

GUERNSEY PORTS MASTER PLAN

JANUARY 2013





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EXECUTIVE SUMMARY

As the shipping industry changes and develops, so must the ports which serve it. The ports of Guernsey are no exception to this, and here shippers with cargo and trade, as well as tourists, must be encouraged to visit the island in order to sustain it.

Twenty-five years ago, St Peter Port was watching the expansion of the port, with the completion of the QEII marina and North Beach car park. There were fewer cars, fewer people and a different perception of hazard and risk.

Today, the marinas are full but no longer suit the profile of the average yacht. North Beach car park is heavily in demand, as is much of the waterfront, accommodating workers and shoppers in the town.

The Guernsey Ports Master Plan has been in gestation for a number of years, with an evolving scope and purpose. This finalised document is intended as strategic guidance that addresses broad issues of safety, utilisation and management of assets, over the next 25 years.

The focus of port activities is on reliability and service to the island community. Nearly 300,000 tonnes of cargo arrived or left Guernsey in 2011, without which the island could not continue to function. Keeping this trade moving, safely and efficiently, remains the key priority for Guernsey Harbours. The Master Plan recognises initiatives that will be integral in maintaining and improving the level of service,

with flexibility to address a range of trade forecasts based on population and GDP growth.

Port operations are under scrutiny. Global events and changing perceptions of safety and risk are impacting the way both St Peter Port and St Sampson's receive and handle cargo, necessitating an inevitable change to fuel importation procedures within the next 25 years and potential modifications to the commercial port footprint to retain compliance with the ISPS Code. These are changes driven by external legislation. Specific objectives, including the relocation of the fuel discharging operation from St Sampson's harbour to a more appropriate and isolated berth and compliance with ISPS security (as well as Health and Safety best practice) are non-negotiable and must feature in the island's works programme within the life of this Master Plan. They will be expensive and need to be budgeted for, now.

The ports also accommodate people, whether passengers on the ferries, visitors on cruise ships or yachtsmen sailing locally and arriving from France, UK or further afield. The ports are a gateway to and from the island and traveller's

EXECUTIVE SUMMARY

perceptions of arrival and departure can determine the way each individual sees Guernsey. Initiatives to improve arrival facilities, whether ferry, cruise or yacht, represents an investment not simply for the port, but also in the reputation of the island and in Guernsey's business and tourism

industries. Measures to improve the experience must factor in the planning of facilities and investment over the next 25 years.

Not all change needs to be driven by external factors. There is opportunity to transform the waterfronts in St Peter

Port and St Sampson's, adopting the best of what is there and supplementing to make the harbours the focus of both communities in spirit as well as place. Recommendations to pursue an integrated transport and parking strategy, to separate conflicting uses along the waterfront, are explicit in the Master Plan, as is the scope to regenerate the waterfront areas and consolidate industrial activity away from public areas.

The Master Plan identifies initiatives to address these within five themes for change:

- Guernsey Gateways
- Castle Pier Improvements
- St Peter Port Harbour Waterfront
- Energy Enterprise
- St Sampson's Waterfront Regeneration.

Responsibility for delivery of the initiatives is spread, including elements under control of the Public Services Department (PSD) through Guernsey Harbours, together with aspects that will require investment through the States, private commitment and public engagement. All initiatives respond to feedback from offices of the PSD and ports, from local businesses and from public comment at consultation.

Where the ports are in 25 years will be a fascinating journey. This Master Plan sets the groundwork for further evaluation and planning, initiated by Guernsey Harbours, PSD and others, to consolidate port activities, to generate opportunities for water-related business and to stimulate transformation of the waterfronts.







1

INTRODUCTION

Future development which scans the next 25 years requires research, planning and expertise from knowledgeable parties –involved either with the ports of Guernsey or the shipping industry as a whole. It is also vital to take into consideration the views of the local population, as they perhaps know the area best.

1.1 INTRODUCTION

In May 2012, the Public Services Department of the States of Guernsey (PSD) appointed a team of professional advisers to develop and refine existing port-related studies, plans and development objectives into a complete strategic document – a Ports Master Plan. The team comprised of Moffatt & Nichol, a global consultancy specialising in ports and maritime engineering, and Turley Associates, leading the stakeholder engagement and consultation process.

The scope of the Master Plan study is specific, set out in the terms of reference for the study. It adopts and builds upon earlier work by PSD and other advisers to present:

- An overview of the ports' existing trading operation
- Consideration of the ports "within an island context", where the ports constitute an essential service
- A review of the current ports' infrastructures and the future demands which the ports will have to meet
- An assessment and outline of proposals for development to meet the ports' future demands
- Identification of the most strategically important

developments for the ports over the medium to long-term

- Implementation programmes required for the recommended changes
- Consideration of funding mechanisms for future developments.

Figures 1.1 and 1.2 (overleaf) show the location of Guernsey and of the two principal harbours, St Peter Port and St Sampson's. The study area principally comprises the land for which Guernsey Harbours have responsibility, together with areas potentially suitable for seaward expansion and area adjacent to the ports that interface closely with port activities.

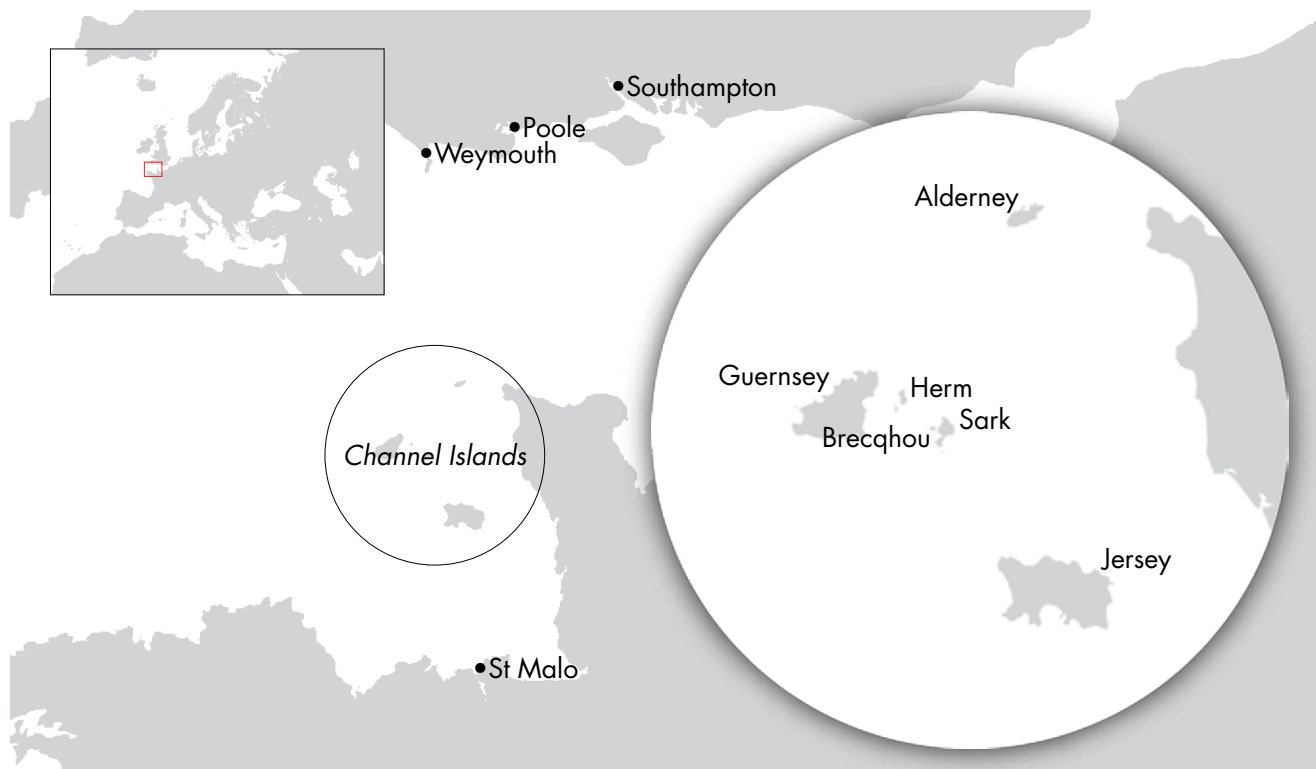
REPORT STRUCTURE

This report is structured as follows:

- Chapter 1 – Introduction
This chapter introduces this document, the Master Plan project and Guernsey ports.
- Chapter 2 – Existing Port Facilities

INTRODUCTION

Figure 1.1: Guernsey Location Map



This chapter provides an overview of the ports today. It summarises existing port operations and key spatial issues.

- Chapter 3 – Port Trades and Forecasts

This chapter summarises the operations of the two ports, including current and forecast shipping and cargo analysis to determine future port requirements (infrastructure and resource).

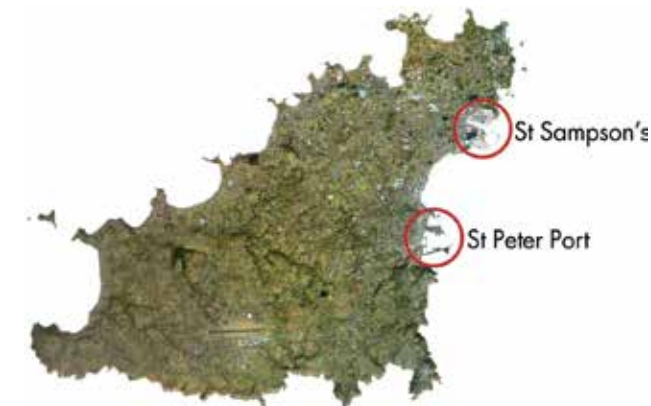
- Chapter 4 – Community Engagement

This chapter summarises the three consultation rounds that have informed the development of the Master Plan.

- Chapter 5 – The Future Vision

This chapter provides a summary of the main initiatives identified through analysis and consultation to optimise the ports through the course

Figure 1.2: Port Location Map



of the next quarter century, including constraints and opportunities identified through the master planning process.

- Chapter 6 – Implementation Strategy

This chapter provides key actions and next steps to advance the initiatives identified in Chapter 5.

ABOUT GUERNSEY HARBOURS

Guernsey is the westernmost island in the Channel Islands. With a population currently in excess of 62,000, it is the second largest of the islands, after Jersey. The islands are served by ferry services into the UK (Poole and Portsmouth) and France (St Malo), as well as passenger services to Normandy and inter-island routes. The cargo for the islands of Herm and Sark is dispatched from Guernsey (St Peter Port). Guernsey's ports are therefore integral to and essential for island life.

Guernsey Harbours is a business unit of the PSD, with

responsibility for the port areas of St Peter Port harbour and St Sampson's harbour, which are the focus areas of this Master Plan. The mission statement for Guernsey Harbours is:

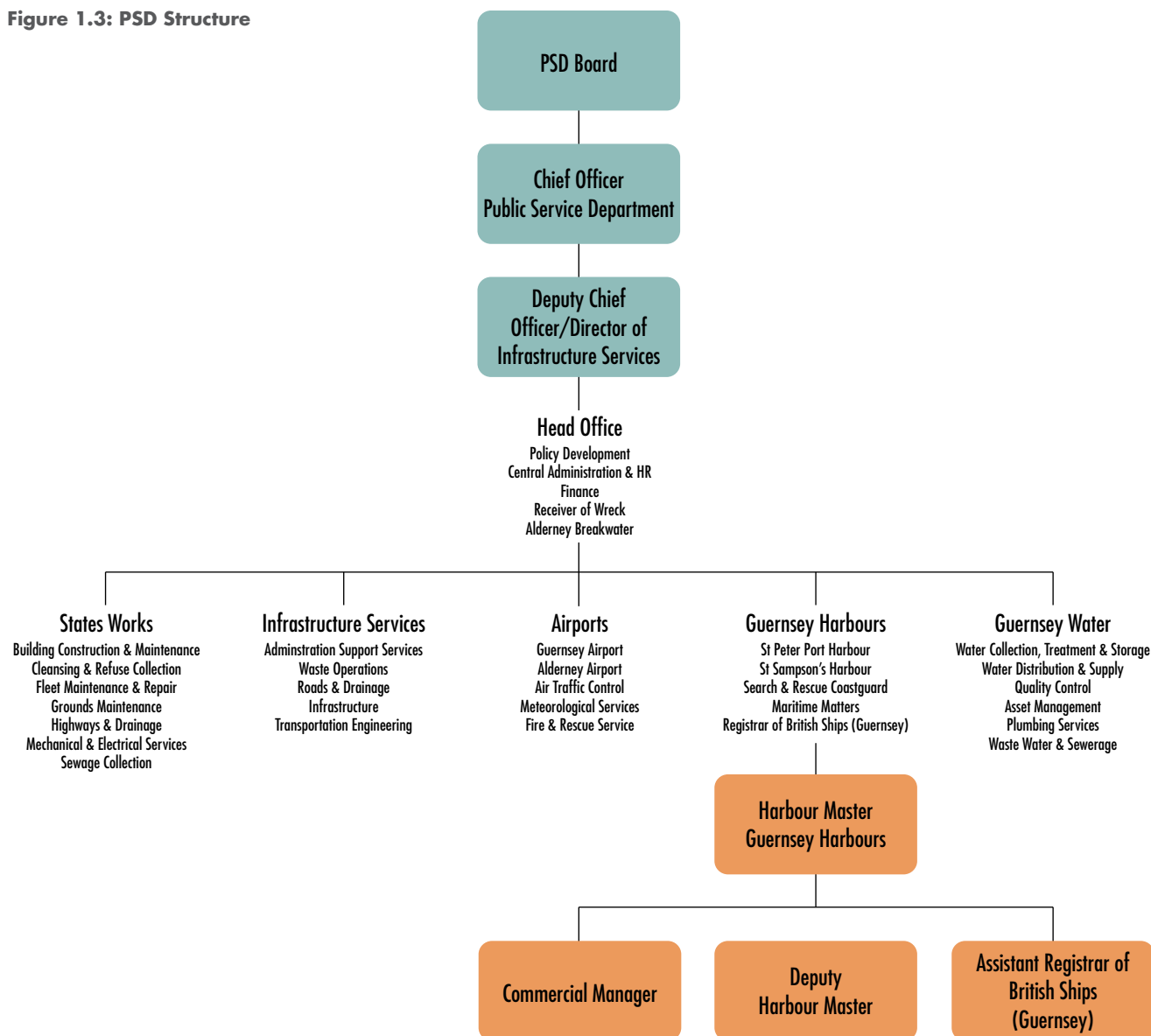
"To safeguard, secure and provide for the maritime needs of the island."

The States of Guernsey's Public Services Department is responsible for a wide range of maritime functions. This includes management and operation of the harbours at St Peter Port and St Sampson's. Responsibility for the port structures is shared between Guernsey Harbours and the Environment Department, with the latter specifically tasked with maintaining sea defence structures along the high water line (essentially the coastal edge pre-development of the port complex). The port areas that fall under PSD/Guernsey Harbours' responsibility are illustrated in Figures 1.4 and 1.5. These areas nominally represent the limits of the Master Plan area.

As the main commercial gateway to the Bailiwick, Guernsey Harbours handle approximately 98% of all Guernsey's freight imports and exports, including 100% of all liquid hydrocarbon fuel imports. St Peter Port harbour also provides essential links to key ports on the south coast of the UK and to France, as well as Jersey, Alderney, Sark and Herm, carrying around 33% of all in and outbound passengers.

Guernsey Harbours' functions include provision and administration of terminal facilities, moorings, ships registry, pilotage, coastguards, aids to navigation, and facilities maintenance. The ports are essential for the import and export of goods and therefore are integral in the commercial

Figure 1.3: PSD Structure



INTRODUCTION



Figure 1.4: St Peter Port

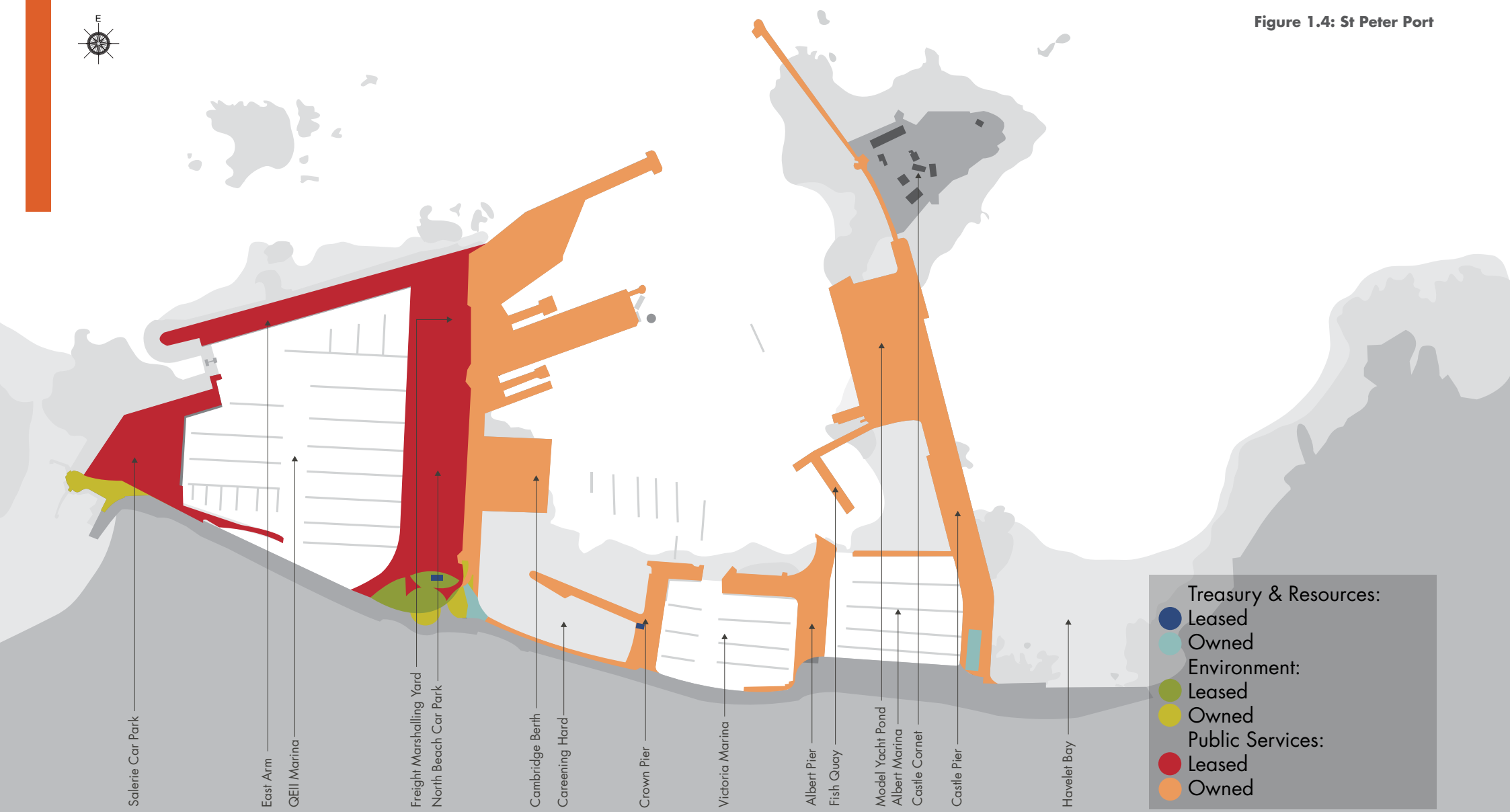


Figure 1.5: St Sampson's Harbour

Trafalgar Quay

La Crocq

Abraham's Bosom

North Pier

South Commercial Quay

Mont Crevelt

Longue Hogue Reclamation



States-owned areas

PSD – Harbours:

● Buildings

● Land

● Harbour

Treasury & Resources:

● Buildings

● Land

● Area being reclaimed by PSD

INTRODUCTION

success of the islands. While a significant employer in its own right, the port also has direct impact on local businesses, generating secondary employment in marine-related industry and stimulating tourism/recreation associated with the marinas and cruise facilities.

Both harbours have facilities for commercial ships and marinas for leisure craft. The two ports are not in competition and require a co-ordinated approach so that future development of facilities is aligned. Prior to the implementation of modifications to berths 4, 5 and 6, there has been relatively little capital investment within or around the port areas since the expansion of the QEII marina and east pier.

1.2 WHY IS A MASTER PLAN NEEDED?

The United Kingdom's Department for Transport (DfT) produced Port Master Plan Guidance (2008) which identified the main purposes of the Port Master Plans in the UK are to:

- Clarify the ports' strategic plans for the medium and long-term
- Assist regional and local planning bodies, and transport network providers, in preparing and revising their own development strategies
- Inform port users, employees and local communities on how they can expect to see the ports develop over the coming years.

Guernsey does not have any statutory requirement to produce a Port Master Plan. However, the PSD has long recognised the value in undertaking a formal masterplanning process

to determine the shape and direction of harbour operations and investment into the 21st century. Additionally, given the prominent location of both ports, wider initiatives in St Peter Port and St Sampson's rightly overlap with the ports' strategy. The Master Plan therefore incorporates initiatives that impact on and optimise the harbours, while recognising that these initiatives may not be driven by PSD or Guernsey Harbours – it is an area Master Plan, not simply one focused on the commercial role of Guernsey Harbours.

The DfT guidance provides a checklist of the primary aspects that a UK Port Master Plan should cover. While obviously not specifically applicable to Guernsey, the template has been adopted as a guide to the structure and content of the Guernsey Ports Master Plan, the scope for which was agreed between the PSD and the consultant organisations, acknowledging the specific circumstances of Guernsey's ports as the primary conduit for all goods into and out of the island. As such, the primary focus of the Master Plan has to be operational and functional, and therefore does not include all elements itemised in the DfT Guidance. Nevertheless, the guidance document stresses the importance of consultation with key stakeholders, interested parties and the wider public, and this has been adopted in determining the strategic priorities.

This Master Plan represents the culmination of a process initiated by the PSD, and includes work undertaken by the Department. It sets out projects for the short term (that is, the next five years) as well as projects for the longer term.

1.3 MASTER PLAN STRATEGIC OBJECTIVES

The Guernsey Ports Master Plan is a key document establishing the future direction for the harbours. The intent of the Master Plan is to present a strategic development framework for the next 25 years, guiding current and potential port users, operators and stakeholders.

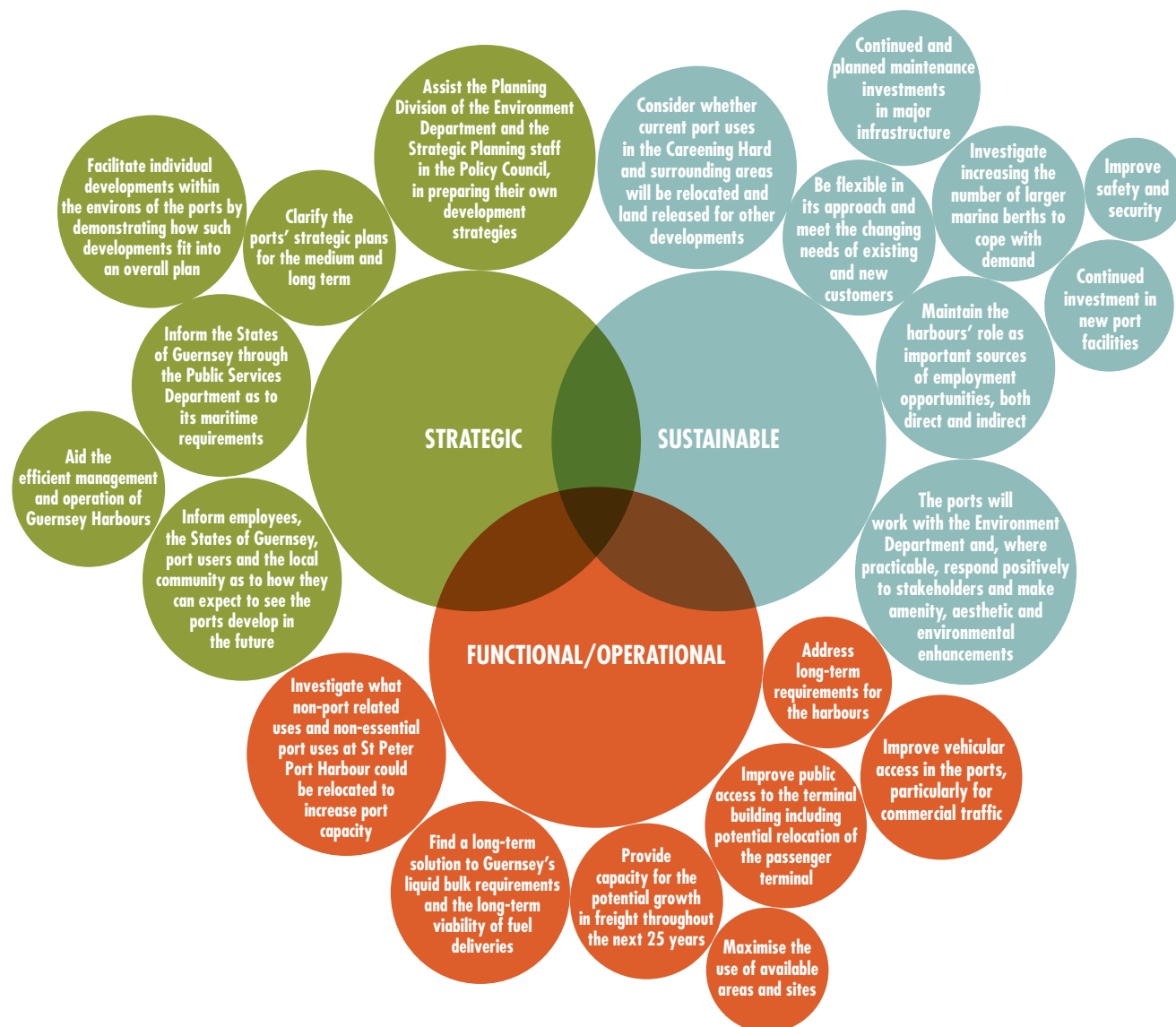
The study objectives can be summarised as:

- Optimise the performance of the ports to meet existing and future projected throughput (transport planning, modernisation of facilities, replacement of essential equipment), recognising the essential role the ports have for the island
- Identify initiatives to address safety and security concerns within the ports, including relocation of hazardous operations, implementation of International Ship and Port Facility Security Code (ISPS) zoning and segregation of user groups
- Maximise value generated for the States of Guernsey. Consider diversification of port operations to increase revenue, particularly in the leisure sector, including cruise and marina related initiatives
- Prioritise investment needs, within an implementation plan, to guide development strategy over the next 25 years.

Additional and more specific objectives for the Ports Master Plan are illustrated in Figure 1.6, namely:

- Clarify the ports' strategic plans for the medium and long-term
- Assist the Planning Division of the Environment

Figure 1.6: Objectives



Department and the Strategic Planning staff in the Policy Council, in preparing their own development strategies

- Inform the States of Guernsey through PSD as to its maritime requirements
- Aid the efficient management and operation of Guernsey Harbours
- Facilitate individual developments within the environs of the ports by demonstrating how such developments fit into an overall plan
- Inform employees, the States of Guernsey, port users and the local community as to how they can expect to see the ports develop in the future
- Identify measures to secure long-term operational resilience in both harbours
- Provide capacity for the estimated growth in freight throughout the next 25 years
- Maximise the use of available areas and sites
- Investigate what non-port related uses and non-essential port uses at St Peter Port harbour could be relocated to increase port capacity
- Improve vehicular access in the ports, particularly for commercial traffic
- Improve public access to the terminal building including potential relocation of the passenger terminal if the security line is relocated
- Find a long-term solution to Guernsey's liquid bulk requirements and ensure the long-term viability of fuel deliveries

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- Ensure sustainable port development
- Improve safety and security
- Continued and planned maintenance investments in major infrastructure
- Continued investment in new port facilities
- Be flexible in its approach and help meet the changing needs of existing and new customers
- Consider whether current port uses in the Careening Hard and surrounding areas will be relocated and land released for other developments
- Investigate increasing the number of marina berths and support facilities to cope with demand
- Consider the viability of providing improved access to cruise liners and explore the benefits of this service and related facilities
- Maintain the harbours' role as important sources of



- employment opportunities, both direct and indirect
- Work with the Environment Department and, where practicable, respond positively to stakeholders and identify amenity, aesthetic and environmental enhancements
- In line with other objectives, make the ports financially viable and self-supporting.

1.4 MASTER PLAN CONTEXT

PREVIOUS STUDIES

Over the lifespan of St Peter Port harbour and St Sampson's harbour, a number of reports and studies have been commissioned for various port-related purposes. Many of these reports, where appropriate, have guided the direction of this Master Plan and are referenced throughout this report. Key references are listed in Appendix A.

STRATEGIC LAND USE FRAMEWORK

The following notes derive from 2007, during preparation of a Waterfront Strategy for Guernsey, and are replicated to reinforce continuity of approach:

- The benefits to be realised from the strategy need to be the firm focus of the project from the outset and it must be ensured that those benefits are delivered whatever the changing circumstances during the lifetime of the project
- The strategy needs to take a long-term perspective that is sustainable over many years

- It should be established that there is sufficient confidence and commitment locally to sustain the development of a major strategy over the long-term
- The relationship between port operations and security and other uses in the harbours must be carefully managed during the development and following its completion
- Integration between the waterfront area and the wider urban area is vital. There must be ease of movement between the two areas and people need to be drawn into the waterfront and positively encouraged to use the area
- Any necessary transport infrastructure should be considered first even though this may mean front-loading the costs ahead of receiving a return from other aspects of the development.

The 2011 Strategic Land Use Plan (see 'Policy LP8' panel) identifies an integrated Ports Strategy as a key component in the leisure and recreation policy, highlighting the need to balance and integrate competing uses.

The Strategic Land Use Plan, prepared by the Strategic Land Planning Group, was approved by the States of Guernsey in November 2011. Within the 'Linking Policies' section of the Plan, under the subsection 'Main centres as attractive places to spend leisure time' it identifies the important role that St Peter Port and St Sampson's harbours play in defining the character of the main centres and offering potential for improving the public outdoor spaces for greater social, economic and environmental benefit. It states that, through a co-ordinated approach to planning and development, a

POLICY LP8

MAIN CENTRE VITALITY AND VIABILITY – LEISURE

The States will seek to instigate measures and support projects that enable the town and The Bridge to be maintained as attractive places to spend leisure time by:

- i. respecting their special historic character while enabling development to take place that will permit them to respond to modern leisure and recreation expectations
- ii. encouraging the improvement of public areas to ensure the centres are desirable places to spend leisure time
- iii. making provision for opportunities to improve leisure and recreation facilities within and around the harbour areas while balancing this with essential port development and operational requirements
- iv. developing a harbour strategy to balance competing uses
- v. encouraging the development of a diverse range of economically viable leisure, culture and arts related developments within the main centres
- vi. developing a vision for traffic and transport within and between the main centres that seeks to minimise the negative impact of the motor car on leisure spaces while also making provision for modern public transport facilities.

strategy should be prepared that looks beyond the purely functional requirements of the ports and seeks to satisfy wider social, economic and environmental objectives.

RELEVANT LAND USE PLANNING POLICIES

The States of Guernsey's Environment Department has a number of policies relating to external transport links which need to be considered as part of any planning application. These policies¹ are outlined here:

Safeguarding of sites which offer an opportunity for port-related development:

POLICY ETL 1: In considering proposals for development with the Harbour Areas, the Committee will seek to ensure that sites which are suitable for port-related development are retained and safeguarded from inappropriate development.

New Harbour Facilities:

POLICY ETL 2: The further improvement of the harbour facilities and the construction of new facilities together with their associated land uses, in accordance with an approved Harbours Strategy, will be supported.

The quality of the quayside environment:

POLICY ETL 3: In considering development proposals within the Harbour Areas, the Committee will take into account the quayside's distinctive character, important public views, and the need to conserve and enhance features of architectural and historic interest.

St Peter Port harbour is also designated as a conservation area and Policy DBE7 also applies:

POLICY DBE 7: Development within, or affecting the setting of, a Conservation Area will only be permitted if it conserves or enhances the character and appearance of the area, in terms of size, form, position, scale, materials, design and detailing. Particular attention will be given to the removal of unsightly and inappropriate features and the retention of features that contribute to the character of the area.

1.5 CLIMATE CHANGE

As a guiding principle, the Master Plan recognises climate change. The expected resultant rise in sea levels presents new challenges for all ports. Future infrastructure initiatives should take account of the environmental impact and carbon footprint of all operations and proposals identified through the Master Plan process. Of significance, the Environment Department has published Flood Risk Assessment Studies on Guernsey's Coastal Defences which provide assessment and guidance in respect of flood related threats to the ports.

¹ Urban Area Plan (review no. 1), July 2002, the former Island Development Committee



02

EXISTING PORT FACILITIES

St Peter Port dates back to the 13th century, St Sampson's harbour to the 19th century, protecting Guernsey's fleets and serving the hinterland and adjacent islands. Over the years, the ports have been developed, updated and altered in order to maintain performance, and further change will continue into the future.

2.1 INTRODUCTION

Guernsey Harbours operates the two primary harbours in Guernsey, at St Peter Port and St Sampson's. The two sites operate in tandem, with services shared between the two locations. St Peter Port handles the import and export of freight, passengers and commercial and private vehicles, while St Sampson's caters for aggregates and receives fuel deliveries for the island. St Peter Port also accommodates the island's fishing fleet. Both ports incorporate marinas for pleasure vessels (operated by Guernsey Harbours) and support a number of marine-related businesses.

