

ABERDEEN HARBOUR
EXPANSION PROJECT
November 2015

VOLUME 3
TECHNICAL APPENDICES



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*Volume 3:
Technical
Appendices*

APPENDIX 1-A CASE FOR GROWTH





CASE FOR GROWTH



Introduction

With year on year growth and continued increase in activities projected, Aberdeen Harbour Board is developing a plan for growth that will secure our current position as Europe's leading marine support centre for the offshore energy sector, and the principal commercial port serving north-east Scotland.

Contributing upwards of £510 million to the economy annually and supporting in excess of 11,000 full time equivalent jobs, the Port plays a critical role in the economy of Aberdeen and Scotland as a whole. Its sustained activity and growth are essential to the maintenance of the local and national economy.

There is a strong message from our customers that the Port must grow in order to better accommodate current and emerging demands. Physical growth will be complicated by our city centre location and the current demands on the existing transport network.

We recognise the opportunity presented by the review of the National Planning Framework and the first Strategic Development Plan for Aberdeen City and Shire to begin a dialogue with partners on the future growth of the Port.



Contributes
£510 million
to the
economy
annually

11,000
full time
equivalent
jobs

4.76 million
tonnes of
imports &
exports

World Imports & Exports



More than
7,800 vessel
arrivals

In excess
of 150,000
passengers

Links to 40 +
Countries

Aberdeen Harbour

25.91 million
Gross Shipping Tonnage



UKCS Cargos

2,124,233 Goods Tonnage

Goods Tonnage 1,574,822

533,966 Goods Tonnage

173,951 Goods Tonnage

European Imports & Exports

UK Imports & Exports







Aberdeen Harbour & Global Gateway

During 2011, Aberdeen Harbour was Scotland's gateway for trade linking with more than 40 countries around the globe, as well as numerous UK ports. Shipping enables the efficient movement of cargoes around the world at far greater volumes than are achievable by less sustainable means.

As well as the various destinations for trade, Aberdeen Harbour enables access to offshore locations, where platforms, rigs and renewable energy installations are established, maintained and eventually decommissioned. Last year this activity transported some 2.1 million tonnes of cargo to the UKCS and other oil and gas regions around the world, highlighting the level of influence the UK holds in this global industry.

Current forecasts predict an increase in cargo over the coming years with little sign of a slow-down. Major investments in the UKCS, announced recently, ensure continued oil and gas support activity up to and beyond 2040. In the future, should certain streams of business taper off as a consequence of reductions in oil and gas production, these will likely be replaced by growing markets such as decommissioning and offshore renewables.



Accommodating Growth Today

Through careful investment we have, to date, served the expanding needs of our customers; maximising use of the available space.

A number of significant improvements have already been implemented, or are planned to meet requirements in the future.

These include:

Commercial Quay East	Operational
Torry Quay Phase One	Operational
Delivery of Torry Quay Phase Two	Spring 2013
Deepening and widening of the Navigation Channel	Complete

Torry Quay phases One & Two will provide additional deep water berthing and an extensive back up area that will greatly assist in handling future growth in oil-based traffic. Commercial Quay East provides much needed additional general cargo handling space. Changes to the Navigation Channel will assist with 24-hour operation for the majority of vessels and allow access for the wider vessels used for subsea work and those involved in deploying offshore renewables projects.

However, there are further developments in the key sectors that we currently support which will place pressure on the existing physical confines of the harbour. These include:

OIL AND GAS SUPPORT

- Some subsea and specialised vessels are now too big for the port
- Some deeper drafted oil support vessels are tidally restricted in gaining access to the port or particular berths
- Vessels requiring berths whilst “off hire” or carrying-out routine maintenance
- Further growth in oil service traffic where existing bases are busy or nearing capacity

OTHER TRAFFIC

- The increase in size of general cargo vessels serving West Africa and beyond
- Growth in other cargo sectors (eg. Scrap, Salmon Feed & Timber)
- The anticipated growth in decommissioning work from the Oil and Gas industry
- The physical size of offshore windfarm deployment vessels
- Potential future increase in size of Northern Isles ferries
- Other ferry traffic
- The physical size of the vast majority of cruise vessels in a growing European market
- Inability to create a Cruise terminal and ‘welcoming area’







Renewables

The National Renewables Infrastructure Plan (N-RIP) was published by Scottish Enterprise in 2010 and sets out the means by which it is intended to realise the Government's aspirations for significant growth in the offshore renewables industry.

