Incentives for Attracting Development

Lack of investment support for initiatives led by the private and/or community sector is a key obstacle to developing marine recreation infrastructure. In such cases, some form of investment incentive is usually needed to stimulate marine recreation projects that will regenerate or rejuvenate SPHs. This is because such projects often involve investment in infrastructure or facilities that are of a “public good” nature, but have high capital costs that discourage investment by potential project promoters.

Grant aid: Grant aid is a common form of incentive for public good investment in marine recreation, particularly for smaller developments or for developments that are not of a “mixed use” nature. Grant aid schemes are usually targeted at particular types of development or types of location. The Northern Ireland Fishing Villages Renewal Initiative is an example of a targeted grant scheme, which was instrumental in the funding of the Phennick Cove Marina development (see Case Study). Its focus was on areas that were traditionally dependent on the declining commercial fishing industry, and its purpose was to develop alternative forms of enterprise and economic activity to address this decline. The Marine Tourism Grant Scheme is another example of a targeted grant scheme, with its particular focus on addressing poor quality infrastructure.



Ballycotton

A properly targeted grant scheme should result in a positive impact on the development of SPHs. Grant aid is likely to be particularly important for ports and harbours that are situated in smaller locations, away from the major population centres. This is because their size and surrounding scale of activity would most likely deter their potential for raising funds through other methods.

Tax incentives: Tax incentives are another funding option available for developing marine recreation and for rejuvenating SPHs. In most cases, tax incentives that encourage marine recreation development are used as part of a “mixed use” development. For example, such developments might include the development of a marina as well as residential or commercial property in the same scheme. In most cases, the property element of the scheme effectively pays for the marine recreation development, as marine recreation activities are typically too small to generate profit levels that entice investors. It is therefore very unlikely that a stand-alone, tax-incentivised marine recreation development will attract interest without an investment “carrot”.

Tax incentives can also provide an indirect stimulus for marine recreation activity, in particular passive pursuits. Initiatives such as the Urban and Village Renewal Schemes have brought considerable development and enhancement of public areas such as amenities for walks, picnics etc. This type of rejuvenation results in visual and amenity improvements at small or disused ports and harbours, attracting more people to use the port/harbour as a resource.

Again, a properly targeted tax incentive schemes to develop marine recreation must be specific about the type of development to be encouraged. For marine recreation, this would include a guarantee that marine recreation development will be appropriately incorporated into mixed schemes. Otherwise, a scheme might not achieve its original purpose, i.e. to develop the marine recreation sector as a tool for economic development in an area. For example, the Pilot Tax Relief Scheme for Certain Resort Areas was launched in 1995 to improve the quality and range of tourism product available at 15 traditional resort areas. Virtually any form of tourism or tourism-related activity was eligible for assistance under the scheme (including marinas, moorings and breakwater facilities). However, there was no criteria requiring a mix of tourism facilities to be provided and as a result, nearly all the development stimulated under the scheme was for holiday cottages, which offered the best return on investment for investors. A key lesson for developing marine recreation, therefore, is to guarantee that the development of marine recreation is a core eligibility criterion for inclusion in any tax incentive scheme that aims to develop the sector.

In practice, tax incentives are likely to work best for SPHs that are situated near relatively large population centres or near key tourism destinations. These are the types of centres that would generate the demand for residential and commercial development that is necessary to make mixed-use development viable.

Pre-development funding: The costs involved in proper planning are a major constraint for prospective marine recreation developments. Investment needs are not solely capital-based, and the need for “seed” funding for *development planning* is particularly important for community-led initiatives. A development cannot proceed without being properly planned and thought-out in advance. This involves a large amount of preparatory work, including feasibility studies, cost-benefit analyses and environmental impact statements. The combined cost of carrying out such studies can run into thousands of euro. For many potential community-led projects, this is a difficult and sometimes insurmountable obstacle to overcome. It suggests that there is therefore a strong case for better supports to fund such activities. Support for good pre-development planning is also a cost-effective way of enabling decisions on how scarce resources for capital support can be better targeted at projects that have the best potential for generating a worthwhile economic return.

Scope for public/private partnerships (PPPs): There is strong Government interest in using PPPs in Ireland, and in PPPs' potential for funding development projects. This has stimulated wider interest in PPPs, with increased calls for using them in a myriad of different contexts. The Report to the Inter-departmental Group in Relation to Public Private Partnerships defined PPPs as a partnership between the public and private sectors:

“... for the purposes of designing, planning, constructing, financing and/or operating an infrastructure project. The key feature for a successful PPP is the allocation of a project's risks between the public and private sector according to each party's ability to manage and bear them, without destroying the economic balance of the project”³.