The key existing facilities and their functions at both harbours are outlined in the following sections.

2.2 ST PETER PORT HARBOUR

St Peter Port is a natural anchorage with the first harbour constructed in 1275. The original harbour was depth-limited and the facility was extended over a 150-year period, extending the primary berths into deep water, creating sheltered berths for commercial, and more recently,

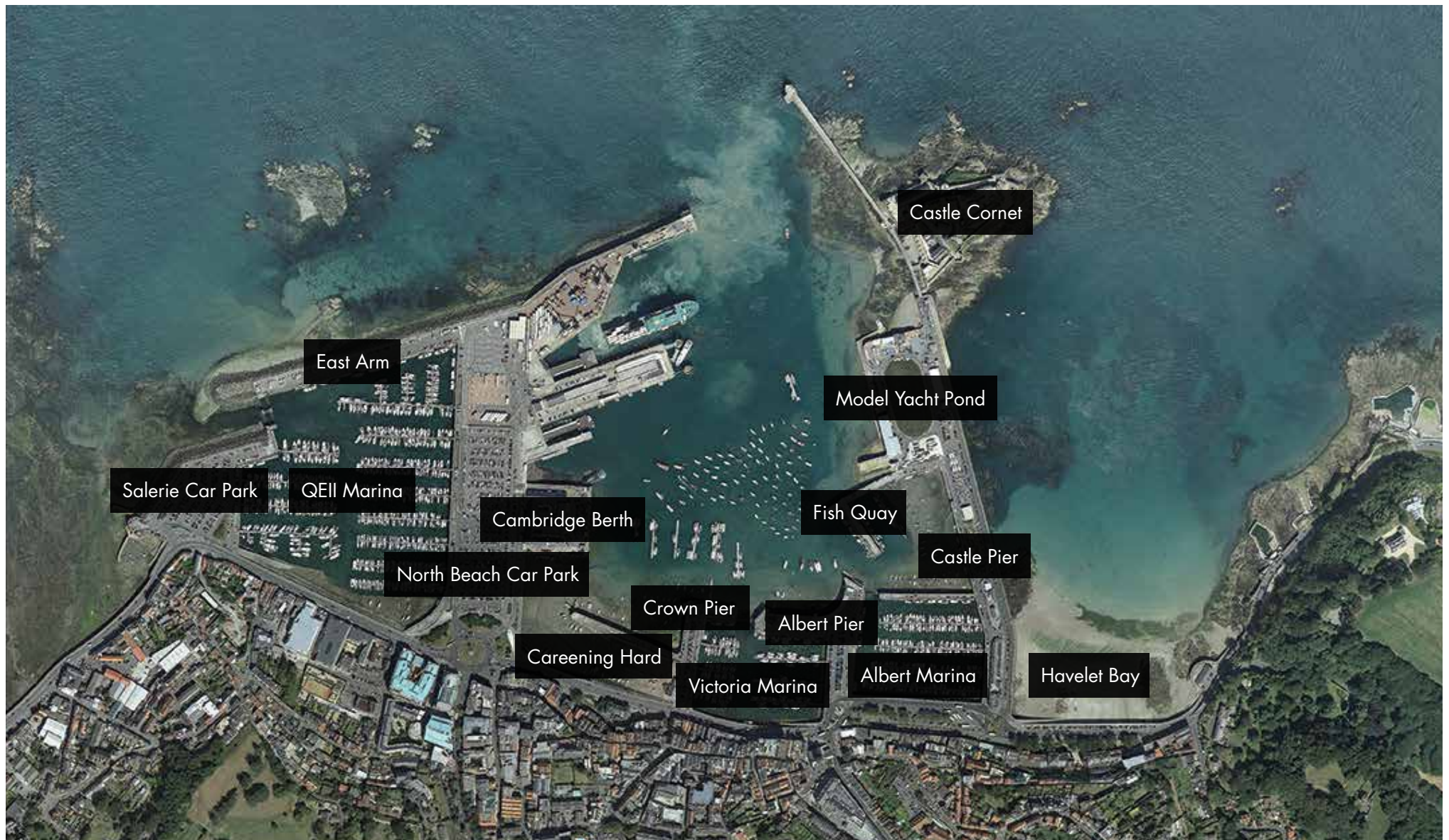
recreational vessels. There are two navigable entrances to the harbour, approached from the east. The primary, commercial entrance runs between the White Rock Container Berth and the Castle Emplacement breakwater towards the south of the harbour estate. There is also a dedicated entrance to the QEII Marina at the most northern extremity of the port area. The tidal range is between 6.6m for neap tides and 8.9m for spring tides.

The port operates as a split site. While Guernsey Harbours has control of all roads within the port, defined as the area east of the former foreshore, there are five discrete components linked by public highways, namely:

- The Salerie Car Park
- Commercial Port
- Crown Pier
- Albert Pier
- Castle Pier.

As well as these five spatial areas, the port incorporates five key functional components. A more detailed description of some of the key facilities is provided on the following pages.

EXISTING PORT FACILITIES



THE COMMERCIAL AREA

The commercial area, comprising the outer berths in the main port area, is deemed a secure area for customs and immigration clearance primarily for cargo import, export, marshalling and storage. The facilities include Lo-Lo berths, with associated craneage, Ro-Ro berths for container shipment and general vehicle transit, passenger facilities (for cross-border ferries) and freight/vehicle marshalling areas, as illustrated in Figure 2.1. It is apparent that, at present, there is some public access within the secure area, particularly to the New Jetty. This is not ideal and establishment of a controlled area is an urgent priority. The port has ISPS Certification for the present configuration.

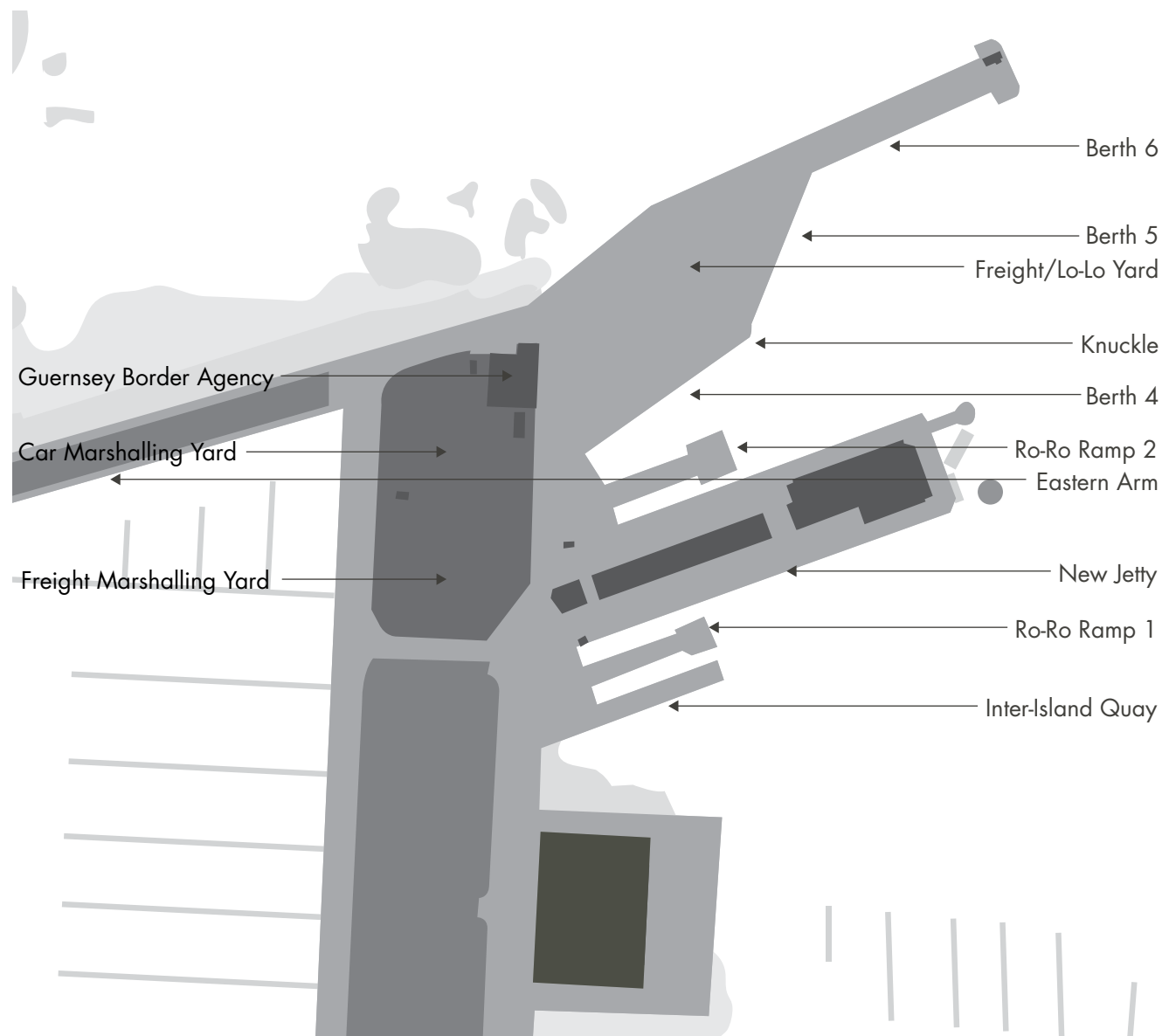
LO-LO BERTHS



There are three Lo-Lo berths (for lift-on, lift-off goods, i.e. cargo which must be lifted onto and off the vessel using cranes). Numbered as Berths 4, 5 and 6, these are located at

Figure 2.1 (left): St Peter Port

Figure 2.2 (right): St Peter Port Commercial Area



EXISTING PORT FACILITIES

the outer extent of the port, alongside the main breakwater. In July 2008, the Public Services Department advised the States of the need to upgrade the facilities on Berths 4, 5 and 6¹. The project to refurbish these berths incorporates the replacement of the four cranes on Berths 4 and 5 with two port mobiles, the reinforcement of areas on which the new mobile cranes will operate, and necessary repairs to all other required areas. The States approved the proposal as an essential undertaking. Works are on-going, with completion scheduled for 2014.

- Measuring approximately 94m in length and with deep water alongside, Berth 4 is the preferred Lo-Lo berth. The berth was constructed in 1970 and is equipped with a 32-tonne Scotch Derrick crane, constructed in 1971, accompanied by a 7-tonne rail-mounted portal crane, constructed in 1966
- Berth 5 was constructed in 1971 and measures approximately 75m in total length with a 28m central landing stage. The berth has a 32-tonne Scotch Derrick crane and a 7-tonne rail-mounted portal crane, duplicating the equipment on Berth 4. The berth has restricted operational use, due to alongside water depth and length restrictions. However, given the significance of the Lo-Lo facility for the island, retention of two fully functioning berths is considered a minimum requirement for Guernsey Harbours
- Berth 6 is 85m in length and has a landing stage mid-way across the berth which is constructed in a similar fashion to the landing stage on Berth 5. The

berth has one static, electrically-powered 5-tonne portal crane, constructed in 1946. This crane has a maximum load of 5 tonnes, a working radius of 55ft and a maximum lift height of 60ft. Berth 6 is the least well-equipped and has the least flexibility of the berths, as it has limited depth of water and minimal shore access. It is unsuitable for use by anything other than those vessels loading for Sark or Herm. Operationally, the hardstanding at Berth 6 is used for segregating cargo for Sark from that destined for Alderney and the UK. The current port configuration is congested, and relocation of this function into the main freight handling areas at Berths 4 and 5 would be detrimental.

RO-RO BERTHS

There are two Ro-Ro ramps in the port (for roll-on, roll-off goods, i.e. cargo or passenger vehicles which do not require cranes to be loaded, but are driven on and off the deck of the ship). These are located adjacent to (east and west of) the New Jetty (see Figure 2.2). These are used for trailer-based freight, commercial and private vehicles. Both ramps are in satisfactory condition.

Table 2.1: Commercial Port Yard Areas

Description	Location	Key Parameters	Current User(s)	Existing Area (m ²)
Storage Yard	Behind Berths 4 and 5	General Cargo and unitised freight	Huelin Renouf, Channel Seaways, Sark Shipping	9,120
Freight Marshalling Yard	Near Customs Shed	Unaccompanied Ro-Ro trailers	Condor Ferries	6,220
Car Marshalling Yard	South Quay	Accompanied Ro-Ro and vehicular traffic	Condor Ferries	2,945
Total				18,285

Source: Moffatt & Nichol

Right (clockwise from top left): The new jetty and passenger terminal; Inter-Island Quay; Careening Hard; The Fish Quay

CARGO MARSHALLING AND STORAGE AREA

The yard area behind Berths 4, 5 and 6, the Freight Marshalling Yard and the Car Marshalling Yard are the primary areas for marshalling and storing cargo at St Peter Port. These areas are used for receipt of incoming cargo and preparation of Ro-Ro traffic departing St Peter Port harbour. Details of the yard areas are provided in Table 2.1.

Shipping containers come in various standardised sizes: 28m³, 58m³, and 66m³. St Peter Port harbour can store up to 80 containers at any given time, with 42 of these being held in the marshalling area. This will increase to a maximum of 110 following the completion of on-going work on Berths 4, 5, and 6 in 2014.

THE NEW JETTY AND PASSENGER TERMINAL

The New Jetty was originally completed in 1929 and comprises a reinforced concrete suspended deck of approximately 9,800m² supported on reinforced concrete piles. There is an under deck walkway which provides access at low water. The jetty forms the safe point of entry

¹ Billet D'État XI July 2008 p946



EXISTING PORT FACILITIES

for both passengers and Ro-Ro freight sea traffic.

The New Jetty houses a number of buildings that were originally constructed as freight storage sheds. These buildings are predominantly single storey, flat-roofed, lightweight structures. One such building, situated on the end of the New Jetty, serves the primary purpose as a foot passenger terminal for the ferries. The Passenger Terminal has been extended and modified substantially on several occasions since its original construction, and now measures approximately 1,900m² in size. While the building remains structurally sound, and includes basic facilities like toilets, both the internal facilities as well as its location are no longer considered fit-for-purpose. It currently houses a café, public telephones, toilets and has adjacent public parking.

Nominally within the secure area of the port, public access to the New Jetty is currently required at all times for those wishing to meet/drop-off foot passengers at the terminal, as well as for those accessing the variety of local businesses housed in the other jetty buildings.

THE INTER-ISLAND BERTHS

INTER-ISLAND QUAY

The Inter-Island Quay is 800m² in size and is currently used primarily for the transport of passengers between Guernsey and Herm, Sark or Brecqhou. The berth is also used by cruise ship tenders as they dock to drop/collect passengers taking short excursions.

CAMBRIDGE BERTH AREA

The area (Emplacement) adjacent to the Cambridge Berth is 5,600m² in size and is currently used by numerous

separate entities, from both the private and public sector. The surrounding/adjacent berths and steps are used by the Herm and Sark ferry services and Brecqhou Construction on some journeys, but not all, as access is dependent on the tide. In addition, the berth contains storage for a number of freight handling companies, the Harbour Master's offices and associated functions, various workshops where Lo-Lo freight is processed, and smaller commercial entities. Businesses currently working within the Cambridge Berth area, leased by Guernsey Harbours, are listed below.

- Guernsey Port Services Ltd
- Brecqhou Development Ltd (marine and driving operations)
- White Rock Café
- Allied Coasters Ltd
- Alderney Shipping Co Ltd
- Channel Seaways Ltd
- Sark Shipping Company Ltd
- Felix Shipping Ltd
- Orac Ltd
- Lucas Freight Ltd
- Harbour Office
- MS Engineering Ltd.

THE FISH QUAY

The Fish Quay is located in the south-western corner of St Peter Port, connecting to Castle Pier. The structure was built in 1987 as a reinforced concrete deck supported on piles with alongside pontoons.

There are approximately 170 vessels in the licensed Guernsey commercial fishing fleet, of which approximately 30 moor alongside the Fish Quay at any one time. A relatively deep pocket of water surrounding the Fish Quay allows for greater accessibility and water circulation – critical requirements for the fishing fleet.

The Fish Quay is well-used, and therefore is in need of refurbishment (or replacement) of structural components. Some improvements to the supporting infrastructure (such as craneage, access ladders, ice provisioning and fuel facilities) are also necessary.

MARINAS AND MOORINGS

A substantial water area within St Peter Port harbour is utilised for leisure purposes, without corresponding availability of shore support facilities for engineering workshops and other related businesses.

The marinas for leisure mooring in St Peter Port have various construction dates. The Victoria Marina was built in 1973, the Albert Marina was built in 1975, and the Queen Elizabeth II Marina was built in 1989.

There are currently some 2,000 berths in the St Peter Port harbour with 1,833 local moorings and 400 visitor moorings, including swinging moorings and provision for rafting. There is an increasing competitive requirement for car parking within St Peter Port, which compromises the available land space and limits the scope for the provision of further facilities within the port area. Guernsey Harbours offers marina facilities, including a marina office, showers and toilets, a laundrette and public telephones. Most of the facilities are

contained in St Peter Port, making it the preferred option for leisure mooring. Nevertheless, the general provision is poor, when compared with equivalent marinas in Northern France and the UK.

CAREENING HARD

The Careening Hard was created in the 1870s, originally as a patent slipway which was converted to a careening beach in 1921, leaving the machinery/winding house which remains today as the marina showers and toilet building. The Careening Hard is an area containing a man-made spending beach, numbers 8 and 9 drying berths, and a number of drying moorings mainly for smaller vessels.

The Careening Hard presently represents a very low earning capacity area of the harbour. It occupies 10,000m² and has a boat length limit of 20m.

PUBLIC ACCESS AND AMENITIES

The primary public area in St Peter Port is located at the southern end of the port, comprising Castle Cornet, the Guernsey Yacht Club and Model Yacht Pond as well as Havelet Bay to the south.

In addition, areas of the port have been adopted by the public for (free and permit) parking, including the East Arm, North Beach Car Park, the Salerie Car Park, Crown Pier, Albert Pier and areas on Castle Pier. These car parks are not revenue earning but require administration and carry health and safety obligations for the port.

2.3 ST SAMPSON'S HARBOUR

St Sampson's harbour was constructed in 1880 and is a drying port. The harbour entrance is exposed during strong winds and is subject to high tidal currents across the mouth (at high tide rather than mid tide), as well as the hazard of rock outcrops and the frequent poor visibility in and around the area. All commercial vessels require mandatory assistance by local pilots during transit. The harbour can accommodate vessels of a maximum length of 79.2m at the discretion of Guernsey Harbours.

St Sampson's has two main berths for commercial vessels, the North Pier and the South Commercial Quay, together with marina berths and associated facilities. Further development to expand commercial port facilities within the inner harbour has been discounted based on access constraints and the basin spatial restrictions.

INNER HARBOUR

COMMERCIAL BERTHS

NORTH PIER

St Sampson's offers Lo-Lo freight facilities but does not have Ro-Ro capabilities. Two rail-mounted quay cranes installed on the North Pier in 1987 allow for solid bulk and aggregates to be lifted, up to a maximum capacity of 7 tonnes. Further to this, the North Pier has liquid fuel transferring capabilities. Up to two small vessels can berth on the North Pier at any one time.

Right (top): Inner Harbour North Pier
Right (bottom): Inner Harbour South Commercial Quay



EXISTING PORT FACILITIES



■ **Figure 2.3 (left): St Sampson's Harbour**

SOUTH COMMERCIAL QUAY

The South Commercial Quay has bulk unloaders which allow for cement to be transferred, as well as facilities allowing for the liquid fuel and gas consignments. The South Commercial Quay can accommodate up to three vessels concurrently, albeit subject to vessel size and, particularly, cargo hazard.

LIQUID FUEL AND GAS

St Sampson's harbour is the primary entry point for petroleum products onto the island. Both the North Pier and the South Commercial Quay have facilities for discharging tankers. However, due to the characteristics of the harbour, fuel tankers are required to dock at drying-out berths. This is not generally accepted practice; international safety guidelines state that drying-out berths are not suitable for the transfer of fuel products². To safeguard supply of liquid fuel to the Bailiwick, the States of Guernsey purchased in December 2008, two NAABSA (not always afloat but safely aground) tanker ships to operate through St Sampson's, recognising that use of such vessels is not ideal and that measures to improve flexibility (in terms of vessel size and schedule) and safety (in terms of proximity of operations to residential areas and use of drying berths for fuel supply) are a priority. It is acknowledged that the dimensions of the present tanker fleet are at the maximum limit for operations within the harbour, and that modification within the harbour is not appropriate. The requirement to undertake inspection of the seabed after use and before arrival of the next ship has a significant

impact on efficiency and berth usage.

MARINA

The construction of St Sampson's marina in 2005 created substantial new moorings. The layout of the marina allows for 350 always afloat berths with water retained behind a tidal sill. There is therefore access restrictions based on tidal elevation. The marina layout maximises the available space and the number of moorings could not be increased further without radical engineering work to expand the water area used for marina purposes. It is unlikely that St Sampson's marina would be the central focus of any developments aiming to increase marina berth capacity.

PARKING AREAS

There are three former quay areas in the inner harbour that are now either used as general public parking or are under-utilised with little revenue generation:

- Abraham's Bosom, on the north side of the harbour close to the North Pier, is utilised for public parking and provides a base for berth holders using the northern pontoon area
- Trafalgar Quay is approximately 1,650m² in area and is situated on the north side of St Sampson's marina. The area is currently under-utilised and generates little revenue. The structural integrity of the area is thought to be unsatisfactory and therefore no development can take place or permanent structure built in this area until a survey has been carried out to assess its condition
- Le Crocq is located on the southern side of the

harbour, between the two southern pontoon systems. It is utilised for public parking and for berth holders using the adjacent moorings.

THE LONGUE HOUQUE RECLAMATION

There is an ongoing reclamation project to the south (and outside) of the mouth of the harbour, forming a substantial land area adjacent to the harbour. The southern portion of the site has been in-filled and is destined to accommodate a waste handling/processing facility. The northern area is yet to be filled (although the perimeter bund/revetment is in place), but has been identified for Guernsey Harbours' activity although the area has not been formally allocated at this time.

² ISGOTT – International Safety Guide on Oil Tankers and Terminals – 16.7



03

PORT TRADES AND FORECASTS

The various passengers and cargoes passing through Guernsey have a huge impact on the day-to-day practices at its ports. By looking at current port trade and forecasting how it may look in the future, we can anticipate which direction upcoming port development should take.

3.1 INTRODUCTION

This chapter outlines the various port trades passing through Guernsey's ports as well as their historical and forecast cargo volumes over the medium to long-term. These projections have informed the analysis and development of the Master Plan with regards to the ports' spatial and functional requirements over the next 25 years. As port trades and trends change to meet ever-evolving technologies and markets, Guernsey's ports must adapt accordingly and incorporate flexibility in their development approach.

3.2 KEY DEMAND DRIVERS FOR TRADE FORECASTING

An effective Ports Master Plan requires foresight to prepare for future trade volumes and associated spatial and functional requirements. Forecasting trade demand comprises the establishment of historical and current trade patterns, identification of demand drivers which influence trade, and projecting the influence of these drivers.

To understand the scale and type of future trades at

Guernsey's harbours, a Future Harbours Requirements Study was commissioned and published in September 2010. As part of the study, a socio-economic indicator review was conducted, wherein the key demand drivers for Guernsey were identified as population and Gross Domestic Product (GDP) growth rates. Each of these is discussed briefly on the following pages.

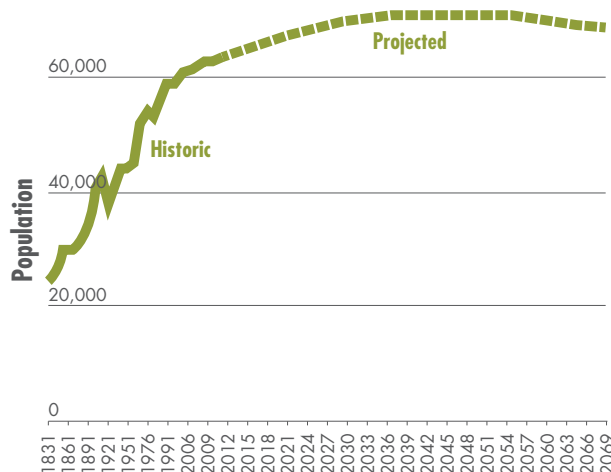


PORT TRADES AND FORECASTS

POPULATION

Guernsey's historical and projected population figures are displayed in Figure 3.1. The forecast indicates that Guernsey's population will experience slowing growth over the next 30 years, peaking at close to 71,000 inhabitants in 2045, with a slow and steady decline thereafter. This generally suggests that demands for port trades tied to population will experience slow growth over the 25-year timeframe of the Ports Master Plan.

Figure 3.1: Predicted Population Growth (distorted time axis)

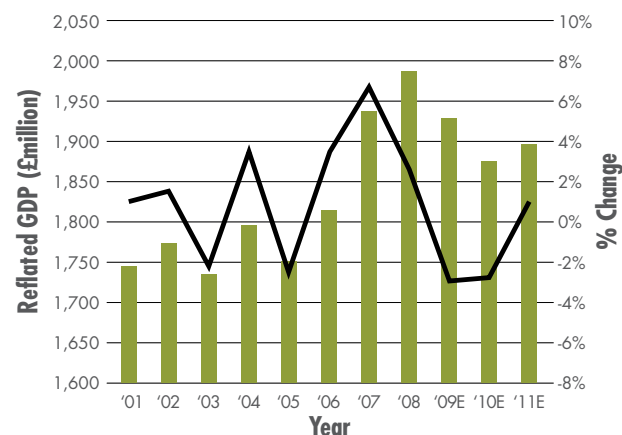


Source: Guernsey Annual Population Bulletin – Policy Council – 2012

GROSS DOMESTIC PRODUCT (GDP)

Following strong economic growth from 2006-2008, Guernsey's GDP contracted in 2009 and 2010 due to the global recession. Positive growth returned in 2011, although output was still below 2009 levels, as shown in Figure 3.2.

Figure 3.2: Guernsey GDP 2001 to 2011 (estimated)



Source: The States of Guernsey's Policy and Research Unit

According to economic projections at the time of this writing, Guernsey's year-on-year GDP growth rate for 2012 is expected to be flat, with a return to 1% growth in 2013. Guernsey's long-term GDP growth rate target is 2%, further indicating general trade growth over the lifespan of the Master Plan.

3.3 PORT TRADE ANALYSIS

A brief description of the main port trades handled at St Peter Port and St Sampson's is provided in this section, along with historical trends and projected growth.

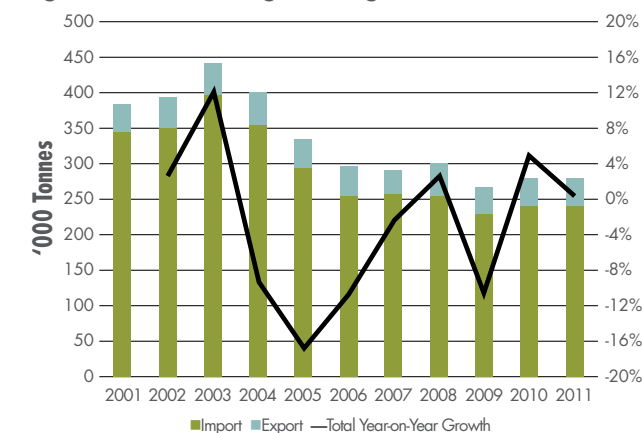
More details on trade projections can be found in the Future Harbour Requirements Study.

Table 3.1: Cargo Handling Locations

Cargo Type	St Peter Port	St Sampson's
Ro-Ro (and Ro-Pax)	•	
Lo-Lo	•	
General Cargo	•	•
Liquid Bulk		•
Solid Bulk		•
Recreational Boating	•	•
Cruise	•	
Commercial Fishing	•	

Recent historical tonnages and growth rates are shown in Figure 3.3.

Figure 3.3: Gross Cargo Tonnage Trend



Source: Guernsey Harbours

UNITISED CARGO (LO-LO AND RO-RO)

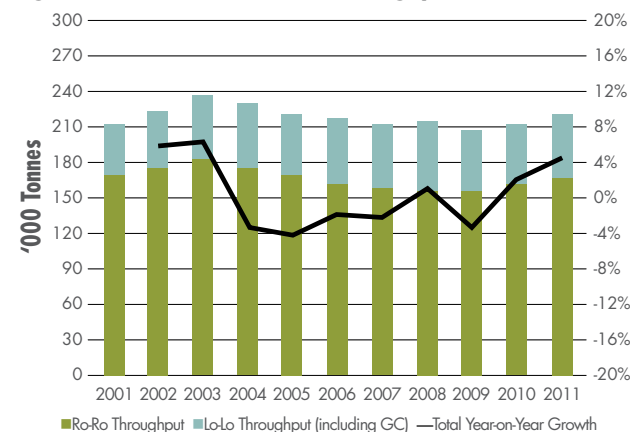
HISTORICAL

Unitised cargo (UC) is freight which is carried aboard a vessel on standardised pallets or containers. In Guernsey,

the Lo-Lo and Ro-Ro berths in St Peter Port are both used for unitised cargo, and this represents the largest trade type handled by tonnage in Guernsey's ports. Unsurprisingly for an island such as Guernsey, where subsistence is heavily reliant upon goods from overseas, approximately 85% of the unitised cargo crossing Guernsey's quays by tonnage is imported.

As shown in Figure 3.4, Ro-Ro traffic represents the majority of unitised cargo handled at Guernsey Harbours (approximately 75% by tonnage in 2011). Lo-Lo traffic, while representing a much smaller proportion, has seen larger growth in tonnage than Ro-Ro over the last ten years.

Figure 3.4: Lo-Lo and Ro-Ro Throughput Trend

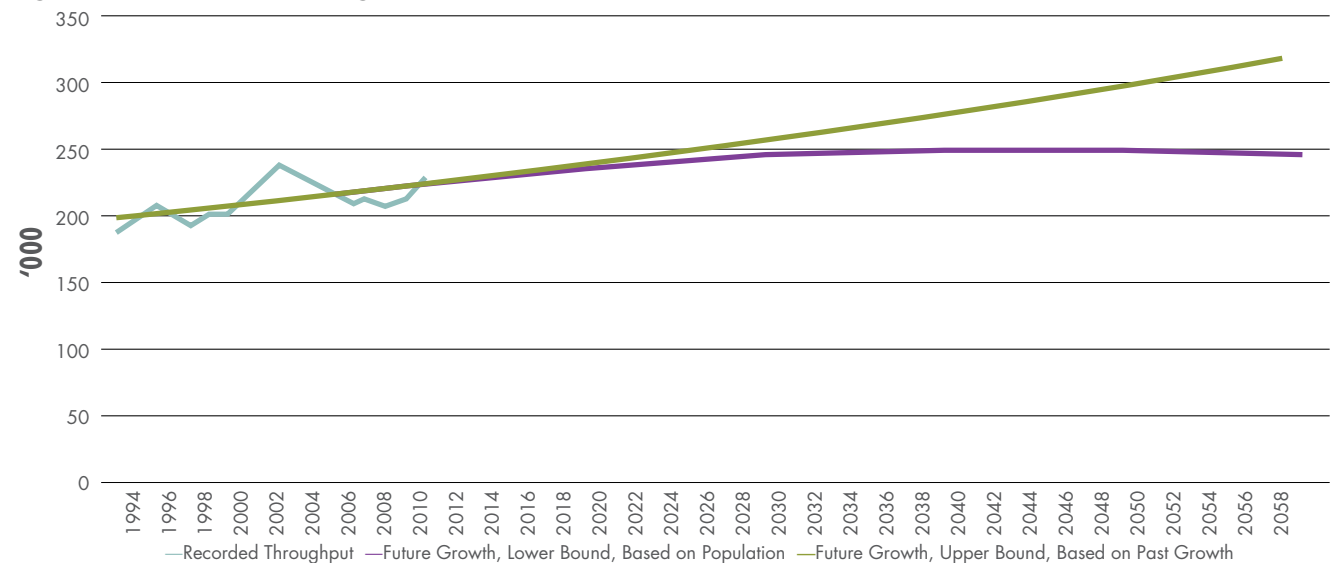


Source: Guernsey Harbours

PROJECTED GROWTH

Recent trends suggest that there will continue to be a decrease in Ro-Ro and an increase in Lo-Lo. The problem arises that unlike Ro-Ro freight, which can be driven straight off in an

Figure 3.5: Future Unitised Cargo Predictions



Source: Crane and Quay Strategy States Report (December 2011)

accompanying trailer, Lo-Lo freight has to be processed and stored before being moved on. This requires space and while there are 72 spaces for freight storage, the data indicates that the current available storage space will not suffice to accommodate any growth of trade within Guernsey's harbours. The estimated future demand for unitised cargo is shown in Figure 3.5, taken from The Crane and Quay Strategy States Report (December 2011). The document stated that the figure illustrated "The estimated upper and lower limits for future cargo throughput at St. Peter Port harbour... These predictions are for average throughput and it is quite possible that individual years will have throughputs outside the upper and lower predictions. Nonetheless, the average throughput is expected to be between these figures."

The upper limit is obtained by continuing to apply the historic annual increase to the current throughput whilst the lower limit relates throughput directly to projected population. The predictions extend to 2059 for combined Lo-Lo and Ro-Ro freight. The proposed cranes will have the capacity to handle the Lo-Lo volumes associated with the upper limit predictions across the berths, although the current area behind the berths for storage of containers and Ro-Ro freight is likely to be inadequate for these volumes. Even the lower limit projection gives a peak freight throughput larger than Guernsey Harbours currently handles".