Capitalising on Scotland's potential to develop a world leading renewables industry is a key element of the Scottish Economic Recovery Plan (February 2011) and as such it is in the national interest to support the means of doing so.

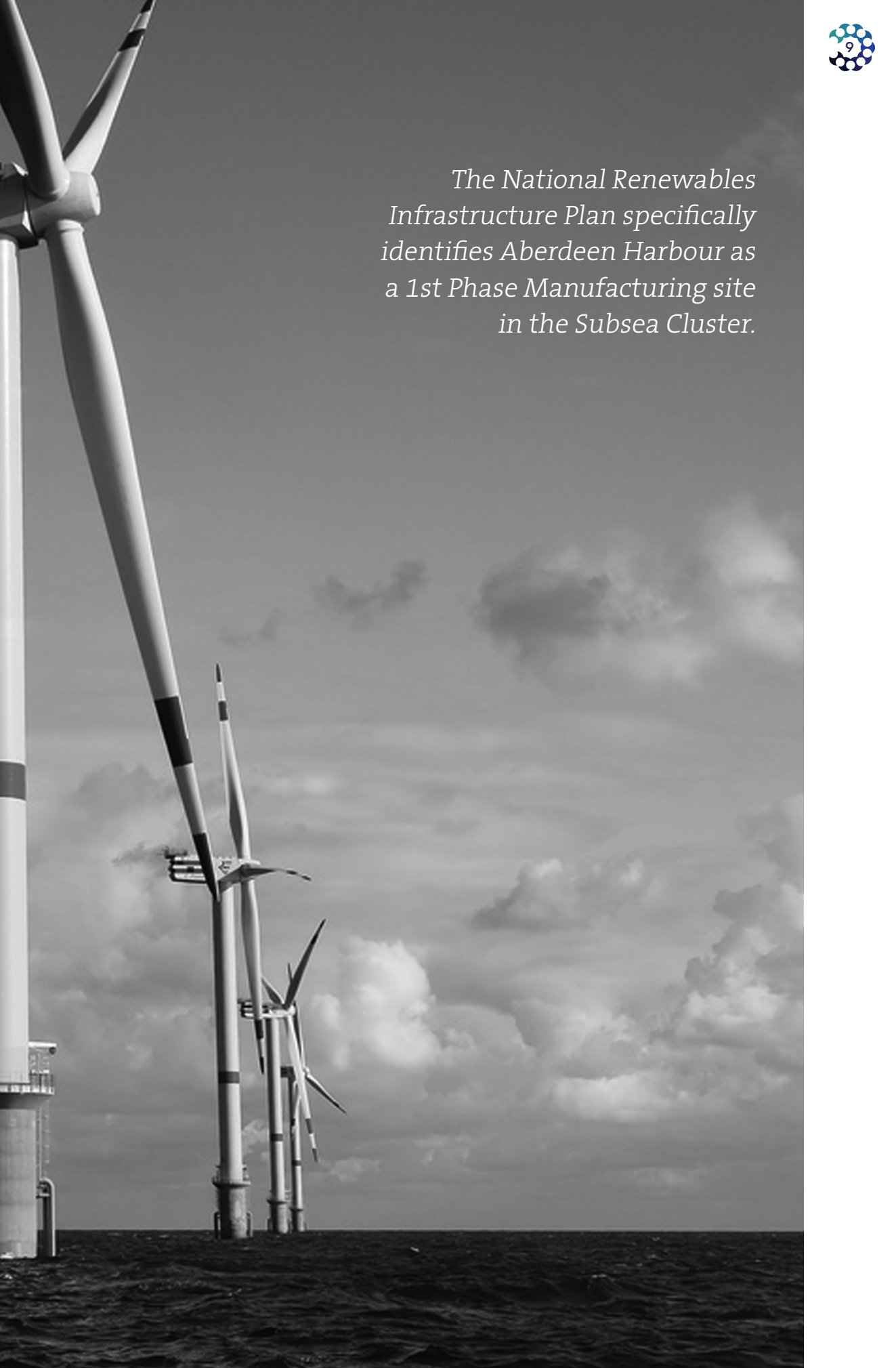
Aberdeen Harbour, as one of the identified locations for the development of the offshore renewables industry, is key to the realisation of national ambitions in this regard as well as the generation of new jobs and employment opportunities at a regional level.