The Report to the Inter-departmental Group did not identify marine recreation as a key PPP investment option in Ireland. This is because the ongoing revenue stream from operating marine infrastructure will, in most cases, not justify private sector investment in that infrastructure. However, some form of PPP is being used to develop marine recreation activities in a limited number of locations. An example is Greystones Harbour, where a PPP arrangement is being used to finance re-development of the harbour area that includes mixed uses (residential and commercial).

³“Report to the Inter-departmental Group in relation to Public Private Partnerships”, Farrell Grant Sparks Consulting, July 1998, pg. 1.



Marine tourism “partnership” for developing marine recreation is more likely to involve a different approach to standard PPPs, i.e. one that is not driven purely by “financial engineering” considerations. This could involve the public sector working with the private sector, but it could also involve the public sector working with community groups. Partnership could be initiated by either side, based on a desire to tap into a perceived potential for development. The resulting partnership will most likely involve public assistance (local authority/harbour authority) in providing infrastructure and private/community involvement in providing activities that will add value to this asset. Both grant aid and tax incentives may be sought, if available, to assist development work.

Assistance is crucial to stimulate such partnerships. In particular, lack of finance to develop project ideas is a major obstacle. Without such assistance, the full potential of good projects that are worthy of capital development might often be overlooked. This is where seed funding becomes important, as it can allow both sides of a partnership and other interested parties to further explore the potential that exists for worthwhile development. While the NDP Marine Tourism Grant Scheme, although currently suspended, does in principle allow for limited funding of pilot projects (e.g. feasibility studies, development planning, etc.) that stimulate such partnerships, more of this type of funding is needed.

Case Study: Dingle Marina

This case study illustrates the socio-economic impacts of integrating marine leisure activity in the rejuvenation of Dingle harbour.

Dingle town and peninsula are particularly popular tourist destinations and well served by shops, pubs, restaurants and accommodation. The fishing industry is also important, with landings valued at £8.1 million in 1997. The town's fishery harbour and integrated marina is managed by the Harbour Master on behalf of the Harbour Board.

The rejuvenation of Dingle harbour commenced in 1990 when the marina and associated breakwater were opened. The Marina Centre, which provides on-shore facilities for visiting boat crews was opened in 1998. The marina has 80 berths and a number of independent businesses also operate within the rejuvenated harbour area, providing marine activities such as sailing, diving and angling to visitors. Other services provided in the harbour area include fuel; boat, engine and minor sail repairs; and repairs to radio and electronic equipment.



Dingle Marina

The harbour also provides premises for local sailing and rowing clubs, the diving club and the Dingle Dive Centre which contains a lecture room and a small gymnasium. The marina and its associated activity holidays are actively promoted and the harbour hosts major international sailing events such as the prestigious La Solitaire du Figaro.

The socio-economic impact of integrating marine leisure activity in the rejuvenation of Dingle Harbour:

It is estimated (1997) that direct expenditure associated with marine leisure activity in the rejuvenated harbour together with associated spend from visiting boats, summer sailing courses, sail charters, diving and sea angling, generates almost €841K to the local economy. The estimated total effect of marina activities on employment in the Dingle area is 32 Full Time Equivalent (FTE) jobs.

6.0 Conclusions

6.1 Growing Awareness of Potential

The decline in some of the traditional uses and activities in SPHs results in the need to find new and alternative uses for redundant infrastructure/assets. Coinciding with this decline, there is growth in the leisure market, particularly in the demand for all forms of marine recreational activity, including those activities that require facilities and services in SPHs. There is also growing awareness of the fact that certain infrastructural and land/water resources in SPHs are presently under-utilised. The availability of these assets represents an important opportunity to develop marine recreational activities so as to maximise the potential of SPHs.

The Case Studies presented in this report provide evidence to demonstrate that investment in marine leisure activities based in SPHs can act as a stimulus to development both within the SPH in question and throughout its catchment. However, there is evidence to suggest that the scope for the development of marine leisure activities is not widely appreciated and that there is a need to promote awareness of the various instruments and mechanisms that are already available to assist development initiatives in SPHs, for example in the preparation of Regional Development Strategies and the development of Local Area Plans.

Whilst government policies are generally supportive of the development of marine recreation in SPHs, in practice, the structures that are in place are not appropriate to deliver on this and potential funding is spread across a number of supporting measures resulting in minimal impact. In addition, the potential developers are somewhat fragmented and there isn't a clear "legitimate authority" for developing a broadly based vision encompassing marine tourism and leisure in SPHs.