Based purely on current per-capita tonnage, the peak unitised cargo throughput may be in the order of 260,000 tonnes.



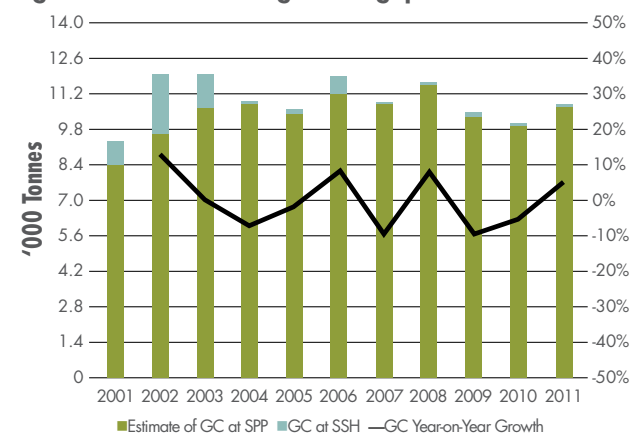
GENERAL CARGO

HISTORICAL

General cargo consists of products or commodities that are typically not conducive to packaging or unitisation, such as project cargoes, timber, paper rolls, structural steel and equipment.

General cargo is handled in Lo-Lo form at both St Sampson's and St Peter Port. There has been a steady shift away from this method of shipping towards unitised cargo, as the standardisation of shipping containers allows for greater efficiencies in transportation, storage and handling. Nonetheless, some freight is too heavy and/or bulky to be unitised and therefore remains as general cargo.

Figure 3.6: General Cargo Throughput Trend



Source: Guernsey Harbours

General cargo tonnages experienced a significant decline between 2001 and 2008 at St Sampson's harbour, while they have steadily increased at St Peter Port over the same

time period (tonnages of general cargo handled as Lo-Lo freight at St Peter Port are inexact, making figures on this cargo type less definitive).

A reasonable deduction from this trend would be that general cargo operations have remained stable and have simply transferred for the most part from St Sampson's to St Peter Port, with the remaining tonnage increase in combined Lo-Lo being attributed to a steady growth in the trade. However, the loss of Low Value Consignment Relief (LVCR) on exported goods is expected to have impacted on tonnages, and will continue to deflate exports in the near future.

PROJECTED GROWTH

General cargo tends to be project-specific and is usually closely linked to the construction industry. In this respect, general cargo is often associated with a 'just in time' system where cargo is imported as and when needed. A review of historical data highlights the fact that general cargo, unlike unitised cargo, shows no correlation with population statistics, which conflicts with one of the key demand drivers identified for other trade types.

Forecasts from the Future Harbour Requirements Study project general cargo throughput will reach 14,000 tonnes by 2019; 16,000 tonnes by 2029; and 24,000 tonnes by 2059.

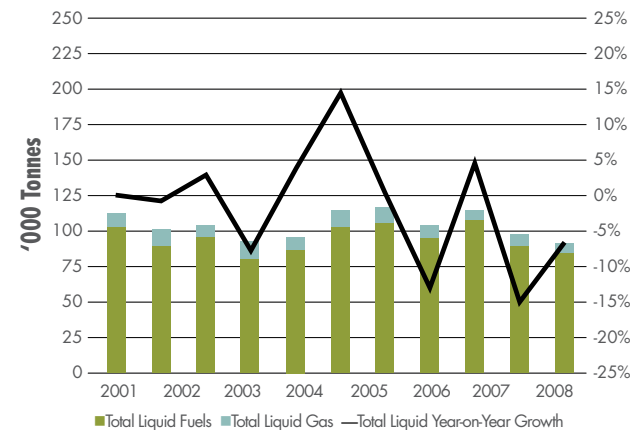
LIQUID BULK

HISTORICAL

Liquid bulk cargo is any unpackaged/non-unitised 'wet' cargo, such as liquid fuels, base oils, chemicals, liquid edibles (vegetable oils, fruit juices, etc.), liquefied natural

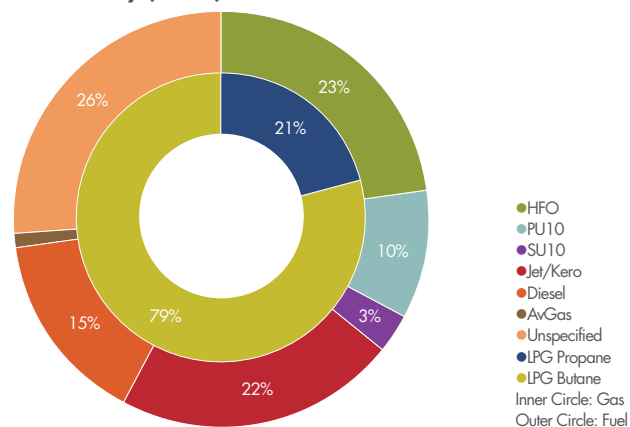
gas and liquefied petroleum gas. Guernsey's liquid bulk market comprises the importation of petroleum products,

Figure 3.7: Liquid Bulk Throughput Trend



Source: Guernsey Harbours

Figure 3.8: Breakdown of Liquid Bulk Imports by Commodity (2011)



Source: Guernsey Harbours

heavy fuel oil (HFO) and liquefied petroleum gas (LPG). These activities take place solely at St Sampson's.

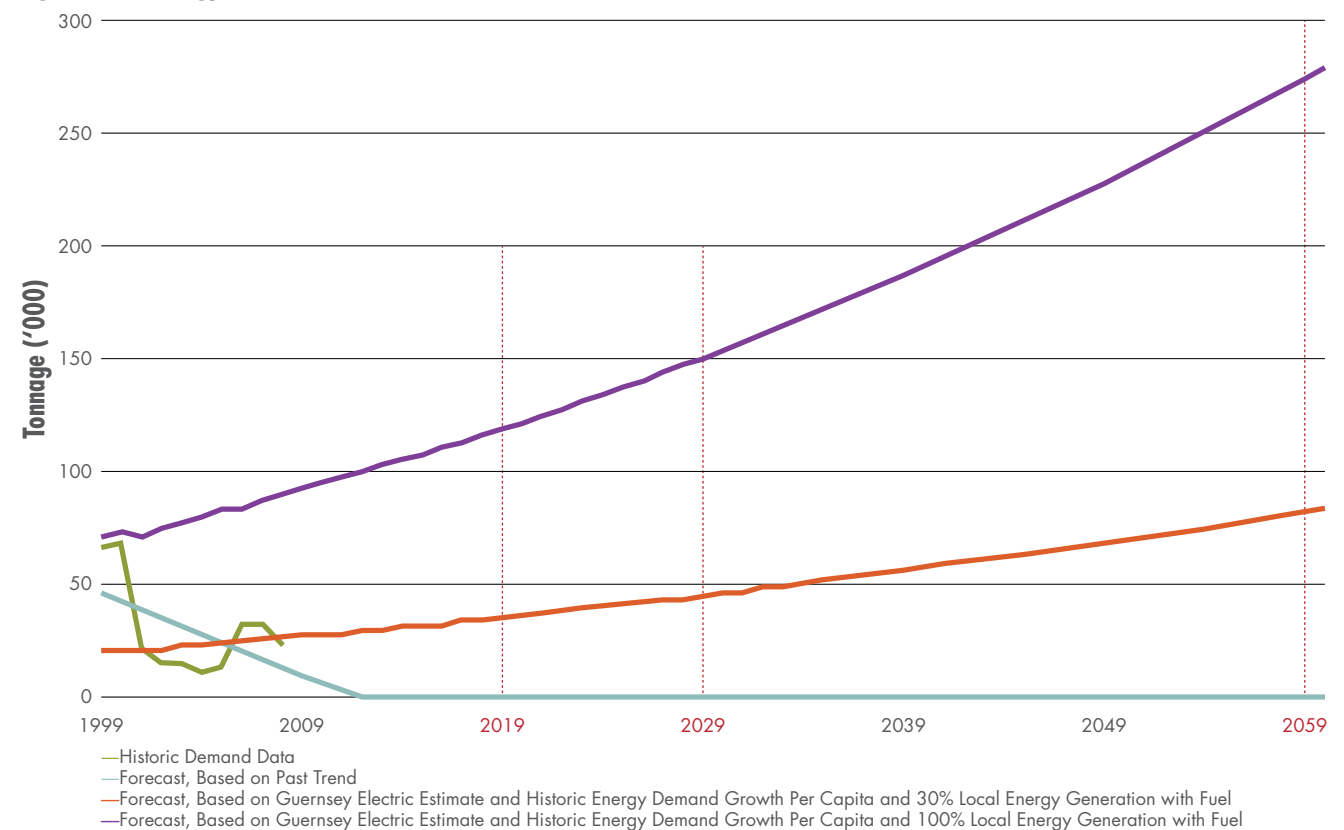
Data from 2001 to 2008 show the total tonnage of liquid fuel imports to have fluctuated between approximately 105,000 and 125,000 tonnes per annum. The average import of liquid fuel throughput over this period was approximately

114,000 tonnes per annum.

PROJECTED GROWTH

The liquid bulk market in Guernsey mostly comprises of fuels and gases which have distinct demand drivers, namely electricity, heating and transport. Each of these is discussed on the following pages.

Figure 3.9: Energy-Related Fuel Demand Scenarios



Source: Future Harbour Requirements Study, 2010

PORT TRADES AND FORECASTS

ELECTRICITY

Electricity generated on the island relies heavily on the import of heavy fuel oil. Following the installation of an interlink cable between Guernsey, Jersey and France in 2001, the majority of the island's electricity requirements were met through the use of the cable link.

However, following a failure of a section of the cable between Guernsey and Jersey in early 2012, Guernsey was required to revert to full on-island electricity production, with the subsequent increase in demand for the importation of heavy oil.

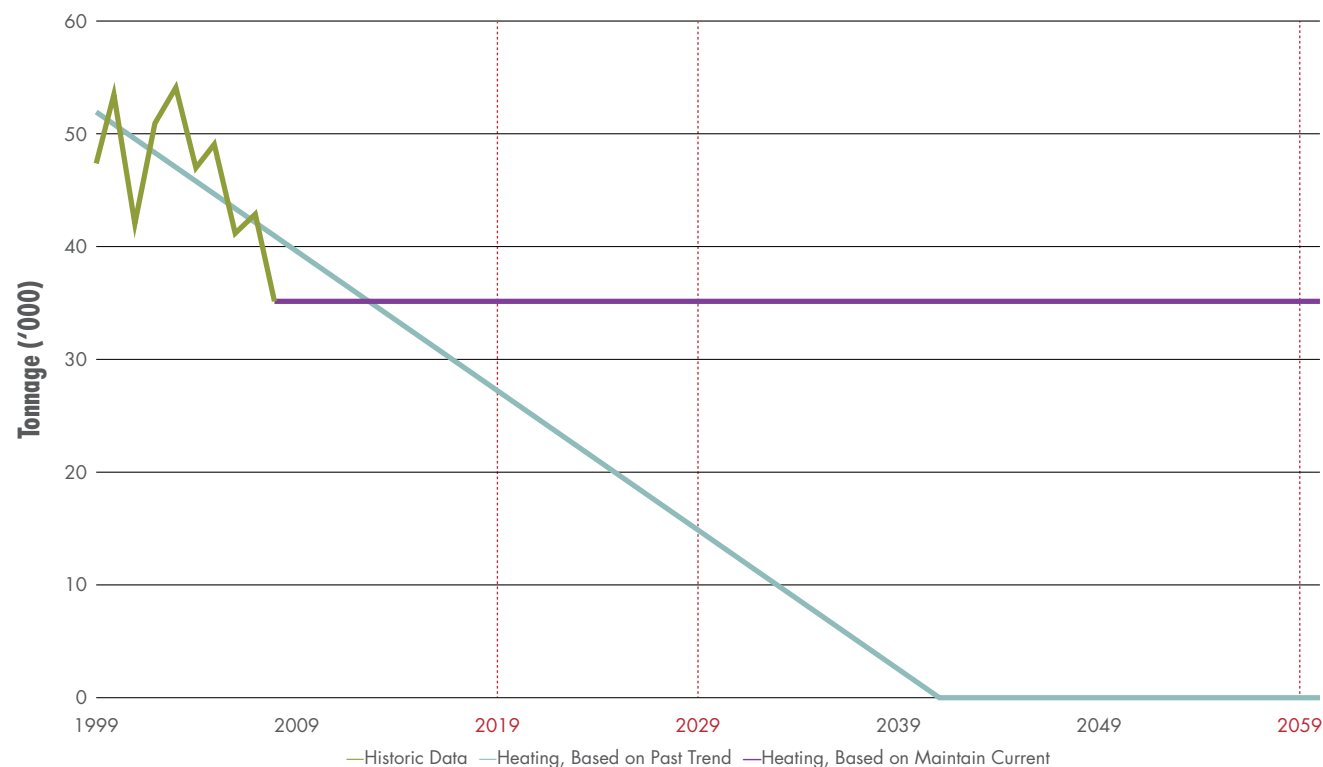
Guernsey Electricity is required to maintain the ability to meet the island's peak energy demands by producing electricity on-island (currently through diesel powered generators) and therefore there will remain a requirement to ensure this production can continue even once the cable link to Europe has been re-established.

There is a proposal for a second interlink cable to be built sometime between 2014 and 2020. If this proposal is accepted, the knock-on effect would be a further decrease in demand for heavy fuel oil.

In the Future Harbour Requirements Study, three scenarios for electricity demand were forecast, as listed here and illustrated in Figure 3.9:

- Scenario 1: Following current demand trends, 30% of Guernsey's electricity will continue to be generated on island
- Scenario 2: In the case of the existing cable becoming decommissioned, 100% of Guernsey's electricity will

Figure 3.10: Heating-Related Fuel Demand Scenarios



Source: Future Harbour Requirements Study, 2010

be generated on island to meet demand, increasing heavy fuel oil imports dramatically

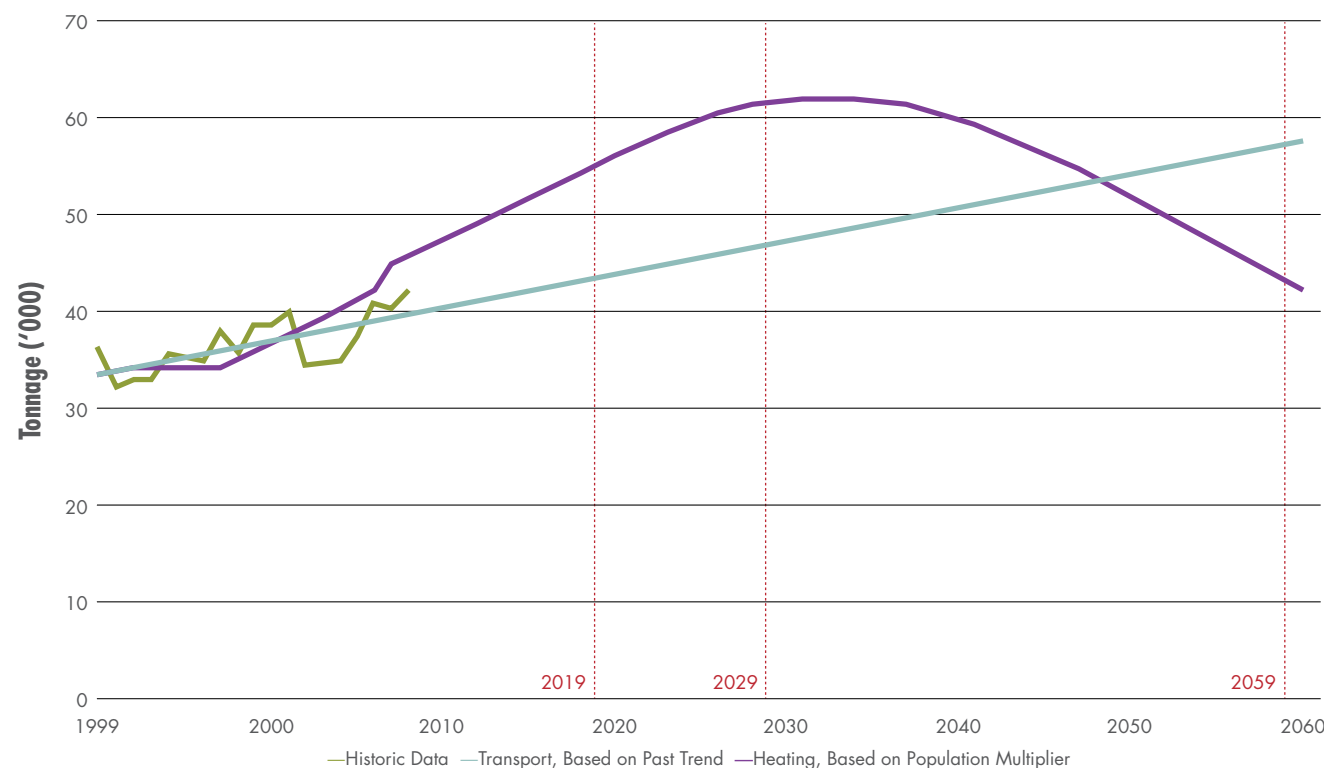
- Scenario 3: Assuming a second interlink cable is constructed, no electricity will thereafter be generated on island.

HEATING

Guernsey's mains gas comprises a mixture of propane,

butane and air; bottled gas can be either propane or butane. One forecast scenario based on current usage of heating-related fuels predicts that demand will remain constant. Another scenario, based on past trends, suggests that demand for heating-related fuels will fall close to zero by 2040. Figure 3.10 illustrates the forecast levels of demand for heating-related fuels.

Figure 3.11: Transport-Related Fuel Demand Scenarios



Source: Future Harbour Requirements Study, 2010

TRANSPORT

Transport fuels have shown slow growth in the past, with an annual growth rate of 0.82% between 1990 and 2008. This steady increase is thought to be related to increased vehicle ownership linked with population growth.

Thus, future demand for transport fuels is projected to continue to rise with population, although the production of more fuel-efficient vehicles may slow the growth rate.

Two demand scenarios were forecast in the Future Harbour Requirements Study, as shown in Figure 3.11.

The first scenario forecasts linear growth based on past trends, while the second scenario correlates transport fuel demand with population.

Potential future fuel efficiencies have not been accounted for in the forecasts.

SOLID BULK

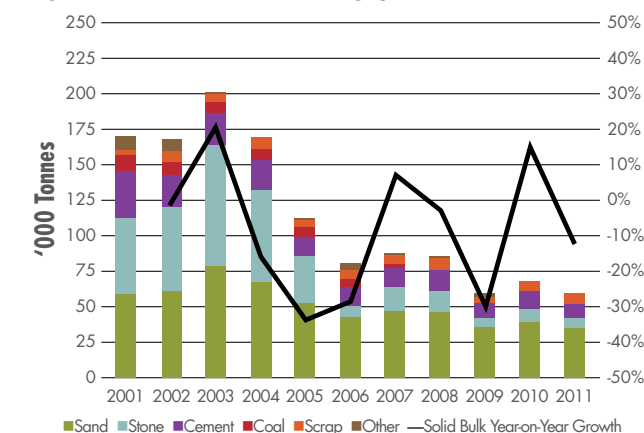
HISTORICAL

Solid bulk cargo is any unpackaged/non-unitised “dry” cargo, such as grains, aggregates, chemicals and cements. Guernsey’s solid bulk market includes the import of aggregate (sand and stone) and cement, and the export of scrap products (ferrous and non-ferrous metals). All of these cargoes are handled at St Sampson’s.

Recent data indicate that the solid bulk market has been in decline since 2003 at an approximate rate of 11% per annum. This is a decline in all sectors of solid bulk cargo, with the exception of the scrap products export, which has increased over the same period.

Historical solid bulk tonnages and compositions are illustrated in Figures 3.12 and 3.13.

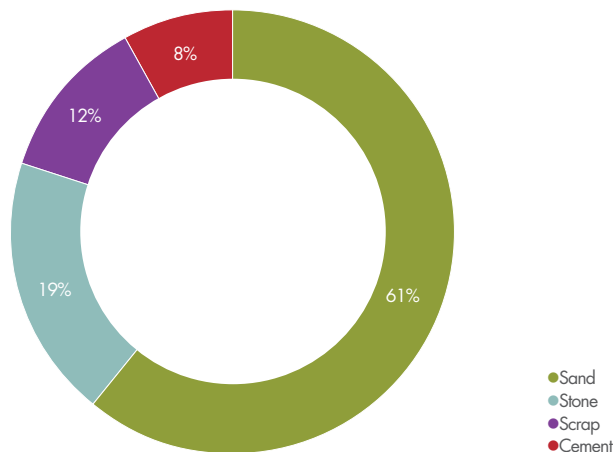
Figure 3.12: Solid Bulk Throughput Trend



Source: Guernsey Harbours

PORT TRADES AND FORECASTS

Figure 3.13: Breakdown of Solid Bulk Trade by Commodity (2011)



Source: Guernsey Harbours

PROJECTED GROWTH

The recent decline in solid bulk cargo may be attributed to a decrease in construction activities and an increase of recycled aggregates and environmental awareness. A significant amount of the demand for aggregates is produced on island through quarrying and local availability of mineral resources. Guernsey's existing aggregate resources are currently estimated to be depleted by 2028. However, if the Chouet Headland is utilised, this could be delayed by a further 20 years. Once these resources are used up, there is estimated to be a large increase in importation of solid bulk cargo.

In the event of large construction projects, there is likely to be a sudden increase in the import of aggregate, resulting in significant short-term strain on the existing port infrastructure.

Table 3.2: Projected Solid Bulk Cargo Tonnages

Description	Year	2019		2029		2059	
	Units	Lower Bound	Upper Bound	Lower Bound	Upper Bound	Lower Bound	Upper Bound
Coal	[t]	0	11,500	0	12,000	0	12,000
Cement	[t]	0	32,000	0	32,000	0	32,000
Sand	[t]	42,000	79,000	42,000	79,000	42,000	79,000
Stone	[t]	7,000	90,000	7,000	235,000	157,000	240,000
Other	[t]	0	9,000	0	9,000	0	9,000
Scrap	[t]	9,000	10,000	9,000	11,000	9,000	11,000
Bottom ash	[t]	0	10,000	0	10,000	0	10,000
Total	[t]	58,000	241,500	58,000	388,000	208,000	393,000

Source: Future Harbour Requirements Study, 2010

It is also considered likely that the scrap product component of the solid bulk market will increase in future due to increased recycling. Projected solid bulk cargo tonnages are shown in Table 3.2.

RECREATIONAL BOATING

HISTORICAL

There are approximately 2,000 berths providing leisure moorings in Guernsey; 1,650 in St Peter Port harbour and 350 in St Sampson's harbour. The visiting yachting population can use up to 10% of berths at any given time.

Boats up to 24.5m in length can be accommodated; however, certain considerations have to be taken for beam (width at the widest point) and draught (depth of the bottom of the vessel from the water line).

PROJECTED GROWTH

There has historically been strong demand for moorings, with the current supply of 2,000 moorings nominally

oversubscribed. The waiting list for available moorings is displayed in Table 3.3, showing demand spread across various berth sizes, with a total of 530 moorings currently being desired.

Table 3.3: Marina Berth Demand

Boat Length	Quantity
Up to 5.5m	87
5.5m-6.5m	99
6.5m-8.0m	190
8.0m-9.0m	42
9.0m-11m	61
11m-13m	21
13m-15m	15
15+m	15

Source: Guernsey Harbours, 2011

In general, increasing population and GDP result in an increased demand for moorings. However, island population is set to plateau and GDP is currently static, so the recorded

demand is potentially inflated by people simply looking at registering a berth in case of future yacht purchase – the actual demand is significantly lower. This is not necessarily true for all yacht sizes, and potentially reconfiguration of the marinas to accommodate fewer, larger yachts may fit better with the actual demand profile. There is certainly interest for berthing of very large yachts (erring to superyacht) which would require enlargement of existing marinas or construction of berthing areas within St Peter Port harbour.

CRUISE HISTORICAL

Guernsey already has a large number of cruise liners visiting and is an important cross-Channel stopover. It regularly receives cruise liner passenger figures far in excess of competing destinations and the ten-year average of cruise liner arrivals is 63, landing more than 40,000 day-trip tourists to the island each year. Despite the island only

being able to offer anchorage facilities, Guernsey is the third largest port in terms of number of ships calling and passengers handled in the British Isles. Passengers from cruise liners contributed an estimated £1.3 million in 2010 to the local visitor economy and Guernsey was the number one British port of call for day visitors.

Cruise liner passengers arrive by tender and disembark and embark at the Inter-Island Quay, which offers basic facilities and is not ideally situated. Therefore, Guernsey must be proactive simply to maintain its position as a key visiting place for cruise liners or else risk losing this profitable market to other destinations.

Table 3.4 shows cruise liner data from 2001-2010. With more in-depth measurements concerning cruise liners introduced in 2007, it will be possible in future to understand cruise liner trends more accurately and in greater detail. The feedback for 2012 indicates an increased number of

bookings but a significantly greater number/proportion of cancellations, largely weather related.

PROJECTED GROWTH

The future number of cruise liners entering Guernsey's waters is difficult to predict. Further to this, the amount of passengers landing in Guernsey is even more so, as many extraneous variables can affect this figure, for example the weather conditions on the day(s) tenders would be trying to land.

Conclusions from the Future Harbour Requirements Study state that: *"Cruise passenger numbers are increasing and the development of a formal gateway to Guernsey that does not involve visitors having to negotiate commercial activities is likely to be of benefit."* Further research suggests that these conclusions are valid and must be taken into consideration as a potential area of improvement over the 25-year horizon of the Ports Master Plan.

Improvements in this area would either require a dedicated and more suitable cruise liner tender berth, or a dedicated berth for the main ship to dock alongside, discussed in Section 6.

COMMERCIAL FISHING HISTORICAL

Guernsey's commercial fishing fleet comprises approximately 170 licensed vessels, the majority of which are less than 10m in length. The fleet size has remained relatively constant over the past six years. At any one time, approximately 25-30 vessels may be moored at the Fish Quay and another 25-30 in the Pool (i.e. the central harbour area). In the winter, some spaces in the recreational marinas are also used by fishing vessels.

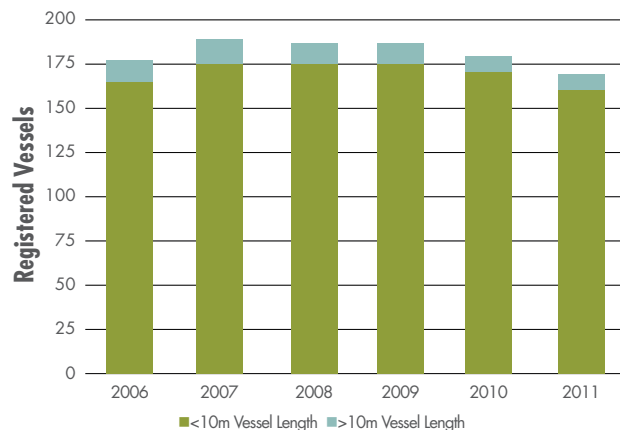
Table 3.4: Cruise Liner Arrivals to 2010

Year	Liners Arrived	Cancellations	Persons Landed	Average Per Ship
2001	73	N/A	N/A	N/A
2002	54	N/A	N/A	N/A
2003	71	N/A	N/A	N/A
2004	65	N/A	N/A	N/A
2005	68	6	N/A	N/A
2006	74	10	N/A	N/A
2007	53	19	28,911	657
2008	73	35	54,518	802
2009	45	30	42,021	1001
2010	54	8	44,382	888

Source: Guernsey Harbours, 2011

PORT TRADES AND FORECASTS

Figure 3.14: Registered Vessels in the Fishing Fleet



Source: Guernsey Commerce and Employment, Sea Fisheries Section

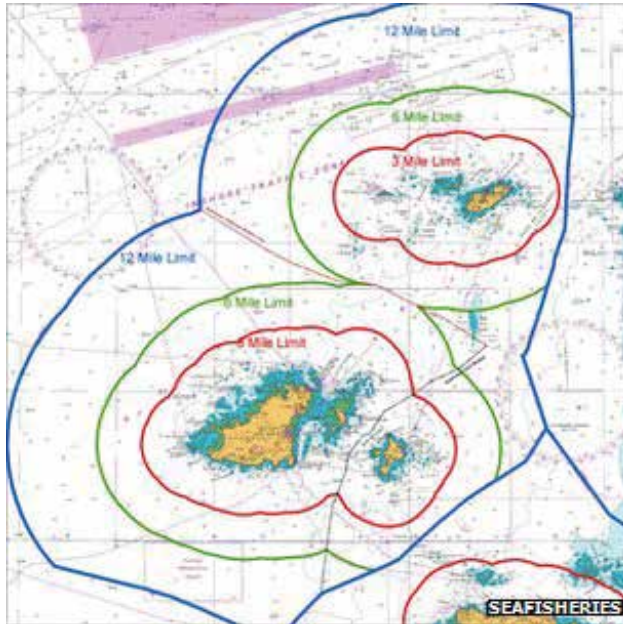
Most of Guernsey's catch is exported. Once brought back to St Peter Port, the catch is typically offloaded to trucks and then to the warehouses for shipping. Landings data show that annual catch weights have ranged between 1,400 tonnes to 1,850 tonnes over the past seven years. The tonnage is a function of the ratio of wetfish to crab/lobster within the catch and, whilst the weights in the last few years (2008 onwards) appear to have declined, there is no significant change in fishing activity, simply an increase in the percentage of wetfish within the catch.

PROJECTED GROWTH

As the majority of Guernsey's commercial fishing catch is exported, the sector's growth has little correlation with Guernsey's population and GDP drivers. Statistics from the past decade suggest that there is little growth expected for this trade sector.



Figure 3.15: Fisheries Management Agreement Zoning



Source: Guernsey Commerce and Employment, Sea Fisheries Section

A Fisheries Management Agreement (FMA) was passed in 2012 which extends the licensed fishing territory surrounding Guernsey, Sark and Alderney from three nautical miles to 12 nautical miles. Approximately 1,000 square nautical miles surrounding the Bailiwick had previously been unregulated since 2007.

The new legislation will restrict UK vessels and trawling methods in the 12-mile territory, which is expected to secure the sustainability of Guernsey's commercial fishing industry into the future.

3.4 FUTURE TRADE OPPORTUNITIES

Concerning future trade opportunities, Guernsey's ports must develop in such a manner as to:

- Be sufficiently flexible and incremental to cater for future trade growth which would enable Guernsey Harbours to respond quickly to new opportunities
- Consider the potential for the expansion of freight, marine leisure and continued fisheries activity
- Make allowances for the amenities required to sustain marine activities, such as workshops, maintenance, accommodating essential personnel, and the like.

RENEWABLE ENERGY

An example of one future trade opportunity for Guernsey's ports is the offshore renewable energy sector.

Situated in the Bay of St Malo off the west coast of Normandy facing the Atlantic Ocean and with some of the strongest tidal currents in the world, Guernsey is well positioned to be a major contributor to the emerging marine renewable energy market and meeting the needs of the 21st century.

The States of Guernsey are looking to exploit the natural resources in the waters of the Bailiwick by exploring the possibility of marine renewable energy. The options currently being considered are wind, wave and tidal energy.

The Commerce and Employment Department is responsible for the marine renewable energy programme and has set up a sub-committee, the Renewable Energy Team (RET), to drive the initiative.

The RET will work in conjunction with several other States'

departments, Guernsey Electricity, and external organisations to ensure that Guernsey is prepared for renewable energy, and to provide a significant proportion of energy generation for the island at the start of the next decade.

It is not expected that the fabrication and installation of the renewable energy generators will take place from Guernsey because it is unlikely to be able to offer the large amount of space required for such an operation. However, it is hoped that once these energy generators have been installed, they can be maintained from Guernsey.

Renewable energy generators are large pieces of equipment and in order to maintain them, there is a need for access to a port with deep-water berths and available covered space in the near vicinity for maintenance work to be carried out. Ideally such a work space would be at the port but if not, it should be within a few hundred metres of the port due to the difficulty in transporting the equipment. There should also be constant access available for maintenance boats.

The space requirements for the maintenance of renewable energy generators mean that it is unlikely that such an operation could take place at St Peter Port harbour. St Sampson's harbour, or an industrial area nearby, could offer the available space required, but at present the port does not offer access at all states of the tide.



04

COMMUNITY ENGAGEMENT

The people who know Guernsey best are those who live, work and play there. The views, opinions and ideas of the local community are crucial when evaluating present issues to steer the future of Guernsey ports.

4.1 INTRODUCTION

Engagement with interested parties, commercial operators, port users, stakeholders and the public has formed an integral and important part of the evolution of the Ports Master Plan. This section of the Master Plan provides an overview of the community engagement process carried out by Turley Associates, Moffatt & Nichol and PSD.

4.2 BACKGROUND

Turley Associates, Moffatt & Nichol and PSD understand and have embraced comprehensive community engagement processes as a crucial component of successful masterplanning. Following best practice, stakeholders and community members have been engaged throughout the process from project inception through to submission of the Ports Master Plan.

Engagement with all interested parties is an important process within any major master planning proposal. It is an iterative process that seeks to listen, gain understanding, incorporate thoughts and ideas, and report back as

the Master Plan continues to evolve. Turley Associates, Moffatt & Nichol and PSD have involved a wide range of stakeholders including States of Guernsey Ministers and employees, commercial operators, port users, community representatives, community and business groups, existing businesses and local communities.