The Board recognise the significant opportunity which this represents and is keen to embrace this with a view to the future operations at the Port. In order to realise the full potential of this opportunity, however, further thought is required on how to overcome the current physical limitations and improve access to the Port.





*The National Renewables
Infrastructure Plan specifically
identifies Aberdeen Harbour as
a 1st Phase Manufacturing site
in the Subsea Cluster.*





Growth & Planning Context

The preparation of the Strategic Development Plan (SDP) for Aberdeen City and Shire is well underway with the draft document expected to be issued for consultation in the coming months. It is anticipated that the importance of the Harbour and the need to secure its future contributions to national and regional economies will be recognised in this publication.

National Planning Framework 2 was published in June 2009. This sets out the spatial aspects of the Scottish Government's commitment to sustainable economic growth and recognises the significance of the port, stating (Paragraph 205, Page 81) that "Aberdeen Harbour provides essential support services for the offshore oil and gas industry and the tonnage of vessels and cargo handled continues to grow. It is the principal mainland port for freight, passenger, vehicle and livestock services to Orkney and Shetland."

A monitoring report was recently published for NPF which confirmed that a review will commence shortly with a draft NPF3 to be published in the autumn for consultation.

It is anticipated that the sites identified in the National Renewables Infrastructure Plan, of which Aberdeen Harbour is one, will be identified in the next iteration of the National Planning Framework as National Developments, either individually or collectively. These emerging planning documents and the next Aberdeen Local Development Plan will set the context within which our future growth will take place.

From the evidence gathered thus far, it is clear that the significance of the Harbour in terms of international trade and its services to the energy industry, tourism and lifeline ferry services point towards the need for development associated with securing its long term future and growing its role within the renewable energy industry.





Considering the Options for a Nationally Important Development

THE PRESSURE ON LAND

Our location within the heart of Aberdeen offers unique qualities much valued by the Board, the City Council and surrounding communities.

A programme of land assembly has been undertaken, however, the natural confines of the existing Harbour provide limited scope for the expansion of our operations.

The River Dee Special Area of Conservation also presents a challenge to expansion and is likely to become an increasingly significant constraint to future development and Port operations.

Land surrounding the Harbour is predominantly allocated for mixed use development in the current Local Development Plan and is the subject of continuous pressure for the development of uses which are not always compatible with Port activities.

INFRASTRUCTURE LIMITATIONS

The existing access arrangements can also be a hindrance to our effective operation and future expansion.

The area in and around Market Street has consistently been identified as a problem area for traffic management and the impact of such on the public realm and City Centre. The high volume of traffic not only affects the City itself, but can also cause problems maintaining consistent and efficient transport links to and from the Port. This constraint could detract from the appeal of the Harbour as a place to do business. Various studies and surveys have concluded that there are limited options for addressing this issue, with pressure on the local road network likely to increase as our operations grow.







Chris Lloyd

Aberdeen Harbour Board Chairman



Colin Parker

Aberdeen Harbour Board Chief Executive

Aberdeen Harbour Board seeks early engagement with key stakeholders to consider the different scenarios for the future growth of the Port. We want to discuss what growth means for Aberdeen, the region and Scotland as a whole.

We understand that many stakeholders will have an interest in this process. In our roles as Chairman and Chief Executive, it is our hope that this document goes some way to demonstrate the pressures which are faced by the Harbour and the exciting opportunities that may present themselves as we move forward.

We will shortly commence the consideration of the feasibility of the future development of the Harbour, taking into account a range of criteria, including; Business Case; Deliverability; Accessibility (Road/ Rail); Proximity to existing Port; Community Benefits; Environmental Impact; Landscape and Visual Impact; and Minimising Traffic Impact and Disruption.

We would like to hear your views on the growth of the Port. If you wish to be kept up to date with the feasibility study process and informed of any opportunity to participate you can register interest using the contact details shown below:

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