The many and varied opportunities for marine recreational development in SPHs are balanced by a number of practical constraints and technical considerations. In the main, however, adherence to the proper planning and development procedures; careful investigation during the initiation phase; and preparation of all of the necessary business and technical feasibility studies can ensure that the effect of these constraints is minimised.

The role of the local authority is central to SPH rejuvenation initiatives. A key finding of this report identifies the merits of adopting a partnership approach to development in which the local authority, in partnership with community and private interests, works to secure the future of the SPH. However, partnerships of this kind will only work if the underlying concept is sound.

Rejuvenation projects must be grounded in reality and must prove their commercial viability before any investment takes place. For this reason the availability of funding for 'soft' interventions such as feasibility studies, business planning, technical investigation, pilot projects, etc. is a critical factor and should be accorded a higher priority in marine policy and development schemes in future.

6.2 Positive Benefits from Marine Recreation Projects in SPHs

The potential and the opportunities afforded by marine recreation in helping to rejuvenate SPHs are discussed in Sections 2 and 3. All of the SPHs mentioned in the Case Studies, although initiated by different combinations of players and for different reasons, exhibit positive benefits from the use of marine recreation as a catalyst for rejuvenation.

In Carrickfergus, strategic planning by the Town Council catalysed regeneration of the harbour area. The PPP – Maritime Area Partnership, responsible for implementing the strategy succeeded in attracting over £25m sterling investment in development of mixed-used infrastructure, a range of leisure and amenity facilities and the creation of 335 jobs in the area.

The rejuvenation of Phennick Cove, funded by the Fishing Villages Programme N.I., has resulted in attracting private investment in hotels and other facilities and amenities to the harbour area. The rejuvenation process has helped to create new employment, secure existing jobs and has served to restore local confidence, while introducing new marine leisure recreational activities to the area.

The local community was the driving force behind the regeneration and development of Cahersiveen. The community identified this regeneration project as a key means of addressing local economic development, tourism considerations and amenity enhancement. A marina and water activity centre was developed in the small harbour at Cahersiveen, through a unique community and local authority partnership, with the support of exchequer funds matched by community funds.

The rejuvenation of Dingle harbour, with an integrated marina centre and facilities, is estimated to generate over €800K in the Dingle area. The effect of this expenditure on employment is 32 full time equivalent jobs.

In summary the benefits arising from rejuvenation projects based on marine recreation include:

- More efficient utilisation of (redundant) assets
- Encouraging a higher level of maintenance of existing assets
- Introduction of new uses, activities, vitality and skills to a locality
- Retention of jobs and creation of new employment opportunities
- Attraction of investment, new business and additional visitors to the area
- Generation of revenue for the SPH and its catchment
- Enabling local business to participate in new markets (tourist, leisure, etc.)
- Improving the quality of the environment and of life in an area
- Helping, by virtue of better facilities and services, to improve public safety

6.3 Support for Marine Recreational Projects Aimed at Rejuvenation in SPHs

The existing policy frameworks are supportive of rejuvenation projects in SPHs. (See Section 2, 2.4). Evidence, as documented in the case studies, suggests that the benefits arising from the promotion of marine recreation as a stimulus to rejuvenation are both positive and conducive to further investment and to the maintenance of sustainable development in local areas. However, this study found that if the opportunities that undoubtedly exist are to be fully realised, there are a number of issues relating to the promotion, support and conduct of SPH/marine recreational initiatives that need to be addressed. The following issues are noted, in particular:

- There needs to be clear national policy, leadership and vision on the development of marine recreation in SPHs. This can be complemented by local initiatives.
- Lack of awareness of the opportunities for developing marine recreation in some SPHs is a constraint to development. There is a need to promote the opportunities arising from marine recreation as a stimulus to the rejuvenation of SPHs.

- The absence of up-to-date information concerning the scope and performance of the (marine recreational) industry is a constraint, not least to those who may wish to invest in facilities or services in SPHs. This situation should be examined, the scope of essential information identified and measures put in place to monitor the industry and publish regular data and analyses relating to its performance. Information on marine recreation participation needs to be comprehensive and not restricted, as at present, to occasional estimates of overseas tourism numbers engaging in some marine activity.
- Some funding for the initial feasibility and technical investigations (essential to ensure that projects are realistic) is already available but these funds are difficult to access. As in all development projects, the initial groundwork for a rejuvenation project is vital. This initial phase of a project will include the cost of setting up and maintaining the organisation that will develop the project. It will also include the planning, engineering, design and market feasibility studies that are essential to establish the viability of a project, and these can be very expensive. Because of the initial uncertainty it can be extremely difficult for community-led projects to finance this work or to find matching funds. There is a strong case for the provision of seed funding to enable the *development planning* phase for such initiatives. The adoption of innovative PPP arrangements offers opportunities for rejuvenation and investment in marine infrastructure for the development of the marine tourism and leisure sector.