Engagement has taken place through a variety of stages including a series of meetings with commercial operators and stakeholder workshops and focus groups held between May and July 2012. The workshops were interactive and included a wide-cross section of representatives. To support the workshops, a series of public drop-in sessions were held to ensure any interested person could be involved in the process. The engagement programme was concluded with a public exhibition in September 2012 which was open to all.

A dedicated website was set up to run alongside the formal engagement events. Copies of all material were made available on the Ports Master Plan website: www.gov.gg/portsmasterplan.

Detailed summary reports of the first two stages of the

COMMUNITY ENGAGEMENT

engagement process are appended to this report. These set out the nature and scope of each phase as well as give an overall summary of the feedback received, how this would be considered and incorporated, and next steps. The views of all commercial operators, stakeholders and community members have been carefully considered and reflected within the Ports Master Plan where viable.

4.3 THE IMPORTANCE OF STAKEHOLDER AND COMMUNITY ENGAGEMENT

As part of the development of the Ports Master Plan, a defined and informative programme of engagement is best practice. This can take a number of different forms depending on the nature, scale and location of the project. In this instance a bespoke programme of focus groups, workshops, meetings and drop-in/exhibition sessions was devised in accordance with the DfT guidance and local experience.

The intention and purpose of the Ports Master Plan is to establish a framework and set of objectives and opportunities for the future of Guernsey's harbours over the next 25 years. There is no formal States of Guernsey guidance on Community Engagement; however, their intention from the outset of the project was to ensure wide-ranging participation throughout the master planning process. Ensuring community and stakeholder engagement in the master planning process is essential to obtaining valuable local insight, historical links and overall to securing wider 'buy-in' to initial ideas, objectives and visions. It is also an important stepping stone in terms of future consents that will be required to deliver elements of the Master Plan. It is intended that interaction will

be ongoing throughout the life of the Master Plan.

The community engagement process is set within clearly defined parameters setting out how the public will be consulted and at what stages in the process. This should be as early as possible within the process to ensure that the public have the opportunity to influence the contents of the Master Plan. However, this will be within a set of constraints which will also be communicated to the community.

A record of the engagement process has been maintained,

predominantly reported through the summary reports and within this report. Depending on the future of the Master Plan, this can be used alongside or as part of the planning framework as required.

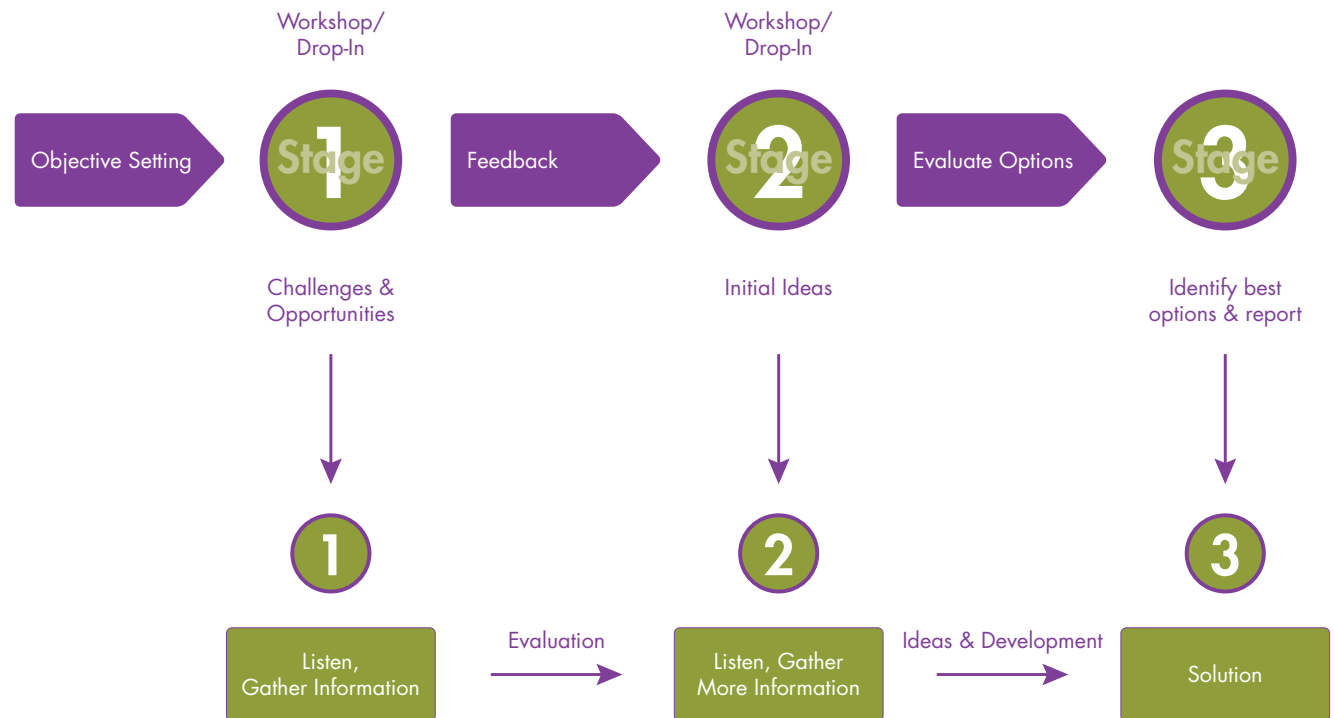
4.4 THE MASTER PLAN JOURNEY

MASTER PLAN STAGES

STAGE 1

Define Objectives – setting the objectives of the Master Plan.

Figure 4.1: Master Plan Consultation Strategy



STAGE 2

Gather Information – through the initial stakeholder workshops and the initial public drop-in gather thoughts of port users/operators and local communities on challenges and opportunities.

STAGE 3

Consider Feedback – consider the output from the initial consultation stages and report taking into account the wider spatial planning context.

STAGE 4

Develop Initial Ideas – resulting from the first stage of consultation and considerations of viability.

STAGE 5

Present Initial Ideas – through the follow-up stakeholder workshops and public drop-in and gather more feedback.

STAGE 6

Evaluate Options – evaluate further feedback and reconsider initial ideas ensuring the options comply with the objectives of the process.

STAGE 7

Draft Master Plan – using the feedback from the consultation exercises, work-up a draft Master Plan.

STAGE 8

Identify Best Options – present outcomes and draft Master Plan for further comment.

STAGE 9

Reporting – prepare and submit completed Master Plan to PSD.

CONSULTATION TIMELINE

STAGE 1

Interviews with commercial operators: 24 May 2012, Beau Sejour

Stakeholder Focus Group/Workshops: 25 May 2012, Beau Sejour

Public Drop-In Session: 31 May 2012, Beau Sejour

STAGE 2

Commercial Operators Workshop: 2 July 2012, Les Cotils

Follow-Up Stakeholders Workshop: 2 July 2012, Les Cotils

Follow-Up Public Drop-In Session: 10 July 2012, Beau Sejour

STAGE 3

Public Exhibition: 14 and 15 September 2012, Beau Sejour.

4.5 ENGAGEMENT ACTIVITIES

Alongside the formal engagement activities, all of the relevant material was uploaded to the website for anyone to view. Comments could also be made to PSD via email and were all considered as part of the process.

STAGE 1

A summary report sets out a detailed account of the Stage 1 engagement activities which included:

- Interviews with commercial operators
- Stakeholder focus groups/workshops
- Public drop-in session.

These initial sessions were designed to actively listen to local

knowledge and ideas focused around a series of topic areas and initial ideas. These early sessions considered local challenges and opportunities for the harbours as well as Guernsey; general thoughts and feelings about Guernsey; social, and environmental and economic challenges facing Guernsey.

Sixteen commercial operators, 22 local organisations and 30 members of the public attended the initial events which were held in May 2012. The level of public attendance was lower than anticipated; however, across the three different activities, a wide cross-section of Guernsey residents was represented.

These sessions resulted in a long list of potential options and opportunities for both St Peter Port harbour and St Sampson's harbour which were all considered as part of the early stages of the Master Plan formulation.

STAGE 2

A summary report sets out a detailed account of the Stage 2 engagement activities which included:

- Commercial operators workshop
- Stakeholder workshop
- Public drop-in session.

The follow-up sessions were intended to build on the initial engagement sessions and refine some of the initial opportunities, adding more detail where appropriate. These sessions considered a series of refined challenges and opportunities taken from the initial stage of consultation and considered by the consultant team and PSD as part of the Master Plan evolution.

COMMUNITY ENGAGEMENT

These sessions still allowed for attendees to make general comments on these topic areas and to suggest new or alternative ideas. The output of these follow-up sessions was a further-refined list of viable opportunities for each port.

Again, 16 commercial operators attended the workshop, 16 local organisations attended the stakeholder session and in excess of 60 people attended the public-drop in session, which again was considered to represent a wide cross-section of residents.

STAGE 3

Stage 3 of the engagement programme comprised a two-day public exhibition, held at Beau Sejour, which was open to everyone. Across the two days (Friday 14 and Saturday 15 September 2012) approximately 80 people attended the exhibition including a number of the commercial operators and stakeholders who attended previous workshop sessions.

The exhibition comprised a series of ten display banners describing the master planning process and the integral engagement programme running alongside the preparation of the Master Plan. The display also included a summary of feedback from the other stages of engagement and illustrative plans for both St Peter Port harbour and St Sampson's harbour including some more detailed illustrations for specific concepts.

Attendees were invited to provide feedback, this time more focused and related specifically to prioritisation and implementation given the stage in the process.

ST PETER PORT – PRIORITIES

Attendees were asked to consider a list of identified priorities

TABLE 4.1: St Peter Port Harbour

Improve storage, functionality and traffic in the commercial operations area	40% of respondents considered this to be most important 20% of respondents considered this to be least important
Introduce multi-level car parking (optional revenue source)	40% of respondents considered this to be most important
Rebalance short-term parking provision with environmental/leisure/commercial enhancement	
Redistribute administration, logistics and passenger facilities	20% of respondents considered this to be least important
Redevelop the Careening Hard to ensure full utilisation and increase revenue generation	
Relocate leisure boat lay-up areas to St Sampson's	
Redevelop Cambridge Berth area to complement adjacent development	
Additional moorings and amenities for recreational boating, e.g. large yacht facilities and fuelling dock	20% of respondents considered this to be most important
Redevelop Castle Pier facilities	
Improve access and amenities at Havelet Bay beach	40% of respondents considered this to be least important
Access dock(s) for recreational boating in Havelet Bay	20% of respondents considered this to be least important
New breakwater to shelter Havelet Bay	
Relocate Lo-Lo to St Sampson's	
Potential port expansion and alongside cruise berth(s)	
Improve pedestrian access and recreation areas	

taken from the illustrative drawings forming part of the draft Master Plan and rate these in order of importance from most to least.

The list comprised the following:

- Address functional requirements
- Modernise facilities
- Improve the harbour as a 'Gateway to Guernsey'
- Enhance recreational facilities
- Increase revenue generation to make ports more self-funding
- Transfer heavy commercial activities to St Sampson's

in the long-term.

Eighty percent of respondents considered that addressing functional requirements was the most important priority, with 20% considering modernising facilities as the most important priority. Forty percent of respondents considered enhancing recreation facilities was least important to them.

ST SAMPSON'S HARBOUR – PRIORITIES

The same exercise was provided for St Sampson's with the list comprising the following:

- Improve safety with respect to proximity of public and handling of hazardous cargoes

TABLE 4.2: St Sampson's Harbour

Enhance facilities for recreational boating	20% of respondents considered this to be least important
Enhance facilities for maintenance, repair and essential harbour services	20% of respondents considered this to be most important
Develop Longue Hougue reclamation for essential harbour services	
Enhance cargo handling facilities and storage areas for dry bulk, Lo-Lo and general cargo	20% of respondents considered this to be least important
Improve storage and logistics facilities	
Create green buffer zone to separate commercial/industrial and public areas	20% of respondents considered this to be most important 60% of respondents considered this to be least important
Re-arranged and more efficient car parking	
Retail/commercial enhancement of underutilised areas	
Develop deep-water jetty	60% of respondents considered this to be most important

- Improve security of fuel supply to Guernsey by developing an offshore deep-water jetty
- Accommodate potential relocation of industrial activities from St Peter Port harbour
- Make better use of areas that are currently under-utilised.

Sixty percent of respondents considered that improving the security of fuel supply through the development on an off-shore deep-water jetty was the most important priority with the remaining 40% of respondents considering the improvement of safety to be the most important priority.

Forty percent of those who responded considered that making better use of areas that are currently under-utilised was the least important priority with the remaining 60% evenly spread between improving safety, improving fuel supply and accommodating the relocation of industrial activities from St Peter Port harbour.

The second element of the feedback form related to the 'Future

Vision' of each harbour. Respondents were asked to identify their preferences in terms of priority for implementation.

4.6 SUMMARY

The fully inclusive engagement process was integral to the development of the Master Plan and comprised a three-stage approach to ensure that the widest possible audience could be reached and most importantly have their views considered.

Attendance at the workshop sessions was very strong at both the initial and follow-up stages. Attendance at the public sessions was slightly lower than anticipated at the initial stage, better at the follow-up stage and good at the final public exhibition.

A lot of ideas and comments were collected and considered. Where appropriate, these have been fed into the final version of the Master Plan and the elements included, on the

whole, are those that received wide-ranging support at each stage of the engagement process.

Consultation feedback broadly aligned with contributions provided for the Environment Department's Visioning exercise.





05

THE FUTURE VISION: PROPOSED PORT DEVELOPMENTS

Based on consultation, research, analysis and evaluation, the Master Plan team has developed a strategy for the progression of St Peter Port and St Sampson's harbours for the next 25 years.

5.1 INTRODUCTION

Throughout the development of the Ports Master Plan, four underlying themes have consistently dominated the evolution of concepts, both through the steering group and at consultation, and these essentially set the strategy for the ports' next 25 years.

Firstly, there is no strong trend suggesting increased throughput, with close alignment between population and tonnage, and no economic drive towards development of radically new markets or competition with mainland France. Rather, the focus is on reliability and of service to, and within, the community; essentially how to perform better rather than to fundamentally change.

The need for consistent (and affordable) energy is an island-wide concern. While the link to France has alleviated the absolute reliance on imported fuel, on-island power generation will continue. Creating a safe, appropriate, discharge facility to replace the present tanker system is a necessity that sits firmly within the island's energy strategy. This, together with consideration of marine-based renewables, places the energy sector as a key component

of the ports' strategy.

Tourism is a major employment sector on the island. Through the cruise, ferry activities and marinas, the ports are a gateway to the island. Enhancing the ports' facilities to exceed visitor expectations will positively impact on the profile of Guernsey.

Finally, the States, through PSD and Guernsey Harbours is seeking to generate revenue through its assets in order to reinvest accrued capital within the ports, either for modernisation of facilities or to initiate major projects.

5.2 STRATEGIC OBJECTIVES

The Master Plan has highlighted three key strategic objectives:

- Reliability and resilience – consolidation of the ports' core activities, operational safety and ISPS
- Energy and sustainability – safeguarding fuel supply to the island, servicing marine renewables
- Tourism and leisure – making the most of the two harbours within an island context.

THE FUTURE VISION: PROPOSED PORT DEVELOPMENTS

The following sections set out the strategies and initiatives for St Peter Port and St Sampson's harbours within the Master Plan.

5.3 THE MASTER PLAN

ST PETER PORT

THEMES

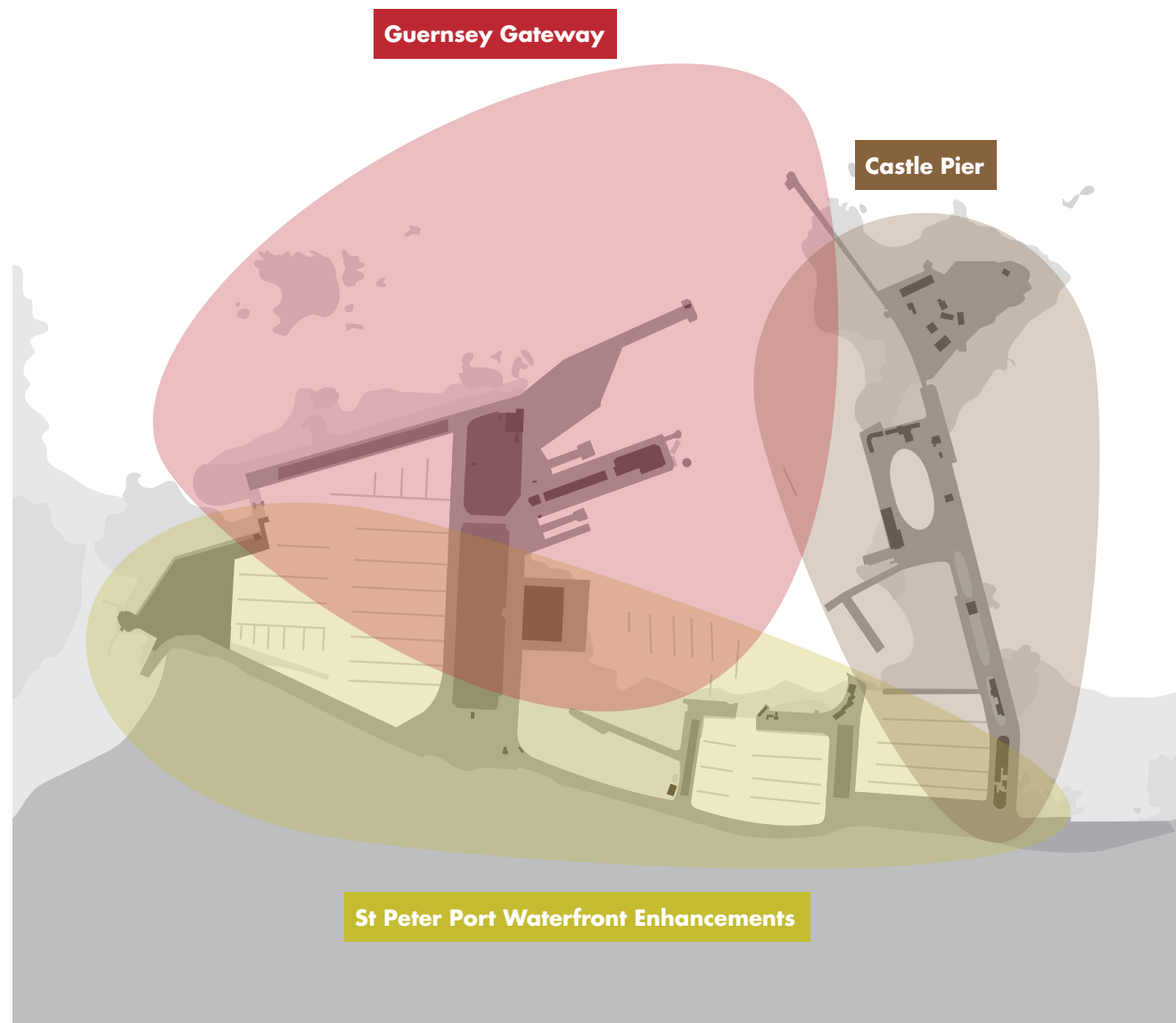
- Guernsey Gateway – safeguarding the port operations and maximising visitor experience on arrival and departure
- Castle Pier – building on the historic landscape on the southern edge of the harbour, focusing on the fishing fleet
- St Peter Port Harbour Waterfront – enhancing the harbour margins to improve public realm, develop and strengthen the interface between town and water and increase recreational value.

PRIORITIES

The priorities for the future development of St Peter Port harbour can be summarised as follows:

- Address the functional requirements to sustain port operations and projected growth over the next 25 years
- Where replacement is not viable, modernise the port's existing facilities in terms of structural adequacy, operational efficiency and service
- Enhance the harbour's distinct character and aesthetic beauty as a gateway to the island

Figure 5.1: St Peter Port Themes



THE FUTURE VISION: PROPOSED PORT DEVELOPMENTS

Figure 5.2: St Sampson's Themes



- Enhance the harbour's recreational facilities
- Transfer heavy commercial activities to St Sampson's harbour in the longer term.

ST SAMPSON'S

THEMES

- Energy Enterprise – consolidating energy provision, through fuel supply and storage, marine renewables and waste processing
- Waterfront Regeneration – integrate the waterfront within the wider development strategy for The Bridge and town, optimising commercial, residential, leisure and recreational opportunities.

PRIORITIES

The priorities for the future development of St Sampson's harbour can be summarised as follows:

- Improve safety with respect to the handling of hazardous goods and proximity to the local population
- Improve the security of fuel supply to Guernsey
- Accommodate the potential relocation of heavy commercial activities from St Peter Port harbour
- Make better use of under-utilised harbour areas.

5.4 RELIABILITY AND RESILIENCE

OVERVIEW

The harbour installations in Guernsey are unlike mainland

THE FUTURE VISION: PROPOSED PORT DEVELOPMENTS

developments in that they primarily serve the local population. Most imports are for local consumption, marina berth holders are largely local residents and the occupants of the various parking areas are also local.

As such, the port users understandably feel a sense of ownership for the facilities. Potential changes to the structure of the ports and restrictions on use for public access and parking could then have a direct and long-term impact on the regular users.

The two harbours are also the gateway to Guernsey not only in terms of cargo and passenger movements, but also aesthetically. Regardless of economic and financial benefits, it is obvious from the public participation process that the residents of the island do not want this connection between the town and its waterfront to be disrupted or lost.

From an operational standpoint, efficiency and reliability of service are the core values Guernsey Harbours strives to meet. However, St Peter Port and St Sampson's have evolved to their current operational configuration by reacting to demand and legislation rather than through a clear plan. Consequently, both ports suffer from safety and performance issues that can, in part, be addressed through reconfiguration rather than expansion. In particular, St Peter Port suffers from overlap of very conflicting uses, in terms of freight, passenger and vehicle movements within a constricted area.

With the exception of construction materials (aggregate and armourstone), the forecast for the ports does not indicate significant changes in cargo tonnages (general or unitised) crossing the quays, although there is a trend in unitised bulk with cargo moving from Ro-Ro to Lo-Lo. Lo-Lo cargo generally

takes longer to clear from the port area and therefore demands increased footprint for import and export. Ro-Ro generally clears quickly, or can be incentivised to do so. The loss of Low Value Consignment Relief (LVCR) for exported goods will also impact on the short-term throughput, with reduced tonnages expected. Cargo forecasts were conducted as part of the Future Harbour Requirements Study submitted in September 2010.

Guernsey is aligned with international security standards, dictated by the IMO International Ship and Port Facility Security (ISPS) Code and has undertaken to conform to the requirements. ISPS is a risk-based safety protocol structured to implement a consistent level of security at ports and on ships, worldwide (similar to airport safety procedures). The ports are currently ISPS compliant, although it is considered probable that increased security provision will be necessary to maintain full compliance with the code in the future.

In order to meet the requirements of the ISPS Code, each port facility needs to meet a mixture of physical and operational requirements. These broadly cover the following:

- Access to parts of the port facility needs to be controlled (in some form) to ensure that access is limited to those people who have relevant business within the port. Where access is provided to the general public, this needs to be supervised
- Access restrictions and security should be provided for key facilities and operations within the ports that have higher risks
- Security activities relating to cargo handling should focus on the prevention of cargo tampering, and

stopping cargo that is not meant for transport being accepted and stored within the port

- In order to ensure the integrity of ships' stores, a range of security measures are recommended, including: checking and inspection, goods not to be accepted unless ordered, searching of delivery vehicles, and escorting of delivery vehicles within the port area
- A range of security measures may be appropriate for unaccompanied baggage (i.e. baggage that is not with its owner at the point of inspection/search), relating to its identification, appropriate screening (including searching), storage and transfer between port and ship. This includes the requirement that it is handled securely after screening
- An appropriate level of security monitoring needs to be undertaken to ensure its continued safety and security.

The current operational area has not evolved to meet these standards in respect of isolating cargo and ship-side operations from areas of public access. Future reconfiguration will be necessary to introduce segregation, with shared-use facilities relocated to span the "Security Line".

ISPS and rationalisation of cargo and vehicle movement within the port are expected to necessitate expansion of the physical operations footprint outside the current perimeter. The North Beach Car Park, constructed between 1984 and 1989 as part of the port estate but absorbed within St Peter Port's parking provision, represents an obvious area to re-purpose, but the consequent displacement of long-period commuter parking spaces would be unpopular unless

THE FUTURE VISION: PROPOSED PORT DEVELOPMENTS

mitigated by alternative parking provision.

To assess feasibility, results from Future Harbour Requirements Study analysis have been used to evaluate the sizing and layout of the commercial area in terms of required trailer slots, container stacking areas, car marshalling lanes and lengths to be consistent with best practice elsewhere. Feedback from the Guernsey Border Agency (GBA) was used for sizing the customs inspection area and segregation introduced to address issues associated with ISPS. The concept configuration is presented in Appendix E, demonstrating an idealised footprint, based on prioritisation of port (freight and ferry) activities over other uses. The configuration is based on the worst case throughput, namely that Lo-Lo traffic remains on berths 4, 5 and 6.

Key port challenges include:

- Space limitations, congestion, traffic flows and public/commercial conflicts
The landside area of St Peter Port comprising the freight storage and handling areas, car marshalling yard and North Beach Car Park suffers from limited available space, leading to significant congestion and conflicts between public and commercial operators. Besides restricting operational functionality and efficiency, these conflicts lead to safety and security hazards. Guernsey Harbours works within stringent health and safety parameters and employs a specialist Health and Safety consultant to advise on an ongoing basis.
- Resistance to loss of parking
The use of North Beach as a car park is a contentious issue. Since the development of the QEII Marina, this

prime piece of port real estate, conveniently located close to town, has been used for free public parking. Given existing space constraints in the commercial area of St Peter Port, and with an outlook to the port's potential spatial requirements over the next 25 years, the footprint occupied by the North Beach Car Park may increasingly be in demand for port operations.

- Vessel manoeuvring area, tidal restrictions and waterborne congestion

In addition to landside spatial constraints, St Peter Port harbour also suffers from waterborne congestion. Given the significant tidal fluctuations, large portions of the harbour dry out on a daily basis, leading to reduced "wet" berthing, mooring and manoeuvring areas.

GENERAL STRATEGY – CONSOLIDATION

Reconcile cargo and passenger movements within the two ports to rationalise equipment, optimise land areas and safeguard users. Relocation of Lo-Lo movements to St Sampson's in the long-term to alleviate congestion within the port area in preference to expansion into North Beach.

SPECIFIC INITIATIVES – THE COMMERCIAL AREA AND SECURITY LINE

The present security line in St Peter Port – essentially the boundary between secure port operations and areas accessible by the public is not as clearly defined as would normally be expected. Future rationalisation of activities to segregate port-side activities from the public realm will require reorganisation of the land area, including relocation

of some core facilities. Initial evaluation of the ideal port footprint based on present/forecast throughput (assuming Lo-Lo remains in St Peter Port for the medium-term) is included in Appendix E. It is acknowledged that the port plan represents an optimised layout for the commercial area, responding to constraints generated by adjacent uses, but prioritising port operations. Further evaluation is necessary, but expansion and modification is expected to become a necessity as security, cargo and passenger issues become increasingly significant.

SPECIFIC INITIATIVES – INTER-ISLAND QUAY

The Inter-Island Quay is primarily used by for passengers travelling locally between Guernsey and Herm, Sark or Brecqhou, and by cruise ship tenders. The location is to be retained, but must function in proximity to the proposed new terminal building and will impact on the alignment of the security line. However, improvements to the low water access, by extending the pontoon and providing better (more direct) access to the Passenger Terminal, will benefit all users and improve the coherence of passenger accommodation generally.

SPECIFIC INITIATIVES – FISH QUAY

Given certain physical requirements such as water depth and equipment laydown areas, the existing Fish Quay is best suited to continue serving Guernsey's commercial fishing industry and should not be relocated. However, with growth expected, the facilities will require refurbishment over the period of the Master Plan, and additional facilities provided. The development should be in tandem with tourism initiatives along the Castle Pier. It is understood that the fishermen

THE FUTURE VISION: PROPOSED PORT DEVELOPMENTS

would support enhanced facilities to promote the industry at, or near, the quayside.

Other current requirements are:

- Crane to lift fish off the vessels (especially at low water)
- Access ladders
- Improved fuel facilities
- Gated security
- Self-service ice facilities
- Secure onshore storage for fishing equipment.

SPECIFIC INITIATIVES – CARGO HANDLING CONSOLIDATION AT ST SAMPSON'S

The present configuration of St Peter Port's commercial port is constrained by its configuration, utilisation and adjacency to marina and public parking areas. The option to relocate the Lo-Lo function to St Sampson's, potentially to a deep-water pocket berth alongside (to the north of) Longue Hogue or to a berths alongside deep-water fuel structure, would consolidate bulk cargo, aggregate and liquid bulks into an area that is generally industrial in nature, would alleviate current constriction within St Peter Port's handling areas. The new cranes and handling equipment being procured for St Peter Port can be redeployed to St Sampson's. Consideration of the impact of increased vehicle activity in the vicinity of St Sampson's would need to be assessed to determine routing and configuration.

Unlike petroleum or aggregates, Lo-Lo is a liner activity, with shipping running to a regular schedule. In consequence, a relocated berth would need to be accessible for arrival and

departure at all stages of the tide (and broadly speaking, weather).

The proposed offshore jetty at St Sampson's must be multi-purpose to allow bulk material handling alongside, including aggregate and cement. Flexibility for other functions, such as Lo-Lo, could be allowed for in its design. Provision for waste export, either from the deepwater jetty or from a berth alongside Longue Hogue, is essential.

Consolidation of the existing cargo berths in St Sampson's (North Pier and South Commercial Quay), focusing on Longue Hogue, would improve operations for aggregate and Lo-Lo unitised cargo, as well as rationalising use of the inner harbour for recreation use.

The Longue Hogue reclamation is only partially infilled at the present time and it is assumed that completion of the infill will be completed within the period of the Master Plan. The reclamation represents the optimum location for expansion and consolidation of future marine-based activities. Consideration should be given to the potential merits of further expansion of the reclamation southwards or seawards as part of the evaluation of significant infrastructure including the deep water fuel berth.

GENERAL STRATEGY – REVENUE

Guernsey Harbours (PSD) is actively looking to increase revenue from the port areas to generate capital in support of investment into the ports and island infrastructure. While commercial freight and passengers do attract a port charge, there are areas of port land that can be used to generate revenue, through lease, use charges or through development

on new income streams. It should be recognised that the ports, being under States ownership, rely on public investment for modifications and maintenance but will need to develop partnerships with private sector to cross fund development in the future.

SPECIFIC INITIATIVES – REDEVELOPMENT OF CAMBRIDGE BERTH AREA

The area adjacent to the Cambridge berth is an ideally situated parcel of port land that has great potential for redevelopment. If its existing commercial uses can be relocated into the secured commercial area, then the Cambridge Berth area could be transformed to complement the redevelopment of the Careening Hard. The Cambridge Berth area could potentially be used for car handling; however, through the process of the Master Plan and community engagement, preferred redevelopment concepts for the Cambridge Berth area have been identified, including retail, restaurants and residential. It is clear that the existing occupants will need to be offered relocation. Some activities are appropriate within the port's security area, including the Harbour Master's office and workshop. Refurbished facilities on the New Jetty or at Berth 6 could be appropriate. Clearly, while the location currently suits the commercial occupants, the condition of the existing units is not ideal and displacement to modern accommodation, even if off site, would be acceptable for some users. Accommodation for site specific users, including café and ferry booking office, would need to be retained within the relocated terminal building. Many of the users are tied into property leases that expire in 2015. While short-term extensions would be appropriate, it would be prudent to retain break clauses to allow termination/relocation.

Relocation of business will be centrally coordinated through the Financial Transformation Programme (FTP) Property work stream that is currently underway. This work stream will ensure that business requirements are addressed and appropriately accommodated, and that any potentially displaced uses from the harbour areas can be identified and planned for through the FTP Property process.

SPECIFIC INITIATIVES – NORTH BEACH

The North Beach Car Park represents a key component of any modernisation and expansion of the commercial port. The area will be required, in part or in full, to allow reconfiguration to meet security requirements and to allow enhanced cargo handling and distribution. However, the existing function as a free public car park is likely to result in strong resistance to change of use. As part of a wider strategy for traffic management on Guernsey, measures to disincentivise car use along the harbour front and, particularly in North Beach, could include implementation of parking charges for the area(s) as an option. Ideally the car park charges could be raised by the port for reinvestment in the port, although centralised collection contributes to island-wide infrastructure improvements. Any such initiative must align with the emerging retail and transport strategies and must be coordinated between Public Services and the Environment and Commerce & Employment Departments.

5.5 ENERGY AND SUSTAINABILITY

OVERVIEW

Import of liquid bulk (fuel) is essential for viability of the

island. The current procedure for fuel imports uses specialised NAABSA (not always afloat but safely aground) tankers at drying-out berths within St Sampson's inner harbour.

Harbour access at St Sampson's is limited as a result of the tides, in which the largest vessels are required to enter at high tide on a spring tide; currents, which at the top of the tide can reach up to five knots; and high wave climate, as large waves and long period waves (swell) are present through the Little Russel. Navigation is further hindered by the presence of rock outcroppings near the harbour mouth. Commercial berthing space within St Sampson's is at a premium, exacerbated by limited windows of harbour access, leading to congestion and the need for careful planning and scheduling to avoid conflicts.

Dredging within the harbour would increase the time period that vessels could remain at berth. However, unless the approach channel was also dredged, harbour access would still be constrained by the tides.

Work is required to ensure St Sampson's harbour fully meets the requirements of the International Safety Guide on Oil Tankers and Terminals¹. While the two States-owned vessels, the Sarnia Cherie and the Sarnia Liberty, are currently in good working order, their anticipated operational life expires within the period covered by the plan and like-for-like replacement is not recommended. Implementation of a safe, reliable long-term solution that provides wet-berthing for a larger proportion of the North European vessel fleet therefore is a priority, recognised at strategic level by the

¹ ISGOTT – International Safety Guide on Oil Tankers and Terminals – 16.7

States of Guernsey².

In tandem, it is recognised that future development and implementation of alternative energy sources, particularly marine-based wave or current systems, will require support services located within the port complex, with deployment and recovery using general cargo quays associated with dedicated landside facilities. This potential requirement should be acknowledged, with capacity available in an appropriate location.

GENERAL STRATEGY – CREATION OF AN ENERGY ENTERPRISE ZONE

Given the opportunity to consolidate a range of energy-related initiatives at Longue Hougue, the Master Plan recommends adoption of an Energy Zone in the area to the south of the existing harbour, incorporating import, storage and distribution of fuel; waste processing and export of recovered materials; and facilities to support marine renewables. Fuel storage, currently distributed around St Sampson's, should be consolidated within the Longue Hougue reclamation site, releasing the harbour waterfront for regeneration. Implementation of a dedicated deep-water facility for fuel transfer (and bulk cargo) must be implemented on safety grounds and should be considered as part of the rationalisation of fuel and energy operations within the St Sampson's area. Implementation of a new deep-water berth away from the Inner Harbour is strongly supported (through consultation) by the commercial operators involved in import distribution and energy generation.

² Guernsey's Energy Resource Plan

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SPECIFIC INITIATIVES – LIQUID BULK DEEP-WATER BERTH

At the present time, fuel is imported into St Sampson's and discharged across a drying berth. There are significant safety issues associated with the operation, albeit mitigated by Guernsey Harbours procedures. Access to the harbour is navigationally challenging, with high tidal currents. The use of a drying berth precludes vessels from departing at low water in the event of fire or explosion risk during the discharge operation. The berth is within the inner harbour, with residential and commercial properties within the nominal safety/blast zone.

Relocation to a deep-water, offshore berth therefore removes the obligation on the States of Guernsey to operate their own vessels to ensure the supply of petroleum products, and alleviates potential risk associated with the transfer operation. Options for creation of a deep-water liquid bulk (and general bulk) cargo berth were considered within the Future Harbour Requirements Study and concepts have been further assessed and developed within the Master Plan study. Please refer to Appendix D for a summary of the alternatives assessment.

The FHRS indicates that the expected vessel size for Guernsey deliveries, without the existing restrictions, will be on the order of 5,000 DWT. Clarksons data and a review of vessels in this size range indicate typical dimensions for a 5,000 DWT tanker to be:

- Length 95m
- Beam 15.50m
- Loaded draught of 6.00 to 6.50m.

It is recommended that the berth be designed to accommodate 6.5m draught vessels with allowable under-keel clearance of 1.5m.

The recommended option derived from the alternatives assessment conducted as part of this Master Plan, illustrated in Appendix D, incorporates an outer caisson structure in a dredged deep-water pocket, providing shelter on the fuel berth, linked to shore by an open trestle structure carrying fuel, other liquid bulk cargoes and potentially, scope to expand the facility into a multi-use berth for general bulks (including aggregate, cement and/or Lo-Lo). Facilities for waste export must be included within the provision, either as bulk or containerised cargo.

Detailed assessments of configuration, including marine and terrestrial environmental appraisal and planning/consenting review, should proceed as a priority.

5.6 TOURISM AND LEISURE

OVERVIEW

The airport and the two ports represent the primary points of entry and egress to the island. While much of the activity at the ports is associated with residential and commercial transport, tourism also represents a substantial component of the passenger and vehicle traffic through St Peter Port, both by ferry and cruise ships. The port benefits from visitor traffic through port dues, but these visitors also contribute significantly to the wider economy of the island.

The States of Guernsey therefore recognises that the ports

(through PSD/Guernsey Harbours) have a responsibility to provide facilities that encourage visitors, by simplifying and improving passenger experience within the port, through investment in passenger facilities (terminal building), rationalisation of vehicle movements (safety) and, ultimately, in improvements in berthing facilities for cruise vessels including, potentially, dedicated alongside moorings.

GENERAL STRATEGY – WATERFRONT REGENERATION/GATEWAYS

Invest in gateway projects to improve the point of entry for visitors and to optimise the value, to the port and wider community, of the States of Guernsey. Create clear delineation between commercial and visitor zones within the main port area (in St Peter Port). Optimise marginal land holdings to deliver benefit to the community, in terms of recreational and public facilities (marinas, public space and car parking).

SPECIFIC INITIATIVES – GUERNSEY GATEWAY PROJECT

St Peter Port may be the first and last experience visitors have to Guernsey. The perception of that experience will colour their appreciation of the island as a whole, and influence future decisions as to location of holiday destinations in subsequent years. While cruise calls provide direct income to the island, they also represent a means of marketing the island for a day. The ferry and cruise arrival point is therefore a gateway, figuratively and literally, and should be developed as such, offering a true sense of arrival in contrast to the more prosaic and dated features presently on offer.

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PASSENGER TERMINAL

Relocation of the passenger terminal is already identified as a priority initiative to address safety, security and operational issues within the existing port. Creation of a ferry and cruise hub incorporating features accessible from the town and providing additional revenue streams, including duty free shopping and eating facilities, are necessary to improve the passenger experience on arrival and departure. The scale and nature of the terminal facility needs to be reviewed against future cruise use (particularly if a dedicated cruise facility is to be developed) but the creation of a passenger facility that improves passenger perception, meets security requirements and generates revenue for the port, is clearly necessary. Development of proposals should be integrated with wider planning strategies in association with the Environment Department.

CRUISE

Guernsey already has a large number of cruise liners visiting and it is vital that it maintains its place as an important cross-Channel stopover. As the cruise liner business shows no sign of abating, St Peter Port could potentially be the premier port of destination in Great Britain. Guernsey's challenge is to increase the number of cruise liners visiting the island and to increase revenues derived from cruise liner traffic.

The restriction on berthing for large cruise vessels impacts on both. While vessels have to moor off with passenger access by tender, the scope for substantial change is probably small (and is not seen as a great disbenefit). However, the present standard of tender berths and waiting areas that are offered to cruise liner passengers is lower than normally expected

(globally) and is a disincentive for operators. Improvement of facilities will be necessary to maintain the present frequency of calls, as other locations upgrade and expand competing facilities.

There is an overriding requirement for modernisation/replacement of the existing passenger terminal driven by location (as discussed above) and service. The design of new facilities needs to address local and ferry needs, but should equally adopt best practice for present and future cruise clients.

The mooring provision is weather dependent, both for vessels at anchor and, particularly, for passenger transfer using tenders. Long-term provision of a dedicated terminal facility outside the existing breakwater, offering all tide, all weather access for the largest classes of cruise vessel represents an aspiration for the island. Two initial concepts have been developed and are presented in the Appendices. At the present time, the anticipated cost associated with port expansion on this scale is understood to be prohibitive if funded through the port/island alone and a significant contribution from the cruise industry itself would be required to initiate a scheme of this magnitude, unless a strong case for implementation is made based on the strategic importance of the industry to the island.

In February 2012, the States of Deliberation noted a report from the Public Services Department entitled, "Guernsey cruise industry growth and the requirement for Enhanced port facilities". It concluded that:

"The cruise industry has shown steady growth over the last decade. Guernsey is in an excellent position to gain much

more from the cruise market, but to do so will need to provide additional facilities to allow ships to berth alongside.

The potential economic benefits need to be weighed carefully against the investment costs required and the associated risks.

The Public Services Department (Guernsey Harbours) is in the process of preparing a Ports Master Plan. This will provide a long-term plan and strategy for the Ports, seeking to maximise the efficient use of the limited land available. It will also ensure any future Port development happens in a co-ordinated manner. If a future cruise liner berth is seen as a realistic possibility, this will be factored into the Master Plan. It does not guarantee it will be built but it will seek to ensure that nothing else is constructed that would otherwise sterilise an area that might be required for cruise liners.

By working in conjunction with the Commerce and Employment Department it is clear that this is not solely a maritime matter but is also a valuable opportunity to develop the economy and create employment. In light of approaches and enquiries the Commerce and Employment Department has received from the cruise industry, it would wish to provide some indication of whether improved berthing facilities in Guernsey is a possibility."

Creation of a more appropriate berthing facility for cruise vessels within the harbour is likely to be a prerequisite for significant expansion of cruise-related opportunity. However, facilities in Europe being developed by the cruise industry have led to an expectation that a cost per berth on the order of £8 million is sustainable, but that anything above that cannot be justified through the industry alone, so there is a significant shortfall between the cost estimate for the outer

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berths and the cruise industry valuation that would need to be funded through other routes. Implementation should be reviewed during the Master Plan period to reassess viability, particularly once significant investment is committed to inner port refurbishment. The outcome of the evaluation including, if favourable, detailed proposals, should be presented to the States of Deliberation as required by its resolution of 9 February 2012.

MARINAS

Some 10% of annual visitors to Guernsey arrive by private yachts using the port's marinas and this should be strongly encouraged. Specifically, in 2011, there were 26,000 'chargeable yacht nights' with Customs annual figures, taken from declarations, suggested 7,359 vessels with 23,800 actual visiting yacht crew. Improvements to the marina facilities, particularly landside areas, are necessary to establish the marinas as destinations of choice for transient yachts, recognising that the quality of the moorings is not sufficient differentiation, especially when tidally constrained. Given the implications of any modification to the landside parking areas on the wider community, and the need to offer facilities to local users as well as visitors, development of the harbour waterfront has been identified as a discrete initiative.

FUEL PROVISION

There are fuelling facilities within QEII marina and the main harbour at St Peter Port. However, given the relative advantageous tax relief on fuel, and the proximity of the island to shipping routes between northern Europe and the Mediterranean, expansion of the service to cater for all

classes of yacht would attract larger boats to the island. While the largest craft may not stay in Guernsey, the long-term goal would be to expand the accommodation for larger yachts. Commercial bunkering, potentially from the new fuel berth in St Sampson's would extend the potential service to all transient vessels.

SPECIFIC INITIATIVES – ST PETER PORT CASTLE PIER

While the primary focus of Guernsey Harbours remains the operation of the two ports, responsibility for Castle Pier also falls under the PSD remit. From a purely ports perspective, the operation of the fishing harbour is a high priority but, more broadly, the pier should be considered for redevelopment, utilising the castle, model yacht pond, breakwater and associated buildings to optimise the area and address the quality of the approach to the castle. Equally, while the fishing harbour is successful and is a popular asset in the town, opportunity exists to expand and consolidate outlets in the vicinity of the harbour, both for sales and to take advantage of the proximity of the harbour for gastro-outlets that have strong and direct affinity with the fleet. The initiative may not come from the port, but PSD recognises the potential value to the wider community.

SPECIFIC INITIATIVES – ST PETER PORT HARBOUR WATERFRONT ENHANCEMENTS

St Peter Port harbour has daily impact on the town and island, through core ferry and freight services. Less obviously, it is the use of port land for public parking that has become the harbours' contribution to the community, specifically the use of the marginal land between the harbour and town. The PSD recognises that responsibility for enhancement within this

zone has wider impact and needs an integrated approach, in line with the Visioning exercise currently underway on the island. Nevertheless, Guernsey Harbours must seek to generate revenue through these assets.

PARKING

Guernsey Harbours is, almost by default, a significant player as a marina operator. The number of berths held by the two ports, and revenue received, exceeds that of a number of "recognised" operations in the UK. The St Peter Port marinas generally accommodate residents rather than visitor craft. They function as boat parks, but are less effective as stand-alone entities in the way that many UK (or French) marinas do. Most significantly, the ratio between water area and dedicated land area is significantly skewed, with the adjacent areas taken by public (commuter) parking. This is satisfactory from a user perspective and clearly has huge benefit to the town. Nevertheless, from a visitor perspective, the density of parking along the town waterfront detracts from the obvious visual attraction of the harbour and marinas themselves. Initiatives to reduce the visual impact of parking through infrastructure investment and cultural change should be adopted, both in the short-term to facilitate reconfiguration of the port operational area and, longer term, as part of a waterfront enhancement to reduce the visual impact of the parking areas on the asset that is the harbour. PSD will work with Environment and Commerce & Employment Departments on the emerging transport and retail strategies to address issues of parking within and around the harbour areas with the aim of reinforcing the overall vision for the ports and how they relate to the town and The Bridge.

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MARINAS

The marina provision within St Peter Port and St Sampson's is in the order of 2,000 berths. These are predominantly let to residents on the island, with an area dedicated to visitor moorings set aside in St Peter Port. It is understood that the existing marina moorings are oversubscribed, albeit at the present time this may reflect place-holding by potential berth users rather than a genuine waiting list.

The marinas are considered to be very good value to berth holders. Facilities are functional, serving a resident population that lives in close proximity to the berths, doesn't generally overnight on-board and does not need top quality facilities at the marinas. Low spec marinas at low berthing rates result in low levels of investment and generally poor standards when compared with commercial marinas on the Normandy coast or in UK.

The marinas were constructed some 20 years ago. In the intervening period, yacht sizes have generally increased and many marinas of a similar age have undertaken significant reconfiguration to rationalise the fairways spacing and berth size to accommodate the modern fleet. Larger vessels require more water area and, in a given basin, result in fewer vessels being accommodated. However, the return per m² of water is higher for larger yachts.

The marinas therefore potentially represent a revenue source for the States of Guernsey, which can be maximised by initial investment to optimise the facilities. It would result in a reduction of the total number of berths with a clear local impact.

- Consideration for dry stack storage of smaller craft to



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reduce the number of small craft in the water at any one time would effectively allow reconfiguration of the marinas to increase the average berth dimensions to focus on larger craft

- The area of the inner harbour is currently under-populated, largely due to the combined influence of tide and wave penetration. Protection of the inner area, permitting expansion of all tide (and large yacht) mooring beyond the present tide-locked basins will allow development of a superyacht capacity in the harbour and allow for redeployment of existing berths, exchanging inner berths for those in deeper water. A concept for an inner harbour marina has been discussed with local businesses and is presented as an option in Appendix C
- Consideration should be given to introducing a marina management organisation to operate some or all of the marina basins
- Provision of enhanced facilities and rationalisation of the areas around the basin to raise the quality of the environment will impact on the berthing rate that can be charged
- The marinas are more than simply boat parks for local yachtsmen. They provide a foreground to St Peter Port and are the heart of St Sampson's. The visual impact of the marinas sets the tone for the town and defines the way the waterfront works.

Proposals for increasing and improving leisure moorings must be considered throughout the lifespan of the Ports Master Plan, providing revenue to the port but, crucially, uplifting the

waterfront environment to create a truly spectacular element of both St Peter Port and St Sampson's.

CAREENING HARD

The Careening Hard is a large and underutilised 'wet' area of St Peter Port harbour which has potential for reconfiguration and development.

The Careening Hard currently serves as a spending beach in the harbour, and allows for boat recovery and maintenance. It currently generates minimal revenue. Ideally located along the waterfront promenade and adjacent to town, it is the only element of the St Peter Port waterfront that has not been absorbed into marina/car parking use and therefore represents a clear opportunity for creative intervention to generate revenue for the port operation and to optimise a portion of the waterfront to re-establish physical links between the town and the harbour, readily accessible visually and physically from both land and water.

It is unlikely that creation of a marina area within the Careening Hard would be viable in isolation, given the need for dredging and strengthening of the existing harbour wall. Equally, simply allocating the area as further parking would appear to compound the existing issue for the town. Certainly, reclamation for commercial office buildings or multi-storey car parking appear to be unwelcome.

The redevelopment of the Careening Hard would require a private sector partnership to realistically raise the necessary capital to develop the area for any proposed change of use, but the potential contribution of this area within the context of the waterfront must be acknowledged. A specific study

on options for development should be undertaken as a priority, with the brief aligned to the recommendations of the Visioning strategy for the island. The evaluation should extend to include the Victoria Pier and flexibility should be retained to allow modification and renovation of the buildings on the pier, either through short-term lease arrangements or clear termination clauses, to allow integrated redevelopment of this frontage.

HAVELET BAY WATERFRONT

Havelet Bay is an area of natural beauty and recreation for the community. There is an opportunity to further enhance the waterfront area for public and recreational use while maintaining its character.

Some recreational boaters currently moor in Havelet Bay when weather conditions accommodate. These moorings are unregulated by Guernsey Harbours. There is an opportunity to better utilise Havelet Bay for moorings, where capacity is available.

SPECIFIC INITIATIVES – ST SAMPSON'S WATERFRONT

Operational requirements to remove fuel transfer from the inner harbour, coupled with the opportunity to consolidate bulk and aggregate import onto Longue Hougue, gives scope for significant regeneration of the St Sampson's Waterfront to optimise the use of the marina, the three quays (Le Crocq, Trafalgar and Abraham's Bosom) and to incorporate the North and South Piers within the inner harbour. With the development of an offshore terminal, the South Commercial Quay and surrounding area would become available for alternative development, potentially for additional moorings

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and an expanded fuelling dock.

The inner harbour quay walls at St Sampson's have structural limitations that constrain the ability to deepen the harbour basin and increase the landside loading along the harbour perimeter.

As with St Peter Port, the quay side areas are currently in demand for public parking, although no income is generated to the island.

Several areas in and around St Sampson's are currently under-utilised and are prime for redevelopment for the purpose of essential harbour services. Examples of such areas include:

- Griffiths Yard, behind the North Pier, currently used as a boat storage yard and as a depot for the island's fleet of sewage trucks
- Abraham's Bosom, an untidy area currently used for parking of vehicles or boats
- Trafalgar Quay, currently used for boat storage. The structural capacity of the quay walls limits the allowable surface loading
- Le Crocq, currently used in an ad-hoc manner for parking and boat storage, as well as for recycling facilities.

Plans to redevelop Leale's Yard, toward the west end of St Sampson's, have been in gestation for some time, with the purpose of revitalising The Bridge as a place to visit, shop and eat. An integrated and coordinated approach is therefore required, steered by the Environment Department, PSD and other States' departments, and taking account of the Vision for The Bridge, such that the waterfront along St

Sampson's harbour is enhanced in tandem.

There are potential issues associated with flooding and sea level rise. St Sampson's harbour frontage is prone to flooding both during extreme high tides and throughout especially large swells.

While flooding is presently only of short duration and therefore may not have a significant impact, over the next 25 years, as sea levels are expected to rise, consideration must be given to ensure appropriate measures are taken to protect existing and future infrastructure. Any development along St Sampson's waterfront should be designed to mitigate potential sea level rise. In accordance with the Environment Department's Flood Risk Assessment Studies and Coastal Defence Strategy.

TRAFALGAR QUAY

The Trafalgar Quay is a small piece of reclaimed land of just under 1,650m² situated on the north side of St Sampson's harbour. It is currently poorly used with some trailered/small boat parking. Due to suspected stability issues, it will need an extensive survey to find out what must be completed before it is used for anything of substantial weight. A number of possible uses have been suggested, ranging from a recycling bring bank site, parking and boat storage. Guernsey Harbours is not currently able to offer any units to marine trader businesses. However, it is recognised that the Trafalgar Quay could provide up to four separate units at ground level with provision for office space, each around 400m². The provision of a fuelling facility for local boats would also be of value, potentially operated through a marina operator or by marine traders on the site. Regardless, the area is clearly of value in the context of the St Sampson's waterfront, and

measures to generate revenue through parking (potentially lease rather than metered) should be considered, if endorsed through the Transport Strategy. It is important that the "ownership" of these marginal areas is redefined, both to establish clear responsibility in respect of safety, and to define the responsible organisation for future change of use.

Any scheme for development on Trafalgar Quay should be considered in conjunction with a wider St Sampson's Development Strategy in association with the Environment Department and other States' departments.

LE CROCQ

The central area is used for a few winter lay-ups of boats and some unregulated parking which is attracting complaint for the visual impact of the activity. Guernsey Harbours need to plan the area with formalisation of parking provision, coupled with public realm works to establish a valuable and pleasant area with good sightlines through the harbour, so it could be utilised for revenue, e.g. rented parking, and, as with Trafalgar Quay, would define responsibility for safety. There are designated parking spaces and segregation of parking from boat storage is therefore appropriate. Ideally, winter lay-up would be integrated within a marina business located within a defined area on the waterfront.

ABRAHAM'S BOSOM

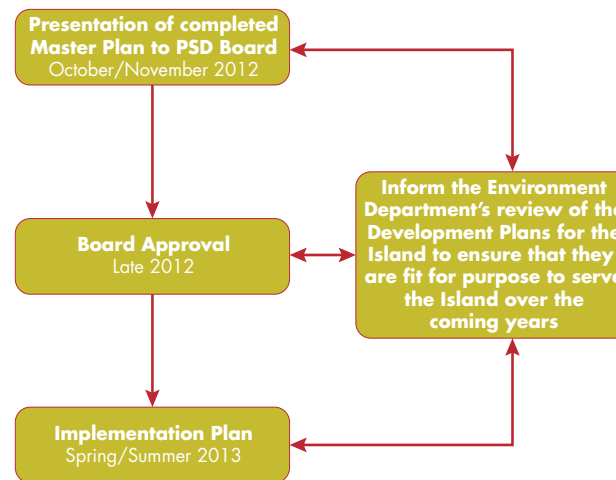
Development of harbour-related marine industry units together with commercial and retail set on the outer end of the quay, serving yacht owners and general public. The area could be leased to existing or new businesses focusing on the recreational boating activity within the harbour.



06

IMPLEMENTATION STRATEGY AND NEXT STEPS

The Master Plan strategy needs to be deliverable, and implementation will require engagement from States and the community. The Master Plan sets out the framework, but the implementation process defines how the specific projects need to be taken forward.



While this Master Plan has been undertaken for PSD and Guernsey Harbours and therefore focuses on the environs of the ports, responsibility for delivery lies jointly between the Guernsey Harbours, stakeholders and partners.

All infrastructure initiatives should take account of potential impacts associated with climate change and sea level rise, and must align with the Environment Department's emerging Coastal Defence Strategy.

PORT PRIORITIES

THE COMMERCIAL AREA AND SECURITY LINE

1. Undertake third party audit on ISPS compliance. Assess potential for future strengthening of Code. Identify compliance strategy that minimises impact beyond existing footprint (while retaining operational capacity)
2. Review berth usage to concentrate freight movement to the east of New Jetty (Ro-Ro Berth 2) and/or implements passenger access to the west of Ro-Ro Berth 1. Develop port security plan adopting audit recommendations
3. Prepare security schedule identifying key milestones for operational compliance and interim milestones for reconfiguration
4. Develop/refine port operation plan based on security and operational requirements (iteration of concept in Appendix E)
5. Identify procurement/management strategy for implementation
6. Complete modernisation of Berths 4, 5 and 6
7. Implement charges for cargo storage, with all cargo to be collected within specified hours of landing/clearance

IMPLEMENTATION STRATEGY AND NEXT STEPS

8. Undertake phased reconfiguration of port area as necessary to maintain compliance with Code.

CARGO HANDLING CONSOLIDATION AT ST SAMPSON'S

1. Review operational feasibility of creating a deep water berth at Longue Hougue, located at the northern end of the reclamation
2. Assessment of future utilisation of the reclamation area, including provision for Lo-Lo, aggregate and bulk goods import/export
3. Review potential options for future expansion of the reclamation and safeguard flexibility when implementing capital works
4. Evaluate potential for land swap, exchanging areas elsewhere in the harbours for areas on Longue Hougue and St Sampson's
5. Undertake physical and model studies to define berth configuration and operational parameters, develop design and cost plan
6. Identify funding requirement and contribution available from industry (aggregate/industrial)
7. Identify procurement/management strategy for implementation
8. Procure and implement berth construction.

LIQUID BULK DEEP-WATER BERTH

1. Undertake technical studies to determine and refine configuration of berth structures, including wave, wind, and current monitoring; bathymetric and topographic surveys of the potential jetty site and adjacent land areas, together with initial environmental (fisheries and benthic) studies

2. Undertake environmental scoping for the selected marine location
3. Refine and expand design criteria and requirements (vessel types, cargo range, occupancy) and potential multi-use options (Lo-Lo, aggregates, waste export)
4. Develop structural solution for jetty form
5. Undertake geophysical and geotechnical evaluation to determine dredge and foundation conditions
6. Develop cost plan and establish budget/funding requirement
7. Prepare procurement strategy for the facility, including construction and operational stages
8. Develop works schedule, with operation milestone within 15 years
9. Support area wide action plan (prepared by States of Guernsey) for St Sampson's/The Bridge, including consolidation of industrial and utility functions to Longue Hougue
10. Procure and implement berth construction.

FISH QUAY

1. Review operational requirements for the facility, including provision of craneage and cold storage
2. Evaluate potential for on-site point-of-sale facilities and/or expansion of the trade/restaurant facilities
3. Undertake structural assessment of quay and wave screen to confirm residual life
4. Identify maintenance provision for the facility; assess charging strategy for the users
5. Implement modernisation of equipment and undertake maintenance to extend operational life of facility.

COMMUNITY PRIORITIES

GUERNSEY GATEWAY PROJECT

PASSENGER FACILITIES

1. Establish cruise and ferry profile to assess terminal demand and opportunities
2. Undertake design review of the ferry and cruise passenger facility, potentially through design competition to select architect practice. Allow public engagement in the evaluation of schemes
3. Identify optimum location (Cambridge Berth Emplacement, North Beach or East Quay) for integrated terminal facility
4. Relocation of non-essential business and consolidation of activities in the Cambridge Berth area
5. Detailed evaluation of parking provision along North Beach, to reach consensus on the scale and location of residual parking. Reduction in the parking footprint is essential enabling works to allow reconfiguration of the port area
6. Instigate dialogue with potential operators/investors.

CRUISE

1. Undertake consultation with cruise operators to fully explore berth requirements (vessel sizes and drafts, operational constraints) and funding options. Establish commitment to Guernsey as a destination
2. Establish value to Guernsey from cruise operations
3. If supported by commercial/market analysis, undertake data collection and modelling to establish design and environmental parameters for approach to

St Peter Port

4. Prepare and cost design cruise berth design concepts. Consider other locations other than St Peter Port.

INTER-ISLAND QUAY

1. Review berth usage and implement structural changes to improve all tide accessibility
2. Review land side facilities in conjunction with operators and cruise industry
3. Prepare berth configuration plan.

REDEVELOPMENT OF CAMBRIDGE BERTH AREA

1. Undertake user review of the port area, to assess commercial value of retention within the port footprint
2. Establish commercial lease rates for properties within the port
3. Undertake preparation of area plan to identify optimum development profile to interface with town
4. Implement discussion with local businesses to identify development partner/operator for facilities within the Cambridge Berth area.

NORTH BEACH

1. Work closely with the Environment and Commerce & Employment Departments to implement island-wide parking policy, incentivising schemes to reduce traffic within St Peter Port (car share, park and ride, parking charges)
2. Promote/support transport and retail strategies
3. Implement charging scheme based on message of re-investment in port infrastructure and waterfront enhancement.

ST PETER PORT CASTLE PIER

1. With the Planning section of the Environment Department and the Policy and Research section of the Policy Council, evaluate commercial and tourism benefit of enhancement of fishery outlet opportunities serving the island (and advertising the fishing industry). Evaluation to be led by Strategic Planning team
2. Invite public contribution through the Visioning process to establish brief for evaluation of the area as a discrete element of the waterfront
3. Encouragement, through public investment and favourable planning strategy, for development on Castle Pier focusing on protection of historic features, and implementation of commercial development that is in sympathy with the existing amenities
4. Establish an investment framework to attract investment and to establish a maintenance provision for the pier and associated facilities
5. Assess potential to expand marina facilities from Castle Pier into the inner harbour.

ST PETER PORT HARBOUR WATERFRONT ENHANCEMENTS STRATEGY

1. Promote preparation of an integrated waterfront enhancement plan incorporating transport and land-use studies
2. Assess user resilience to change through Visioning work and targeted consultation.

PARKING

1. Undertake a safety audit to determine PSD liability/

exposure for damage to vehicles parked on PSD/ Guernsey Harbours land. Implement signage strategy

2. Lobby for transport strategy to include parking controls
3. Implement charging policy of all car parks on the waterfront (to subsidise bus service, park and ride and port maintenance and special projects)
4. Identify zoning for allocation of parking for marina (only) use.

MARINAS

1. Review berth mix and compare/contrast with UK (south coast) and France (Normandy coast) provision
2. Assess user resilience to change (fees, pontoon provision, landside facilities)
3. Assess dry stack options
4. Invite proposals from commercial operators for transfer of management responsibility from Guernsey Harbours to third party organisation. Bids to include assessment of investment and identification of land requirements.

CAREENING HARD

1. Commission design study for the Careening Hard utilising multidisciplinary study team
2. Assess delivery mechanisms for proposals – public/private partnership, land lease
3. Invite proposals from commercial operators for transfer of management responsibility from Guernsey Harbours to third party organisation.

IMPLEMENTATION STRATEGY AND NEXT STEPS

ST SAMPSON'S WATERFRONT

STRATEGY

1. Promote preparation of an integrated waterfront enhancement plan incorporating traffic and land-use studies
2. Assess user resilience to change through Visioning work and targeted consultation.

PROJECT FINANCING

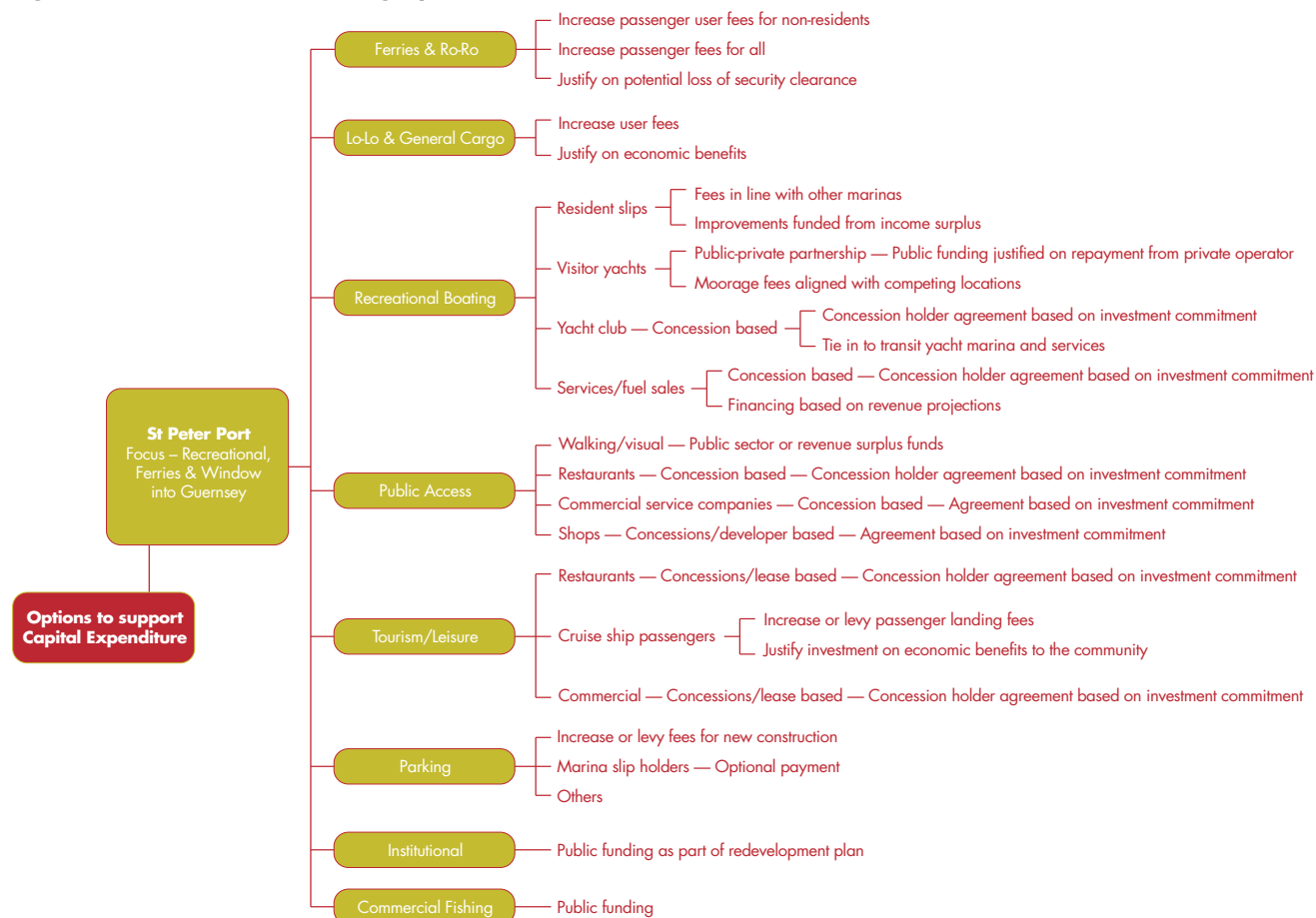
CAPITAL FUNDING

One of the primary objectives of any development plan is to recover the initial investment through revenues. However, with the exception of high volume or high demand situations, it is rare for new public port or marina construction to be financially viable without some level of public funding. In the private sector, a normal rate of return in investment (ROI) is on the order of 23 to 25% with a 10 year period for recovery of the initial capital costs. In the public sector, where bonding or outside financing is permitted, ROI can be on the order of 10 to 15% depending on generated economic benefits, with payback periods that can extend to 20 to 25 years.