In conclusion, it is clear that marine leisure and boating activity can and does play a significant role in securing the rejuvenation of SPHs. It is clear also that there are some gaps in the support mechanisms for initiatives based on marine recreation. The strategic development of marine recreation in SPHs needs to be guided by clear policy statements, underpinned by the provision of appropriate resources, if the momentum of development built up in recent years is to be maintained.

7.0 Appendices

7.1 Appendix 1: Listing of Irish Ports

Source: Report of the Task Force on the Development of Port Estates in Commercial Harbours.

Main Trading Ports

Bantry Harbour
Port of Cork
Drogheda Port
Dublin Port
Dun Laoghaire Harbour
Galway Harbour
New Ross Port
Shannon Foynes (Foynes)
Shannon Foynes (Limerick Docks)
Port of Waterford

Smaller Trading Ports

Dundalk Harbour
Fenit & Tralee Pier
Sligo Harbour
Wicklow Harbour
Youghal Harbour

Non-Trading Ports

Ballina/River Moy Harbour
Dingle Harbour
Westport Harbour

Smaller Ports

Annagassan Pier
Arklow Harbour
Baltimore & Skibereen Harbour
Kinsale Harbour
Wexford Harbour

7.2 Appendix 2: An Analysis of Marine Recreation Activities and Infrastructural Requirements

Activities	Elements of Small Harbour Infrastructure																									
	Breakwater(s)	Quayside	Pier	Hard standing	Slipway(s)	Crane or hoist	Floating pontoon/decks and ladders	Floating moorings	Boathouse, warehouse/storage	Net drying/repair area	Ice house	Harbour offices	Public toilets (showers)	Access roadways/ramps	Dry dock/repair dock	Yacht/Boat clubhouse, other	Chandlers	Boat repair shed	Sail loft	Small industry	Navigation equipment	RNLI station	Fuel depot/stage	Market/Auction hall	Amenity area, shelters, bandstand	Parking area or compound
Swimming	3	4	4	4	2	4	3	4	4	4	4	4	1	2	4	3	4	4	4	4	4	1	4	4	2	1
Diving	3	2	2	2	1	3	3	4	3	4	4	3	1	2	4	2	3	3	4	4	3	1	1	4	3	1
Snorkelling	3	3	3	3	2	4	3	4	3	4	4	3	1	2	4	3	4	4	4	4	4	1	3	4	3	1
Surf boarding	4	4	4	3	3	4	4	4	3	4	4	4	1	2	4	3	4	4	4	4	3	1	4	4	2	1
Water skiing	3	3	3	2	1	4	2	4	2	4	4	3	1	2	4	3	3	3	4	4	2	1	2	4	2	1
"Cruising (ship, commercial)"	1	1	1	1	1	1	3	4	3	4	4	1	1	1	3	3	2	3	4	4	1	1	2	4	2	1
Yacht cruising	1	1	2	2	1	2	2	2	3	4	4	3	1	1	3	2	2	3	3	4	1	1	1	4	2	1
Day sailing	1	2	3	1	1	2	2	2	2	4	4	3	1	1	3	2	2	3	3	4	2	1	2	4	2	1
Yacht/dinghy racing inshore	1	2	3	1	1	2	2	2	2	4	4	3	1	1	2	1	1	2	2	4	1	1	2	4	3	1
Yacht racing offshore	1	1	2	2	1	1	2	2	2	4	4	3	1	1	2	1	1	2	2	4	1	1	1	4	3	1
Model yacht racing	1	2	2	2	1	4	3	4	2	4	4	4	1	1	4	3	3	4	3	4	3	2	4	4	2	1
Powerboat racing	1	1	3	2	1	1	2	2	2	4	4	3	1	1	2	1	1	2	4	4	1	1	1	4	3	1
Water scooter	3	3	3	2	1	2	3	3	2	4	4	3	1	2	3	3	2	3	4	4	2	1	1	4	3	1
Boating - rowing	1	2	3	1	1	2	3	4	2	4	4	2	1	1	4	2	3	3	4	4	2	1	2	4	2	1
Boating - canoeing	3	3	4	3	1	2	3	4	2	4	4	3	1	1	4	2	3	3	4	4	2	1	4	4	2	1
Boat excursions (commercial)	2	1	2	3	2	3	3	3	3	4	4	2	1	1	2	3	2	2	4	4	1	1	1	4	2	1
Sea fishing/angling - boat	2	2	3	3	1	2	3	2	2	2	2	2	1	1	2	2	2	2	4	4	1	1	1	3	2	1
Sea fishing/angling - shore	3	2	2	4	4	4	3	4	4	4	4	4	2	1	4	3	4	4	4	4	4	2	4	4	2	1
Rock climbing	4	4	4	4	4	4	4	4	4	4	4	4	4	3	4	4	4	4	4	4	4	2	4	4	2	1
Walking/rambling	3	2	1	4	4	4	4	4	4	3	4	4	2	1	4	4	3	4	4	4	4	3	4	4	1	1
Sightseeing	3	2	2	4	4	4	4	4	3	3	4	3	2	1	4	3	4	4	4	4	3	4	4	4	2	1
Links/golfing	4	4	4	4	4	4	4	4	4	4	4	4	2	1	4	4	4	4	4	4	4	4	4	4	3	2
Picnicing	4	3	2	4	4	4	4	4	4	4	4	4	1	4	4	4	4	4	4	4	4	4	4	4	1	1
Board-sailing					2		3						2	3		3	3				3				3	1
Collecting	4	4	4																							
Painting/drawing	4	4	4																							
Photography	4	4	4																							
Beach sports	4	4	4																							