As part of the PSD, capital funding for Guernsey's marine installations comes directly from central government where harbour projects must compete with other public needs, such as schools, highway improvements, hospitals and the recent airport improvements.

Many public ports operate with a degree of autonomy often supported by tax or other public revenues, This is not the case for Guernsey Harbours, and a strong case must be made to justify any capital expenditures, or there needs to be a clear indication that the expected income or economic

Figure 6.1: St Peter Port Financing Options



benefits to the community will repay the investment in an acceptable time.

FUNDING OPTIONS

The short and long term recommendations presented in this Master Plan cover a wide range of needs and projects,

ranging from community safety and security requirements through to tourism and visitor related projects.

As such, each of the project groups requires a different and individual financing assessment in order to support any request for funds.

As can be seen from the graphics in Figure 6.1 and 6.2, projects identified in this Master Plan require differing approaches to financing.

While it is understood that there concerns in respect of Private Public partnerships, it is recommended that the States of Guernsey, through the Public Services Department, consider PPP forms of procurement for those major projects where revenues can support the investment, possibly bolstered by economic benefits. This approach would potentially be appropriate for the development of transit moorage facilities in the main harbour, where a private developer would provide and construct the marina pontoon system and facilities, a central clubhouse and services area whilst the public sector would provide the land and waterside infrastructure and permanent installations. However, feedback from stakeholder and board consultation has highlighted reluctance to relinquish responsibility/control of major infrastructure projects and an enthusiasm for more traditional funding and contractual relationships, with infrastructure procured through public funding or through in-house engineering capability. Other than PPP, options for private investment include regulated private industry (potential contributor to the energy initiatives) and other private finance that may be more aligned with regeneration opportunities along the waterfronts rather than direct investment into the ports. Notwithstanding this reluctance, it is clear that consideration has been given to joint public and private funding for expansion of the cruise facilities, should a

viable business case and scheme be forthcoming.

There are opportunities for concessions and leases for commercial facilities, including restaurants, shopping, the existing marinas and fuel supply in both harbours. If packaged on the base of sound business plans, these facilities would be developed at no or little cost to the public sector.

Parking is a sensitive issue since it is for local residents and there are few practical or acceptable alternatives in the vicinity of the town centre. From the public discussion process, it was acknowledged that there is a shortage of spaces in the harbour area and most people understand that this is likely to get worse as improvements are made to the ferry and commercial area facilities. In general terms, the consultation responses suggest there is public acceptance for

fee based parking but this needs to be examined through the transport and retail strategies.

The resolution of the fuel import issue is more challenging from a financial standpoint. However the elimination of the risks identified in a number of reports justifies the need to provide an acceptable alternative. Once funded, the new offshore berth could be the subject of an operator or management concession that would provide income to recover some of the investment cost.

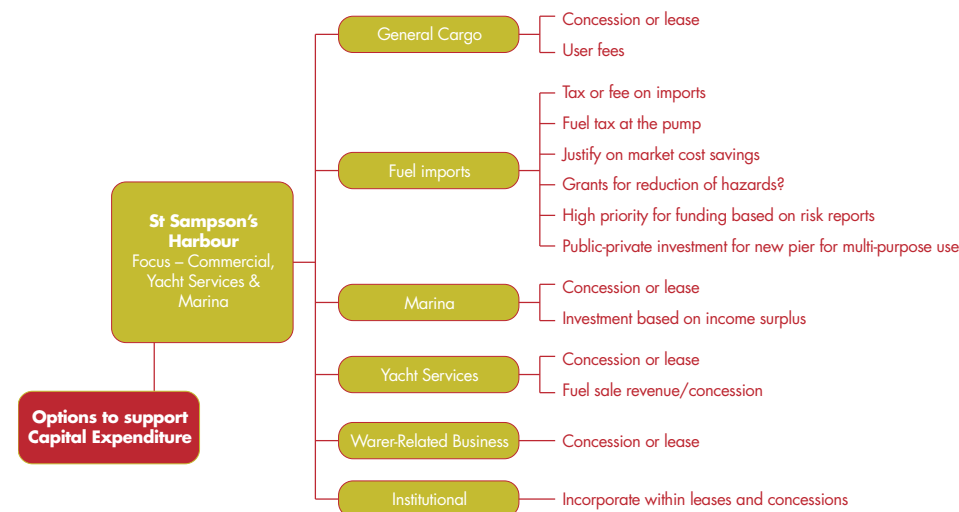
The type of concession could vary from a design-build package to a simple operating lease, with the allocation of capital costs dependent on the option finally selected.

Other options that might be more difficult to institute would be the recovery of the cost of the new offshore berth via a fuel tax charged at the pump or a direct user fee on import volumes, which in turn would translate to an added cost to the users.

If of interest, these proposals would be supported by an economics benefits analysis that would demonstrate the potential costs savings or risk reductions to the community as a whole.

Finally, the financial records indicate that Guernsey Harbours contributed some £2.6 million to the General Revenue Fund in 2011. Clearly any revenue increases in the future would allow the States of Guernsey to invest in the ports, both to make improvements to the facilities and catch up on deferred maintenance of the marine installations within its purview.

Figure 6.2: St Sampson's Harbour Financing Options





07

APPENDICES

APPENDIX A: CONTACTS AND REFERENCES**KEY CONTACTS****HARBOUR MASTER'S OFFICE**

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APPENDIX B: COMMUNITY ENGAGEMENT SUMMARY REPORTS

B.1 STAGE 1 CONSULTATION SUMMARY REPORT

1. Introduction

- 1.1 The purpose of this first stage report is to provide a summary of the initial round of consultation comprising interviews with the commercial operators, stakeholder focus groups and the public.
- 1.2 Section 2 sets out a summary of the feedback from the interviews with commercial operators including common themes.
- 1.3 Sections 3-5 set out a summary of the feedback from the stakeholder focus group sessions incorporating additional comments received by members of the public at the drop-in session.

2. Stage 1 Consultation Process Explained

- 2.1 Interviews with the Commercial Operators.
 - 2.1.1 On the 24 May 2012, 16 commercial operators/companies with a direct interest in the operation of the ports attended a face to face interview with PSD and its consultants Moffatt & Nichol and Turley Associates.
 - 2.1.2 This provided an unrestrained opportunity to speak to Moffatt & Nichol and Turley Associates and raise issues pertinent to the development of a Ports Master Plan. The PSD played a low key role on the basis that we wanted to capture thoughts and ideas as part of the overall consultation process rather than attempt to address issues or create solutions on the spot.
- 2.2 Stakeholder Focus Groups.
 - 2.2.1 Following the interviews with the commercial port operators, Turley Associates together with Moffatt & Nichol and PSD convened a stakeholder focus group session.
 - 2.2.2 The focus groups comprised, as far as possible, a cross-section off the public, with representatives drawn from various community and commercial groups and associations.
 - 2.2.3 Twenty-two (out of twenty-three) different organisations attended the workshop session further to an invitation from the PSD. These organisations represented a wide cross

section of Guernsey communities and port users.

2.2.4 The workshop session comprised an overall introduction to the Port Master Plan process and objectives as well as timescales and the consultation programme. This was followed by a series of group exercises as follows:

- Thinking about Guernsey – four questions focusing on the positives, negatives and opportunities within Guernsey
- Global Issues and Opportunities – reviewing the social, environmental and economic impacts facing Guernsey as well as factors relating to ‘my special island’
- Local Opportunities and Challenges – consideration of the initial objectives and opportunities forming part of the Master Plan process
- What could the port’s look like in the future? – a visioning exercise considering the future of the port’s stemming.

2.2.5 The exercises were undertaken as a group with material provided to complete each exercise. The responses were collected, compared and summarised and will feed into the next stages of the production of the Port Master Plan.

2.3 Public Drop-In Sessions.

2.3.1 Held on 31 May 2012 at Beau Sejour. A summary of the material and outputs from the initial stakeholder sessions was displayed with an opportunity for members of the public to ask questions and comment further.

2.3.2 Approximately 30 people attended and therefore, this low level of public input at this stage needs to be borne in mind when reading the report and considering the views expressed and recorded.

3. Commercial Operators’ Feedback – Challenges and Opportunities

3.1 Challenges.

3.2 A number of challenges were identified by the commercial operators of the harbours which should be considered as part of the Master Plan. For St Sampson’s harbour, the challenges were identified as:

- Conflict with other operators (e.g. timings for berths)
- Tides and weather conditions

- Fuelling arrangements
- Lack of space on berths and congestion between operators
- Specific types of boats required to access berths, i.e. boats that are able to dry out
- Potential tidal/current flow impacts from offshore development.

3.3 The majority of respondents who attended the public drop-in session agreed with those challenges.

3.4 For St Peter Port harbour, the challenges identified by the commercial operators were identified as follows:

- The need to accommodate tenders for cruise liners
- Lack of space for commercial operations
- Customs and Immigration Office in wrong location – considered space could be better utilised for other uses
- Capacity for boats/yachts
- Existing facilities for visiting boats not up to standard, e.g. availability of berths for larger visiting boats
- Conflict between leisure and commercial operations, particularly in terms of usable space
- Piecemeal development in the past
- Traffic management and accessibility
- Parking
- Weather/tides
- Storage arrangements
- Arrangements for loading passengers
- Adequate space for coaches loading and unloading passengers.

3.5 As for St Sampson’s harbour, the overwhelming majority of respondents agreed with the challenges identified above.

3.6 Opportunities.

3.7 The commercial operators were asked to identify opportunities that they think exist and would like to be considered as part of the Master Plan. A summary of these is set out below. The local residents who attended the public drop-in session were asked whether they agreed or disagreed with these opportunities.

3.8 St Sampson's harbour.

Issue	Responses from the public drop in session (See Section 2.3)
Deep-water fuel berth – potential for multi-purpose use	An overwhelming majority of people agreed with this opportunity (83%)
Future use of Longue Hougue land reclamation area for commercial operations once reclaimed	All who responded agreed with this opportunity (100%)
Intensification of commercial uses, e.g. moving more commercial operations to St Sampson's harbour	All who responded agreed with this opportunity (100%)
Enhanced management of existing berths and facilities, e.g. scheduling	This opportunity had fewer responses, 2 in favour and 1 against
Development of dry dock facilities for commercial and leisure	This opportunity had fewer responses, 2 in favour and 1 against

3.9 St Peter Port harbour.

Issue	Responses from the public drop in session (See Section 2.3)
Growth of cruise ship operation	All the people who responded to this opportunity agreed with it (100%)
Enhancement of fuelling facilities for large visiting boats	Out of those who responded, the majority (all but 1) agreed with this opportunity (80%)
Better utilisation of North Beach car park including lower level car parking and/or decked above ground car parking with potential for a town park above	An overwhelming majority of people agreed with these opportunities (78%)
Improve facilities for visiting boats	Out of those who responded, the majority (all but 1) agreed with this opportunity (83%)
Utilisation of Careening Hard for additional marina berths	Not many responded to this opportunity: 2 people were in favour and 1 opposed
Creation of deep-water berth for cruise ships	Opinions were split with an equal amount of people in favour and against this opportunity
Expansion of freight area	Not many responded to this opportunity; however, opinions were equally divided: 2 in favour and 2 against.
Redevelopment of part of Cambridge Berth for a tourism/leisure quarter	Not many responded to this opportunity: 2 people were in favour and 1 opposed.
New passenger arrival/departure hall and associated facilities	Not many responded to this opportunity: 2 people were in favour and 1 opposed

Issue	Responses from the public drop in session (See Section 2.3)
Enhanced servicing and pull-out facilities	Not many responded to this opportunity: 1 person was in favour and 2 against
Lengthening of Inter-Island Quay	Not many responded to this opportunity: 1 person was in favour and 2 against
Re-utilisation of Model Yacht Pond	An overwhelming majority of people disagreed with this opportunity (80%)
Conversion of fish quay to leisure use	The majority of people disagreed with this opportunity (67%)
Utilisation of Havelet Bay for all-tides marina spaces	An overwhelming majority of people disagreed with this opportunity (71%)

3.10 A number of additional opportunities were identified at the public drop-in:

- Use reclaimed land at St Sampson's for all cargo and fuel operations – none at St Peter Port harbour
- A better area in town for cruise ship tenders – facilities
- Disabled access to town
- Bus services to Harbour Terminal
- Community centre – theatre/cinema/arts complex
- Real estate use
- New tourist harbour terminal
- New town square at North Beach
- Slight redesign of current bus station in that area
- Potential opportunity to locate offshore fuel terminal in Doyle Passage north of Beaucette where there is natural deep water close to shore with good navigation and manoeuvrability, adjacent undeveloped land and benevolent metocean conditions
- Potential to reclaim area east of the East Arm for commercial use
- Potential to develop standardised concrete blocks using by-products from incineration for marine applications (breakwaters, shore protection, etc.)
- Potential to develop bridge crossing between Victoria and Albert piers for better pedestrian access whilst also creating an artistic/architectural centrepiece.

3.11 Approximately 30 people attended the public drop-in session and these comments

represent their additional views. This low number of comments makes it difficult to regard the views expressed as representative of the wider community.

4. Initial Stakeholder Focus Groups – Thinking about Guernsey

4.1 Information was gathered during the initial stakeholder session with invited local stakeholders around the 'Thinking about Guernsey' theme. The stakeholders were asked a number of questions and provided the following feedback:

4.2 What does St Sampson's harbour make you think of?

- Proximity of housing and commercial uses
- Heritage
- Slipways and boat launching
- Scenery
- Cars
- Noise
- Unattractive industrial estate
- Road and boat congestion
- Attractive marinas
- Dated/old fashioned
- Under-utilised
- Dirty cargo
- Boats
- Grey industrial setting.

4.3 What does St Peter Port harbour make you think of?

- Gateway to island – coming home
- Traditional/basic
- Attractive views
- Past sell-by date
- Clean cargo

- Road and boat congestion
- Unattractive industrial estate
- Attractive marinas
- Heritage
- Cars
- Noise
- Commercial and leisure uses.

4.4 What makes them good places to live, work or visit – St Sampson's harbour

- Good parking
- Convenience if living in north of island
- More convenient for boat owners
- Less expensive than town
- Still quaint and pretty
- Enhanced marina facilities
- Scale
- Busy.

4.5 What makes them good places to live, work or visit – St Peter Port harbour

- Views
- Appearance
- Busy
- Waterfront activities
- Attractive marinas
- Model yacht viewing area
- Castle Cornet and harbour setting
- Cheaper boat fuel
- Shopping and facilities

- Attractive town or arrival
 - Yachting facilities and yacht club
 - Picturesque setting
 - Compact
 - Vistas and town character
 - Use for events
 - Links to other islands, e.g. Herm
 - Flowers.
- 4.6 What is not so good about living, working or visiting them – St Sampson's harbour
- Dirty
 - Power station – emissions/aesthetics
 - Bulk Lo-Lo is very cramped
 - Facilities are not well arranged – conflicts between uses
 - Very industrial – not so good for living
 - Cars too dominant.
- 4.7 What is not so good about living, working or visiting them – St Peter Port harbour
- Lack of facilities in harbour area
 - Cars too dominant
 - Disconnection between town and harbour area
 - Lo-Lo/Ro-Ro is very cramped
 - Unsafe in car parks – vulnerable to traffic
 - Traffic.
- 4.8 What one thing do you think would make the areas better? – St Sampson's harbour
- Rebuild majority of the area
 - Reclaiming spaces for people rather than cars
 - Clear separation between industrial uses

- Make it pedestrianised and enhance security.
- 4.9 What one thing do you think would make the areas better? – St Peter Port harbour
- Make it pedestrianised and enhance protection/security
 - Clear separation between visitor port/pleasure craft and commercial operations
 - Reclaiming space for people rather than cars
 - Remove cars by providing replacement parking and enhance amenity facilities.
- 4.10 There was no public feedback on the above or additional comments put forward.

5. Social, Environmental and Economic Challenges facing Guernsey

- 5.1 Following a presentation about global and local economic trends, the stakeholder groups were asked to identify social, environmental and economic challenges facing Guernsey. The following were identified:
- 5.2 Social:
- Ageing population
 - Food importation
 - Population capping/strategy
 - Social exclusion
 - Affordability of housing
 - Deskilled population.
- 5.3 Economic:
- Funding the 'Vision'
 - Attracting new business and inward investment
 - Cost of resources
 - Sticking to the budget
 - Diversification.
- 5.4 Environmental:
- How waste strategy will impact and be implemented
 - Increase in traffic and congestion

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- Management of current resources
- Natural resources
- Pollution.

5.5 As above, there was no additional feedback from the public on these challenges.

6. Local Opportunities and Challenges

6.1 The stakeholder groups were provided with a list of harbour functions and asked to consider which location would be the most suitable for that function. Members of the public who attended the drop-in session were also asked for their comments on this including identifying any additional functions that were not previously identified.

6.2 Approximately 30 people attended the drop-in session and of those, not all chose to answer or comment on all of the elements. Therefore, it is considered that their views do not represent a wide-cross section of the community. Their answers have been recorded, however, when balanced against the stakeholder feedback should not be given as much weight.

6.3 A summary of which location is considered most suitable for each of the following harbour functions is set out below:

Harbour Function	Stakeholders' Location Choice	Public Responses from drop in session (See Section 2.3)
Cruise liner passengers	St Peter Port	All who responded agreed with the stakeholders
Life boats, pilots and essential services	St Peter Port	All who responded agreed with the stakeholders
Passenger ferry landings	St Peter Port	All who responded agreed with the stakeholders
Commercial fishing	St Peter Port	The majority of respondents agreed with the stakeholders
Public access	St Peter Port	Only 2 people responded and they both agreed
Yacht club(s)	St Peter Port	The majority of respondents agreed with the stakeholders
Water-based leisure activities	St Peter Port	There was not a prevalent opinion, with an equal split between people who agreed and disagreed with the location.

Harbour Function	Stakeholders' Location Choice	Public Responses from drop in session (See Section 2.3)
Industrial area	St Sampson's	All who responded agreed with the stakeholders
Commercial Port – containers	St Sampson's	All who responded agreed with the stakeholders
Commercial Port – freight lorries	St Sampson's	Only 1 person responded and agreed
Fuel importation	St Sampson's	Only 1 person responded and agreed
General cargo (assuming water access), e.g. bags, crates, cartons, pallets	St Sampson's	Only 1 person responded and agreed
Dry bulk cargo, e.g. commodity cargo that is unpackaged 'free-flowing' in large quantities	St Sampson's	Only 1 person responded and agreed
Recreational boat services (haul-out, repair and storage)	St Peter Port and St Sampson's	Only 2 people responded: one agreed with the stakeholders and the other disagreed
Marinas	St Peter Port and St Sampson's	The majority of respondents agreed with the stakeholders
Social meeting places	St Peter Port and St Sampson's	Only 2 people responded and they both agreed
Recreational walks	St Peter Port and St Sampson's	2 out of 3 people agreed with the stakeholders
Restaurants and bars	St Peter Port and St Sampson's	All who responded agreed with the stakeholders
Fuel selling	St Peter Port and St Sampson's	Only 1 person responded and disagreed
Dry boat storage	St Peter Port and St Sampson's	Only 1 person responded and agreed

6.4 The public agreed almost exactly with the feedback from the stakeholders.

Necessary Improvements.

6.5 A number of necessary improvements were identified by the PSD prior to the stakeholder focus group session. These were presented to the stakeholder groups as essential considerations for the long-term Master Plan:

- To provide deep-water fuel berth access at St Sampson's harbour
- To increase safety around St Sampson's with respect to navigation channels and proximity of the public to areas handling hazardous products
- Creation of more mooring spaces and updated marina services
- Streamline the traffic circulation and as much as possible resolve traffic conflicts from

the different port functions

- Streamline customs and security checks and passenger flow
- Balance parking needs with other uses of the port land
- Upgrade the port infrastructure
- About half of the Longue Hougue area has been allocated to solid waste processing
- Income generation – tourism and leisure facilities
- Cruise liner options
- Overhaul of existing harbour buildings.

6.6 There was no disagreement from any of the stakeholder groups in relation to these objectives.

6.7 The following additional improvements and comments were noted at the public drop-in:

- No more building on the castle emplacement
- No below tide-line parking
- Improvement of cruise ship facilities: dual-use berths, cruise, super yacht, fuel
- Leave Havelet Bay alone
- North Beach car park: underground and lower deck; single upper deck; green roof attractive
- Marina security and facilities, e.g. key fobs and swipe cards; no key pads
- Paid parking.

6.8 Opportunities Stemming from the Necessary Improvements.

6.9 The following opportunities were identified as potential ideas resulting from the necessary improvements. Each of the stakeholder groups was asked to consider these and comment on whether they were positive, negative or neutral.

6.10 Members of the public at the drop-in session were also invited to comment on these objectives.

Opportunity	Stakeholder Response +/- or Neutral (N)	Public Response from drop in session	Public Agreement or Disagreement (See Section 2.3) (A or D)
Parking			
Lift up the Model Yacht Pond to provide usable space below	-	The majority of people agreed that re-use of the Model Yacht Pond would be negative (71%)	A
Utilise the area of reclaimed land close to Longue Hougue for parking with a shuttle service into town	-	Few people responded (3 in total); the majority (66%) disagreed with the stakeholders' response	D
Expand Salerie Car Park through removal of landscaped bund	-/N	Few people responded (3 in total); the majority (66%) agreed with the stakeholders' response	A
Create underground parking at North Beach	+	Only two people responded and opinions were split 50-50	A/D
Create raised deck parking at North Beach	+	An overwhelming majority (83%) agreed with the stakeholders response	A
Remove some or all of the parking from Victoria Pier	+	Few people responded (3 in total); the majority (66%) disagreed with the stakeholders' response	D
Remove some or all of the parking from Albert Pier	+	Few people responded (3 in total); the majority (66%) disagreed with the stakeholders' response	D
Create underground parking at the Salerie Car Park	+	Opinions were split 50-50 between those who agreed and disagreed with the stakeholders	A/D
Provide parking for mooring holders	N	The majority (75%) agreed with the stakeholders' response	A
South Esplanade additional parking		Few people responded (3 in total); the majority (66%) disagreed with the stakeholders' response	D
Recreational Boating			
Develop Careening Hard as marina for larger visiting boats	+	Only two people responded and opinions were split 50-50	A/D
Develop Careening Hard as a marina for larger Guernsey registered boats	+	Only one person responded and disagreed with the stakeholders	D
Possible relocation of fishing harbour to St Sampson's harbour and conversion of St Peter Port's fishing harbour to provide additional marina slots, provided that tides can be mitigated	+/-/N	2 people responded and agreed with the stakeholders	A

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Opportunity	Stakeholder Response +/- or Neutral (N)	Public Response from drop in session	Public Agreement or Disagreement (See Section 2.3) (A or D)
Add recreational boat services (haul-out, repair and storage) in St Sampson's harbour	+	2 people responded and agreed with the stakeholders	A
Better utilisation of Havelet Bay	+	Only one person responded and disagreed with the stakeholders	D
Re-use/Refurbishment/Redevelopment of Existing Buildings			
Refurbishment and improvement of Cambridge Berth to include tourism/commercial uses	+	No public comment	
Ferry Terminal/Customs and Immigration Building could have cosmetic update, modernisation, new seats and facilities	+	Only 2 responses, one agreeing with the stakeholders and a neutral one	
Re-use of the buildings at Castle Cornet area and surrounds	+	Only one person responded and agreed with the stakeholders	A
Improve commercial fisheries buildings and facilities	+	2 people responded and agreed with the stakeholders	A
Relocate the Bus Terminal and redevelop the area	+	Only two people responded and opinions were split 50-50	A/D
Customs Car Hall relocation	+	No public comment	
Development of the Area between St Peter Port harbour and St Sampson's harbour (Les Banques)			
Provide additional parking if shuttle service can be developed	+	No public comment	
Consider new residential and retail development to provide revenue stream	+	Only one response agreeing with stakeholders	A
Lo-Lo/Ro-Ro Cargo			
In long-term, move Lo-Lo to St Sampson's harbour if drying issues can be resolved	+	No public comment	
Relocate freight importation from St Peter Port to St Sampson's harbour to locate it closer to the freight warehouses, which would remove traffic between St Peter Port and St Sampson's	+	Only one response agreeing with stakeholders	A
Cruise Berths			

Opportunity	Stakeholder Response +/- or Neutral (N)	Public Response from drop in session	Public Agreement or Disagreement (See Section 2.3) (A or D)
If financially viable, create an alongside cruise berth; to be created outside the breakwater at St Peter Port harbour. Might comprise a new breakwater alongside berthing facilities	+	Only two people responded and opinions were split 50-50	A/D
If financially viable, improve the existing solution by providing larger tender vessels to bring passengers ashore	+	Only one response agreeing with stakeholders	A

7. Conclusion

- 7.1 The stakeholder events were well attended with a wide cross section of the operators, the community and local groups represented.
- 7.2 The feedback from these groups has been reported and summarised within this report, to be considered as part of the next stages of the Master Plan process.
- 7.3 In terms of the public drop-in session, this was open to any member of the public with an interest in the Master Plan process. However, despite advertising and media coverage attendance and interest was low with only approximately 30 attendees.
- 7.4 This number of attendees is not considered to represent a wide cross section of the community, unlike the stakeholder representatives. Therefore, careful weighting of their responses must be undertaken.

8. Next Stages of the Production of the Ports Master Plan

- 8.1 Round 2 Stakeholders consultation – 2 July 2012. This will comprise a further session for the operators (3-5pm) and a further general stakeholder's workshop (6-8pm).
- 8.2 Round 2 public drop-in session – 10 July 2012.
- 8.3 Publication of draft Master Plan (date to be confirmed).
- 8.4 Public exhibition of draft Master Plan (date to be confirmed).

9. What is the Role of the Ports Master Plan and what will Happen once it has been Produced?

- Guide for future development and investment
- Valuable information for inclusion within the Island Infrastructure Plan currently in development
- Enables the planning system to take account of harbour-related development when preparing Development Plans
- Enables other States projects such as development of a retail strategy, production of visions for the town and The Bridge, development of a transport strategy, etc to integrate and work together to achieve overarching strategic objectives of the States.

B.2 STAGE 2 CONSULTATION SUMMARY REPORT

1. Introduction

- 1.1 The purpose of this second stage report is to provide a summary of the follow-up round of consultation comprising a workshop with the commercial operators, a workshop with general stakeholders and a public drop-in session.
- 1.2 The intention of the follow-up sessions was to demonstrate and discuss how the comments received at the initial consultation stage have been considered as part of the evolution of the Master Plan.
- 1.3 Section 2 sets out a brief explanation of the consultation process.
- 1.4 Section 3 sets out a summary of the feedback received from the commercial operators.
- 1.5 Section 4 sets out a summary of the feedback received from the stakeholder workshop including common themes.
- 1.6 Section 5 sets out comments received at the public drop-in session.
- 1.7 Section 6 refers to the St Peter Port and St Sampson's 'Visioning Exercises' that are being prepared alongside this Master Plan.

2. Stage 2 Consultation Process Explained

COMMERCIAL OPERATORS' WORKSHOP

- 2.1 On 2 July 2012, 16 commercial operators/companies with a direct interest in the operation of the ports attended a follow-up workshop related to the Guernsey Ports Master Plan.

- 2.2 The purpose of the workshop was to update commercial operators on progress made since the initial consultation exercises held on 24 May 2012 and to demonstrate how comments received have been incorporated into the evolution of the Master Plan.
- 2.3 The workshop comprised a presentation covering a summary of the consultation process and progress made to date; a summary of the challenges and opportunities arising from Stage 1 of the consultation programme; and a summary of the initial Master Plan visions and concepts again arising from the Stage 1 feedback.
- 2.4 Attendees were then given the opportunity to review the initial concepts in more detail and discuss them with Moffatt & Nichol, Turley Associates and the PSD. Feedback was available through a Q&A session as well as feedback forms.

STAKEHOLDER WORKSHOP

- 2.5 Immediately following the Commercial Operators' Workshop, also on 2 July 2012, Turley Associates and Moffatt & Nichol convened a general stakeholder workshop session.
- 2.6 As above, the purpose of the workshop was to update the general stakeholders on progress made since the initial consultation stage and to demonstrate how comments received at the initial events have been considered as part of the evolution of the Master Plan.
- 2.7 As before, this workshop group comprised, as far as possible, a cross-section of the community with representatives drawn from various community and commercial groups and associations.
- 2.8 Sixteen (out of an invited 39) different organisations attended the workshop session further to an invitation from the PSD. These organisations represented a wide cross-section of Guernsey communities and port users.
- 2.9 The workshop comprised a re-cap of the Ports Master Plan process and a summary of progress to date in relation to the consultation programme. This was followed by a series of group exercises as follows:
 - Challenges and Opportunities – taken from the initial stage of consultation
 - Master Plan Scenarios and Options – developed from the initial stage of consultation:
 - St Peter Port – Short-Term Scenarios/Options

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- St Peter Port – Mid/Long-Term Scenarios/Options
- St Sampson's – Mid/Long-Term Scenario 1
- St Sampson's – Mid/Long-Term Scenario 2.

2.10 The exercises were undertaken as a group with material provided to complete each exercise. The responses were collected, compared and summarised and will feed into the production of the Ports Master Plan.

PUBLIC DROP-IN SESSION

2.11 Held on 10 July 2012 at the Beau Sejour, a series of exhibition banners were presented as follows:

- Background to the Project
- Master Plan Strategy
- Master Plan Journey
- Stakeholder and Public Input
- St Sampson's harbour – Challenges, Opportunities and Future Vision
- St Peter Port harbour – Challenges, Opportunities and Future Vision.

2.12 The banners set out the consultation and master planning processes and demonstrated how comments received at the initial stage of consultation had been considered and incorporated into the evolution of the Master Plan. The drop-in session presented a further opportunity for members of the public to ask questions and make additional comments.

2.13 In excess of 60 people attended and whilst this is a reasonable level of public interest, it is still not a substantial turn-out and only four people opted to submit formal comments either at the session itself or following the session via the website.

2.14 The event was advertised in both the Guernsey Press and on local Guernsey radio.

2.15 This level of attendance and response needs to be borne in mind when reading the report and considering the views expressed and recorded.

3. Commercial Operators' Feedback

3.1 Following the presentation (which is available to view on the website) the commercial operators/port users who attended the event were invited to take part in a 'walk-about'

with the opportunity to post questions and discuss the proposals with the PSD, Moffatt & Nichol and Turley Associates.

3.2 The comments received are set out below:

St Sampson's Plans:

- "The general principle appears to be relocation of bulk liquid storage to south side – what considerations have been made for servicing existing bulk liquid on north side bearing in mind the investment that exists in these storage areas?"
- "The wider opportunity to explore pipelines into the island should be included in this process. This would give significantly better benefits for the island:
 - Increase security of gas and oil to the island (not reliant on tides/ships/operational restraints)
 - Reduce the need for land at Bulwer Avenue and allow States to develop residential etc.
 - Reduce risk to the island – less storage of oil or gas, no COMAH (Control of Major Accident Hazards) to tier sites
 - Ship issue long-term as the smaller ships become less available
 - Not significantly different cost wise
 - Tried and tested the Isle of Man is currently introducing natural gas to the island (sponsored by the States but paid for by energy companies over time). This could be supplied to the power station".

Lock Gates at St Sampson's:

- "If gates are introduced or if Lo-Lo is moved to St Sampson's vessels will have to stay in the port for a 'tide'. At present Lo-Lo vessels working is St Peter Port arrive, work and depart in a matter of hours. This potential restriction will affect schedules and increase costs".
- "The lock gates would need to be extended further out to allow greater access, but costs would be prohibitive".

St Peter Port Plans:

- “Amenities on Havelet Bay – waste of money”
- “Relocation of bus terminus – to where?”
- “Insufficient parking for port users”
- “Coach parking – as many as 7/10 coaches can be at New Jetty at any one time, same on cruise liner day. Come and see how we have to operate and manage”
- “Public Cambridge Berth – won’t work. You can’t send people that way with suitcases or looking to get into town on a day trip or from a cruise ship”
- “Castle Pier redevelopment requires good coach access”
- “Passenger terminal requires better coach access and parking”
- “Hard to make work on cruise ship days – people take shortest way to town regardless of scenic view”.

3.3 This summary represents the view of eight of the commercial operators who provided feedback.

3.4 In addition, we also received a detailed technical response from one commercial operator which has been considered and incorporated into the Master Plan where appropriate.

3.5 This response related predominantly to under-utilised areas of St Peter Port harbour and opportunities to increase revenue generation particularly in relation to the recreational boating industry. Many of the detailed comments closely accord with other responses received from commercial operators and members of the public.

4. General Stakeholders’ Feedback

CHALLENGES AND OPPORTUNITIES

4.1 The first exercise focused on the list of challenges and opportunities that were compiled following the first stage of public consultation. These were presented to the stakeholder groups for their consideration and comment.

ST PETER PORT HARBOUR

Challenges	Percentage agreeing that this is a challenge	Percentage agreeing that this could become an opportunity	Comments
Parking areas – loss of spaces	100%	100%	Provision for key parking areas/underground parking to free up other areas. Less parking/self-financed parking
Maintaining/relocating boat lay-up facility	75%	100%	Relocation to ensure proper facilities Seasonal changes
Preserving public access and recreational use	100%	100%	Resolve conflict of use, safety, security
Space limitations, congestion, traffic flows and public/commercial conflicts	100%	100%	
Vessel manoeuvring area, waterborne congestion and tidal restrictions	50%	50% (25% did not answer)	Challenges from natural restrictions Congestion is not a high priority
Preserving natural beauty of Havelet Bay	75%	25% (50% did not answer)	Opportunity to keep/enhance
Mooring capacity is constrained	75% (25% did not answer)	75% (25% did not answer)	Investment
Dated facilities	100%	100%	Investment
Others?			Challenge and opportunities for improved access (for disabled/impaired)

Opportunity	Percentage agreeing that this is an opportunity	Comments
Redevelopment and reuse of parking areas and improved pedestrian/vehicle interface	100%	
Redevelopment of Careening Hard	100%	
Refurbishment/redevelopment of Fish Quay	100%	
Redevelopment of Cambridge Berth for retail/residential/recreation	75%	Not residential
Relocation and redevelopment of bus terminus	100%	Transport hub/interchange – not parking

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Opportunity	Percentage agreeing that this is an opportunity	Comments
Redevelopment of Castle Pier for retail/commercial and improvement of access route to Castle Cornet	100%	If sympathetic/carefully handled (especially commercial)
Light development for public amenities/recreation	100%	
Available space for regulated moorings in Havelet Bay	50% (25% undecided)	For safety/drying Needed for young recreational use Too exposed
Potential for reclamation and development, e.g. for cruise facilities	100%	Possibility for private/public development May cause congestion problems
Others?		Underground car-park at bus terminus More security in QEII marina

ST SAMPSON'S HARBOUR

Challenge	Percentage agreeing that this is a challenge	Percentage agreeing that this could become an opportunity	Comments
Longue Hougue designated for waste management	50%	50% (25% did not answer)	Technical issues – waste management
Shallow area impedes berthing of two vessels simultaneously at North Pier – congestion between operators	75%	50% (25% did not answer)	Providing facilities for deep water berth
Tidal restrictions require vessels that dry out – safety issues, operational limitations	100%	75% (25% did not answer)	Alternative uses
Crabiere Rock and strong currents impede navigation at the entrance of the harbour	100%	100%	Remove it
Trafalgar Quay walls have low load-carrying capacity	100%	75% (25% did not answer)	Investment/redevelopment
Gravity walls in the inner harbour may not allow deepening	50%	50% (25% did not answer)	Making whole area marina Not needed
Others?			Blast zones will limit development and number of people in area

Opportunity	Percentage agreeing that this is an opportunity	Comments
Longue Hougue area available for development after reclamation	100%	
Area behind North Pier can be used for solid bulk storage and facilities	100%	Aesthetics/tidy up
Potential development of lay-up and repair facilities (especially in case of alternative development of Careening Hard)	75%	Site already in use Size restrictions
Waterfront enhancement to complement Leale's Yard development	100%	In line with other plans
Potential to develop offshore fuel terminal	100%	If needed
After relocation of liquid bulk berth, use South Commercial Quay for lay-up facility and/or domestic/visiting mooring expansion	75% (25% did not answer)	
Potential for tidal berths adjacent to Longue Hougue	75% (25% did not answer)	Natural restrictions
Others?		New bridge to divert traffic away from bridge frontage Slipway

MASTER PLAN SCENARIOS AND OPTIONS

4.2 The second exercise presented to the stakeholder groups focussed on Master Plan Scenarios and Options. Following a brief presentation on each of these scenarios/options the groups were asked to consider a series of options, presented graphically, for both St Peter Port harbour and St Sampson harbour and comment.

ST PETER PORT HARBOUR – IMMEDIATE/SHORT-TERM NEEDS

Need/Plan	How?	Agree	Comments/Suggestions
Improve storage, functionality and traffic in the Ro-Ro/Lo-Lo area	Relocate Customs Building Provide trailer parking slots Re-arrange the traffic flows Utilise additional space from reduced parking footprint	100%	High priority

Need/Plan	How?	Agree	Comments/Suggestions
Introduce multi-level parking (optional revenue source)	Develop underground parking to reduce parking footprint at ground level Develop additional parking levels above ground, with potential to combine with green space and/or retail Combination of the above	75% (25% mixed response)	Not to increase number of spaces if spaces are lost in above plan Underground solution a preference
Redistribute administration, logistics and passenger facilities	Move administration and logistics offices to New Jetty Relocate and/or refurbish passenger terminal Provide some storage space near the relocated Customs Building	100%	
Redevelop Cambridge Berth for retail/residential/commercial and pedestrian access	Use released space for retail, residential, coffee shops, restaurants Footpath on the waterside perimeter	100%	
Redevelop Castle Pier facilities for commercial/retail use	Refurbish existing buildings for retail, marine services Improved pedestrian access	75% (25% mixed response)	Parking provision/traffic circulation required
Redevelop Careening Hard	Connect to newly developed Careening Hard area (e.g. fish market or marina)	75%	High priority in accordance with Master Plan
Joint development strategy for Careening Hard and Fish Quay	Commercial fishing and fish market Large yacht moorings and amenities Additional moorings for recreational boating Fuelling facilities Refurbishment of Fish Quay facilities Relocate lay-up and repair space to St Sampson's harbour (e.g. Abraham's Bosom)	75%	Preference for concept 2 (yacht/visitor moorings) Disagreement with concept 1 (fishing market)

Need/Plan	How?	Agree	Comments/Suggestions
Improve access and amenities in Havelet Bay	New changing rooms/showers/WC Parking New cafe facilities Jetty for small craft	75% (25% mixed response)	Amenities/facilities important
Others?			Potential car parking at Havelet Bay Cliffs Use East Arm for parking for leisure craft owners Control access to QEII Marina

ST PETER PORT – MEDIUM/LONG-TERM NEEDS

Need/Plan	How?	Agree	Comments/Suggestions
Ro-Ro (freight and passengers), Lo-Lo, inter-island services, freight marshalling yard	Relocate Lo-Lo to SSH Convert Berths 4,5 and 6 to alternative use (e.g. marshalling yard, berthing space)	100%	
Port expansion and cruise berth	New alongside berth(s) on reclaimed land East of the QEII Marina Expanded area for coach access Additional area for multi-purpose development	100%	Conflict over residential development
Controlled yacht moorings in Havelet Bay	Potential floating breakwater Access dock(s) on either side of the bay to serve boaters	50% (25% mixed response)	Impact on natural beauty and protected wreck site

ST SAMPSON'S HARBOUR – DEEP-WATER FUEL BERTH OPTION

Need/Plan	How?	Agree	Comments/Suggestions
Provide better fuel import security and improve fuel handling safety	Construct offshore, deep-water fuel jetty, connected to Longue Hougue Re-route liquid bulk pipeline and storage network	75% (25% mixed response)	Other options/locations wanted Agreed need

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Need/Plan	How?	Agree	Comments/Suggestions
Improve and/or expand dry bulk handling operations	Convert North Pier into only dry bulk facility Allocate space behind berth for stockpiling Dredge to enable berthing two vessels simultaneously at North Pier Develop new berths outside harbour entrance with additional reclaimed storage area Potential breakwater development required	75% (25 % did not answer)	Disagreement with breakwater development – costs and environmental impact
Expand domestic and/or visiting mooring capacity	Redevelop South Commercial Quay into additional mooring spaces and amenities Utilise existing liquid bulk infrastructure for fuelling facilities	100%	Disagreement with visiting boats
Relocate maintenance and repair and lay-up areas from St Peter Port	Convert landing at Abraham's Bosom or South Commercial Quay	75% (25% did not answer)	Concern over space
Improve utilisation of Trafalgar Quay	Strengthen structural capacity and redevelop (e.g. marine services, parking)	75% (25% did not answer)	
Develop Abraham's Bosom	Utilise for lay-up facility and/or develop for coffee shop/restaurant, parking, etc.	50% (25% did not answer)	Lay-up already exists Lay-up only, disagreement that area needs development
Relocation of Lo-Lo operations from St Peter Port	Develop berths adjacent to Longue Hougue for Lo-Lo and general cargo Potential for multi-purpose use of deep- water jetty and berths	100%	
Expand logistics and freight marshalling areas	Utilise reclaimed area on Longue Hougue	100%	

Need/Plan	How?	Agree	Comments/Suggestions
Consolidate liquid bulk storage	Utilise reclaimed area on Longue Hougue to consolidate liquid bulk storage on south side of the harbour Free up north side of the harbour for redevelopment	75%	Could have knock on effects
Others?			To link north and south side (like St Malo swing bridge) Refuelling facilities for local boaters

ST SAMPSON'S HARBOUR – LOCK GATES OPTION

Need/Plan	How?	Agree	Comments/Suggestions
Provide better fuel import security and improve fuel handling safety	Develop locks at harbour entrance, enabling always-afloat berthing inside harbour and improving tidal access and navigation inside existing harbour Protected entrance and tug assistance required Shorten inside breakwater	25%	Physical barriers – tides, slack water Not achievable
Improve and/or expand dry bulk handling operations	Allocate space behind berth for stockpiling Dredge to enable berthing two vessels simultaneously at North Pier Develop new berths outside harbour entrance with additional reclaimed storage area	75% (25% did not answer)	
Expand domestic and/or visiting mooring capacity	Introduce lock gates to enable better utilisation of marina	50% (50% did not answer)	Good idea but not viable
Relocate maintenance and repair and lay-up areas from St Peter Port	Convert landing at Abraham's Bosom or South Commercial Quay	25% (75% did not answer)	
Improve utilisation of Trafalgar Quay	Strengthen structural capacity and redevelop (e.g. marine services, parking)	50% (50% did not answer)	Good idea but not viable

Need/Plan	How?	Agree	Comments/Suggestions
Develop Abraham's Bosom	Utilise for lay-up facility and/or develop for coffee shop/restaurant, parking, etc.	25% (50% did not answer)	Good idea but not viable
Relocation of Lo-Lo operations from St Peter Port	Develop berth adjacent to Longue Hougue for Lo-Lo and general cargo Develop new berths outside harbour entrance with additional reclaimed storage area	50% (50% did not answer)	Good idea but not viable
Expand logistics and freight marshalling areas	Utilise reclaimed area on Longue Hougue	50% (50% did not answer)	Good idea but not viable
Consolidate liquid bulk storage	Utilise reclaimed area on Longue Hougue to consolidate liquid bulk storage on south side of the harbour Free up north side of the harbour for redevelopment	25% (50% did not answer)	Good idea but not viable
Others?			Both the breakwater option and the lock gate would cause major tidal issues

5. Follow-Up Public Drop-In Session

5.1 The follow-up public drop-in session comprised a series of presentation banners as follows:

- Background to the Project
- Master Plan Strategy
- Master Plan Journey
- Stakeholder and Public Input
- St Sampson's harbour – Challenges, Opportunities and Future Vision
- St Peter Port harbour – Challenges, Opportunities and Future Vision.

5.2 Attendees were invited to review the banners and ask questions of the team. They were also invited to provide feedback via a feedback form which comprised four questions. A summary of the responses is set out below, however, as highlighted herein, this represents the views of only four respondents who provided formal feedback.

CHALLENGES AND OPPORTUNITIES

Consider the list of challenges and opportunities, taken from the initial stage of consultation, for St Peter Port harbour and St Sampson's harbour. Do you have any comments:

St Peter Port harbour

- "Careening Hard must not be changed – it's too important for leisure boat maintenance and adds to the character of St Peter Port"
- "Model Yacht Pond could occasionally be used for other purposes, e.g. ice rink"
- "Need to create a disabled friendly atmosphere"
- "Encourage large passenger ships"

St Sampson's harbour

- "Essential to relocate fuel facilities"
- "Attract more tourists".

INITIAL IDEAS FOR ST PETER PORT HARBOUR

Do you have any comments on the initial ideas for St Peter Port harbour?

- "Add more facilities, e.g. public toilets in Salerie Car Park"
- "Redevelopment of Castle Pier facilities should be predominantly for leisure activities"
- "Better utilisation of North Beach – potential for markets and art"
- "More work on transport and civil building issues and less emphasis on money and yachting"
- "Potential for a new Ro-Ro jetty to be constructed from the Cambridge Berth. The 'New Jetty' could then be demolished to make way for additional berthing space"
- "Build a north-south wall in the inner harbour basin with pontoons on its west side. This would provide protection to the west side of the harbour and create additional mooring spaces"
- "Developing the Careening Hard would worsen the wave climate in the harbour".

INITIAL IDEAS FOR ST SAMPSON'S HARBOUR

Do you have any comments on the initial ideas presented for St Sampson's harbour?

Lock Gates:

- “Interesting idea but potentially unviable – navigation would be potentially impossible”.

Deep-Water Fuel Berth:

- “Preferred option”
- “Good idea on safety grounds”
- “The off-shore fuel berth should be multi-purpose including accommodating cruise ships”.

Any other general ideas/comments?

- “A road bridge should be installed between Le Crocq and Northside to divert traffic away from The Bridge”
- “Condition of Fish Quay is poor”
- “Need for a traffic strategy”.

6. St Peter Port and St Sampson’s Visions

INTRODUCTION

- 6.1 In November 2011 the States approved the Strategic Land Use Plan (SLUP). This plan sets the broad direction for the Environment Department in reviewing the island’s Development Plans and requires a co-ordinated approach to development in town and on The Bridge to make sure that the vitality and viability of these main centres is retained and enhanced in the future. This is to include visions for the future of town and The Bridge created in conjunction with their main users.
- 6.2 The Environment Department has recently established a Visioning Team to prepare the Visions. The Visioning Team is a group of volunteers representing a cross-section of town and The Bridge users including businesses, residents, tourists, policy makers, cultural and leisure representatives. The remit of this group is to prepare the Visions and promote them, identify the projects and programmes that will deliver the Visions and co-ordinate action.
- 6.3 The Visions will be given life through the production of the land use planning policies prepared by the Environment Department and there will be significant crossover between

the land use policy and the development of a Ports Master Plan. Therefore the PSD has been working closely with the Environment Department to ensure compatibility of policy and to enable development deriving from the Ports Master Plan to contribute positively to other States objectives, as identified through the Visioning exercises. This could be through the physical enhancement of the waterfront or the inclusion of specific forms of development.

- 6.4 The Visioning workshop was held at the end of June 2012 and run by the Visioning Team (comprising 12 volunteers) representing a cross-section of town and The Bridge users.
- 6.5 The Consultation Report for Visioning Day has now been published and this has been reviewed by the Port Master Plan Team to ensure key points related to the harbours are considered as part of the Ports Master Plan.
- 6.6 There were several key messages resulting from the Visioning Day that are particularly relevant to the preparation of the Ports Master Plan. The following comments of the Visioning Team have therefore been taken into consideration in preparing the draft Ports Master Plan.

KEY OPPORTUNITIES TO CHANGE THE BRIDGE

- Provide alfresco dining and mix of uses along the waterfront and turn the ‘boat park’ into a proper marina with a visitor’s pontoon, facilities close by and information centre
- Possible provision for refuelling and large vessel berths
- Build a swing bridge to take away HGVs and through traffic from the front.

KEY OPPORTUNITIES TO CHANGE THE HARBOUR

- Improve pedestrian access and promote and encourage people to go into the harbour area
- Make better use of the piers (especially Cambridge Berth and raised section of Albert Pier and end of Crown Pier) possibly using commercial development to promote beneficial development which can be used by the public
- Rationalise traffic flows and parking in and around the harbour
- Improve the sense of arrival into Guernsey (the welcome mat)

- Examine whether the cruise liner tender link drop-off point could be better – arrival point should be located closer to town
- Less ad hoc and piecemeal development and more coordination.

6.7 The Visioning Day incorporated a town harbour ‘placecheck’ exercise. There were also some important outputs from this that should be considered as part of the Ports Master Plan and in many cases are similar to the challenges and opportunities that have arisen through the consultation exercises for the Master Plan.

THE TOWN:

CASTLE PIER

- Ad hoc and piecemeal feel to the development in the area
- A conflict of uses and everything appears “jammed in”
- Important to retain an element of fishing in St Peter Port but some of the fleet could operate out of St Sampson’s
- Fishing industry could be diversified to include association with other uses such as fish restaurants
- Walkway route to the Castle feels ‘naked’ and barren. It lacks signage and/or ancillary facilities. Much more could be done to take advantage of the outlook
- Vallette and Havelet Bay are visible but the areas are underused and have the potential to be enhanced to provide much more valuable amenity.

SOUTH ESPLANADE

- The Albert Marina side of the south esplanade is a poor environment for pedestrians
- The wide areas for traffic create a considerable barrier to reaching the harbour side (six lanes)
- Bus terminus is not used to its full potential.

THE QUAY

- The area is still dominated by traffic
- The end of the Albert Pier represents a lost opportunity having great potential for leisure use with some commercial development. Also potentially a good landing point for cruise liner tenders.

CROWN PIER

- Poor connection between the Crown Pier and the town centre
- Pier is dominated by car parking
- Area around the Careening Hard has particular potential to increase activity – enhanced facilities for visiting boats and public facilities as well as amenity facilities.

LIBERATION MONUMENT

- Divorced from the car park area
- Does not create a successful ‘gateway’ into the town centre – lack of information.

CAMBRIDGE BERTH

- Currently a ‘collision’ of uses
- Superb opportunity in terms of views and orientation – dependent on relocating the commercial port operations.

FERRY TERMINAL

- Provides a particularly poor ‘gateway’ to Guernsey
- The terminal building looks like an afterthought
- Opportunity for comprehensive redevelopment
- Poor interface between traffic and pedestrians
- Not considered to be the best location for cruise liner passengers to disembark.

THE BRIDGE:

ABRAHAM’S BOSOM

- New uses could be introduced along the waterfront
- Awareness of history should be promoted.

NORTH QUAY

- Parking arrangements work well but area feels car dominated and noisy
- Industrial uses could be relocated in a single area to the east. North Quay has great potential for other uses.

THE BRIDGE (1)

- Opportunity for development of the front – encourage people away from Leale’s Yard.

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THE BRIDGE (2)

- Provision of facilities for visiting crafts would bring more life into the area and support more leisure and evening activity in the centre
- There should be more convenience for pedestrians around the whole front area.

LE CROcq PIER

- Currently used in an ad hoc manner for parking and boat storage
- Scope to develop and enhance the area for leisure activities making the most of the setting and views whilst still providing some parking for the marina
- Best location for a bridge to take away traffic.

- 6.8 A full copy of the Consultation Report for Visioning Day (26 June 2012) will be available shortly.
- 6.9 The content and nature of the discussion and points to come out of the Placecheck will be considered as part of the evolving Ports Master Plan to ensure that they are coordinated in approach.
- 6.10 Many of the points discussed have also been raised and formed part of the Ports Master Plan consultation exercises that have occurred to date.
- 6.11 The Ports Master Plan team will continue to work closely with the Environment Department as the Master Plan evolves towards completion.

7. Conclusion

- 7.1 The stakeholder events were well attended with a wide cross-section of the operators, the community and local groups represented.
- 7.2 However, whilst the operators' workshop was well attended, many chose not to provide further feedback on the initial proposals presented to them.
- 7.3 The feedback from these groups that has been received has been summarised within this report, to be considered as part of the next stages of the Master Plan process.
- 7.4 In terms of the public drop-in session, this was open to any member of the public with an interest in the Master Plan process. The event was advertised in the local paper and on local radio. Approximately 60 people attended which was double the amount that attended the initial drop-in session.

- 7.5 Whilst the number of attendees improved, only a small number completed feedback on the material that was available for them to view. Therefore, careful weighting of their responses must be undertaken.

8. Next Stages of the Production of the Ports Master Plan

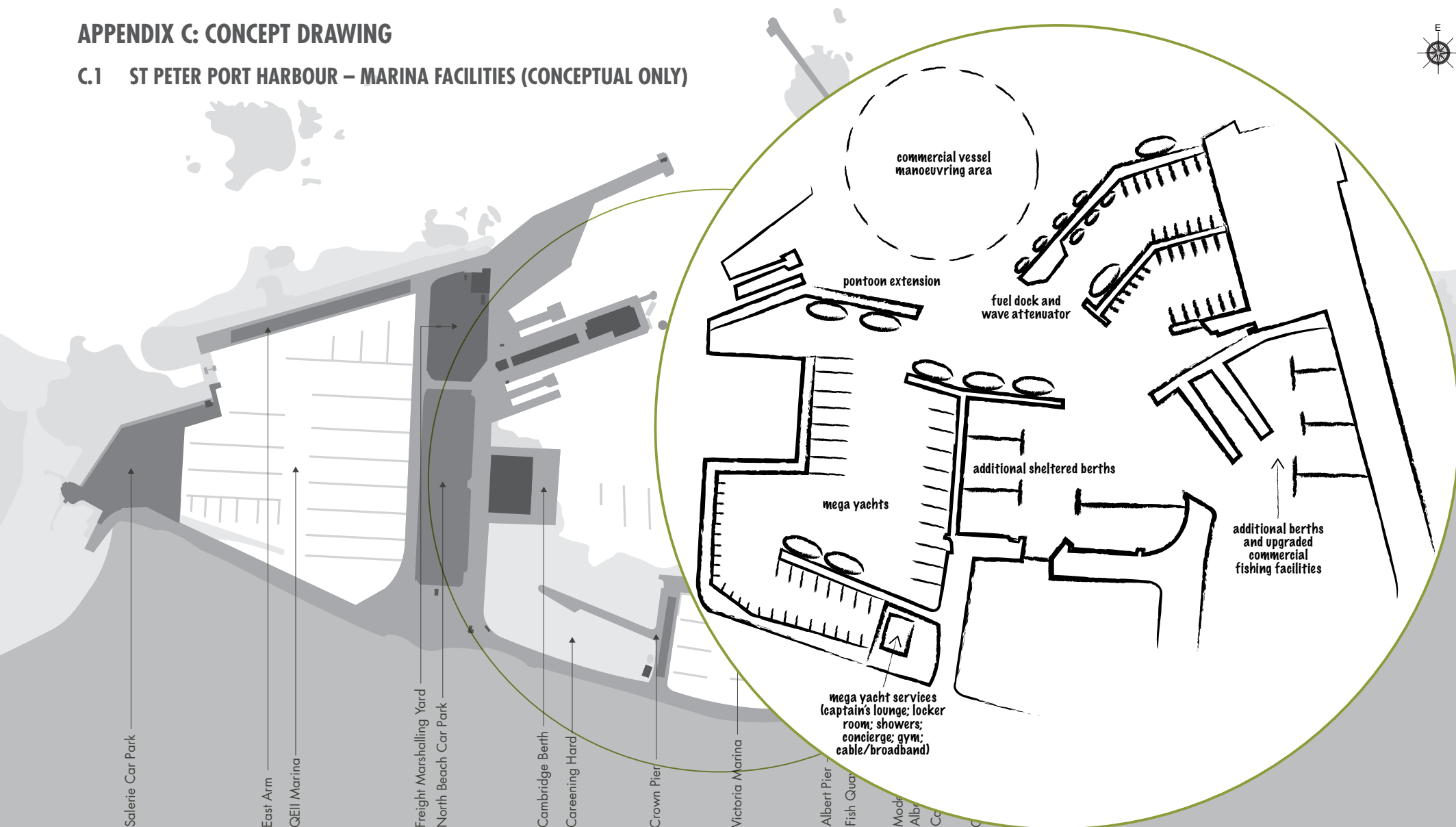
- 8.1 The final consultation event before publication of the Master Plan will comprise a Public Exhibition and will be held on 14 and 15 September 2012.
- 8.2 The location of the exhibition is yet to be confirmed, however, will be advertised in advance of the events.
- 8.3 Publication of the Master Plan is anticipated two-three weeks following the public exhibition.

9. What is the Role of the Ports Master Plan and what will Happen once it has been Produced?

- 9.1 The Ports Master Plan is intended to guide future development and investment at both St Peter Port harbour and St Sampson's harbour over the next 25 years.
- 9.2 It will provide important information for inclusion within the island's Infrastructure Plan that is currently in development.
- 9.3 The Ports Master Plan will enable the planning department to take account and incorporate harbour-related development when preparing future Development Plans.
- 9.4 It will ensure cohesion and coordination with other States projects and strategies such as a retail strategy, the visions for town and The Bridge and development of a transport strategy. The approach will work towards achieving the overarching strategic objectives of the States.

APPENDIX C: CONCEPT DRAWING

C.1 ST PETER PORT HARBOUR – MARINA FACILITIES (CONCEPTUAL ONLY)



APPENDICES

APPENDIX D: ST SAMPSON'S LIQUID BULK BERTH ALTERNATIVES ASSESSMENT

The provision of liquid bulk is essential for viability of the island and the current method of importation is not sustainable over the lifespan of the Master Plan. The method of using drying-out berths for fuel imports is outdated and does not meet the guidelines of the International Safety Guide on Oil Tankers and Terminals. Further to this, the vessels required for this form of freight transfer are highly uncommon, with the two States-owned vessels, the Sarnia Cherie and the Sarnia Liberty, being two of only seven worldwide that can perform this transfer.

Future requirements indicate that a reliable and sustainable resolution must be brought into place for the transfer of liquid bulk within the timeframe of the Master Plan. The financing for such a proposal will also need to be considered and the business case for such a project put forward to justify its implementation. These issues will need to be addressed and resolved to secure liquid bulk trade during and after the next 25-year period.

The development of a strategy must be set as a priority, and implementation of this must begin within the timeframe identified for the lifespan of the current strategy, to provide the continuity of essential fuel supplies.

REQUIREMENTS

LIQUID BULKS PROJECTIONS

According to the FHRS report, four companies currently import liquid fuels at St Sampson's. Each company owns and operates tanks that are removed from the berth area. Forecasts for future demand are rather vague as seen in Table D1 below, since there are a number of initiatives or projects that may increase or drastically reduce the need for imported product in the mid to long-term.

At the present time, vessel size for deliveries is controlled by the depth limitations at the harbour and the need for the tankers to take the bottom while at berth. Consequently, the States of Guernsey operates two vessels to ensure the supply of petroleum products.

In the event that the drying out limitation could be removed, and the entry window limitations resolved, there would be a wider range of vessels available for deliveries of the various products shown in Table D1.

Table D1: Projected Liquid Fuel Imports to 2059

Description	Units	Year								
		2019			2029			2059		
		Lower Bound	Mid Range	Upper Bound	Lower Bound	Mid Range	Upper Bound	Lower Bound	Mid Range	Upper Bound
Fuel for Electricity HFO	[t]	0	10,400	34,300	0	13,000	43,500	0	23,600	78,900
Fuels for Transport Fuel	[t]	12,700	15,800	15,800	13,500	17,900	17,900	12,400	16,400	16,400
Fuels for Heating	[t]	7,800	7,800	10,100	4,300	4,300	10,100	0	0	10,100
Gas Demand LPG	[t]	2,300	2,900	3,500	2,300	2,900	3,500	2,300	2,900	3,500
Total	[t]	22,800	36,900	63,700	20,100	38,100	75,000	14,700	42,900	108,900

Notes: The estimate is derived based on six week storage requirement. For electricity, heating and gas a peak factor of 2.5 has been utilised to allow for a higher demand in winter weeks. An even demand distribution throughout the year has been assumed for the transport fuel demand i.e. a peak factor of 1 has been assumed.

Source: Future Harbour Requirements Study. Halcrow, September 2010

VESSEL CRITERIA FOR IMPROVED FACILITIES

The FHRS report indicates that the expected vessel size for Guernsey deliveries, without the existing restrictions, will be on the order of 5,000 DWT, and it is assumed that the vessel would discharge a full load while at the berth. Clarksons data and a review of vessels in this size range indicate typical dimensions for a 5,000 DWT tanker with overall length of 95m, beam of 15.50m and loaded draught of 6.00m to 6.50m.

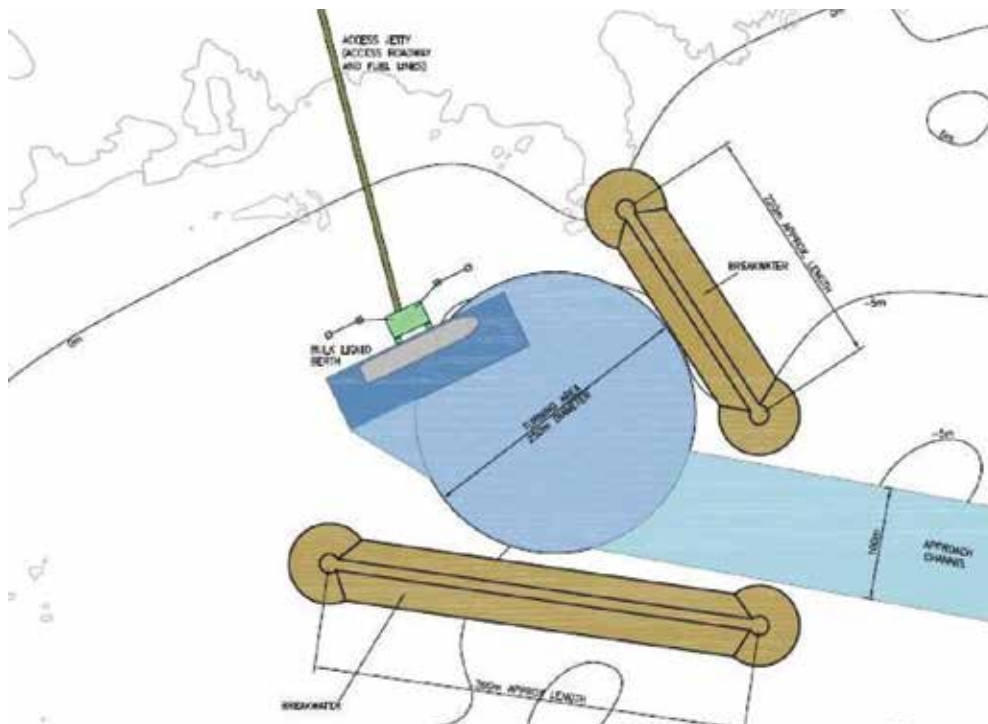
ALTERNATIVES ASSESSMENT

BREAKWATERS AND NEW BASIN

CONCEPT

The FHRS study presented a number of options to remove the existing fuel import stations to a protected berth.

Figure D1: FHRs Concept for Offshore Fuel Berth at St Sampson's



Source: Future Harbour Requirements Study, September 2010

Given the high cost of dredging and the need to construct major breakwater structures, a number of options were developed such that the facility could accommodate general cargo (containers) and bulk products.

INVESTMENT REQUIREMENT

The investment requirement for the option shown in Figure D1 was estimated by Halcrow to be on the order of £112 million, which would clearly be impossible to recover from berthing costs or acceptable surcharges on the products to be imported.

Options to extend the capability of the facility to handle general cargo and dry bulks increased

the estimated cost of the project to some £229 million.

PROS AND CONS

PROS

- Removes fuel handling from the current location which is close to occupied buildings
- Accommodates larger vessels
- Extends tidal window for entry and exits.

CONS

- Extremely high cost compared to throughput and berth occupancy needs
- Single product berth would not accommodate other commodities
- Impossible to recover costs via user or berthing fees.

CONCLUSIONS

While the option clearly has merit from a safety and vessel accommodation standpoint, its adoption cannot be justified given the extremely high cost.

DREDGED CHANNEL AND BERTH POCKETS

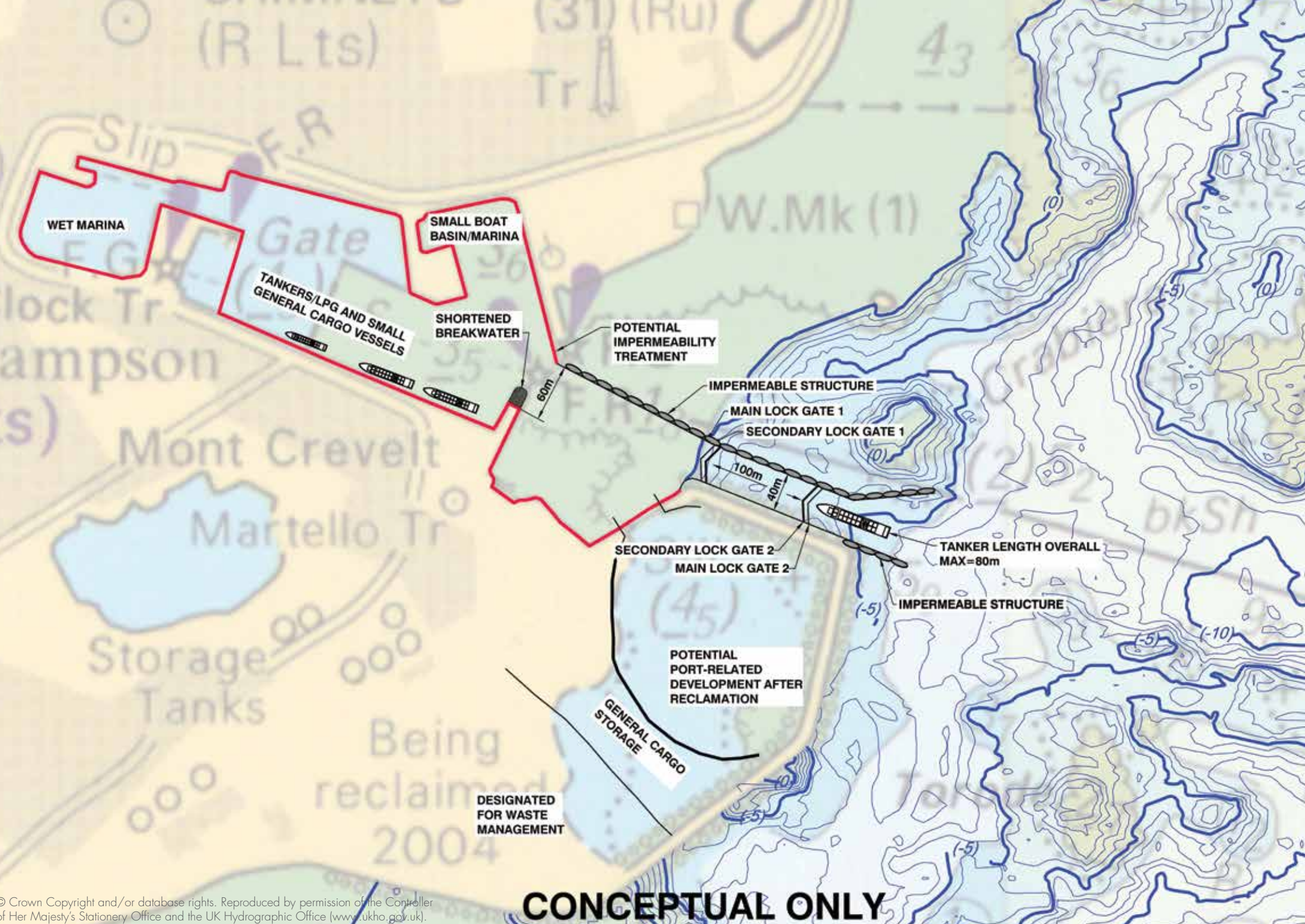
CONCEPT

Proposals have been presented to dredge deeper pockets at the existing berths such that tankers will not need to take the ground at low tide. While this would permit a wider range of vessels to call at St Sampson's, it does not resolve the safety concerns of proximity to the occupied buildings, and it would be impossible to remove a berthed vessel from the dredged pocket in the event of a fire or accident.