- 1 Essential, of critical importance to the conduct of the activity 2 Important or useful facility for the activity
 3 Relatively unimportant or optional 4 Not important or irrelevant to the activity

7.3 Appendix 3: Outline of Approach to Cost Benefit Analysis

Project description and options: When analysing economic impact and cost–benefit, it is important to clearly identify the proposed marine recreational elements planned for a port/harbour, or the various options that might become part of the right mix of activities. Later stages of the analysis will help to define what the right scale and mix of activities is for an acceptable level of investment.

Assessment of potential demand: The assessment of potential demand should be a thorough analysis. It should give credible evidence of the likely demand for marine recreational activities generally and for individual activities. The assessment of potential demand should include:

- Population levels and trends in the catchment area of a port/harbour, e.g. is there population growth to support growing potential into the future, is the age/gender profile suitable for the types of activities planned?
- Trends in income levels, in particular disposable incomes, i.e. do people have more or less money to spend on recreational activities?
- Economic growth trends, including output, labour force and employment trends to gauge what the future prospects are for income growth.
- Analysis of people's propensity to engage in marine recreational activities, i.e. is there an existing market that are marine recreation participants, is there a "latent" demand from people who would avail of marine recreational activities if they were available?
- Analysis of the visitor market for marine recreational activities. How big is the domestic/overseas visitor market? What are the future prospects? Where do visitors come from? What do they come for? (e.g. quality of activities and services expected) Where in Ireland do they typically go to?
- Competitor analysis, looking at the existing supply of marine recreational activities in Ireland and overseas (if relevant) to gauge the type of product required to attract business, the extent to which the proposed location is/is not already catered for, or to identify "gaps" or niches that have under–developed potential.
- Analysis of the proposed location in the context of all of the above, to see if it has a readily available local resident market, the potential to attract domestic/ overseas visitors, and a competitive location.

Financial/activity projections: The assessment of potential demand will form the basis for making informed projections about the likely levels of marine recreational activity that can be attracted to a port/harbour. This should in turn be translated into financial projections of what will be earned from direct income. This will be accompanied by a realistic estimation of the costs involved, including contingency for cost and time overruns (e.g. inflation). Again, different scenarios can be developed based on different mixes of activities. Financial appraisal is also important to gauge return on investment, using techniques such as Net Present Value (NPV), Internal Rate of Return (IRR) and Return on Capital Employed (ROCE).

Estimation of social benefits: The social benefits may include indirect and induced income generated by marine recreational activities, jobs created (direct and indirect, including employment in construction), additional tax revenues generated, impact on property values etc. While some benefits (and indeed costs) may be difficult to give monetary values to, they should nonetheless be considered qualitatively in the overall cost-benefit thinking so as to better inform decision making.

Estimation of social costs: Social costs might include the opportunity cost of the funds invested (i.e. the costs foregone of using the money invested for other activities), the opportunity costs of labour, external costs such as congestion or pollution, or the cost of displacement (i.e. displacing of marine recreational demand from other locations or displacement of other activities from the location due to infrastructure pressures, competition for space etc).

Net benefits/costs: Social benefits arising from the project minus social costs arising from the project.

Sensitivity analysis: Sensitivity analysis will be important both in looking at the impact of different activity options/mixes and in looking at sensitivity in shifts in demand/costs for a given option/mix. This may involve looking at how impacts change as the scale of development is altered, looking at impacts based on high/medium/low demand scenarios or comparing impacts with a “do nothing” scenario.

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