Deepening of the berths is difficult given the gravity wall construction at St Sampson's, but could be achieved by the construction of a new berth face some 5m in front of the existing wall, with foundations and links to the existing structure to ensure its stability.

INVESTMENT REQUIREMENT

No cost estimates have been developed for this option, but it is expected to be on the order of £9.5 million.



CONCEPTUAL ONLY

Table D2. It should be noted that this scheme simply provides a berth pocket for tankers and does not offer any additional space or reorganisation of the berth area within the harbour.

Table D2: Estimated Cost of Berth Pocket Dredging

Description	Quantity	Unit	Unit Cost (£)	Amount (£)
Mobilisation	1		250,000	250,000
New Berthing face	250	m	7,500	1,875,000
Fenders, bollards and hardware	200	m	1,000	200,000
Dredge and Disposal in Rock	31,250	m ³	120	3,750,000
Dredge and disposal in muds	6,250	m ³	35	218,750
Relocate headers and pumps	1		150,000	150,000
Paving and Misc improvements	3,750	m ²	50	187,500
Sub total				£6,631,250
Contingencies	30%			1,989,375
Site Investigation	1		75,000	75,000
Engineering and Supervision	7%			603,444
Permits and Approvals	1%			86,206
Estimated Total Cost				£9,385,275

PROS AND CONS

PROS

- Permits wider range of tankers for fuel supply
- Moderate investment requirements.

CONS

- Does not resolve risk issue related to occupied properties
- Does not extend vessel arrival and departure windows.

CONCLUSIONS

While this option has some merit as a short-term measure, it does not resolve the main issues that the fuel berths are located close to occupied buildings and require relocation, nor does it open the window for access and egress to the berthing areas. As such, it is difficult to justify the

cost of the work.

LOCKS SYSTEM

CONCEPT

One option to provide wet berths in areas of high tidal range is the construction of a lock system. For St Sampson's harbour, this concept would offer the potential for vessels to enter at mid-tide, when currents are lower, and give a wider window for entry and departure.

More importantly, it would maintain a constant depth within the harbour basin, eliminating the requirement for vessels and particularly fuel tankers to be capable of sitting on the bottom at low tide.

At the same time, however, locks are expensive to construct and maintain and also limit navigational flexibility. This latter is probably of limited concern since entry and exit to the harbour is already severely limited.

An additional issue relates to the capability of the existing gravity wall quays to retain the

Figure D3: Longitudinal Section through Locks

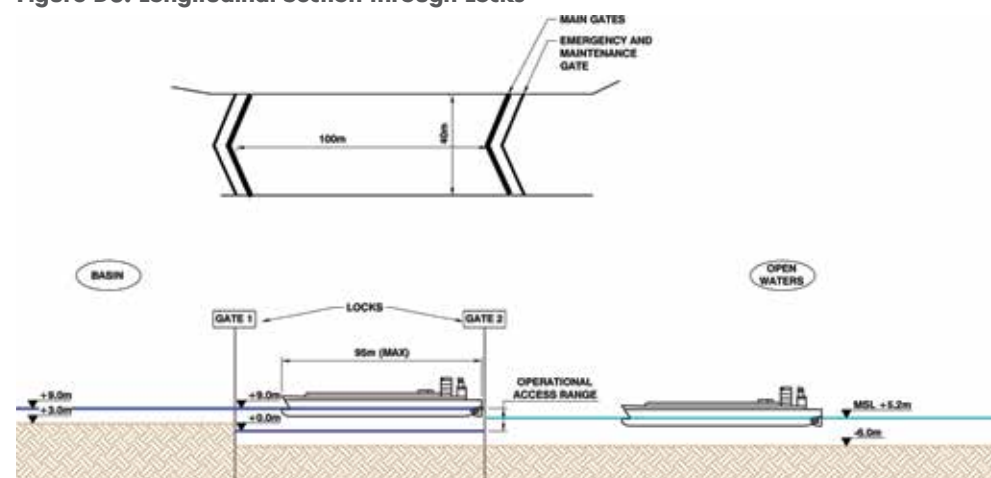


Figure D2 (left): General Arrangement for Locks Option at St Sampson's Harbour

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elevated water level in a locked basin, which might require substantial extra works to limit the flow of water from the basin into the surrounding sub soils.

A suggested lock system that would permit small general cargo vessels and fuel tankers to enter and leave the harbour from mid to high tide is shown. It will also permit the passage of fishing vessels and recreational craft under the appropriate tidal conditions.

The general layout of St Sampson's with a locked system is shown in Figure D2, with a section through the locks shown in Figure D3.

As can be seen from the sectional view, the intention would be to offer a 9m vertical lift in the locks, thereby maintaining the water depth in the harbour at the equivalent high water mark, while permitting tanker vessels to enter and leave at tidal elevations of greater than +2m when the tidal currents are less severe. Small craft could enter and leave at all states of the tide, but this is normally achieved by adherence to a fixed opening timetable to conserve water and reduce the operations cost.

INVESTMENT REQUIREMENT

As can be seen from Table D3, the estimated cost of all the work involved within the locks concept

Table D3: Preliminary Estimate of Cost for Conversion of St Sampson's to a Locked Harbour

Description	Amount (£)
Dredging	12,075,000
Caissons and Wave Protection	93,250,000
Locks Structures	162,000,000
Breakwater Modifications	225,000
Impermeabilisation of Ex. Harbour	12,500,000
Sub total	£280,050,000
Contingencies	84,015,000
Site Investigation	1,250,000
Engineering and Supervision	27,304,875
Permits and Approvals	3,640,650
Estimated Total Cost	£396,260,525

Source: Moffatt & Nichol

could easily reach £400 million. Although the project would greatly increase the serviceability of St Sampson's, it would be extremely difficult to justify the allocation of funds for this major project given other key priorities for the States.

It would also be difficult to finance via a Public Private Partnership (PPP) arrangement since revenues would not support the debt service or offer a satisfactory rate of return on the investment.

PROS AND CONS

PROS

- Permits wider range of tankers for fuel supply
- Extends tidal window for entry and exit
- Mid-tidal entry will reduce navigation issues with currents
- Converts St Sampson's to a wet harbour, with entry and exit restrictions
- Could be adapted to accommodate general cargo and small container vessels
- Small craft would have full tidal access via the locks.

CONS

- Extremely high investment cost
- Intensive engineering, technical and modelling studies required
- Existing wall structures will require modification to maintain water levels
- Does not resolve risk issue related to occupied properties
- Not feasible to recover costs via user or berthing fees.

CONCLUSIONS

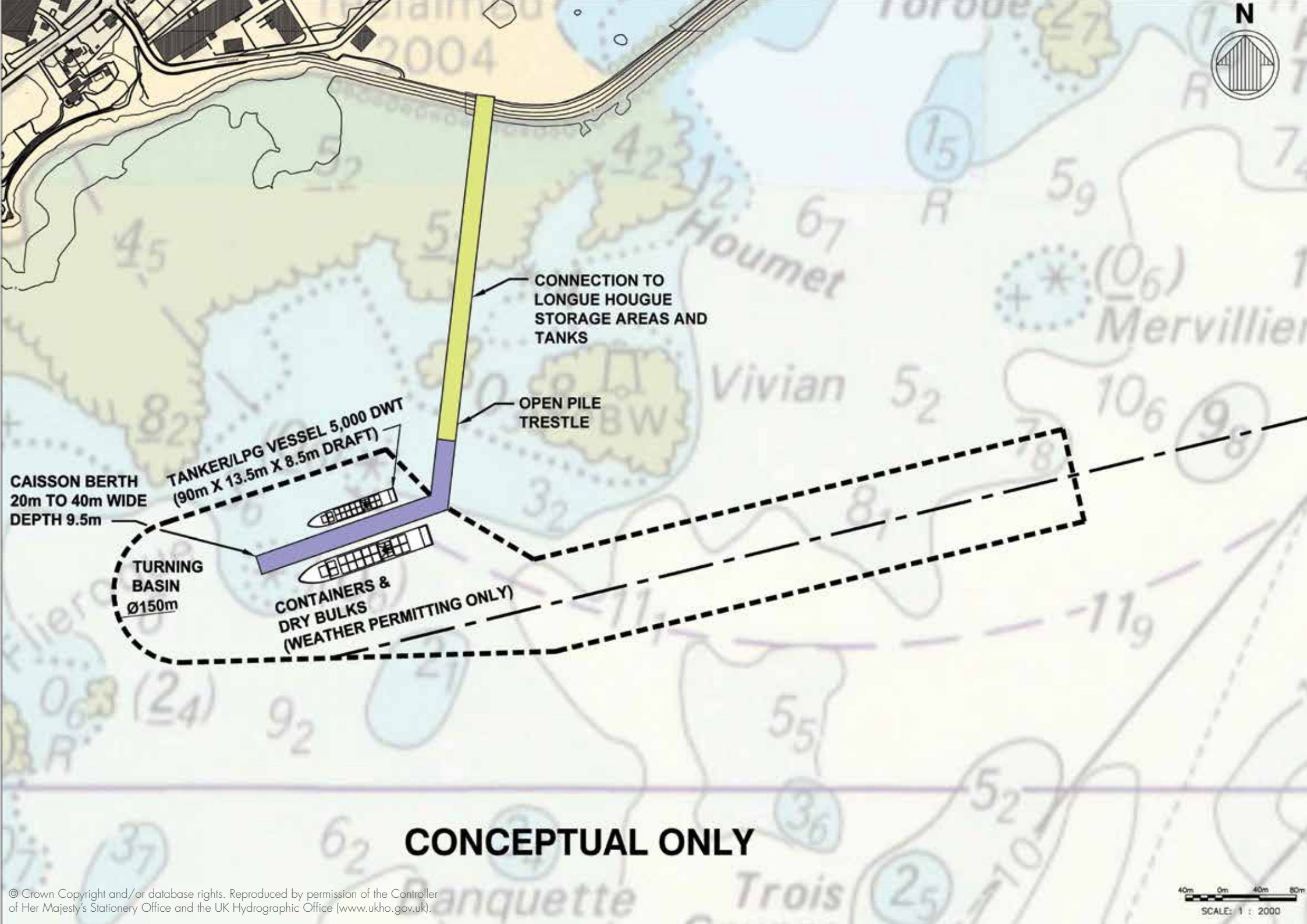
Not justifiable from a financial and funding standpoint.

OFFSHORE CAISSON BERTH

CONCEPT

As a modification of the offshore concept proposed by Halcrow and shown in Figure D4, it is suggested that the berth structure and wave protection elements can be combined by the use of

■ **Figure D4 (right): Concept Development for Outside Fuel Berth at St Sampson's Harbour**



CONNECTION TO
LONGUE HOUGUE
STORAGE AREAS AND
TANKS

OPEN PILE
TRESTLE

TANKER/LPG VESSEL 5,000 DWT
(90m X 13.5m X 8.5m DRAFT)

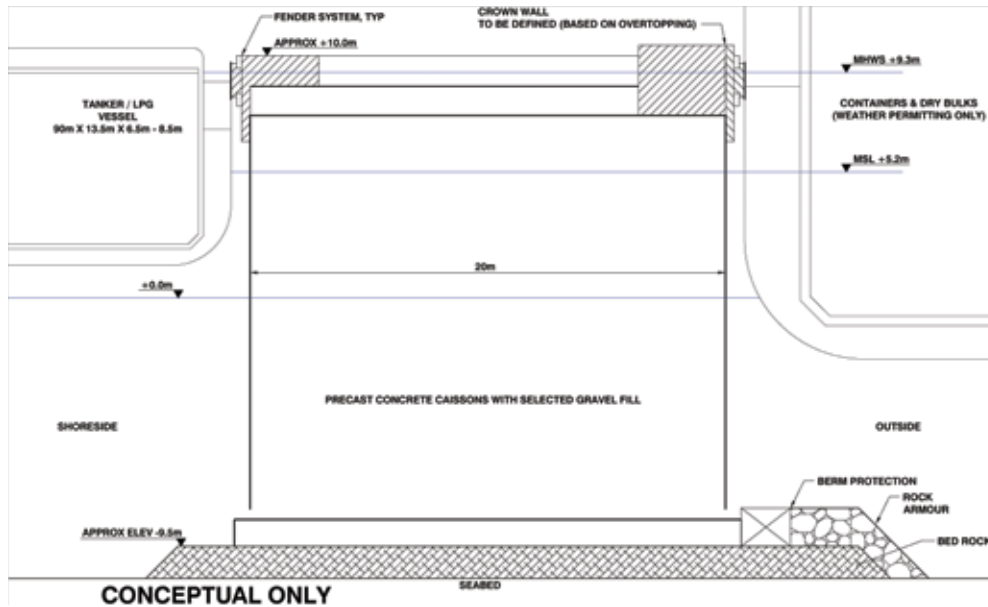
CAISSON BERTH
20m TO 40m WIDE
DEPTH 9.5m

TURNING
BASIN
Ø150m

CONTAINERS &
DRY BULKS
(WEATHER PERMITTING ONLY)

CONCEPTUAL ONLY

Figure D5: Typical Caisson Cross Section



a caisson type structure. This form of construction also has the advantage that the units can be constructed offsite and transported to Guernsey on submersible barges or similar equipment. Fill material to stabilise the units can also be imported, thereby minimising the construction impact on Guernsey's infrastructure and highway system.

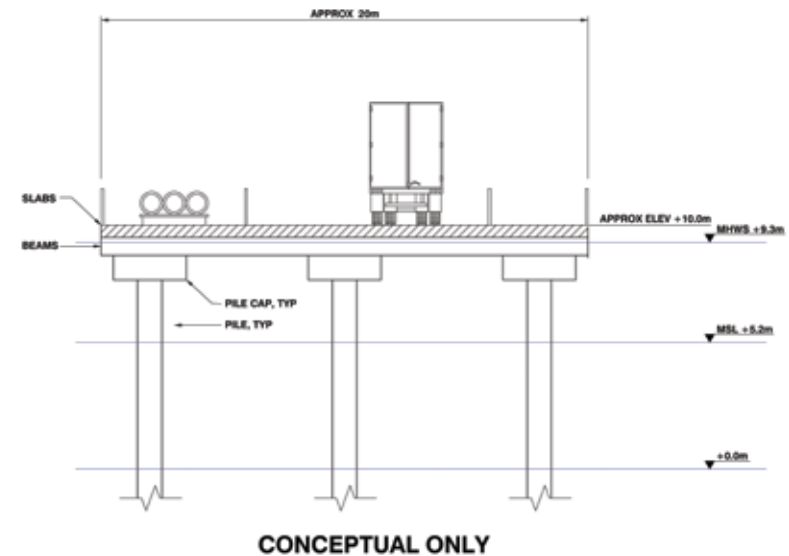
Since the berth structure is no longer purpose designed for liquid transfer, per the Halcrow option, it can also be used to offload other cargoes when not used for fuel transfers.

Figure D4 shows a general arrangement of the concept which would provide a solid berth structure some 200m in length, constructed from one or two caissons 20m wide, depending on a structural assessment of wave loads and other criteria. At this early concept stage, it is assumed that two caissons would be placed, offering a 40m platform with ample room for vehicle access and turning together with space for hot storage of containers, tanker trucks or other elements.

An open piled trestle is proposed to connect the berth to Longue Hogue, with fuel lines and other utilities suspended below the deck or placed on a utilities tray outside the main trestle structure.

The use of open piles for the trestle then imposes the minimum impact on shoreline processes but some degree of solid structure may be required to ensure calm conditions at the berth.

Figure D6: Typical Section of Access Trestle to Fuel Berth



INVESTMENT REQUIREMENT

A first order cost assessment was prepared for the outside fuel berth concept for comparison with the proposal presented in the Halcrow report. Based on the broad assumptions and estimated requirements for rock dredging etc., it appears that the cost of the Moffatt & Nichol concept would be on the order of £71 million, as compared to £143 million for the Halcrow option with full breakwater protection.

PROS AND CONS

PROS

- Moves fuel handling from the St Sampson's harbour basin
- Offers potential to use the reclaimed area on Longue Hogue
- Could accommodate general cargo vessels when not required for fuel deliveries

- More cost effective than breakwater construction option
- Caissons construction offsite has minimum impact on local infrastructure and communities.

CONS

- Significant funding requirement
- May not be able to recover the investment cost through port revenues or user fees
- May generate objections from local community from aesthetic viewpoint
- Cost is very sensitive for rock dredging quantities and cost
- Downtime assessment due to weather is critical to determine service level expectations.

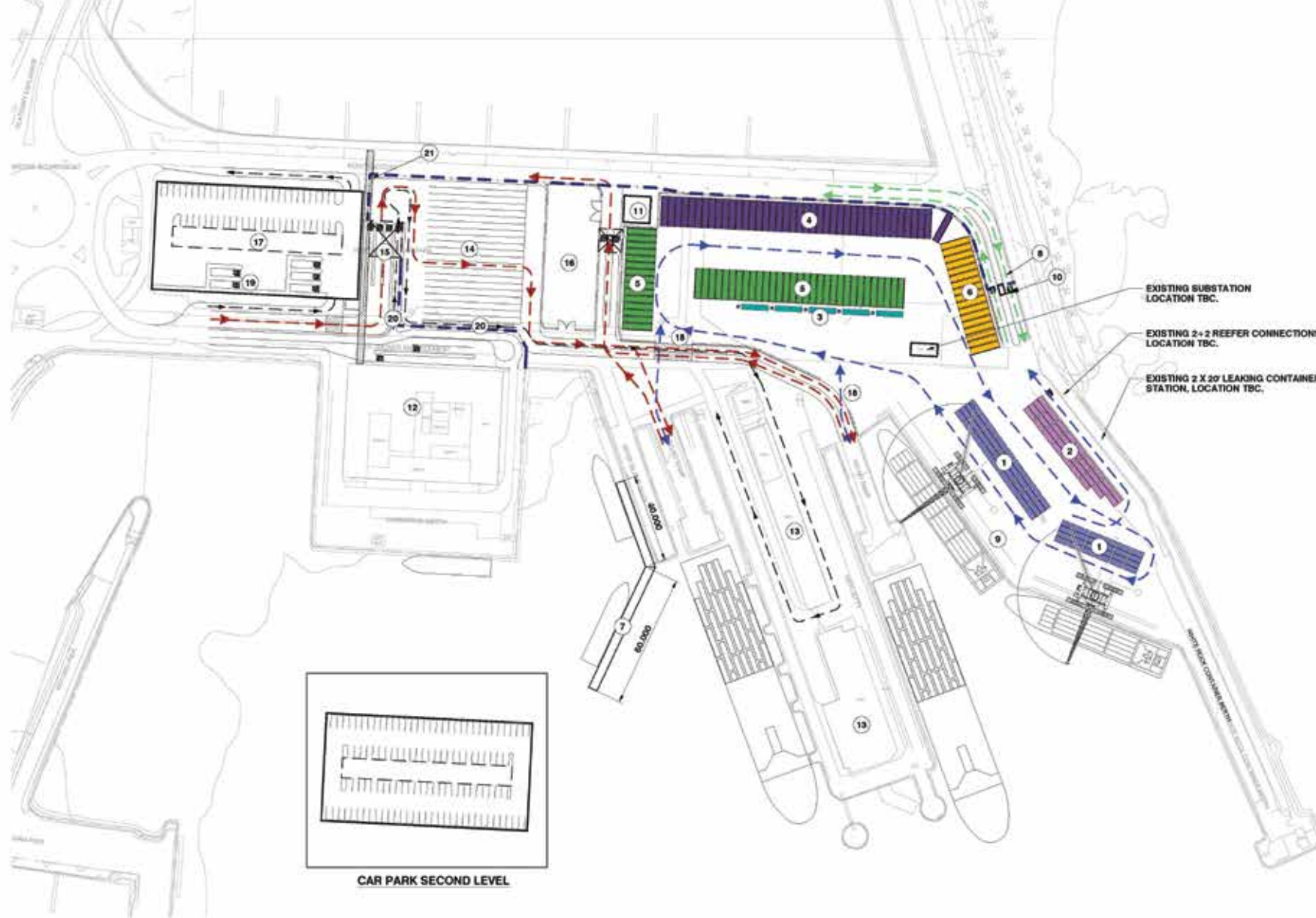
CONCLUSIONS

- Probably the preferred means to resolve the fuel handling issues with the current system
- Offers potential to relieve the load on St Peter Port for general cargo.

APPENDIX E: ST PETER PORT COMMERCIAL PORT AREA

A concept plan based on retention of the current cargo mix has been developed and discussed through consultation. The key aspects of the proposal are described as follows:

- In February 2012, the States of Deliberation approved the Crane and Quay Strategy, in accordance with States Strategic Objectives. In consequence, modifications and investment in new equipment is on-going for Berths 4, 5 and 6. The marshalling area is used for both unitised and general cargo, as well as Ro-Ro freight. The refurbishment of the berths, replacement of the cranes and reorganisation of the freight yard will ensure that, with appropriate on-going monitoring and maintenance, the facilities being upgraded within the project will service the island's needs for at least 20 years. The layout makes provision for ongoing throughput of Lo-Lo cargo in St Peter Port. However, in the longer term (and proposed within the Master Plan time frame) relocation of Lo-Lo trade to St Sampson's would alleviate congestion in the marshalling areas of St Peter Port. St Peter Port would then become a dedicated foot/accompanied vehicle port with all cargo using the Ro-Ro ramps. The phasing of the relocation of Lo-Lo traffic will impact on the final configuration of the port, with the concept representing the worst case (maximum footprint) based on best practice and peak predicted tonnages. The provision of Lo-Lo facilities within the potential cruise berth (Appendix F) would also alleviate land take if the proposal were advanced
- Ro-Ro commercial traffic uses two dedicated ferries, with limited passenger accommodation. Lorries are marshalled for import/export within the secure area, initially sharing with Lo-Lo cargo but ultimately taking full ownership of the areas behind Berths 4, 5 and 6. Priority berthing is recommended to be on Ro-Ro Berth 2
- Ro-Ro private vehicles utilise dedicated passenger ferries and are isolated from heavy freight during transit. However, the ferries use the same ramps as the commercial freight. Priority berthing is to be on the western ramp (Ro-Ro Berth 1) to reduce interface with the commercial traffic. Cars will be marshalled (outbound) in a new holding area within the present car park alongside QEII Marina (North Beach)
- The Passenger Terminal must be modernised (see Tourism Objectives) and could be relocated to the Cambridge Berth area to serve ferry and cruise passengers, and to



CONCEPTUAL ONLY



interface with town-side traffic for drop-off and collection. The existing terminal building on the New Jetty becomes redundant and is absorbed within the secure port operations area. While ideally segregation of the freight service (on Ro-Ro Berth 2) and passenger/car ferry (on Ro-Ro Berth 1) would segregate cars from heavy vehicles, transit between the ferry and terminal for foot passengers would still entail crossing roadways. Ideally, a high level bridge with covered conveyor should be provided to segregate foot passengers from vehicle traffic. Alternatively, foot passengers will need to be shuttled between terminal and ship using buses or shuttles

- The car marshalling area for outbound (from island) traffic will be located within the secure area, with a security checkpoint on entry to the secure zone.

■ **Figure E1 (left): Concept for Reconfiguration of the St Peter Port Commercial Port**

APPENDIX F: ALONGSIDE CRUISE BERTH ALTERNATIVES ASSESSMENT

BACKGROUND

At the present time, cruise vessels calling at Guernsey anchor off St Peter Port and ferry passengers to the Inter Island Quay in tenders. While this does control the flow of passengers, not all cruise customers are comfortable with small launches and weather conditions will prevent discharge from time to time.

Given the sheer size of the modern cruise vessel, it would be difficult to accommodate them within the harbour without a total shutdown of all ferry and Lo-Lo activities. This then implies a requirement to evaluate the potential to build a new facility outside the harbour that will permit direct disembarking and embarking of passengers.

It should be noted that, in consultation, cruise operators have indicated that the use of tenders is not considered prohibitive to the continued adoption of Guernsey as a port of call; that investment in a berth (as opposed to landside facilities) is not considered a priority from the cruise operator perspective and that the provision of a new berth is only worth undertaking if it guarantees all weather use with no (or minimal) down time.

CONCEPT

FULLY PROTECTED CRUISE BASIN

Clearly a fully protected basin will be the preferred option from a passenger comfort point of view. However, the direction of wave approach at this location coupled with the necessity to maintain access to the main port and Queen Elizabeth II marina compromises the potential to achieve a fully protected berth. A number of options were considered, including two configurations extending seaward of the commercial port (Option A illustrated). Any construction to create a berthing area outside the existing port boundary would involve significant amounts of rock dredging, estimated by Halcrow to cost at least £100 per cubic metre so alignment and position relative to deep water needs to be balanced with minimisation of rock removal. This precludes a north facing entry to the basin.

The illustrated facility is a substantial structure but, as shown, it does offer the opportunity to provide a sheltered (but not all weather) inner berth for Lo-Lo cargo transfer or to accommodate

APPENDICES

smaller cruise vessels. Extension of the breakwater to the south of the main entrance would be necessary to provide full shelter.

The concept represents a major construction project that will require considerable technical analyses before adoption. As can also be seen from the capital cost estimates, the project must be viewed in light of other requirements for the island and the harbours, and the potential revenues and economic benefits that may be derived from the investment.

UNPROTECTED CRUISE SHIP BERTH

A possible option for passenger transfer to town would be to provide a means to access an anchored or moored cruise ship outside the protected harbour area. One such concept would be the SeaWalk floating pier that is extended from the shoreline to an anchored vessel allowing passenger to walk to the shore.

Unfortunately, the wave conditions at Guernsey are not likely to be sufficiently calm to permit the regular use of this type of access, and it will also be essential to prevent an anchored ship from rotating with the tide or changes in wind direction.

Another option would be to provide a fixed pier, but this would require passengers to walk almost one kilometre to get to shore, or some sort of shuttle system using small vehicles. A fixed mooring would also be needed and is it expected that wind and wave conditions would render the facility unusable for a high percentage of the time.

For these reasons, an unprotected cruise ship berth would require considerable wave and technical analyses before any decision could be made on its potential for Guernsey. As noted, the investment is not merited by any apparent preference by the cruise industry for a berth, in preference to tenders, if this does not provide all weather berthing.

INVESTMENT REQUIREMENT

An order-of-magnitude cost assessment indicates that the project is likely to be at least £183 million (excluding the cost of extension to the southern breakwater). It therefore follows that this potential improvement for cruise ship accommodation requires considerable evaluation before any decision may be made to proceed.

PROS & CONS

PROS

- Will enable direct disembarkation of passengers under most weather conditions
- Will increase the number of visitors to Guernsey and extend the time on shore
- Will provide economic benefits to the local business community
- Offers potential to handle general cargo and Lo-Lo vessels, freeing up existing yard space for expanded Ro-Ro activities
- Provides structural support to the outer arm of the harbour.

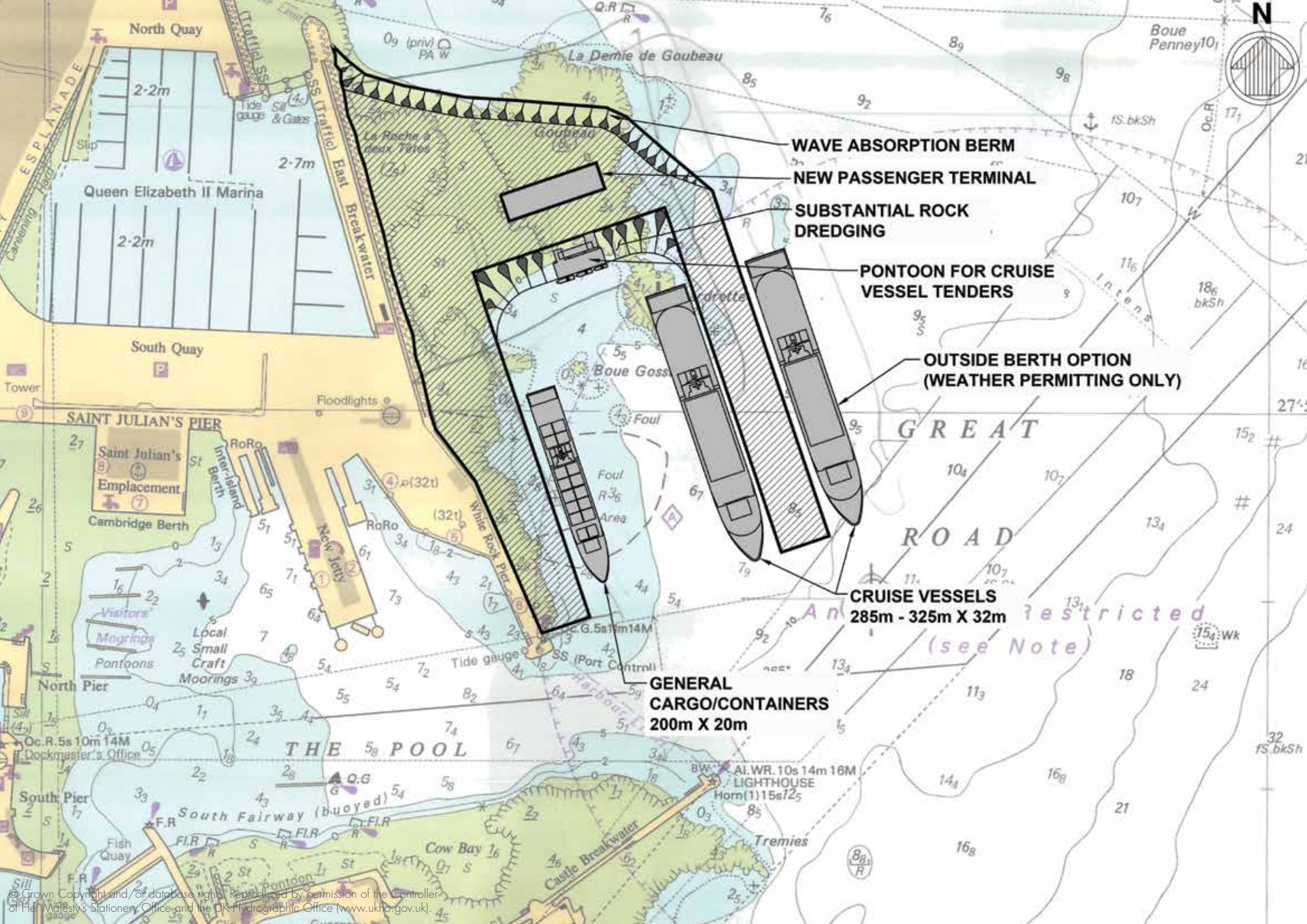
CONS

- Does not enable direct disembarkation of passengers under all weather conditions
- Extremely high capital cost
- Limited direct revenue expectations from vessel berthing and passenger fees
- Difficult to quantify economic benefits from short-stay visitors
- Not the highest priority in the competition for investment funds
- Does not appear to meet the requirements of the cruise industry as illustrated.

CONCLUSIONS

While a desirable project for Guernsey, the extremely high investment requirement for this project cannot be justified based on financial revenues or economic benefits. Resolution of the fuel discharge issues at St Sampson's harbour and enhancement of the marine recreational and other elements in St Peter Port would appear to have stronger justification and a higher priority in terms of benefits to the overall community.

■ **Figure F1 (right): St Peter Port Harbour – Cruise Liner Berth Beach Pier**



WAVE ABSORPTION BERM

NEW PASSENGER TERMINAL

SUBSTANTIAL ROCK
DREDGING

PONTON FOR CRUISE
VESSEL TENDERS

OUTSIDE BERTH OPTION
(WEATHER PERMITTING ONLY)

CRUISE VESSELS
285m - 325m X 32m

GENERAL
CARGO/CONTAINERS
200m X 20m

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